Student Name: ______________________________

Client: ___________________________________

Public Relations Program Organizer

This Organizer is designed to help you develop a public relations program for your class project. It follows the classic four-step process discussed in the lecture and book.

The numbered items below correspond to the sections that should be included in your final written proposal. The program planning process includes:

Research

Your synthesis of research about the organization, offer/situation, opinions of key publics, and communications opportunities.

1. Situation Analysis (Problem Statement and Background) (See Exhibits 1, 2)

Planning

Recommendations for actions and communications

2. Identification of Key Publics/Audiences
3. Statement of Organization Goals and Program Objectives
4. Action Strategies
5. Communication Strategies (Summary and detailed Planning Matrix outlining themes and media/activities to be used to achieve program objectives (see Exhibit 3)

Implementation

Additional details about executing your recommendation

6. Tactics/Tasks
7. Timetable
8. Staffing (see Exhibit 4)
9. Budget (see Exhibit 5)

Evaluation

How the success of your efforts can be assessed and feedback provided to your client.

10. Evaluation Plan and Feedback (see Exhibit 6)

Use Part One (pages 2-5) to compile necessary research and Part Two (pages 6-17) to write your plan. Additional details will be discussed in class and can be found in the text. See also Exhibits 1-6. Tips for writing your proposal are in Exhibit 7 (page 26). This document and the planning matrix on page 13 can be downloaded on the World Wide Web at: http://lamar.colostate.edu/~pr/organizer.htm.

PART ONE: RESEARCHING YOUR PROGRAM

The first step is to understand thoroughly the situation--including the client organization and its products/services, opinions of key publics, and communication opportunities that are already available to you. Use pages 2-5 of this Organizer to collect your research. Before you begin your research, review Exhibit 2. It contains alternative way might organize key findings once your research is completed.

Research: Organization

Exact name of client:

Brand names or other name for campaign:

Name and phone number of client contact:

Designated spokesperson to be quoted in materials (if any):

Addresses and telephone numbers of all locations to be included in materials.

E-mail address or web-site (if any):

Standard description of organization (a succinct phrase, sentence or short paragraph that can be used in letters, news releases, etc.) This description *positions* your client vis-à-vis others and can include any pre-emptive claims that might apply (the oldest..., the first..., the only..., etc.)

Verify/obtain logos, trademarks or other graphics to be used in program.

Research Checklist About Organization (also see Exhibit 1)

1. Organization's mission statement, history, charter, bylaws, history and structure.
2. Lists, biographies and photos of key officers, board members, managers.
3. Statistics about resources, budget, staffing, sales, profits, stockholders, etc.

Research: Offerings/Situation

Products/Services

☐ If your campaign will focus on a specific product or service, collect all pertinent information about the product/service, including name, description, benefits and features, history, prices, how to order information, etc.

Event(s)

☐ If your campaign will focus on promoting an event, focus on all details needed for someone to choose to attend: event name, date, time, location, prices, ticketing/registration, parking, special activities, calendar of events, special offers, etc.

Problem Situation

If your assignment involves addressing a particular issue or crisis, gather all pertinent information about the background, causes, and participants in the situation. How did the situation arise, why, and what are the possible consequences if not adequately addressed? Who are key people who will be involved in resolving the situation?

Research Checklist for Offerings/Situations (also see Exhibit 1)

1. Product/event marketing plans, ads, brochures/catalog sheets, other descriptive materials,
2. Information about and descriptive materials produced by competitors, if applicable.
3. Position statements by key executives regarding a problem situation.
4. Policy statements and procedures related to the handling of a problem situation.

Opinions of Publics

Begin by identifying all publics that might be important as audiences for your program. Then, identify what these key publics think about your product or problem -- including their *knowledge* and involvement (awareness and understanding, if any), *attitudes* or past *behaviors*.

Your client contact is the best starting point for collecting information. Then, interview additional key informants who can provide additional insights. List possible contacts:

What other evidence is available from *secondary sources* to corroborate the information you have obtained? Who should you interview?

What additional *primary research* might you conduct to corroborate or clarify your findings? (Possibly include in Action Strategies recommendations.)

Research Checklist for Information About Publics (also see Exhibit 1)

1. Descriptions and lists of the organization's internal and external stakeholders.
2. Names and background about individuals and groups who share the organization's concerns, interests and positions on the problem situation.
3. Names and background about individuals and groups who oppose the organization's concerns, interests, and position on the problem.
4. Results of surveys and public opinion polls.
5. Other anecdotal evidence about the people's opinions.
6. Lists of government agencies, legislators, other legislators or regulators who can influence the organization and the problem situation.
7. Copies of relevant regulations, legislation, pending bills, referenda, government publications, hearing reports.
8. Copies of published research on the topics related to the problem situation.
9. Lists of important reference works, records and directors available from client.
10. Reports by outside organizations, such as financial or industry analysts.

