THE UNIVERSAL ACCREDITATION BOARD
ACCREDITATION STUDY COURSE

PRELIMINARY ONE-DAY WORKSHOP

Session P

Overview

This six-hour workshop is a framework for further study. It is designed to give participants a basic understanding of the Examination for Accreditation in Public Relations introduced in 2003, to acquaint them with some essential subject matter and to demonstrate the four-step planning process by working through a case problem. It may be used to 'jumpstart' a preparation course or as a free-standing professional development session to introduce practitioners to appropriate study toward accreditation. Presentation and exercises add up to nearly five hours. With breaks and lunch, it requires about six hours. It may, of course, be divided into two half-day segments, perhaps supplementing the second one with the session on technology.

> ***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. Before the day of the workshop, it will be good to:*
>
> - *review the list of knowledge, skills and abilities that are tested in the Examination*
> - *refresh your memory in content areas such as communication theory, law, and planning*
> - *make sure you are familiar with the exercises you are going to conduct in this session*
> - *consider any adjustments you may need to make in light of further opportunities for the candidates to prepare, and the candidates' present skill level.*

▶ **Handouts for this session** (*See links at end of this section)*

- Ethics Pocket Cards (or offer pdf file to print them – 8-up layout – Handout #49)
- A Graphic Presentation of the Four-Step Planning Process – Handout #13
- Notes on the Four-Step Planning Process Diagram – Handout #43
- Ramsey Steel case problem – Handout #38
- Components of a public relations plan – Handout #25
- List of materials in bookshelf – Handout #44
- Detailed List of Knowledge, Skills and Abilities tested in the Examination Handout #45
- Specific Areas of Competence to be evaluated in Readiness Review – Handout #46
- SQ3R Method – Handout #3
- URLs for Session P – Handout #47
- Research processes, seven titles – Handouts #15 through #21

▶ **Visual Aids needed for this session** (*See links at end of this section)*

- House Rules – Visual #1 (Optional)
- Communication Theory – four diagrams
  - Shannon and Weaver, one-way – Visual #4
  - Shannon and Weaver, with feedback – Visual #5
  - "Noise" added to Visual #5 – Visual #25
  - Schramm – Visual #6
- Flag of Liberty and Learning – Visual #26
- Elements of libel – Visual #20
- Copyright – Visual #21 (Two pages)
- Ethics Pocket Guide – Visual #22
- Standard Process 4-step – Visual #8
- Research – Visual #7 (use 3 of 4 pages)
- 384 – Visual #9
- Informal research, method et al – Visual #27
- Audiences – Visual #11 (five pages)
- Blank page for notes on class' audiences – Visual #30
- Objectives: Awareness, Attitude, Action – Visual #12
- Objectives: Audience, end result, attainment level, time line –Visual #13
- Strategy – Visual #14
- Tactics/tools – Visual #15
- Gantt chart, blank – Visual #24
- Gantt chart, filled in – Visual #28
- Evaluation – Visual #29
- SQ3R – Visual #2

▶ **Exercises conducted during this session**

- Apply Schramm diagram
- Attitudes, values
- Lee Iacocca: libel
- Copyright quick drill
- Participation on research
- Ramsey Steel Case problem

▶ **Lecture material to be delivered during this session**

- Communication theory
- Legal aspects – libel, privacy, copyright
- Research
- Four-step planning process
- SQ3R Study method

I. Agenda for Session

Instructions: Announce, post on chart paper, create overhead, or make handout *2-3 minutes*

- Housekeeping and business matters
- Describe the two-stage examination process
- Review appropriate texts and reference materials
- Communication theory
- Legal aspects – libel, privacy, copyright
- Research – types and applications
- Four-step planning process
- Knowledge, skills and abilities tested in the Examination
- A recommended study method: SQ3R.

II. Class Business

Instructions: Announcements and business handled by coach *5-10 minutes*

- Locate rest rooms and water fountains.
- Turn off cell phones and pagers.
- Decide when to take lunch break.
- Availability of vending machines, coffee, snacks.
- Parking – does it need attention?
- Discuss planning, if any, for future sessions.
- If future sessions are anticipated, start a sign-up sheet around the room, with e-mail and fax address, phones (home and work).
- **Confidentiality**. Identity of candidates for accreditation is confidential. Sometimes people "go public" about being a candidate; sometimes they really do not want it known. You may let the world know you, yourself, are preparing for the accreditation examination, if you wish, but please respect the privacy of others.
- Have we overlooked anything? Comments.

III. A few words about the Examination

Instructions: Presentation by coach; invite questions if you wish *Allow 5-10 minutes*

Tell the class:

▶ As you probably are aware, a new Examination for Accreditation in Public Relations was introduced in 2003 by the Universal Accreditation Board. This Board handles the accreditation process for a group of professional organizations in public relations, including those to which people in this room belong. Further information is available on the Board's Web site. The address is on a list you will receive today.

▶ The process consists of two stages: A personal interview called a Readiness Review which includes discussion of written materials you have submitted, and a multiple-choice Examination administered on a computer at a professional testing center.

- In a few words, here is the process:

  You prepare for the Examination by refreshing and reviewing your previous book learning, and augmenting and enhancing it by new learning if that seems indicated. You may do this by working in a preparation class, by independent study or by working with a mentor.

  You download from the UAB Web site the various materials provided for candidates, which detail the **knowledge, skills and abilities** you should be able to demonstrate, and apply yourself to filling any gaps you see.

  You apply for **eligibility** for the Readiness Review, paying a small fee. Eligibility is a matter of experience, education and appropriate job function.

  You produce a "written submission," responding to a Readiness Review **questionnaire** you download from the Web site. In it you provide insight into your experience and evaluate yourself against a set of professional criteria which are given. Among other things, you describe in writing how you planned or participated in the planning of a **specific public relations program** for your organization or a client. If you never have written or participated in the development of a formal public relations plan, you are to develop such a program for some organization in which you are or have been involved. This is one reason we will spend time on standard planning process today.

  You compile a **portfolio** presentation including your written plan and the work products which best demonstrate your higher-level thinking skills in this profession. You may use technology, but don't start thinking bells and whistles. The emphasis is on substance, not glitz.

  When you believe you are ready to proceed, you make formal application to the UAB for a **Readiness Review**. Your accreditation chair will appoint a panel of three Accredited professionals and submit your questionnaire to them; they have at least ten working days to review the materials. Then you meet with the panel – for perhaps one or two hours – to review and discuss your questionnaire, present your portfolio and answer their questions. If you know there are shortcomings in your plan or other materials, you explain how you now would do it differently or better. If the panelists agree that you are **ready** to proceed, paperwork follows; you make an appointment at the testing center and pay the Examination fee there. If the panel members conclude you are **not ready**, you will be notified and given advice on how to proceed to fill the gaps they perceived.

- The topics for questions in the Examination grew out of a major study of the public relations profession in 2000 – a "practice analysis" to learn what successful practitioners say they really need to know in order to do well at what they really do. Details of that study and of the development of the new Examination are available on the UAB Web site.

- There is no single "official" textbook for this Examination. A "bookshelf" of 10 texts is recommended for study. You make your own choice, to buy or borrow, depending on the gaps you perceive in your own knowledge. The texts are shown on the UAB Web site and are listed on a handout you will receive today (Handout #44). **You are not required to buy ten**

books. You are not required to buy **even one book**, if you have some of them available for study and can make good notes. Later today I will show you an effective study system for creating such notes. It is a good idea to start building a professional library, but how and when you do that is up to you.

▶ ***Observe*:** The 2003 examination is **at least as demanding** as the earlier one your accredited colleagues passed. Probably, more so. One big difference: a complete public relations plan – for a scenario they first saw on examination day – formerly was required in the written examination, and they worked against the clock. Now you deal with familiar real-life situations, working on your own time in your own surroundings. That's a big advantage. Your examples of planning and implementation are presented for the Readiness Review, and you must be prepared to discuss and defend them at that time. In the interview you will need to have, **at your fingertips**, all the knowledge and skills you employed in writing your plan, be able to call everything by its right name and be able to identify the theoretical concepts you have reflected in your work and your system for evaluating the outcome. So start planning now to do whatever you need to do to make sure your brain will be ready for that challenge.

