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Corporate Public Relations Practitioners' Perceptions of Program Evaluation and Encroachment Effect

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THE FLORIDA STATE UNIVERSITY

COLLEGE OF COMMUNICATION

CORPORATE PUBLIC RELATIONS PRACTITIONERS'
PERCEPTIONS OF PROGRAM EVALUATION AND
ENCROACHMENT EFFECT

By

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ABSTRACT

Scholars have studied issues of public relations evaluation and encroachment separately, yet none have previously examined perceptions about evaluation and encroachment together in applied settings. This study features responses obtained during interviews with 21 public relations practitioners working in for-profit companies. These responses contribute to existing literature because they reflect current perceptions of both evaluation and encroachment in real world settings. This study seeks to expand systems theory by addressing systems that de-value communication. It also seeks to broaden excellence theory by explaining how to maintain public relations' independence. Responses revealed that while most practitioners attempt to evaluate their results using either qualitative or quantitative methods (or a combination of both), real obstacles to both approaches remain. Thus a combined approach seems most effective. Presently, most practitioners are not concerned about encroachment and feel that evaluation is only one part of a public relations department's defense against encroachment.

INTRODUCTION

Examining public relations theory at work in an applied setting strengthens both the profession and the discipline. Two streams of theory are merged in the current study – systems theory and excellence theory – to bring understanding to a critical issue that threatens viability of the public relations function in corporations. Systems theory describes how each interrelated department (or subsystem) within a company helps to maintain the company (or system) as a whole. Public relations scholars hold that communications, and thus the public relations function, is integral to successful system maintenance (e.g., Grunig & Grunig, 1989; Grunig, 1992). Yet, systems theory as applied has limitations – in particular, it fails to account for systems that de-value communication. Excellence theory describes how an excellent public relations department functions as an independent internal unit to maintain the system. Yet, excellence theory as applied has limitations – namely, it fails to explain how to maintain public relations' independence.

Public relations increases organizational effectiveness and practitioners regularly evaluate results of their divisions' work (e.g., Ferguson, 1998). Evaluation that proves public relations' value and is acceptable to senior management can be expected to defend against or discourage encroachment onto the public relations function. Encroachment within a company is the assignment of non-public relations personnel to manage the public relations function or the takeover of public relations tasks by non-public relations departments (Lauzen, 1991, 1992). This phenomenon potentially threatens the autonomy and security of public relations departments that are unable to prove their value. Thus, evaluation and encroachment are conjoined concerns vital to the health of the public relations profession.

The purpose of this study is to determine how corporate public relations practitioners' demonstrate value and perceive encroachment effect. Such perceptions will reveal which methods of program evaluation are perceived to be most effective, to what degree encroachment is perceived to be a serious issue, and what (if any) relationship practitioners perceive between evaluation and encroachment. Thus, this study is designed to enhance both systems and excellence theories by closely examining applied settings.

LITERATURE REVIEW

Scholarship relevant to this study is reviewed in four contexts: (1) Systems Theory and Excellence Theory; (2) Obstacles to Evaluation in Public Relations; (3) Evaluation Methods Used in Public Relations; and (4) Encroachment Effects.

(1) Systems Theory and Excellence Theory

Systems theory is helpful in explaining the need for evaluation in public relations; excellence theory helps explain the harmful impacts of encroachment onto public relations. Systems theory promotes an understanding of how interrelated subsystems contribute to an organizational whole and is useful for both understanding and managing public relations (Almaney, 1974; Broom & Dozier, 1990; Cutlip, Center, & Broom, 1985). Excellence theory explains the value of public relations to an organization. Excellence theory also describes how the public relations function is best organized and practiced in a corporate setting, namely by acting strategically and independently within a company (Grunig & Grunig, 2002). In this context, encroachment is a barrier to “excellence.”

Systems Theory and Public Relations

Broadly, systems theory promotes an understanding of how interrelated corporate subsystems constitute a whole system or company that is operating in a changing environment (e.g., Broom & Dozier, 1990; Cutlip et al., 1985). The distinguishing characteristic of a system, according to Almaney (1974), is the structure and pattern of interaction (or communication) between a system’s subunits and the resultant interdependence among them. In other words, wherever two subsystems meet in a company, communication must occur for these subsystems to cooperate with one another (Wiio, Goldhaber, & Yates, 1980). Almaney (1974) considers a system ultimately a “communication network” (p. 37).