Communications Opportunities

Take an inventory of all communications activities in which your client is engaged and that might be relevant to your program--including advertising, direct mail, special promotions, etc. Also examine communications strategies and tactics used in the past. Finally, survey the communications of competitors and other similar organizations for ideas to emulate or avoid. This process constitutes what many practitioners term a *communications audit*.

What media or channels are readily available for your use? Identify:

- ☐ already existing internal or external communications tools used by the client, such as newsletters, mailing lists, web sites.
- ☐ consumer media available in the geographic area served by your client, and
- ☐ trade or special-interest media that serve publics important to your client.

Identify any other special opportunities (events, anniversaries, cooperative programs, etc.) that you might incorporate in your program. As possible, consult the public relations literature for case studies and other guidance based upon programs similar to the one you envision.

Research Checklist For Information About Communication Opportunities (also see Exhibit 1)

1. Lists of organizational media for internal and external communications.
2. Clippings from news coverage of the organization and problem situation.
3. Reports, transcripts or tapes of broadcast coverage.
4. Lists of media personnel and outlets with which the organization regularly works, or has worked in the past.
5. Schedules of special events, observances, and other important dates related to the organization and the problem situation.
6. Lists of current advertising, promotional plans.
7. Lists of public and controlled media used by organizations that share the organization's concerns (including those organization's own internal media).
8. Lists of pubic and controlled media used by organizations that oppose the organization's concerns.

PART TWO: WRITTEN PLAN OUTLINE

1. Situation Analysis/Introduction *(3-5 pages)*

Problem/Opportunity Statement (1 paragraph)

Your written proposal should begin with a very brief narrative introduction in which you provide an overview of your campaign plan for the client. This introduction should capture the attention of the reader, outline the problem or opportunity, and suggest that action is needed. As appropriate, suggest the consequences if no action is taken. (Note: You'll probably want to hone and polish your first draft of this introduction after completing the entire document.)

> Problems usually involve threats from outside the organizations or weaknesses from within that threaten the mutually beneficial relationship between the organization and a group. Problems can include issues that create a gap (disagreement or conflict) between the organization key publics. Examples: a wage dispute with employees, opposition from a community group.
>
> Opportunities usually involve positive external developments or strengths stemming from within that the organization can capitalize upon. Example: plans to introduce a new product.

Write a brief, preliminary Problem Statement here (revise later):

Background (additional details as needed)

In the second part of your introduction, elaborate upon your Summary Problem Statement/Introduction by summarizing your research findings to provide your client with a more comprehensive description of the problem or opportunity you intend to address in your program.

Use <u>one</u> of the outline formats in Exhibit 2, if desired, to structure your discussion. Address the key challenges or obstacles that must be met in order to have a successful campaign, including problems pertaining to knowledge, attitudes and behaviors of key publics. Focus on those issues that are important for understanding your recommendations.

The purpose of this section is to demonstrate your depth of understanding of the issues involved, and to identify any sources of misunderstanding or disagreement about the situation. All material facts should be summarized here. Everything that follows in your proposal should flow logically from this summary. Omit needless details; provide any exhibits in the form of appendices.

This section is a situation analysis only; it should no be a preview of your actual recommendations.

2. Key Publics/Audiences *(1 page)*

From among all of the potentially important publics you identified in your research, make a list of the key audiences to whom your program should be directed.

> *Eliminate* those groups that you determine are *not* important, or that are beyond the reach of your proposed effort.
>
> Later, you might need to eliminate marginally important groups due to a lack of time or financial resources.

Group publics together that are similar and that you might reach through similar media using similar messages. You can classify publics (and organize your list) in several ways:

primary v. secondary,
internal v. external,
active v. aware v. inactive publics, etc.

Be sure to include groups that might be important because they can serve as *intermediaries* or *influentials* in reaching key target groups.

Your summary can be in list form. Comment on particular groups, if required.

- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐

3. Organization Goals and Communication Program Objectives *(1-2 pages)*

Based upon the Statement of the Problem specified in Section 1, and the Key Publics/Audiences identified in Section 2, draft a set of goals and objectives for your campaign.

Organization Goals

Goals: An organizational *goal* is a statement about the outcome you would like to achieve. For example, in a political campaign, the overall goal might be to *get the candidate elected with 50% plus 1 of all votes cast in the general election.*

Program goals often are based on the mission statement, or annual management or marketing plans of the organization. Your program can have one overall goal, but might have several ancillary goals as well. Examples deal with such issues as increases in sales (measured in units or dollar volume), market share, contributions, market position, etc.

A good goal statement (similar to a communication program objective statement) should be stated in the form of an infinitive (To ...) and should be *specific, measurable, attainable* and *time-specific* (state timeframe in which outcome is to be accomplished and measured). Clients generally are able to articulate the outcomes they want to accomplish—and ultimately are responsible for specifying them.

Your goals can be simply listed. Comment only if needed; the rationale should be evident from the Situation Analysis.

☐ Goal #1 To

☐ Goal #2 To

☐ Goal #3 To

Communication Program Objectives

Objectives: A program's *communication objectives* differ from an organizational goal by serving as an intermediate step used to achieve the overall goal. Whereas a general goal describes the overall purpose for the program, objectives relate to *specific outcomes* resulting from the program itself. Note: A program can be successful in reaching one or more program objectives, even if the overall goal is not met!