NOTE TO COACH: A plan for the six-hour workshop follows, in outline format. This outline has been used successfully by experienced presenters for several years; it has been revised to fit the Examination introduced in 2003.

If you use this workshop, the UAB will be interested in your experience and your feedback. Among other things, tell us if the outline format is functional for you, or if you would like to see it converted to the same format as the other sessions in the Coach's Guide. Send e-mail to Ferne G. Bonomi, APR, Fellow PRSA, UAB Coach's Guide work group coordinator: f.bonomi@att.net with a copy to Kathy Mulvihill, UAB Manager, kathy.mulvihill@prsa.org

Links for Session P

Handouts for this session

▸ **All handouts** for this session	http://www.prsa.org/_Advance/apr/coachHO51.asp
▸ Ethics Pocket Cards (or offer pdf file to print them – Handout #49)	http://www.prsa.org/_Advance/apr/coachHO49.asp
▸ A Graphic Presentation of the Four-Step Planning Process – Handout #13	http://www.prsa.org/_Advance/apr/coachHO13.asp
▸ Notes on the Four-Step Planning Process Diagram – Handout #43	http://www.prsa.org/_Advance/apr/coachHO43.asp
▸ Ramsey Steel case problem – Handout #38	http://www.prsa.org/_Advance/apr/coachHO38.asp
▸ Components of a Public Relations Plan – Handout #25	http://www.prsa.org/_Advance/apr/coachHO25.asp
▸ List of materials in bookshelf – Handout #44	http://www.prsa.org/_Advance/apr/coachHO44.asp
▸ Detailed List of Knowledge, Skills and Abilities tested in the Examination w/weighting – Handout #45	http://www.prsa.org/_Advance/apr/coachHO45.asp
▸ Specific Areas of Competence to be evaluated in Readiness Review – Handout #46	http://www.prsa.org/_Advance/apr/coachHO46.asp
▸ SQ3R Method – Handout #3	http://www.prsa.org/_Advance/apr/coachHO3.asp
▸ URLs for Session P – Handout #47	http://www.prsa.org/_Advance/apr/coachHO47.asp
▸ Research processes, seven titles –	
Content Analysis – Handout 15	http://www.prsa.org/_Advance/apr/coachHO15.asp
Random Sample Size – Handout #16	http://www.prsa.org/_Advance/apr/coachHO16.asp
Sample Size/Accuracy – Handout #17	http://www.prsa.org/_Advance/apr/coachHO17.asp
Survey Research – Handout #18	http://www.prsa.org/_Advance/apr/coachHO18.asp
Do-It-Yourself Surveys – Handout #19	http://www.prsa.org/_Advance/apr/coachHO19.asp
Focus Groups –Handout #20	http://www.prsa.org/_Advance/apr/coachHO20.asp
Scientific Method – Handout #21	http://www.prsa.org/_Advance/apr/coachHO21.asp

Visual Aids needed for this session

▸ **All visuals** for this session, pdf format	http://www.prsa.org/_Advance/apr/coachVis32.asp
▸ **All visuals** for this session, PowerPoint	http://www.prsa.org/_Advance/apr/coachVis33.asp
▸ House Rules – Visual #1 (Optional)	http://www.prsa.org/_Advance/apr/coachVis1.asp
▸ Communication Theory –four diagrams	
Shannon and Weaver, one-way – Visual #4	http://www.prsa.org/_Advance/apr/coachVis4.asp
Shannon and Weaver, with feedback – Visual #5	http://www.prsa.org/_Advance/apr/coachVis5.asp
"Noise" added to Visual #5 – Visual #25	http://www.prsa.org/_Advance/apr/coachVis25.asp
Schramm – Visual #6	http://www.prsa.org/_Advance/apr/coachVis6.asp
▸ Flag of Liberty and Learning – Visual #26	http://www.prsa.org/_Advance/apr/coachVis26.asp
▸ Elements of libel – Visual #20	http://www.prsa.org/_Advance/apr/coachVis20.asp
▸ Copyright – Visual #21 (Two pages)	http://www.prsa.org/_Advance/apr/coachVis21.asp
▸ Ethics Pocket Guide – Visual #22	http://www.prsa.org/_Advance/apr/coachVis22.asp
▸ Standard Process 4-step – Visual #8	http://www.prsa.org/_Advance/apr/coachVis8.asp
▸ Research – Visual #7 (use 3 of 4 pages)	http://www.prsa.org/_Advance/apr/coachVis7.asp
▸ 384 – Visual #9	http://www.prsa.org/_Advance/apr/coachVis9.asp
▸ Informal research, method et al – Visual #27	http://www.prsa.org/_Advance/apr/coachVis27.asp
▸ Audiences – Visual #11 (five pages)	http://www.prsa.org/_Advance/apr/coachVis11.asp
▸ Blank transparency for notes on class' audiences – Visual #30	http://www.prsa.org/_Advance/apr/coachVis30.asp
▸ Objectives: Awareness, Attitude, Action – Visual #12	http://www.prsa.org/_Advance/apr/coachVis12.asp
▸ Objectives: Audience, end result, attainment level, time line –Visual #13	http://www.prsa.org/_Advance/apr/coachVis13.asp
▸ Strategy – Visual #14	http://www.prsa.org/_Advance/apr/coachVis14.asp
▸ Tactics/tools – Visual #15	http://www.prsa.org/_Advance/apr/coachVis15.asp
▸ Gantt chart, blank – Visual #24	http://www.prsa.org/_Advance/apr/coachVis24.asp
▸ Gantt chart, filled in – Visual #28	http://www.prsa.org/_Advance/apr/coachVis28.asp
▸ Evaluation – Visual #29	http://www.prsa.org/_Advance/apr/coachVis29.asp
▸ SQ3R – Visual #2	http://www.prsa.org/_Advance/apr/coachVis2.asp

Rev. January 7, 2004

See allotments for presentation time at end

One-day 'Jumpstart' Workshop

NOTE TO COACH: Before using this outline, please read, carefully, the sections of the Coach's Guide whose captions are "For You, the Coach," "Coaching Method" and "Managing the Class." Where this outline calls for "taking responses as usual" or "standard method" it refers to the processes spelled out in those early sections of the Guide.

ALSO: For the research portion, ask ahead of time who, among the participants, has engaged in research of any kind, and ask a few to prepare two or three sentences about their intent and process.

I. Introduction: Emphasizing a few essentials

A. You CAN succeed in the APR examination – IF you will prepare properly.

B. You MUST read the source material in texts and other references – but not rely on it
   1. In a phrase that is probably familiar: It is "essential but not adequate."

C. This **IS** a problem-solving examination, not an examination over textbooks, even though there are recommended texts and the "final" examination is in multiple-choice format.
   1. In all phases of the process, you draw on textbook stuff, but don't recite it (probably).
   2. You **demonstrate** that you know it and know how to use it.

D. What is essential is practice, until you are – in the concept of Madeline Hunter – FACILE.
   1. You are able to apply what you know systematically, quickly, efficiently.
      a. Like riding a bike without having to decide which foot goes around first.
   2. It is better if you can practice in conjunction with others, as you are today.
      a. Not by working in groups – your brain has to work all by itself in preparing your written submission for Readiness Review, and when you sit for the multiple-choice Examination.
      b. But by doing your own thinking, then hearing from others and gaining from them.
      c. At the end of the day today, you will be familiar with a tested method for study and practice.
      d. And you will have a list of the concepts, knowledge, skills and abilities you are expected to have at your disposal as an accredited practitioner of public relations.