Public relations makes communications happen in a system. This communication is vital to the “smooth operation of the total system” because it integrates all subsystems, maintains the internal stability of the total system, and links the total system (i.e., company) with the external environment (Almaney, 1974, p. 36-37). Thus public relations heavily influences how well the overall system functions (Almaney, 1974; Broom, Casey, & Ritchey, 1997; Creedon, 1993).

Systems theory also suggests that the external environment exerts pressure on a system or company to change (Cutlip, et al., 1985; Grunig & Grunig, 1989). Public relations departments thus serve another role important to systems theory by enabling a company to be “open.” An open system or company is one that interacts with the external environment by exchanging information, gauging environmental changes suggested by the information, and continually reacting to those changes (Almaney, 1974; Cutlip et al., 1985; Naumann & Lincoln, 1989). Public relations, as the subsystem responsible for communication in a system, is tasked with

ensuring communications between a system and the external environment occurs (Broom & Dozier, 1990). Without communications and subsequent changes according to environmental pressures, systems become insensitive, dysfunctional, unproductive, and inert (Broom & Dozier, 1990).

This literature review now will explain how systems theory supports the need for evaluation of public relations initiatives. Public relations departments maintain vital two-way communications with publics, thereby gaining an understanding via feedback not only of these publics but also of the quality of the communications it creates for them (Almaney, 1974; Broom et al., 1997; Creedon, 1993). Bivins (1992) defines “feedback” as “information sought by the system to determine the effects of the output” (p. 366). To Houston (1999), feedback in a systems context is “data about changes in the environment” which, when analyzed, allow the system to adjust and maintain its equilibrium (p. 122). Public relations practitioners must gather and interpret feedback to ensure their communications are effective and to assess changes in the environment caused by their communication. Public relations departments, therefore, must monitor and evaluate their impacts on the surrounding environment in order to change and adjust effectively.

Systems theory, as applied in a public relations context, has limitations. Most importantly for the context of the current study, systems theory fails to account for systems that de-value communication. Encroachment onto public relations, which subordinates public relations in a hierarchy and lessens its influence, exemplifies how communication is de-valued in some systems (Lauzen, 1992, 1995). Furthermore, while systems theory explains the role of public relations in an organization and the importance of accurately evaluating public relations programs, what is less certain is what the most effective and accurate *methods* of evaluation are. Systems theory may help convince practitioners of the need for evaluation, but it is unclear when quantitative or qualitative methods are best. The current study is designed to offer such practical advice to practitioners.

Excellence Theory and Public Relations

Excellence theory is the dominant paradigm in public relations research and addresses encroachment onto the public relations function. Excellence theory explains the value of public relations in an organization and describes how the communication function is organized and practiced most effectively in a corporate setting (Grunig & Grunig, 2002). Excellence theory suggests that public relations must serve in corporate roles that are both managerial and technical in nature. In addition, public relations departments must play some role in influencing the company’s strategic management and decision-making (Grunig & Grunig, 2002). Encroachment is problematic particularly in a corporate hierarchy where it subordinates public relations and lessens its influence, thus denying public relations a strategic function and limiting its ability to be “excellent.” Encroachment is problematic in corporate settings because of increased accountability, heightened competition for influence, dependence on shared resources, and the

presence of domain similarity in which two departments share the same skills or tasks (Lauzen, 1991, 1992, 1993; Spicer, 1991).

Excellence theory dictates that public relations practitioners enact managerial roles and influence strategic decisions to be “excellent,” thus encroachment represents an impediment to excellence. Public relations is a unique management function that helps an organization interact with various environmental components (publics). As identified in this literature review, this function is vital to systems theory and, thus, organizational success (Grunig, 1993; Grunig & Grunig, 2002). Therefore, it would seem that public relations departments should strive constantly to be “excellent” and that encroachment should not occur. The fact that *it does* suggests that perhaps not everyone understands public relations’ role in a company or how it delivers value.