Good objective statements focus upon the *effects* or *changes* you want to achieve in human behavior, and do not focus merely tasks or strategies that will be undertaken (e.g. obtain publicity exposure or produce an annual report). Clients are interested in results!

Most objectives in public relations campaigns center around: a) knowledge gain (creation of awareness, improved understanding, or comprehension), b) attitude formation, reinforcement or change, or c) behavior change. These are sometimes labeled *informational objectives* (knowledge and learning) versus *motivational objectives* (attitudes and actions). In fact, one or more of these are usually necessary in order to attain a program goal.

> *Example*: In a candidate's political campaign, the overall goal might be to get the candidate elected. Some specific program objectives to achieve that goal might be:

- ☐ To create awareness of the candidate's name among 90% of potential voters by election day.
- ☐ To create understanding of the candidate's position on key issues among 70% of voters by election day.
- ☐ To create a 70% favorable rating of the candidate among voters, based on polls taken one week prior to the election.
- ☐ To deliver 5,000 potential voters to go to the polls on election day.

A good objectives statement is similar to a good program goal statement. Objectives should be stated in the form of an infinitive (To ...) and should be *specific, measurable, attainable* and *time-specific.*

Specify 3-4 objectives for your program that support your overall organizational goal(s):

☐ Objective #1: To

☐ Objective #2: To

☐ Objective #3: To

☐ Objective #4: To

Strategy refers to the overall approach you plan to use to achieve the goals and objectives you have specified. In other words, strategies describe "how" you will help the client in broad terms. A strategy can be carried out using a variety of different **tactics**, or specific methods or techniques. Your plan should first focus on the strategies you will use, then provide additional tactical details once the client has agreed to the strategic direction.

Strategy usually involves two aspects: **action strategies** and **communications strategies**.

4. Action Strategies *(1 page)*

In this section, address *actions* that need to be undertaken prior to or concurrently with implementation of communication activities. Action strategies pave the way to communication. These include:

A. Policy Changes/Recommendations

Based upon your research, identify any issues that you think should be considered by the client *before* any communications activities are undertaken. These might include changes in organization policy, or product design, pricing or distribution. If not addressed, these problems might pose an obstacle to the program's success. This is where your role as a *public relations counselor* becomes important. Your recommendations probably will require the cooperation of other units within the organization. (Note: Your proposal can assume these recommendations will be accepted.)

B. Additional Research

List any additional formal research that you would like to undertake (such as a public opinion survey) to verify or clarify information prior to the implementation of your program. (Your recommendations, if any, need to be incorporated into the campaign timetable and budget.) This research can often be undertaken concurrently with preliminary parts of a program, but must be completed before any actions are taken that are contingent up the research results.

C. Branding

Although PR professionals can provide valuable insights as part of their consulting services, questions related to the organizational/product/service names, logos, logotypes, trademarks, packaging and graphic design should be determined before planning a PR program proceeds. This is usually a problem only with new organizations or offerings, not established ones.

D. Arrangements/Other Action Strategies

Finally, the success of a PR program can predicated on confirmation of arrangements and other details upon which a program depends. These details might need to be confirmed and approved before any detailed PR program is outlined because the whole plan is contingent upon them. Examples include securing a one-of-a-kind location for a special event, securing a particular date at a venue, finding a co-sponsor of major underwriter, obtaining the services of a celebrity spokesperson, or forming a coalition with an outside organization. Failure to secure these arrangements would probably require substantively altering your strategy. Note: Only major contingencies need to be addressed here; details about execution of a program can be addressed later under "Tactics."

5. Communication Strategies *(1-3 pages, plus Planning Matrix)*

Your primary challenge now is to create and deliver a series of creative public relations messages that will help achieve the program objectives you have specified. The process involves generating as many ideas as possible and choosing those that make the most sense based upon the specified publics and objectives.

Your challenges are to:
a) develop a "Big Idea" or major strategy for your effort that will serve as the anchor for the program, and to
b) outline sufficient details of your strategy so that you can verify that your program is complete and sufficient to address the problem or opportunity and all key audiences.

Summarize Your Strategy: Big Idea

Many public relations programs are anchored around a "Big Idea" -- a single unifying theme or a set of activities. The "Big Idea" for your program will probably emerge as you consider possible options. Other activities then can be built around this program focus.

What is your overall recommendation? Begin with two or three paragraphs that describe your "Big Idea."

Example: If your campaign is predicated around an event, such as a store opening, begin your narrative by stating you recommend staging a grand opening event and give a *brief* description of the unique nature of event and your rationale. Then explain how it might be the anchor for other efforts to reach various audiences (a contest, local publicity, a commemorative brochure, etc.)