E. **Repeating:** This day's work will **not** equip you to pass the Examination. It **will** show you how to prepare for it.

II. Method today

A. Today we are jointly considering the processes of **research and planning** in public relations practice, as set forth in coaching materials for the Examination for Accreditation in Public Relations, PLUS some background on **communication** theory and process which are basic to the work you will be expected to do – in the Examination and the rest of your professional life – and some **relevant legal aspects** which you should know. We will touch on **ethics** in public relations, which I urge you to mark for further study.

B. Before we get down to work today, let me give you some notes for future homework.
   1. You should acquaint yourself with the **history** of the profession.
      a. Borrow one or two of the general textbooks and see how we have progressed from manipulation to meeting the public at the point where we both benefit.
      b. Find out who led the way.
         (1) You expect your doctor to know about Hippocrates and Pasteur and Lister, as well as the latest recent developments.
         (2) You should know about Ivy Lee and Eddie Bernays and Theodore Vail, among others, as well as what's going on today in our field.
   2. You should make sure you are up to speed on **technology**.
      a. While only a tiny percent of the questions in the multiple-choice examination are targeted directly on technology, today's electronic tools come into play everywhere.
      b. If you are not familiar with Weblogs, permission marketing, Usenet groups, managing Web sites and electronic mail, spend some time on technology.
         (1) [NOTE to coach: If you are offering the UAB session on technology later, forecast it here. Otherwise, offer the handouts.]
         (2) The handouts on technology in the UAB Coach's Guide are a good resource. Ask me about them.
   3. **Business literacy** is a new area in the Examination. A valuable one, in terms of your future career path. In for-profit and in nonprofit organizations, the people who make major decisions speak this language. You should, too.
      a. If you don't work in the world of annual reports, stock offerings and regulatory agencies, you probably will want to broaden your vocabulary.
      b. Start with the AP Stylebook – a good, inexpensive everyday reference – and work your way through the 15 pages on Business Guidelines and Style.
      c. [NOTE to coach: Forecast a business literacy session if you are offering one.]
      d. Another good step is an hour in the library, once a week for a while, reading *Fortune*, *The Wall Street Journal*, *Business Week*, *Forbes* and *American Demographics.*
   4. One more thing: **Personal presentation** skills. When you appear before the Readiness Review panel, you will want to be cool, calm and competent, not stammering and stuttering and shuffling your feet. Get some practice, somewhere, with good feedback. Toastmaster's Club is a good resource. It exists almost everywhere. Not much money involved, if any; usually you can join for a while and then go your way.

C. Now, back to today. This very day and our day's work.
   1. We have about six hours **[Note to presenter: Adjust for your local schedule]**.
      a. Not a lot of time compared to the total preparation you will need to do before you undertake the first big step – the Readiness Review.
      b. It will be enough to indicate what you need to know and how you need to be able to use it.

c. I'm thinking of about 45 minutes on communication, 30 to 45 minutes on law, 15 minutes on ethics, less than an hour on research, and the rest of the time on planning.
d. Of course, research is part of the plan, so they may blend into each other.
e. Be aware that you will need to be able to present and discuss a complete public relations plan, with research at both ends of it, with the "Readiness Review" panel. For that event, you should use a plan you have previously written and carried out. If you don't have such a plan, you may create one for an organization with which you are familiar. Unless you have another planning format which covers all the bases we will touch today, it would be good to build your plan along the lines we will use today in the planning portion. If you have an existing plan which misses a base or two, you need to be able to talk about what's missing and why.

D. I am going to hand-feed you more than is usual in an APR prep course.
1. Usually, you would be expected to have done reading on the subject, first.
2. You probably haven't had time for such assignments.
3. In the interest of time, I will lay out some definitions and concepts to work with.
4. I WILL expect you to do further reading to reinforce that material, and augment it.
a. One day's work is not enough for this to stick in your brain, where you will need it.
b. With enough practice, you will become facile.

III. Case problem method

A. A few words about the working method for the case problem, which has been proven to be effective over more than twenty years in preparation for accreditation.
B. In general, I will throw out a problem, or a piece of a problem, and give you a few minutes to make notes on your response.
C. Then I will call for responses – who will give me one thing; how many had something similar; who has something different . . .
D. Let me say that it is important for you to be willing to share your thoughts out loud, even if you are uncertain about their merit.
1. Hearing your own words out loud helps your brain get a handle on them.
2. Hearing the reaction of others – and the coach – helps you decide if you are on target.
E. You may augment your own notes with the thoughts of others as they respond.
1. These are not hand-in notes; they are take-home notes, for future study.

Visual #1 – House rules – if desired

F. **House rules**:
1. You may differ with others, but you may not be destructive or sarcastic.
2. It's OK to say you agree or disagree, and why.
a. Perhaps "I would also consider" . . . "I would want to know" . . . "I would be curious about" . . . or "That hasn't worked for us."
3. Remember to respect the ideas of others, and expect respect for your thoughts.
4. Expose yourself to learn.
a. Remember the Montesorri method:
(1) Children are never told, "You made a mistake."
(2) Instead, they hear: "What did you discover?" "What did you learn?"
b. When differences of opinion crop up, try to put yourself in the mode to discover or learn.

Elapsed: About 10:00 minutes

IV. **Communication theory**

A. Communication is a complex process, as all of us in the profession are aware.
   1. A lot of people think it is simpler than it is.
   2. To paraphrase an old spiritual, "Everybody talkin' about communicating ain't a doin' it" – at least not very well.
   3. People who try to make sense out of complicated things like to draw diagrams, and there are several you need to know and understand.

B. Here is the simplest one. It reflects the work of a couple of telephone engineers named Shannon and Weaver.

Visual #4: Shannon and Weaver

   1. In essence, it involves a sender, a message, a channel through which the message travels, and a receiver.
      a. Going back to high school physics, you may recall that the early telephone instrument converts sound, such as spoken words, into electrical impulses which can then be transmitted over a telephone line. We're back in history, here, speaking about land lines for telephone circuits. That's when this theory was constructed. At the other end of the line, the process is reversed; the electrical signals are converted back into speech.
   2. The terminology is Sender, Encoding, Channel, Decoding, and Receiver.
      a. Is this familiar to you?
      b. What's missing? [Two most important words to keep in your head: What's missing?]
         (1) Take responses from class.
         (2) If necessary, probe for **Feedback**, which repeats the process in reverse.

Visual #5: Shannon and Weaver with feedback

   3. Staying in the world of the telephone, for a moment, you never know if your message is going through until someone answers and responds.
      a. IF the voice on the other end says "Pronto!" or "No comprendo" then you have a good clue that the decoding process isn't working, for that transaction.
   4. Moving beyond the telephone, the process applies to other forms of communication.
      a. Let's say that I have a thought I want to transmit to you.
      b. I may put it into words, such as "Stop!"
      c. Or I might use a signal, [hold up your hand, palm flat and forward].
      d. Or I might blow a whistle – **IF** we both understand that blowing the whistle means "Stop" rather than start the race.
      e. Notice "Common experience" which affects the encoding and understanding.
   5. Sometimes I can perceive by your expression or reaction how my message is received; sometimes I must ask specifically what you understood to see if I am making myself plain.
   6. Many things can interfere with the transmission of the message. On a telephone line or cordless phone, static. In a room like this, there might be distractions. A speaker in the next room might be really high-volume. An emergency vehicle with a siren might go by, outside, and block out whatever I am saying. Oddly enough, in diagraming this is called Noise.

On transparency, add "noise" to diagram
Or use Visual #25, "noise" added to Visual #5

7. Less tangible things can interfere, and have the same effect as Noise. Worries. Weariness of being bombarded by messages. Apathy. Other activity – you are cooking or sawing while someone speaks to you. Lack of common vocabulary. You all can add to the list from your own experience. You may need to cite some items, if you should be asked to discuss this diagram in the Readiness Review.

