



THE UNIVERSAL ACCREDITATION BOARD ACCREDITATION STUDY COURSE

RESEARCH 1

Session **4**

Overview

This session of the Accreditation Study Course is designed to apply the concepts of publics and public opinion to a case study and to begin the discussion on the role of research in the public relations practice.

Reading to be assigned BEFORE this session

- ▶ Research
 - How to determine facts/data about an organization or situation
 - Informal and formal methods
 - Primary and secondary research
 - Use of research in planning
 - Use of research in evaluation
 - Section 5, Detailed list of Knowledge, Skills and Abilities tested, Candidate's Preparation Guide for the Examination for Accreditation in Public Relations

Special Note for Coach

If you have not been coaching recently, please review these preliminary materials: For You, the Coach; The Coaching Method; Managing the Class; About House Rules. Before the day of the class, make sure you are familiar with the content in the reading which candidates should have done, and with the exercises you are going to conduct in this session. Consider any adjustments you may need to make if this is a free-standing unit, or is part of a sequence of preparation classes.

- ▶ **Class assignment for this session**
 - Come prepared to relate research you have done, if any
 - ▶ **Significance of Subject Matter**
 - Research, planning and related functions in Section 5 of the KSAs are weighted at 30 percent of the multiple-choice Examination
 - ▶ **Handouts for this session**
 - Exercise: Planned Parenthood – Handout #12
 - A Graphic Presentation of the Four Step Process – Handout #13
 - Calisthenics #4: Research – Handout #14
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- ▶ **Visual Aids needed for this session**
 - Research – Visual #7 [set of four]
 - Standard Process – Visual #8 (identical to Handout #12)
- ▶ **Other materials needed for this session**
 - Projector for visuals
- ▶ **Exercises conducted during this session**
 - Planned Parenthood
- ▶ **New lecture material to be delivered during this session**
 - Introduction to Research as a part of the Planning Process

I. Reading Assignment

Instructions: Coach review

2-3 minutes

- ▶ **Review with class:** Reading assignment for this session was research
 - > How to determine facts/data about an organization or situation
 - > Informal and formal methods
 - > Primary and secondary research
 - > Use of research in planning
 - > Use of research in evaluation
 - > AND Section 5, Candidate's Preparation Guide for the Examination for Accreditation in Public Relations
- ▶ **Ask class:** How much did you get done?
 - You can't pass the examination without reading the reference material.
 - > Reading the material isn't enough in itself.
 - You need both the reference material and problem process at your fingertips.
 - > SO . . . kindly make any adjustments in your schedule which seem necessary at this point.

II. Agenda for Session

Instructions: Review

2 minutes

- > Exercise
- > Quick reminder of research role in planning process
- > Share experience with research
- > Hang labels on it

Elapsed Time :05

III. Exercise: Planned Parenthood

Instructions: Present situation, facilitate discussion

Allow 55 minutes

Hand out copies of the exercise if you wish (Handout #12)

- ▶ **Announce** the exercise orally, or hand out photocopies of the situation
 - > You are a loaned executive to Planned Parenthood of [your state], in the capital city where the organization has its offices and operates a clinic.
 - > It is the anniversary of the Roe v. Wade decision by the Supreme Court, establishing the right to legal abortion.

- > An ultra-conservative afternoon disc jockey / talk show host on a 50,000-watt AM radio station in [your capital city] broadcasts an interview purportedly with Margaret Sanger, a pioneer in birth control in the early 1900s, who fought to remove the legal barriers to information about contraception. She founded the organization that became Planned Parenthood.
- > The talk show host identifies his "guest" Sanger as favoring eugenics and being racist. Margaret Sanger has been dead since 1966, but this is not mentioned. The quotes from Sanger are authentic; these were her views at the time.
 - Eugenics – a philosophy of improving humanity through “selective breeding” – was a popular viewpoint in the early 1900s. (Hitler's pogroms to eliminate Jews wiped out support for eugenics in this country.)
 - However, Sanger spent most of her career efforts in gaining legal and public acceptance of contraception and family planning.

NOTE: This story is true; in a Midwest city, a broadcast personality did just that.