Other examples of strategies might be:

Generating nationwide publicity through use of a (named) spokesperson (who becomes the Big idea)
Building employee buy-in to the new benefits program through one-on-one contacts supported by an aggressive internal communications program.
Promoting compliance with new on-the-job safety regulations through audio-visual and on-site training programs
Using a series of publications distributed to medical offices to promote patient and doctor understanding of a new medical procedure.

This overview should accomplish three things:

- telegraph your idea to the client in a way that can be understood quickly,
- capture the client's imagination and generate enthusiasm for the idea, and
- underscore how the idea is a logical and imaginative solution to the problem.

After you have summarized your strategy, you should then describe additional details of your strategy, as required. Depending upon circumstances, it might be easiest to organize your discussion by public, by objective, by theme, or by media/activity. Elaborate sufficiently for your client to understand your plan. This section can vary in length and complexity depending upon your recommendation. Focus only on *broad strategy concerns*. Details can be outlined in a Planning Matrix (see below) and in your "Tactics" section.

Outline Details of Strategy: Planning Matrix

Use the accompanying planning matrix to organize the details of your strategy. Download the grid as a Word document at: http://lamar.colostate.edu/~pr/organizer.htm.
Begin by insert your client's name and the organizational goal to be accomplished at the top

❐ Under the "publics" column, list the publics you have identified. Publics with similar characteristics, or that might be addressed together, can be grouped together.

❐ Under the "objectives" column, summarize the objective/objectives (behavior change) appropriate for this public(s). These should be the same as those stated in Section 3.

❐ Under the "concerns" column, list the *needs, wants* or *interests* of these publics as they relate to the focus of your project. What are the objections you must address in order for these groups to engage in the behavior change you desire? Think about your audiences concerns broadly: What's on their minds? What's important in their lives generally? What will motivate them to pay attention or become involved with your message?

❐ Under "themes," list the main ideas that you want to communicate to these groups to help achieve your objectives and overcome the concerns listed. A **theme** is an overall idea that you want key publics to understand; themes recur in messages throughout a program, although the exact execution or wording can vary. Three types of themes are common:

> -- **key facts** people need to know. Examples: the local schools will close for 2 days for emergency repairs, how to identify the symptoms of a disease, procedures for accomplishing a task (such as a home safety inspection).
> -- **benefits** or how a person's life will be improved by taking the promoted action. Common benefits include: low cost, timesavings, convenience, safety, gift giving, relief of stress or pain, social benefits, fun.
> -- **newsworthiness** of a client or its product. These draw on common news values: timeliness (being new), proximity (being local), consequence (impact on people), prominence (involvement by famous people), conflict, curiosity, human interest, etc.

Good themes are clear, direct, relevant, timely, appealing, and honest. They also can be creative or dramatic. Note: A theme is not synonymous with a *slogan*, or a catch phrase used as a continuity device to express a theme. A theme is the core *idea* (not necessarily specific words) people should remember.

❐ Under "media/activity", identify the principal media and/or communication activities that you might use to deliver your messages: publicity in consumer media, a grand opening, an anniversary celebration, a speakers program, etc. Campaigns use a combination of elements from one or more of the five major groups of PR media: public media, interactive media, controlled media, events and one-on-one communications. (See Exhibit 3).

After you have completed the matrix, review it carefully for completeness. Have you identified all possible themes and media? Are all publics covered? Are all your objectives addressed? Also consider whether there are ideas that don't neatly fit. If so, these might not be applicable to the problem, and should be eliminated. Fill in any missing cells.

Your grid serves as shorthand road map or summary of your ideas, but does not eliminate the need to explain your ideas in the narrative.

Public Relations Program Planning Matrix

Organizational Goal/Outcome: [Replace this line: Add Objectives here. Download matrix at http://lamar.colostate.edu/˜pr/organizer.htm]

Publics(s) Target audience(s) to be reached (With common objectives using similar campaign components)	**Communication Objectives** Highest level behavioral change desired (actions, attitude, or awareness)	**Concerns of Publics** Needs, wants, concerns of target group that must be addressed in themes/ key messages	**Themes or Key Messages** (Based on key facts publics should know, benefits and features, or newsworthiness)	**Media or Events** Categories of media or specific outlets, techniques, or activities

6. Tactics/Tasks *(1-2 pages)*

At this point, a client should be able to understand the gist of your recommendation and provide a *conceptual* approval of your plans. However, some clients will be interested in additional details before authorizing you to proceed.

Use this section to provide additional details that were not necessary to discuss in the strategy discussion.

> For example, if you plan a special event, you can describe specifics ranging from invitations to the foodservice and security arrangements. Similarly, if you plan an extensive publicity program, your Tactics discussion might include lists of specific targeted media outlets or news release topics.

The format or the tactics discussion can vary. Generally, an outline or listing of projects is preferable to a detailed, wordy narrative.

As possible, organize the tactics outline as closely as possible with the strategy discussion.

Note: Many public relations programs are evolutionary. Many tactical details often are sketchy when the plan is written. Also, there is some danger in providing too much detail, especially if you think the client will easily be distracted from the strategy by focusing on minute details. Decide how much detail is necessary to provide in order to obtain client approval.