Elapsed: About 15:00

C. More likely, you might be asked to discuss a more detailed one, which expands on the notion of "common experience" within which communication can take place.

Visual #6: Schramm model

Wilbur Schramm, a university professor and author, spent a lot of time and brain power on the factors which affect real communication. You would be wise to read his work in a textbook, – there probably are only a few pages – and ponder it, and reflect on how it affects your everyday work.

Here is one excerpt from the late Mr. Schramm, quoted in "*Effective Public Relations*,"

"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."[1]

1. Now, **Look at the diagram.**
   a. Take **one minute** to think about people in your organization who could be A and B.
      (1) Make a note on paper.
      (2) Who will give me one note– an A and a B?
      (3) [Use standard process for responses.]
   b. **If needed:** Think of communicator A as management; B as employees, and how different their frame of reference is, how the employer-employee relationship affects what is said and what is heard, and the overall social environment in the organization, or the community, has a bearing.
   c. Change the example to long-time residents of your area, and newcomers or immigrants . . .
   d. Change it to teachers and students, to salespeople and prospects . . . .

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[1] Wilbur Schramm, "The Nature of Communication Between Humans," in *The Process and Effects of Mass Communication,* rev. ed., edited by Wilbur Schramm and Donald F. Roberts (Urbana: University of Illinois Press 1971), p. 17, quoted in *Effective Public Relations,* Cutlip Center and Broom, 8th edition 2000, Prentice-Hall, Upper Saddle River, New Jersey 07458, page 252.

e. Consider the factors of culture, customs, language, occupation which make a difference.
f. **This bears study**.

2. What I hope you will do is:
   a. **Copy** each of these diagrams with your own hands. Draw the diagram out with pencil or pen. Looking at it is not the same as drawing it, for your brain. Color-code the areas if that helps.
   b. Put the **labels** on your drawing: frame of reference, context of relationship, social environment, and so on.
   c. **Post** the drawings on your office wall, where you will see them frequently.
      (1) Maybe someone will ask you to explain it all, which will be good!
   d. **Remember** which is which.
      (1) **TIP:** The hardest one has the shortest name. ☺
   e. **Be prepared** to discuss whichever one is asked for, in the Readiness Review. If the question doesn't come up there, it may crop up in a multiple-choice question later. If you don't encounter it anywhere in the examinations – remember how much you have gained from better understanding the process you work with every day.

Elapsed: 25-30 minutes

D. **Adding other aspects: Opinions, attitudes, beliefs, values**
   1. Now let's take another look at the Schramm model.

Visual #6: Schramm model

   2. Think for a moment about how the context of a relationship might be affected by the opinions people hold on controversial issues . . . their attitudes, their beliefs, their values.
   3. An illustration:
      a. Select an item of clothing from a participant or:
      b. Suppose someone comes to work in your office wearing a new sweater, which you find attractive.
         (1) Now: Suppose you learn that it was handmade by that person, from his/her original design. Does that enhance or diminish your reaction? [Observe heads nodding?]
         (2) Or suppose you learn that it is a family treasure, created by a great-grandparent and handed down through several generations. Does that make a difference?
         (3) Suppose you learn, on the other hand, that it was made in an overseas sweatshop by child labor. Now what happens to your opinion? Anything?
         (4) Suppose you learn that it was stolen – shoplifted. Or was a secret gift from someone else's husband or wife. Does your opinion change?
         (5) What factors are at work in the change? Attitudes? Beliefs? Values? Morals? Culture?
      c. Take responses as usual – who will give me one observation? Etc.
   4. Can you see these things fitting into the context of the relationship, or the social environment?

E. **A few further words about textbook treatment** of communication theory.
   1. When you are studying, you may find yourself suddenly thrown into a whole lot of bookish vocabulary. My recommendation is to read through this but don't tangle yourself up in definitions and academic distinctions. You will be examined primarily over your understanding, not the textbook language.
   2. In your studying, look for statements which make sense in common vocabulary. Never mind additional detailed diagrams and models and terminology. Remember, the examination is not regurgitation, but application.
   3. DO look for ways in which information, attitudes, opinions, beliefs and values interact and affect the process of communication, with individuals or groups.

F. **Let's spend a little more time on these concepts:** information, opinions, attitudes, beliefs, values.
   1. Take a moment to think of something currently in the news. Make a note.

      Allow 1 minute
   2. Who will give me one topic?
      a. If nothing useful is forthcoming, ask about:
         (1) What if a new 24-hour supermarket is proposed for your neighborhood – two blocks from your home?
         (2) Or a night club?
         (3) A skateboard park?
   3. General question: What is your opinion about that? Positive, negative, neutral?
   4. What kind of information might change your opinion?
   5. Now let's shift to capital punishment, or abortion. What's your opinion about that?
   6. What kind of information might change your opinion?
   7. [Lead discussion; probe for attitudes, beliefs, values]
      a. What's easiest to measure? To change?

NOTE: Illustration of constructive application of these concepts follows on separate page to keep it intact.

G. **Now let's take a look at an example of putting all this to work.**

1. Let me tell you about the Flag of Learning and Liberty, developed by the National School Public Relations Association.

Visual #26: Flag of Learning and Liberty

2. For its 50th anniversary, this group – NSPRA – organized a project to emphasize the value of education. The project was the brainchild of Edward Bernays, one of the real pioneers in public relations, who was then 94 years old and was actively collaborating with NSPRA on matters he thought important. School public relations people across the country asked leaders in their communities for statements about the importance of education and how it might be improved. Several thousand prominent citizens responded. NSPRA leaders spent hours and hours collating and sorting, to distill the essence of the opinions. Then the flag design was created to represent the attitudes, beliefs and values which came to the surface:

   a. A horizontal red stripe across its top depicts the "strength and vitality of a democratic way of life."
   b. A blue stripe horizontally along the bottom represents the "stability and opportunity made possible by a strong system of education."
   c. A center field of white conveys the "virtue and aspiration of a nation of free people."
   d. The emblem in the middle of the field features two gold flames – one for learning and one for liberty.
   e. These flames are supported by a base of four elements representing high expectations, effective teaching, responsible families and involved communities.

3. School public relations people have known, since 1985, that when they link their current activities, or problems, or opportunities, to these concepts, they are probably on solid ground with decision-makers in their communities.
   a. One of the principles of public opinion is that deeply held values are very slow to change. They persist despite elections, upsets and catastrophes.

H. The lesson: Campaigns that build on the strength of existing values and beliefs have an advantage from the outset. Campaigns that contradict or disregard values and beliefs have a handicap.

I. [If you want to read more about the NSPRA flag project, go to the web site www.nspra.org It's on a handout you will receive, Handout #47.]

Elapsed: 60 minutes:

V. Legal aspects

The legal aspects which most frequently have raised their heads in the examinations for accreditation have to do with defamation – libel and slander –, the right to privacy, and copyright. In recent years, intellectual property has been gaining attention.

Allow 15-20 minutes for libel

A. **Libel.** Let's take libel first, and let's start with Lee Ioccoca.

A moment for a generation-gap question. How many of you know something about Lee Iacocca? [Show of hands.] His career in the auto industry spanned more than 40 years. As general manager at Ford Motors, he is credited with developing the popular Mustang. As Chrysler chairman, the original mini-van. He appeared personally in widespread advertising on television and became something of a celebrity.

1. **The scenario:**
   You are the Public Relations Director for Lee Iaccoca, when he was a chief executive and primary spokesman of the Chrysler Corporation. He has been appointed to lead a national fund-raising drive for restoration of the Statue of Liberty. An editorial in *The New York Times* questions his competence for this task. He is hopping mad about what he sees as unfair treatment. Lawyers (in-house) advise him to sue for libel.

   He wants your thoughts about the advisability of suing. What comments or concerns will you express to him?