- ▶ The task: What research will you recommend to assess the damage and the need for action, if any?
 - > **Tell the class:** We will use our customary method for the exercise:
 - Turn to your notebook or find some paper.
 - Take five minutes to make notes.
 - Put down ways to assess the damage and determine the need for action (if any).
 - Then I will ask for your ideas, one at a time.

NOTE: The class may want to ask questions about the problem, to gain further details. Do not embellish. They must practice working with what they are given.

- ▶ After five minutes, or sooner if the class is ready, take up research first, with the customary method:
 - > **Ask:** Who will give me one thought about appropriate research here?
 - > **Then:** How many had something similar?
 - > **Continue:** Who has a different idea?
 - How many had something similar?
 - > *Respond to items with agreement, approval, questions for amplification or non-committal acceptance.*
 - If something is off target, the candidate will probably discover that during discussion.
 - Your lack of enthusiasm will be indicative.
 - If an off-target suggestion needs to be laid to rest, do it later in this segment.

- > **Continue** until all items are off the candidates' papers.
 - If no one suggests a survey, congratulate the class. Most people do.
 - If someone or several suggest a survey, inquire about:
 - ◆ What is your universe?
 - ◆ How are you going to find the listeners?
 - ◆ Probe for the likely share of audience on a single station at a given time.
 - ◆ Do you see any possible ill effects from surveying?
 - ◆ Remind people that first thoughts are not always the best.
 - > They need to ask themselves the kinds of questions that will help determine whether a survey is practical and will yield useful information.
 - In this instance, surveying is impractical and the audience is probably biased.
- > **Ask**, kindly, if the survey proponents now wish to withdraw that idea.
 - If no one has mentioned “companion radio” introduce the concept – sometimes people turn on the radio as a companion during other activities and do not pay close attention to what is being said. That’s a factor in assessing impact.

*Elapsed Time :30 of Unit
:35 of Session*

- > **Go on:** Is there a way to do subtle research and avoid the above dangers?
 - Look for:
 - ◆ Monitor phone calls
 - ◆ Observe traffic flow of patients in the Planned Parenthood clinic, no-shows, cancellations
 - ◆ Ask patients if they are hearing any awareness of the interview
 - ◆ Check with board of directors for awareness or reaction among friends
 - ◆ Monitor later sessions of talk show
 - ◆ Monitor other talk shows, letters to editor, etc.

Allow 10 minutes

- > **Ask** the candidates to identify their research ideas as formal or informal.
 - Check responses against criteria to reinforce:

Visual: Formal/informal from Visual #7

 - ◆ Criteria: Formal uses scientific method
 - Structured, systematic, can be replicated
 - If a sample is used, and it is a true random sample, it therefore can be projected to the larger universe.
 - ◆ Informal is everything else
 - **Emphasize** that data gathered from informal research requires thoroughness, good notes, a method for gathering the material so that it is usable for later reports or for developing a strategic plan
 - And ask them to identify it as primary or secondary
Again, check responses against criteria:

Visual: Primary/Secondary Visual #7

- ◆ Primary: Examines evidence collected firsthand.
 - Usually, new interviews, paper surveys or observations
- ◆ Secondary: Examines secondhand evidence
 - Previously reported or published

> **Continue:** What will be your research objectives: *Allow 10 minutes*
Visual: Objectives Visual #7

- Immediate?
- Short-range?
- Long-range?
- What will you do with the results of your research?

Elapsed Time 1:00

IV. Notes on Source Material on Research

Instructions: Coach presents this material

2-3 minutes

▶ **Comment:** You may find differing definitions of primary and secondary research in various sources.

- > Sometimes people have trouble expressing this succinctly.
- > Don't be misled.
- > If you see another statement, apply the criteria:
 - Primary examines evidence firsthand; secondary secondhand.
 - Formal means the scientific method is used; it can be replicated.
 - Informal is all other.
 - ◆ In practice, as Mark McElreath, an author and professor at Towson State University, points out, there is often a middle group, such as focus groups and media content analysis with structured methodologies. Keep in mind that they do not apply the scientific method and thus are not statistically reliable methods.

V. Research in the Planning Process

Instructions: Coach presents material with visual for four-step process 10-15 minutes

▶ Let's take a quick look at the standard process in public relations

- > It is often expressed in words, but here is a graphic for it.
- > Put on chalkboard, whiteboard or flip chart, the graphic for four-step process or use visual.