Preparing a detailed tactical plan is primarily for the benefit of the practitioner. A thorough Tactics section can help you:

- ☐ Anticipate and respond to client questions,
- ☐ Provide a road map for implementing your recommendation once the proposal is approved,
- ☐ Identify all necessary tasks, the corresponding time required to complete them, and related out-of-pocket (direct) expenses.

7. Timetable/Calendar *(1-2 pages)*

Your proposal should include a timetable that lists major action steps that must be followed in order to executive the program.

Timetables often involve choosing a *specific date* when an event will take place, or choosing an arbitrary date when all communications should be concluded. Then, working backwards, identify key deadlines. These are dates when tasks must be completed by you, or when materials must be approved by the client.

Choose a format that makes sense for your program. See the examples in the text. A timetable can consist of

- ☐ A chronological listing (by month, week or day),
- ☐ A calendar grid,
- ☐ A Gantt chart, or
- ☐ A PERT chart.

8. Staffing *(1/2-1 page)*

Discuss who will do the work and issues related to the implementation of the plan.

In particular, what changes in procedures or personnel are needed to implement this program, if any? Do you need to:

- ☐ hire additional staff?
- ☐ reassign duties of present employees?
- ☐ assign additional responsibilities to employees on a short-term or permanent basis?

If none of these are pertinent, it can be assumed that you will conduct the entire program.

Although you probably do not need to discuss the details with your client, staffing options can include the use of vendors. Consider the possible roles of the professionals listed in Exhibit 4. Include related costs in your budget.

> Note: Many beginning practitioners error by failing to involve vendors or others who can assist in the implementation of a program. Your job is to orchestrate what needs to be accomplished and to recommend the most cost efficient way of doing the work.

The financial impact, if any, might need to be incorporated in your budget, or assumed by the organization.

> Note: If you were a public relations firm or consultant, you would use this section to describe your firm and list the people (with biographical information) who would be assigned to work on the project. In doing so, you would emphasize your qualifications and why the client should select you or your organization to handle the assignment. This section becomes a selling document as to why you should be selected versus other consultants who might bid for the work. Many proposals by agencies include lists, synopses or case studies of relevant work performed for other clients.

Combining Sections 6-8 (Tasks, Calendar and Staffing)

An alternative approach is to consolidate the listings of tasks, calendar and staffing into a single three-column chart that would include dates, tasks and staff to complete the task (unless only one person is involved)

Such a chart is a useful planning checklist that can be used to monitor progress of the program. Modify the chart as necessary.

This consolidated chart can cover many of the details related to Tasks, Calendar and Staffing. Thus, the details you might discuss in Sections 6-8 might be self-evident. However, you might still need to elaborate in the appropriate sections. Select a format that best explains your plans to your client.

Example:

Program Plan

Date Due	**Task**	**Staff Assigned**
12/1	Write speech, clear with client	Joe
	Write news release on speech	Martha
...	...	...
...	...	...

The Gantt chart below illustrates the same type of integrated chart that might be used. Specific dates would need to be included in this generic example.

Gantt Chart
(By week, with tasks to be completed indicated by X)

Responsible	*Objective*	*Dates:*	Week 1 1 2 3 4 5	Week 2 1 2 3 4 5	Week 3 1 2 3 4 5	Week 4 1 2 3 4 5	
Harris, Smith	1 Speech theme specified		X	. . . . .	. . . . .	. . . . .	(0,0)
Tait	2 Research conducted		. X X . .	. . . . .	. . . . .	. . . . .	(0,0)
Smith	3 Script written		. . . X X	. . . . .	. . . . .	. . . . .	(0,0)
Harris, Smith	4 Speech rehearsed		. . . . .	X	. . . . .	. . . . .	(0,2)
Wilson	5 Slides prepared		. . . . .	X X . . .	. . . . .	. . . . .	(0,0)
Wilson	6 Slides edited, keyed to script		. . . . .	. . X . .	. . . . .	. . . . .	(0,0)
Tait	7 Site setup checked		. . . . .	. . . X .	. . . . .	. . . . .	(2,2)
Harris	8 Speech presented		. . . . .	 X	. . . . .	. . . . .	(0,0)
Donohue	9 Evaluation completed		. . . . .	. . . . .	X	. . . . .	(0,0)

9. Budget *(1—1-1/2 pages)*

As best as you can, identify the key budget components in your plan. Each major project component discussed in the plan should be included. Your budget should include *only* public relations expenditures. If the client will incur additional direct costs (such as the cost of merchandise samples), these should be outlined separately.

Exhibit 4 features a prototype budget format with common program elements. You only need to include items relevant to your program. You may make rough estimates for costs; do not worry about obtaining accurate amounts. Be sure your columns total correctly.

Staff Time
Make your best estimate of the time required to conduct this program, and select a per-hour rate ($15, $25, $35, etc.)