2. Take two minutes and make a few notes, from your common sense or whatever background you may have in this area. What comments or concerns will you express to him?
   a. Who will give me a first response?
   b. How many had something similar to these?
   c. Who had something different?
   d. Probe for legal aspects – elements of libel:
      (1) Published?
      (2) Identification?
      (3) Defamation?
      (4) Damage?
      (5) Fault/malice/negligence?

Visual #20: Elements of libel

3. In practice, first you would run through the legal aspects, at least in your mind, and then you would put on your hat as public relations counselor. The second part of the question will be:

   If he decides to follow the lawyers' advice and sue, what comments do you have about the public relations aspects, and what plans do you suggest for the court of public opinion?

Today, I am going to call this second part of the question take-home work. It's important, though; talk about it with your friends and colleagues after you've read a little more. And be ready to discuss it if and when the time comes.

Quick drill: If the editorial remarks had been in a radio broadcast rather than in print, would the question still be libel?

Libel = written; Slander = spoken; broadcast = usually libel because it customarily is recorded in some fashion, as script or for station archives.

4. Let's shift to libel in real life. In the days following Sept. 11, 2001, in a MidWestern community which is real but shall here be nameless, there arose a rumor that a certain Muslim gas station owner had a poster of Osama bin Laden prominently displayed at his place of business. The rumor at some point was passed via e-mail to the director of public relations at a local university. She, in turn, passed it on to others via the university's e-mail system and, of course, it went on from there. The message not only accused the businessman; it also called for people to boycott the gas station.
5. The gas station is located near a collection of new and used car dealers who previously had routinely filled their vehicles there. The immediate result was a $10,000 loss in revenue over a very short period of time. The next result was a law suit filed against her, as well as against those who received the e-mail directly from her and passed it on.
6. The "poster" on display at the gas station turned out to be copies of the Chicago Tribune, held up for sale (as they had been every day for years). The Tribune ran a full page picture of bin Laden on the cover of the paper that day and the only "crime" the gas station owner committed was to offer the paper for sale to the public.
7. I don't know the outcome of the libel suit. Make your guess, by taking another look at the visual: Was there:
   a. Publication?
   b. Identification?
   c. Defamation?
   d. Damage?
   e. Fault/malice/negligence?
8. What about truth? Was truth a defense?

Plan to do follow-up with textbook material on libel and **privacy**. Give this an hour or so, and be sure you know what **"fair comment"** is, and who **"public figures"** are, and how much scandal or diatribe a reporter can print if it comes up in a city council meeting! Even if someone is saying mean things about your organization or your boss. Be sure you are up to speed on consent forms for photographs in publications, and references for former employees or colleagues.

And be aware that while **truth** is often a defense in libel actions, it may not be if invasion of privacy is charged. A favorite textbook case involves the 1925 film, "The Red Kimono," the true story of a one-time prostitute who was tried and acquitted of murder. The real-life person in the story abandoned her former occupation, married, moved to another part of the country, and lived an exemplary life for seven years before the film was distributed. The movie used her real name, and her new reputation suffered. A lawsuit followed. Despite the fact that the trial records were public, the appeals court held in her favor because the film needlessly identified her by name.

B. **Copyright.**
   1. Use the reference resources on law to make sure you are familiar with the principles and practice of copyright law.
   2. Some things you need to know:

Visual #21– Copyright: first page

      a. Why do you copyright something?
      b. When do you do it?
      c. How do you do it?
      d. What does it cost?
   3. [Give or seek quick answers to a, b, c and d.]

Visual #21: second page

      e. How much of a copyrighted work can you quote?
      f. How do you get copyright permission?
   4. Answer to e: "It depends. " Elaborate briefly, or refer them to further study.
      a. General consideration: Are you depriving the author of income?

C. **Other**
   1. Take a good hard look at the test segment description on legal issues, and set aside some time to fill in your gaps. If you are like most practitioners at the five- to ten-year level, you may have numerous gaps.
   2. A few of the specifics in segment 3.3, Knowledge of legal issues:
      - Disclosure
      - Trademarks
      - Commercial speech
      - First Amendment issues
      - Foreign Agents Registration Act
      - Political expression
      - Freedom of Information Act
      - Due process

These are things every competent public relations person should know and be able to handle, whether you are dealing with attorneys in your organization or as outside counsel; whether you are working in a major organization or as an independent practitioner. You don't need to know all that to write a simple news release or plan an ordinary promotion campaign. As an accredited professional, you will hope and expect to function at a higher level, able to discuss both policy and practice in all channels of communication.

You will find your judgment improves with each step you take in this area of learning. The "bookshelf" for accreditation study includes an excellent text, *Advertising and Public Relations Law*, by Moore et al. It will be a good addition to your personal library. Several of the general texts on the bookshelf have very good sections on law. And the *Associated Press Stylebook and Libel Manual* is a good succinct handbook.

▶ **How will you encounter these subjects in the Examination?**

The work you present for Readiness Review should give evidence that you understand the various aspects of communication theory we have touched on today. If there are legal implications in your plan or your other experience, you should be able to identify and discuss them if asked. In the actual multiple-choice Examination, 15 percent of the questions may be on ethics and law, and another 15 percent on communication models and theories. For details, read the items in the detailed list of knowledge, skills and abilities tested in the Examination. Then study. Study! So you won't be caught short on things you should know and be able to do.

Elapsed: 35-40 minutes on legal aspects
About 1:40 from start

Break time?

VI. Ethics

Allow 10-15 minutes for ethics

Many of us lead a sheltered life, so far as ethical conflicts are concerned. It is possible to live a long time, in some areas of practice, and never encounter a thorny ethical situation. Let me draw a parallel between this and driving a car. You may never be involved in a collision. Let us hope not. Regardless, you need to know what to do, and be well prepared on how to do it, should the occasion arise – or slam into you. Many states have, in the driver's license examination, questions about responsible procedures in the event of a collision. You very likely will encounter something about ethics in your Readiness Review and in the multiple-choice Examination. You need to be prepared to talk your way through a hypothetical problem, and to identify conflicts in a scenario.

A. **A procedure** for making ethical decisions has been developed by the PRSA Board of Ethics and Professional Practice. It is produced in a wallet-sized pocket card. I think it would serve well under any of the partner organizations' codes of ethics I have seen.

Visual #22: Ethics Pocket Guide

Hand out cards, *if you have them, or say*: I have this in a pdf file if you want to print it for yourself.

B. **Let's work with it** for a few moments. Consider this scenario:

As a sole practitioner, you are approached by a group of prominent citizens who want to advocate for the closing of a nuclear power plant 20 miles north of your community. They argue that it is also upwind of a major metropolis 50 miles south and that either an accident or a terrorist attack at the power plant could result in widespread fallout and loss of human life. They want you to prepare informational materials without mentioning the fact that closing the plant could result in rolling brownouts in the metro area.

1. Look at the **values** and provisions on the pocket guide.
   a. Do you see conflicts?
   b. Where?
2. Now look at the **steps** in decision-making, especially step 4.
   a. Take a couple of minutes to make notes. Identify **two** parties who would be affected, and define your obligation to them.

b. *Take responses* –
    (1) Who will give me one affected party and your obligation?
    (2) Who will give me another?
c. *Pursue this only long enough to show ramifications and responsibilities*.

3. This is a very quick dip into a very comprehensive process for resolving ethical dilemmas if and when they come your way.
    a. In real life, you would have taken some time to ponder the factors that influence your decision, and the key values involved. And the rest of the process.
4. The considerations in the values and provisions listed on this little card are probably already in the back of your mind, in your personal philosophy and standards.
5. You need to be able to bring them up front, as professional standards and behavior.
6. In the words of the chair of PRSA's ethics board[2], ethics is the "basic underpinning of our profession." "It's what we do." He adds: Our responsibilities include being a role model, practicing and advocating ethical communication, and making the Code part of our daily practice.