Visual #8, Four-step process

▶ Briefly outline the steps:

- > We start with a question mark:
 - What's the problem (or opportunity)?
 - Is there a problem (or opportunity)?
 - How do we know? Facts? Guesswork? Intuition?
 - Do we need more facts?
 - This becomes the research phase.

- > Then we think: What will take us in the right direction?
 - [Dotted line with arrow]
 - What's at the end of our arrow?
 - ◆ A = audiences and what we want from them
 - ◆ A = awareness, attitude, action
 - This is the planning stage.
- > Then we come to “doing it” – the solid arrow.
 - This is where most people and many projects start.
 - Oddly enough, they flounder, because they haven’t thought through the first two stages.
 - Sometimes plans are prepared because there was only the perception of a problem (or opportunity).
 - There is an old saying, paraphrasing H. G. Wells, which fits, here. Until you have done your research and your planning, “You begin at no beginning and work to no ending.” (Ever been there? Seen that?)
 - Once you’ve done your analysis and planning, the “doing” is pretty simple
- > Then we are back to a question mark.
 - Did it work?
 - ◆ If so, how well?
 - ◆ If not, why not?
 - ◆ How do we know? Facts? Estimates? Guesswork? Intuition?
 - ◆ Do we need to keep on doing it?
 - ◆ Do we need to do it in a different way, at a different time, with different people?
 - ◆ Would something altogether different be better?
 - This is the evaluation phase.
 - ◆ It cycles back to the beginning, as you can easily see.
 - ◆ Planning is cyclical.

▶ *Put* this graphic on your wall; start keeping this in mind whatever you do: for example, answer the telephone, make a short speech, write anything.

▶ *Hand out* copy of visual for the four-step process. (*Handout #13*)

- > If this class is part of a sequence or series, forecast further work on planning and research to come in later sessions.

Elapsed Time 1:15

VI. Clarifying the Problem

▶ *Instructions: Discussion conducted by coach*

Allow 20 minutes

▶ *Comment:* All too frequently, organizations seek a public relations campaign to solve a fuzzy problem.

- > “We need a membership drive for the alumni association.”
- > “We need to get more shoppers downtown on Saturday.”
- > “We need more blood donors.”

- ▶ **Ask class:** Do statements like that ring a bell for any of you?

- ▶ **Comment:** Research techniques can:
 - > Pinpoint the problem
 - > Increase your chances of finding effective remedies

- ▶ Here is an illustration from Broom & Dozier's research text¹:
 - > A regional blood bank, confronted with shortages, declares “we need more donors.”
 - > Interviews with the director and key staff members reveal that they do not have specific data on the frequency and size of the blood shortage they are perceiving.
 - The director, nonetheless, insists that the problem is, simply, “We always need more donors.”
 - > Further interviews with other staff reveals:
 - Usually there is plenty of blood, but when it runs short, the situation is serious.
 - ◆ Some hospitals must postpone elective surgery.
 - ◆ Crises develop; blood must be shifted among hospitals to meet needs.
 - ◆ Staff reassignments during a crisis are a problem.
 - > **Quick drill:** What kind of research has taken place so far?
Answer: Primary, informal
 - > Secondary research: Studying the records and shipment logs for the past two years shows that shortages occur in June, July, August and December, and the shortfall is about 100 units per month.
 - > Further findings:
 - Demand for blood goes up during those same four months in emergency rooms along the major interstate highway.
 - Demand goes up in the summer at hospitals near a large lake resort.
 - The bloodmobile does not operate on college campuses during the summer vacation months.
 - Extra summer blood drives have not been scheduled in place of campus drives.
 - Staff members take vacations during the summer.
 - Calls to college registrars' offices indicate thousands of summer school enrollments.
 - A Red Cross survey in another state indicates that people forget to donate blood during the summer and holidays, when children are home and families are busy, but donors say “they would like to be reminded” of the need.
 - All this comes under the label of “situation analysis.”

- > NOW we have the basis for a substantial research statement of *What's happening now?*, including *what* the source of concern is, *where* it is of concern, *when* it is a concern, *who* it involves or affects, *how* it involves or affects them and *why* it concerns the organization (the blood bank) and its publics.