_____ hours @ $____ per hour $ ___________

(You may exclude Benefits and Office Occupancy)

Out-of-Pocket Expenses (see Exhibit 5) $ ___________

___________________________________ $________

___________________________________ ________

___________________________________ ________

___________________________________ ________

___________________________________ ________

___________________________________ ________

___________________________________ ________

___________________________________ ________

___________________________________ ________

___________________________________ ________

___________________________________ ________

___________________________________ ________

___________________________________ ________

Sub: $__________

Contingency (at 10-15% of above subtotal) + $__________

GRAND TOTAL $__________

10. Evaluation Plan and Adjustment *(1 page)*

As an integral part of your proposal, address how you will measure the success of your effort. You will have already discussed the need for additional research (also known as **formative evaluation**) in your Action Strategies.

Your evaluation scheme can include two components: progress evaluation and summative evaluation.

Progress evaluation involves research conducted *during* the implementation of the program. The purpose is to test and make improvements in program components while they are still in the development stage. Based upon this preliminary feedback, practitioners can make needed *adjustments* in strategies and tactics (including budget and staffing) before a plan is completely executed.

> Examples include: copy testing, readability and usability analyses, focus groups, counting attendance at the first several events in a series of similar activities, advisory panels, exposure tracking, and field testing/test marketing.

Summative evaluation involves assessing your success at the conclusion of the program.

Your evaluation should focus on the *impact* or your efforts measured in the communication outcomes achieved. See Exhibit 6.

For *each* stated communication objective, outline how you will measure your success, using the evaluation tools available to you. The techniques used can be quite practical, but should be focused on measuring the behavioral changes inherent in your objectives, especially

- ☐ Action measures
- ☐ Attitude measures
- ☐ Awareness measures

In addition, you might want to evaluate your efforts in terms of measures traditionally used to measure *outputs*:

- ☐ Exposure measures
- ☐ Production measures

Summative evaluation is critical because it provides useful feedback from key publics. Clients can use the information obtained to make changes or improvements in products or services. Practitioners can include feedback to make *adjustments* in future PR efforts.

Your program should specify when and how you intend to report results to your client. For example, you might state that you will report 15 days following the completion of a major event, at year-end, or at another mutually agreed-upon date.

Be sure that the costs related to evaluation are included in your budget (Section 9).

Review Exhibit 7 for additional pointers on writing an effective program proposal.

Exhibit 1

Sources of Research Information

In developing a program, communicators managers can rely upon a wide array of materials and information.

Secondary data/sources include all extant reports and materials available from others within the organization or from external sources.

Primary data includes information collected, synthesized and reported specifically for purposes of organizing a program. This is original research you might conduct.

SECONDARY DATA/SOURCES

About Organization/ Offerings

Internal Sources

Published materials
. Brochures
. Annual, quarterly reports
. Product sheets, catalogs
. Speeches
. House organs

Reports
. Research and development
. Marketing/advertising
. Financial
. Other

Business/Marketing Plans

Correspondence

External Sources

Newspapers, magazines
Trade associations
Trade journals
Market Studies
Government reports
Other companies
Data bases-Proprietary
Internet

.

About Opinions of Publics

Internal Sources

Public feedback
. Mail analysis
. Phone logs
Ombudsman, consumer affairs, employee relations reports
Warranty, other reply cards

Field reports
Sales trends
Market data--geographic, demographic, psycho-graphic

Existing Research
. Sponsored
. Syndicated (purchased/shared)

External Sources

Published reports
. Syndicated studies (purchased from research vendors)
Internet
.
.
.

About Communication Opportuntiies

Internal Sources

Communications Programs
. Current, proposed
. Past

Marketing/Advertising Plans
. Product descriptions
. Positioning strategy
. Creative, media strategies
. Rejected strategies

Research
. Focus group results
. Creative pre-testing
. Awareness/tracking studies
. Test market results

Clippings

External Sources

Professional articles
Case studies in related Areas, organizations
Directories
Media research departments

PRIMARY DATA/SOURCES

About Organization

Exploratory interviews
. Client, top management
. Other key staff

Key Informant Interviews
. Employees
. Distributors, retailers
. Competitors
. Analysts
. Regulators
. Trade editors
. Trade groups

About Opinions of Publics

In-depth interviews
. One-on-one (Members of key groups or
. knowledgeable experts)
. Focus groups
. Advisory, test panels

Survey research
. Telephone
. Mail
. E-mail/web
. In-person
.

About Communication Opportunities

Exploratory Interviews
. Communications staff
. Marketing/other staff
. Competitors
. Trade/consumer media
. Potential partners

Content Analysis
. Clippings
. Broadcast coverage
. Web site, newsgroup
. discussions

Exhibit 2

Alternative Situation Analysis Outlines

After conducting your research, you should outline your key findings. You can do this several ways. The three formats below use all of the same information but organize it differently. Pick the format that best suits the situation. Generally, you do not need to address all possible aspects equally. Focus first upon and devote the most space to the aspects of most concern.

STANDARD OUTLINE

History and Background – Short summary of what the organization is about as it pertains to the problem or opportunity. Include analysis of the positive and negative forces that contribute to the situation.