C. You can study this further on the PRSA Web site. The URL is on handout #47 which you will get today. There are half a dozen scenarios and a discussion guide for each, walking you through the process to a decision and rationale. It's tedious but sound.
    1. When you walk through one of these, it is useful to stop and consider the influences which might tempt you or press you to make a different decision. The world is full of pressures to resolve our dilemmas according to other agendas.
    2. [NOTE: If your prep course includes the session on Law and Ethics, forecast it for the group.]

Elapsed: about 1:55 from start, plus break time.

[This space is intentionally left blank for notes, and to start Research on a fresh page.]

[2] Charles Wood, APR, Fellow PRSA, 2003 Chair, PRSA Board of Ethics and Professional Practice, Leadership Rally, New York City, June 21, 2003.

VII. Research

A. Now let's get down to business on research.
   1. First, let's put it in perspective.

Visual #8, 4 STEP

   2. Here is a short form for the process we will be using in planning.
   3. Often called a four-step process. Often called by other names.
      a. Familiar acronyms: RACE, RAPP, ROPE . . .
      b. Most acronyms have shortcomings, omitting or glossing over a significant step.
      c. This diagram covers the territory.

B. Whatever you're looking at --
   1. Problem, challenge, opportunity, issue, indistinct monster, potential blessing . . .
   2. You start with questions. The first question mark: **?**
      a. What **IS** the situation?
         (1) Is there **really** a problem? An opportunity? An issue?
         (2) A real monster? A real potential blessing?
      b. How do we know?
      c. Do we know enough?
      d. Are we working with facts? Impressions? Intuition?
      e. What else do we need to know?
      f. How can we find out?
   3. You start with questions. This is the **research phase** of four steps.

C. Briefly, here's the rest of the process – we'll come back to it later –

D. When you have done your research, then you think:

   Where do we want to go from here? **--------> A**

   1. Who are our audiences? Our publics? Our constituent groups?
   2. What do we want from them?
      a. Awareness? Attitude? Action?
   3. This is the **planning phase**.
      a. It probably includes strategies, activities, a timetable and a budget

E. Then you **carry out** your plan. **------->**

F. And then you ask more questions:
   1. Did it work? How well? How do we know?
      a. Repeat the questions from the first question mark:
      b. Do we keep on doing it? **?**
         (1) With the same people, or different people?
         (2) At a different time, or in a different way?
      c. Or do we do something different?
   2. Research again.
   3. It's a cycle.

Give class *Handout #13 – Four-Step Process*
and Handout #43 – Notes on the Four-Step Diagram

QUESTIONS ABOUT THIS?

Comment: Is anyone familiar with the SWOT system in planning? Strength, weaknesses, opportunities, threats? It is widely used in agencies and sometimes in strategic planning. ***Observe***: It's good for a situation analysis. It doesn't decide what to do, or tell you when you've done it. Don't try to use it in the Examination for accreditation, except as a situation analysis. If it comes up in a Readiness Review, feel free to repeat what I just said. ☺

Elapsed: 10-15 minutes on research

From Visual #7: Research

VIII. Research comes in kinds . . .

A. Primary:
  1. Information collected **first-hand**. **From Visual #7: Primary**
    a. By you or by someone else, for you.
    b. Original information.

B. Secondary: **and Secondary Research**
  1. You study **second-hand** information.
    a. Collected by someone else.

C. Formal research: **From Visual #7: Formal Informal**
  1. Uses scientific method.
  2. ***Check for understanding*** [quick drill]:
    a. What makes it scientific?
    b. One minute for notes.
    c. Answer: Formal research is repeatable. In the words of Mark McElreath, there's a recipe for it – a list of things-to-do which allows others to replicate not only the methodology but also, ideally, the results.
  3. It may be done by Gallup, Roper, another research firm, or by you, yourself.
    a. So long as you use scientific method.
    b. Usually, statistical processes are involved.
    c. **Assignment**: Study your texts and reference resources for criteria and process.
      (1) Scientific research is designed to explain or predict observable phenomena.
      (2) It may simply explore what's going on, or it may test a hypothesis.
      (3) In public relations, we don't usually start with a hypothesis.
      (4) Otherwise, the rigorous method applies, for research to be formal.

D. Informal:
  1. Everything else.
  2. Most likely, it's unique each time it's conducted.
  3. This does not mean that haphazard is good enough. Data gathered from informal research require thoroughness, good notes, and a sound method for gathering the material so that it is usable for later reports or for developing a strategic plan.

▶ **Examples and drill for kinds**.

A. Let's look at this in terms of real-life.

B. [**Call for research** done by persons attending, brief description.]

C. As he/she tells us about it, ***please make notes for yourself*** on:
    a. What's primary research and what's secondary.
    b. What's formal and informal.

1. First process: **[Name]**
    a. Just tell us about the research you undertook.
        (1) The process you used; not the findings.

Allow a few minutes for response

    b. How many thought this process was primary?
    c. Secondary?
    d. Why?
    e. How many thought it was formal?
    f. Informal?
    g. Why?
2. Second process: [**Name]**
    a. Repeat steps in 2:
3. Third process: **[Name]**
    a. Repeat steps in 2:
4. QUESTIONS ABOUT THIS?

Elapsed: About 40 minutes on research

Summing up and segue to case problem

Notice that a variety of methods, or research tools, were in use in these examples. I imagine that you are acquainted with them and a number of others. Let me suggest that in your reading and other study, you be alert to additional devices and their **short names**, so that, in your written plan or in the Readiness Review interview you can just throw in an "intercept survey" or a "fax-back survey" and not have to take time to explain it.

Among your belongings you should have good descriptions and sound procedures for "old standby" techniques such as surveys, focus groups, and content analysis – including a table on sample size, confidence level and margin of error. I will be offering a set of such handouts.

I also recommend two **papers by Walter Lindenmann**, who until very recent years was the research expert for Ketchum Public Relations, a major international firm. He covers up-to-date stuff like Internet surveys, quick-tab polls and e-mail polls, and gives costs or estimates of various types of work. One title – a favorite – : *"Research doesn't have to put you in the poorhouse."* Another paper from this experienced real-world practitioner has a really good glossary of terms. Time spent with him will improve your vocabulary and your understanding.

His papers are available at no cost on the Web site of the Institute for Public Relations. The URL is given on a handout sheet of useful Web addresses.

Visual #9: 384

One thing I would like you to start memorizing today: The number 384. One of the things the early pollster George Gallup found out was that when you ask enough people the same questions, you start getting the same answers. Statisticians went on from there, determining the process by which you can choose some people to represent most of the people. It involves **random sampling**, so that each person in the larger group has an equal chance of being chosen.

When you look at the number of people you need to survey, for their responses to be characteristic of a larger population, the number 384 stands out. If you have a population of 100,000, or a million, or 10 million, 384 will do it, **if they are properly chosen at random**. If you have a universe of only 50,000, you need 381. For 10,000 you need 370. For 1,000 you need a little less than 300. You might as well memorize 384.

Sometimes you need larger numbers, for subgroups such as age or region. National surveys in the United States often use a number around 1500, to permit valid stratification by age, income, locality or political preference. In one mid-sized state the sample for breakouts by Congressional districts is about 600. Statewide telephone polls in that state without breakouts usually work with around 500, to compensate for unlisted numbers, persons without telephones and other factors. If your state is larger or smaller, it doesn't make much difference, as you will see from your table on sample size, in the handouts. The good rule of thumb is: **384**.

> **CAUTION:** This is 384 at random, **all** responding. Not 384 mailed out with some replying, or response of 384 from some larger miscellaneous mailing**. It's 384 persons, chosen at random, with answers from 384.**

QUESTIONS ABOUT THIS?

Elapsed: About 45 minutes on research

> **NOTE TO COACH:** Handouts #15 through #21 are study materials for the "old standby" techniques referred to in this section. It is best to hand them out at the end of the day, for take-home use. However, if at this point you are concluding a half-day session, hand them out now.

[This space intentionally left blank for notes, and to start the Case Study on a fresh page.]