“During the months of June, July, August and December, demand for blood exceeds blood bank supplies by approximately 100 units each month. The blood bank's inability to fulfill its supply mission causes critical blood short ages for emergencies at hospitals in the region, postponements of elective surgeries, increased costs of transferring blood among hospitals, and diversion of blood bank staff effort away from donor recruitment and blood collection activities.”

- > **Observe:** With that kind of a problem statement – and the other findings – I'll bet any of you could settle right down to planning a campaign.
- > **Tell class:** Note the seven specs for a research statement:
 - *What's* happening now?
 - *What* the source of concern is
 - *Where* it is of concern
 - *When* it is a concern
 - *Who* it involves or affects
 - *How* it involves or affects them, and
 - *Why* it concerns the organization and its publics.

VII. Use of Research to Remove Roadblocks

Instructions: Discussion conducted by coach

5 minutes

- ▶ Broom and Dozier cite an illustration from Ann Barkelew, APR, Fellow PRSA, who at the time was vice-president for corporate public relations for Dayton-Hudson Corporation in Minneapolis.²
- ▶ There was an immediate need to strengthen the anti-takeover law in Minnesota.
 - > As Ann put it, the amendment prevents a raider from buying a company, breaking it up, and then using the assets of the company to pay back the money the raider had borrowed to buy the company in the first place.
 - > Time was very short. There was an immediate threat from a raider.
 - > The legislature was squeamish about the idea of a special session.
 - > Ann used her company's customer research firm to survey a valid sample of the people of Minnesota to see if they would support legislators taking part in a special session.
 - > The results showed overwhelming support.
 - > Results of the survey were never made public– except to legislators, who met and enacted the amendment.

Elapsed Time 1:40

VIII. Share Experience with Research

Instructions: Discussion conducted by coach

Allow 20-50 minutes

- ▶ Now let's take a look at what you all have already been doing in the way of research.
 - > You will recall that part of your assignment for this session was to bring in research experience.
 - Your own, or something you have participated in, or observed.
 - You are not expected to share proprietary information if there are competitors in the class or if it is against company policy to discuss it.
- ▶ **Clarify:** We are not looking for whole programs now; that's to come under planning.
 - > Just episodes or portions involving research
- ▶ **Start:** Who is willing to be first?
 - > **Ask** any questions that come to mind, to amplify or clarify.
 - Size of universe, size of sample, process, response, application
 - > **Ask** the candidate to label various portions of the work.
 - Formal or informal
 - Primary or secondary
- ▶ **Continue** in like fashion until all have reported.
 - > Probe for labels in each case, for practice in applying criteria.
 - > If time runs out, and there is a subsequent session, defer some until next time.

IX. Follow-Up Assignment: Mental Calisthenics

Here is a mental exercise to help you get your brain in shape for the APR examination. If you have been doing Calisthenics earlier, this is the next step. If not, you can begin here. Do make time for this. It is an essential workout for your mental muscles. Hand out Calisthenics #4, Research. (*Handout #14*)

Elapsed time: 2:00-2:30

References

- 1 Glenn M. Broom, David M. Dozier, *Using Research in Public Relations*, pp 27-28. Copyright 1990 Prentice-Hall, Inc., Englewood Cliffs NJ 07632.
- 2 Glenn M. Broom, David M. Dozier, *Using Research in Public Relations*, p. 30. Copyright 1990 Prentice-Hall, Inc., Englewood Cliffs NJ 07632.

Session 4 Links

Handouts

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|-----|---|---|
| #12 | Exercise:Planned Parenthood | http://www.prsa.org/_Advance/apr/coachpdf/coachHO12.pdf |
| #13 | A Graphic Presentation of the Four Step Process | http://www.prsa.org/_Advance/apr/coachpdf/coachHO13.pdf |
| #14 | Calisthenics #4:Research | http://www.prsa.org/_Advance/apr/coachpdf/coachHO14.pdf |

Visual Aids

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| #7 | Research –Visual #7 [set of four] | http://www.prsa.org/_Advance/apr/coachpdf/coachVis7.pdf |
| #8 | Standard Process
(identical to Handout #13) | http://www.prsa.org/_Advance/apr/coachpdf/coachVis8.pdf |