Internal Factors -- Information about factors within the organization that affect or are affected by the current situation, e.g. limited staff, declining budget, employee opinion, equipment needs, etc.

External Factors – Information about factors outside of the organization that affect or are affected by the current situation, e.g. competition, differing societal trends, government mandates.

Communication Audit – Analysis and documentation of the organization's communication behaviors; how does the organization communicate with its publics and with what success?

FOUR O's

Alternatively, organize your key findings based upon the

Organization (history, organization, personnel, structural concerns)
Offer/Situation (important details of opportunity or problem)
Opinions of Key Publics (including both external and external groups)
Opportunities for Communications (current and desired by client)

SWOT Analysis

Finally, you can summarize the organization's Strengths, Weaknesses, Opportunities and Threats, as these relate to the problem or opportunity to be addressed. This format is especially appropriate where a lot of general background details are already known and the focus of the problem or opportunity is limited in scope. In promotional programs, strengths and opportunities are often the foundation for themes or key messages to be communicated Weaknesses and threats are often acknowledged and must be taken into account, but often are not explicitly addressed. In the case of issues or crisis, weaknesses and threats often prompt the need for action, but themes and actions focus on how the organization is responding, capitalizing on the strengths and opportunities available to it.

Strengths
Weaknesses
Opportunities
Threats

Exhibit 3

Public Relations Media – Reminder List (Partial)

PUBLIC MEDIA

Newspapers, magazines, television, radio, out-of-home media (all operated by third parties).

Publicity (Unpaid):
-- Provide *written materials* (news and feature stories, photos and graphics, video news releases and radio scripts/ actualities; sometimes combined into press kits.)
-- Offer *spokespersons* (for one-on-one interviews, news conferences, press parties),
-- Create/arrange coverage of *events.* Includes broadcast promotions (e.g. radio contests providing or cooperative promotions with media where client is named)

Advertising: (Paid): Print ads, broadcast commercials, out-of-home advertising (outdoor, transit, venue). Includes cooperative ads (sponsorships and cause-related marketing). Online advertising (banners and pop-up ads) also can be purchased on many search engine, media, local directory and special interest web sites. (Unpaid, if client is qualifying not-for-profit organization): public service announcements (PSAs).

INTERACTIVE MEDIA

Computer based: Web sites, e-mail (bulk and personalized), listservs, discussion or usenet groups, chats and chat tours, online newsletters, electronic bulletin boards.
Also: webcasts, webconferencing.

Telephone based: Automated telephone response systems, audio text (recordings).

Video based: Teleconferencing, internal video telecasts,

CONTROLLED MEDIA

Print: Brochures, newsletters, sponsored magazines, annual reports, books, direct mail and stuffers, point of purchase displays, functional media (envelopes, bags, forms, etc.)

Electronic: Videobrochures, CD-ROMs (publications, presentations, games, entertainment fare), audio tapes, sponsored videos and classroom/club materials.

Other: Advertising specialties, premiums/prizes, samples.

EVENTS

Consumer: Sweepstakes and contests, meetings, demonstrations and rallies, observances, exhibitions and expositions, street fairs, community speeches.

Trade/Business to Business: Trade shows; professional, technical and business presentations/speeches; conferences; performance recognition events/awards; contests and incentive events; training programs; meetings.

ONE-ON-ONE COMMUNICATIONS
Face-to-face: Personal visits, including lobbying, negotiations, outreach, and counseling.
Mediated: Postal mail, electronic mail, telephone (including outbound/inbound telemarketing).

Exhibit 4
Public Relations Vendors Checklist

Agencies and Consultants
- Full service, boutique firms
- Individual consultants, freelance writer/producers

Photographers

Videographers, film or audio producers

Graphic designers/production artists

Printers
- Duplicating/quick printers
- Two-, four-color brochure printing
- Book, magazine and newspaper printers

Electronic release distribution services
- Wire services (Business Wire, PR Newswire)
- Facsimile services

Lettershop/mailing house distribution services
- Mail list maintenance
- Press kit printing and assembly
- Addressing, metering, pre-sorting of mail

News retrieval services
- Clipping services
- Broadcast monitoring services

Research firms
-- Original, organization-specific studies
-- Syndicated studies
-- Shared research
-- Data base subscriptions (Nexis, Dialog, etc.)

Advertising specialty firms (awards, give-aways)

Fulfillment houses (process requests for materials)

Sales promotion/incentive program/training firms

Events-Related Vendors
-- Event, meeting planners
-- Equipment rental firms
-- Caterers
-- Entertainers
-- Temporary staff/security agencies/security

Talent (speakers at events, spokespersons)

Exhibit 5

Budget Reminder Checklist

(Only include items relevant to program)

Staffing: **$ 0000**

Salaries 0000
Each staffer @ hourly rate
based on salary.