CASE PROBLEM

I. **Research**

A. Let's turn now to the case problem we will work on today. It incorporates all four phases of the 4-step process we looked at first. It is presented in a 12-step process which can be – repeating, **can be** – a pattern for the work you present to the Readiness Review panel. If an existing plan you decide to present was designed in a different format, you may keep it in that format, but you should be prepared to show how it covers the territory we will go over today, or to discuss how you would modify it to be more comprehensive.

In the normal course of events and in a study group, you would have been building up to this over a period of some weeks, working on lesser problems involving audiences, objectives, strategies, budgeting and timetables. To give you an overview of that process, we'll delve right into a major case study.

Handout #38: Ramsey Steel

B. The case is **Ramsey Steel Faces Pollution Charges.**

1. Just look at the first page for now. Ignore the instruction to read it all.
2. I'll give you five minutes to study that, and then you may ask questions.
3. **Exercise:** Think of three things you would want to do, for research, in this scenario. Make a note. **Two minutes** for work time.
4. Take responses. Check: Formal or informal?

Have ready visual #27:
Informal Research
Method, Sources, Rationale

Here is a way to organize your thinking – and your presentation – about research in case studies. You identify it by **kind** – formal or informal. Then the **method** – in this example, interviews – and **the sources** – the people you will interview. Then the **rationale** – why you think this is a good idea. You could go on to show a number of other methods – surveys, focus groups, formal or informal content review, analysis of complaints, monitoring phone calls – filling in the sources and the rationale. This is a good system for presenting, succinctly, the research you have already done in a campaign, or what you would plan to do. It is always helpful to organize formal and informal research separately.

Note: Illustration on the visual is generic, not from this case problem

5. Quick drill: Look at your notes. Are your ideas primary or secondary research?
6. **Go back** to your research ideas. Take one, and express it in this fashion:
   a. Formal or informal
   b. Method
   c. Sources
   d. Rationale
7. [Take responses as usual and critique as necessary.]

II. Goals

A. Let's go now to Step 2.

B. ***A three-minute assignment***:

1. Glance over the original statement of the problem, and over the findings from research.
2. What would be the best possible outcome of your efforts? How would the company then be perceived, by its important constituents?
3. We're looking for a goal statement. In the long-range.
   a. Something that starts out "To be recognized" or "To be widely perceived" . . . or a similar phrase. Perhaps 10 or 15 words.
4. Take three minutes and draft something.

C. Call for responses as usual.

1. Probe for words or phrases such as:
   a. Responsible
   b. Public-spirited
   c. Concerned about the environment
   d. Continually improving
   e. Significant industry
   f. Major employer
   g. Taxpayer

D. Observe that a goal statement should be broad, the desired end result of communication.

E. Comment that a comprehensive communication plan should include a goal that is consistent with the organization's over-all mission.

Elapsed: About 30 minutes on case problem

III. Constituent groups

A. Now let's move on to Step 3: Identify five key publics or audiences or constituent groups.
A two-minute assignment:

1. Glance over the statement of the problem and the findings from research again.
2. What publics are implied there?
   a. List **five** key publics for your plan.
   b. Who will give me one . . . how many similar . . .
      (1) Probe for customers, affected residents, stockholders, regulatory agencies, county officials. Discuss news media – sometimes an audience, sometimes a channel to your target audiences.
   c. Ask: Anyone have more than five?
   d. Choose your five best. Consider the ones who absolutely must not be ignored.

.

3. Here is the standard checklist for audiences.

Visual #11: Audiences
[five quick pages]

4. This is a good thing to memorize, when you have time.
   a. This comes from a book written by Gary Marx, APR.
   b. It is included in a handout: *Components of a public relations plan*, which I will give you before we are finished today.
   c. When you need to think of audiences, think of this list, 1,2,3,4.
   d. "Who, who, who and whose."

5. Today, at this time, I want to work with three of the publics you listed
   a. Please count off – 1, 2, 3.

Visual #30: Blank page for projection
Write 3 publics

   b. Those of you who are #1 will work with public #1, and so on.
   c. The next step is what you want from that public.

Recover Visual #8: ? ---> A ?
Next visual #12: Objectives: A,A,A

   d. Remember: It's probably awareness, attitude, or action.
      (1) We are moving into "objectives."
      (2) This is the point at which thinking really pays off.
      (3) It sets the stage for all the rest of your work on the problem.

IV. Objectives

A. We are moving to Step 4 on your handout.
B. It's hand-feeding time.
C. A properly written objective has four parts.
   1. One: A behavioral outcome.

Visual #13:
Objectives ●●●●

With some specifics:
   2. The audience from whom you want that behavior
   3. An attainment level – how much, how many. . .
   4. A time frame – when do you intend to reach the objective?

D. So, write one objective for your audience.
   1. I'll give you three minutes for this, today, and then we'll check a few.

Share . . . . [10 minutes?]

   2. Comment on short-term and long-term objectives.
      a. Good to organize in this fashion.
      b. What's short-term? Depends on the project. Maybe 3 months, maybe 6.
      c. What's long-term? Probably a year or more; maybe several years.
      d. In a complete plan, you would probably have at least one short-term and one long-term objective for each important audience. Today we are just getting acquainted with the process and the specifications.

Elapsed: About 60 minutes on case study

BREAK?

Visual #14: Strategy

V. Strategies

A. On Step 5, we consider: How are you going to do this? Work toward your objective?
   1. The operative word is **"How"**.

B. Military minds often think in terms of strategies.
   1. Attack under cover of darkness
   2. Join forces with an ally
   3. Demoralize enemy troops with psychological warfare tactics
      a. Pamphlet shower, radio broadcasts. . . .

C. In public relations, you are looking for ways to accomplish your objectives efficiently, economically, using your resources to the best advantage, perhaps using someone else's nickel or riding on someone else's coattails.

D. Kindly take **two minutes** and write down **one** strategy for your assigned audience.
   1. Your handout asks for two. A real plan would have several. Today, give me one.
   2. It must describe **how** you will work toward your objective.
      a. Not specific activities – a concept of how you will proceed.

E. [Check responses as usual.]
   Non-responders: Check your own work – do you for-sure have a "How" or a "What"?

F. Observe that in the written public relations plan you present in the Readiness Review, you will be wise to declare four or five publics, show short- and long-term objectives for each, and describe the strategies to accomplish your objectives for each public.
   1. One strategy can serve several objectives.
   2. One strategy could work for several audiences, but probably you need something specific for each audience.
   3. You need to be very sure of the structure, in your mind, distinguishing between objectives and strategies. The reviewers very likely will question you about this.

G. You will want to develop a method – one which works for you – of organizing all this information in a relatively succinct fashion. You may be accustomed to working in a spreadsheet for this kind of planning. Another option is a Gantt chart, which I will show you in a moment. You may have another system. Double-check your system to be sure it contains all the elements we are discussing, and will be easy for the reviewers to read through and understand.

VI. Message

A. Turn now, please, to Step 6 of the case problem.

B. Consider, briefly, the Message aspect. We don't have much time to dwell on that, today
   1. If "message" is not clear to you, mark it out for textbook study.

Elapsed: 15:00 after break

VII. Tactics

A. Tools come next. Step 7. These may be called tactics. Same difference.

Visual #15: Tactics/tools

B. Tools/tactics are probably the easiest part.
   1. This is where most of us start thinking, instead of back where we should start.
   2. It's all the things you plan to do.
      a. Meetings, newsletters, posters, tours, whatever.

C. In your written plan, or your discussion of it, you will want to indicate which strategies your tactics are intended to carry out.

D. In a real-life plan, where you have had time to collect all your thoughts and ideas and objectives, you would round out your treatment of tactics with Steps 8 and 9, spokespersons and costs. Today we are going to jump over those steps and go to Step 10.