Benefits (if paid by dept) 0000
Social Security, Health
Plan, Benefits = 30% +/-

Office Occupancy: 0000
(if paid by dept)
Rent, Furniture, Phone,
Equipment, Non-chargeable
supplies

Consultants/Professional Fees **$ 0000**
Includes freelancers/contract labor

Direct Program Costs **$ 0000**

Research 0000
Books
Subscriptions (Dues and
Subscriptions)
On-line computer services
Other research purchased

Publicity 0000
Letterheads, press kits
Duplicating/lettershop
Mailing supplies/list charges
PR distribution services
Clipping/broadcast monitoring

Photography/Videography 0000
Staff time
Film stock and processing
Model fees/props/miscellaneous
Prints

Advertising 0000
Design fees/charges
Production/Distribution
Time/space charges by media

Controlled Media 0000
Design
Publications Printing
Distribution/fulfillment
Purchases: Advertising specialties

Interactive Media 0000
Web Site Hosting/Internet
Service Provider
Webmastering services, design
Site registration
Software

Events 0000
Promotion/tickets/name badges
Location/equipment rentals
Catering/refreshments (include
supplies)
Entertainment/speaker expenses
Staffing/security
Communications expenses
Prizes/giveaways

General: Distribution/
Communication Expense 0000
Postage
Overnight delivery/freight
Facsimile
Photocopying/duplicating
Telephone (long distance, including
incoming 800-number, if any)

General: Travel &
Entertainment 0000
Airline/other public transit
Mileage reimbursement for staff
Meals
Conference registrations for meetings

General: Equipment/supply
purchases 0000

Subtotal of above **$ 0000**

Contingency Reserve **$ 0000**
Add 10-15% to the above
subtotal as reserve

Grand Total **$00,000**

Exhibit 6

Evaluation Metrics for Public Relations Campaigns

Audience Actions/Behaviors
Focus: Gauge effect of message on actual behavior of target audience in areas such as buying, investing, donating, working or voting.

Self-reports about or observations of behavior
- Number who intend to take action (behavioral intent)
- Number who engage in a new behavior (trial)
- Number who repeat desired behavior
- Social and culture change effected by permanent changes created in behavior patterns.

Attitudes
Focus: Effect of a message on audience's predisposition toward a topic (positive or negative). Attitudes serve as a potential predictor of future behavior.

Opinion measures
- Number who recognize importance or relevance of topic (increase in involvement)
- Number who form or crystallize an attitude (where no attitudes existed or attitudes were unfocused)
- Number whose attitudes are reinforced
- Number who change attitudes in a desired direction (yielding)

Awareness
Focus: Audience learning of message content, usually determined by surveying or asking audience members following message exposure. Emphasis on impact, rather than message quality or output.

Knowledge measures
- Number who recognize topic or message (recognition or mere familiarity)
- Number who recall message content (ability to retrieve topic or key facts from memory)
- Number who comprehend message (can explain meaning)
- Number who retain message (can recall it later)

Message Exposure
Focus: Output produced, specifically the number and quality of opportunities created to communicate a message. Publicity exposure also can involve assessment of the proportion of positive versus negative coverage, as well counting inquiries received. Other measures of impressions include: number of hits on web site, number of people who receive mailings, or number of people who attend events.

Media Impressions
- Number of messages created
- Number of messages (stories) actually placed in media
- Total impressions (Combined circulation of media where messages appear)
- Estimated impressions (Total circulation less some factor for people not actually exposed to message)

Production
Focus: Practitioners' own qualitative assessment of what was done. Also can involve expert or peer reviews.
Quality Assessments
- Adequacy of research
- Appropriateness of message
- Production quality of presentation

Exhibit 7
Tips for Writing Your Program Proposal

- Begin your proposal with a title page that reads "Public Relations Proposal for XYX Organization." Include your name, class and date.
- All papers should be typewritten, double-spaced. Be sure to number your pages for easy reference.
- Include each of the 10 numbered sections in your proposal, even if a section (such as Action Strategies or Staffing) is only one paragraph long. The nomenclature you use to label sections can vary, but should be clear.
- You may begin each section on a new page, or use continuous pagination.
- The suggested length for each section is found next to the major section headings in the Organizer.
- Write sparsely; avoid being wordy. Wherever possible, use outlines or lists with bullets or numbered items. Such listings can be quite brief, but items should be parallel in structure, subject matter and word usage.
- Be sure to include key details in your Statement of the Problem and Situation Analysis so that the reader understands all of the key issues and pertinent facts at the beginning of the proposal. Avoid introducing important information later if these facts would influence the Key Publics or the Goals and Objectives you state.
- Be sure to include a typewritten copy of your Planning Matrix in the final project, Download the document from http://lamar.colostate.edu/˜pr/organizer.htm.
- Pay attention to internal consistency. Each section of your proposal should flow logically from the previous sections. Be sure that your facts are consistent from section to section. Use consistent section heads and pagination.
- Spell-check your final document. Also check grammar, punctuation and word usage. This should be a professional document.
- Follow instructions from your instructor about binding your proposal.
- Be sure to retain a copy of your final paper on disk or hard copy.
- Consider including your project in your Senior Portfolio as an example of your ability to plan programs. Other items can include projects from advanced public relations classes and internships.
- Have fun!