VIII. Timetable

A. Step 10 asks you for a timetable

B. **The problem:** Getting everything down in good order.

C. You may have a favorite system for showing when the various aspects of your plan did or should take place. If so, feel free to use it for the plan in your portfolio. If you have not developed such a system, here is an idea.

D. **One solution:** Consider a Gantt chart.

Visual #24: Gantt chart

E. Here is a basic Gantt chart. It is named for Henry Gantt, a pioneer in scientific management. You can use this, or some other scheduling tool, to coordinate the various parts of your plan. Sometimes these devices are called "calendaring tools." You may prefer to use a spreadsheet which covers the same territory.
   1. The columns are labeled for time – usually weeks or months.
   2. In the rows, you show your tactics and when they are in effect or being carried out.

F. You may put your research in a separate chart, or consolidate it with the subsequent plan, whichever works out best for your circumstances.
   1. Sometimes people organize the plan by putting an audience and its message into a caption, and then listing the strategy, tactics and timing for that audience.
   2. You can put your spokespersons, budget and timetable into the same chart.
   3. Make a column for spokespersons.
   4. Another column for the dollar amounts in your budget, or volunteers, or staff.

Visual #28:
Gantt Illustration with arrows

   5. You can draw arrows to show the timetable.
      a. In a spreadsheet, you could use color or shading.
   6. You may need to show all your strategies together, up front.
      a. But people – executives or reviewers – often like to follow an audience through objectives, strategies and tactics, and evaluation, in sequence.
   7. The lovely part about this kind of chart is that if you forget something, you can put it in at the end, show the timing, and it will be seen in the right relationship to the rest.

QUESTIONS OVER THIS?

Visual #29: Evaluation

IX. Evaluation

A. Time for the next to last step – Evaluation.
B. Go back and take another look at your objective for your audience.
C. When it's all over, how can you determine whether you have met the target?
D. Possibilities: **(winding down fast)**
   1. Repeat some of your research.
   2. Monitor meetings or news media.
   3. Review company records and sales data.
   4. See what fits.
E. **Good idea**: Write your objectives with evaluation in mind!
F. Another good idea: Allow for some checking up at intermediate points, in case things aren't working and you need to make corrections.
G. **Take 10 minutes** to make notes on what you might do, and when.
H. Take reports; share; comment.

X. Evaluation against goal

A. Now raise your sights further ahead, on your long-range goal. How and when should you check whether you are making progress toward that end result?
B. Take a few responses, depending on time remaining.

Elapsed: 40 minutes

XI. Summing up . . .

A. I am sure this has seemed like a struggle, for you.
   1. It's hard work, to attack this stuff on a condensed basis.
B. Nevertheless, you should have a good head start on the process.
C. Let me repeat: You CAN pass that examination and gain that credential.
   1. IF you will properly prepare.
D. You have the brain power and the background.
E. You just need to lay out your personal study schedule, or find a prep course in which you can participate – or both – and decide to treat it seriously.
F. **And allow sufficient time** to get what you need to know under your belt, and integrated into your brain, so you can be facile in using it.
G. The knowledge, skills and abilities you are expected to demonstrate are laid out in the Candidate's Preparation Guide, which you can download from the Accreditation Board Web site. Here are handouts with the two lists – those specifically evaluated in the Readiness Review, and those tested in the multiple-choice Examination. **Be aware** that the Readiness Review panel may also be looking for evidence of many of the items tested in the multiple-choice Examination, since the panel is determining whether you are ready for the final stage.

Handout #46: Areas of Competence
Handout #45: List of KSAs
Handout #44: Materials on Bookshelf

   1. Take this home; study it; determine your gaps or areas which need reinforcement.
   2. Notice how much of the examination is devoted to the various areas –
      a. The "weighting" by percentages.
      b. Plan your study accordingly.
   3. Arrange for access to the texts and other resources shown on the "Bookshelf" for study.

XII. A tried-and-tested study process

A. Now, give me five more minutes, to share with you a study process, which truly will help you retain what you learn. It is research-based.

B. People really do retain information better if they study this way.
   1. It produces a ready-made review guide.
   2. It can be especially valuable in the structure for the 2003 examination for accreditation, in which you are invited to draw from a number of different texts and other reference resources, shaping your study to the specified body of knowledge.

Visual #2: SQ3R

C. This is: "How to study so you won't forget it tomorrow – or before the test."
   1. This research-based process was assembled by Francis Robinson. It works.

D. First step: **SURVEY.** Take about one minute. Select a chapter to read. For instance: "PR's Origins and Evolution" in *This Is PR: The Realities of Public Relations*, by Doug Newsom et al., one of the general texts on the "Bookshelf" for accreditation.
   1. Look for major topics in the chapter. Perhaps three to five areas.
      a. In this case, you find a "capsule history" with five eras
         (1) Preliminary period
         (2) Communicating/initiating
         (3) Reacting/responding
         (4) Planning/preventing
         (5) Professionalism
   2. If you will do this -- you can expect to read 24% faster, with the same understanding.

E. Second step: **QUESTION**. Take a topic and turn it into a question – [it needs to be a rather broad question] and put it in your notes – for example:
   1. What was the everyday work of public relations during that "preliminary period"?

F. Third step: **READ** to answer your question.
   1. Make a few notes - headlines, outline form, phrases.
      a. Selling real estate . . . raising funds . . . publicizing sports events . . . fomenting rebellion . . . protesting British taxation . . . promoting the Constitution . . .
   2. Studies show you read with better comprehension and better retention when you read to answer a question.

G. Fourth step: **RECITE**.
   1. Close your book and notebook and see if you can answer your question orally.
   2. If you can't, go back to the book and get the answer in your head.

H. CONTINUE LIKE THAT.
   1. Who was initiating what during the 1800s? Who was reacting about what during the early 1900s? What was being planned or prevented in the later 1900s? What do we mean by Professionalism now?

I. Fifth step: **REVIEW**.
   1. When you finish the chapter or whatever, look over your notes again.
   2. Test to see if you can recite the headings and significant notes.
   3. Review increases immediate recall by more than half.
      a. Review increases recall two weeks later by a factor of four (11% to 46%)
   4. It is important to review within 24 hours. Night to next morning is good.

J. Your notebook, questions and notes, will give you a structure to review for test, and for more permanent reference.
   1. If you borrow a book to study up on a specific aspect or area of practice, such as law, you can easily build a concise set of notes on that topic which will help you recall your reading when you want to review it. You can consolidate your notes from various sources into one notebook as a central reference.

K. Here is a handout with more details on the process, for your toolbox.

Handout #3: SQ3R

XIII. Next steps:

1. Download the application for Readiness Review and the Candidate's Preparation Guide from the website of the Universal Accreditation Board, and use it to help plan your preparation.
2. Decide how you are going to continue your preparation, and how you will allot the time for it.
3. Make the necessary commitment.
4. It won't be simple. It won't be easy. It will be a significant accomplishment. As you take each step along the way, you surely will notice the difference in the way you go about your daily work. The people you work with – or for – may notice it, also. There are cases on record where candidates for accreditation were promoted, or given broader responsibilities, before they scheduled the examination. As one supervisor explained the change: "You're thinking differently."
5. ***I will hope as much for you.***

Elapsed: 50-60 minutes after break.

▶ Now here is the list of URLs I have been mentioning.

Handout #47– URLs for Session P
If not done previously, distribute Handouts #25 and #15-21

XIV. Questions?

What do we need to go over again?

Links to pdf files for handouts and visuals are shown earlier, on separate pages

oOo

Approximate time allocation

Preliminary remarks	5-10 minutes	
Outline:		
Opening	5 minutes	
Homework	5	
Communication theory	20	
Attitudes, values	10	
Exercise	10	
NSPRA example	5	Total so far: 1 hour plus
Legal	40	
Ethics	15	
Research	45	Total so far: 2 hours 40-45 minutes
Case study,	total 2:00	Total presentation 4 hours 40-45 minutes

With housekeeping, breaks and lunch, this works out to a six-hour event.