While excellence theory explains that enacting a “functional” (i.e. managerial) role as opposed to a “functionary” (i.e., technical) one defends against encroachment, it does not specifically address whether or not evaluation is an effective defense against encroachment (Cutlip et al., 1985, p. 193). The current study will address this gap.

(2) Obstacles to Evaluation in Public Relations

This literature review has described the theoretical support for evaluation of public relations initiatives by practitioners in a corporate setting. Yet, the question “Why doesn’t every practitioner evaluate his or her efforts?” remains. Important clues are available in the public relations research literature. Barriers hindering evaluation include not knowing which evaluation method to use, the difficulty in assigning value to public relations effects, and resource constraints (e.g., Bruning & Ledingham, 2000; Cutlip et al., 1985). This study is designed to examine corporate practitioners’ perceptions of encroachment in relation to evaluation of the public relations function.

Despite these barriers, evaluation is a component of many formulas for effective public relations planning. The widely used R.O.P.E. planning process advises the following steps: research, objectives, programming, and evaluation (Cutlip et al., 1985; Smith, 2002). The R.A.C.E. process and the R.A.I.S.E. formula comprise such steps as research, strategy, action or implementation, and evaluation (Brody, 1992; Smith, 2002). Present in each of these different processes is an evaluation step, underscoring the importance of evaluation to any public relations initiative’s planning. Furthermore, there are three basic research and evaluation phases in public relations, according to Cutlip, Center, and Broom (1985). The first phase is preparation of the research criteria and methods. The second phase is implementation of the criteria and methods. The final phase, “impact evaluation,” enables practitioners to most expediently underscore the value of public relations to an organization. It is this final phase, overall program evaluation, that constitutes the focus of the current study. This brand of research answers the question, “Did the program work?” Despite evaluation’s importance, corporate public relations practitioners have been analyzing the problem of effectively evaluating their impact for years, and few are satisfied fully with current measurement tools (Hon, 1997; 1998). Additionally, real commitment to

evaluation is lacking, in conjunction with three broad categories of barriers (Hon, 1997; Austin & Pinkleton, 2001).

First, the most effective methods public relations practitioners should use in measuring program outcomes is unclear. Many practitioners still believe that the results and benefits of effective communications are too abstract and idiosyncratic to be measured (e.g., Bruning & Ledingham, 2000; Cutlip et al., 1985; Ritter, 2003). Thus, those practitioners will ignore evaluation. Those who do measure public relations effects face a variety of challenges associated with the particular method of evaluation they use, whether quantitative or qualitative. Quantitative measurement methods widely used in the past such as tracking media “hits” or counting clips are often considered imperfect because, among other reasons, they do not describe the tone of the coverage (e.g., Burnett & Moriarty, 1998; Hon, 1997, 1998; Weintraub-Austin & Pinkleton, 2001). Qualitative methods such as focus groups and interviews do not provide the firm numeric-based evaluation results corporate chief executives and accountants tend to understand best. There are a variety of other methods used to evaluate public relations campaigns, including communication audit techniques, content analyses, surveys and polls, in-depth interviews, and web analyses (Duncan, 2002). But the challenges associated with determining which method is best have not been overcome.

Second, evaluation is complex and limited because public relations practitioners who do take measurements often have difficulty expressing outcomes in terms corporate accountants and CEOs can understand (e.g., numeric cost/benefit analysis of ROI) (Hon, 1998; Ledingham, Bruning, & Wilson, 1999; Pinsdorf, 2000). Previous communications measurement methods relying on subjective beliefs and judgments will not satisfy accountants or other decision-makers (e.g., Austin, Pinkleton, & Dixon, 2000; Kim, 2001; Schultz, 2002). In order to garner approval for requested budgets, public relations departments must prove their value in such a way organizational decision-makers can understand this value easily (e.g., Austin et al., 2000; Hon, 1997, 1998; Schultz, 2002).

Third, public relations evaluation often is hindered by important resource constraints. Hon (1998) found that though the need for public relations evaluation is understood in the organizations she studied, the scarcity of resources is still a hindrance. This problem, according to Broom and Dozier (1990), has constrained evaluation for many years. Whether practitioners should spend money, time, and personnel evaluating initiatives rather than addressing current problems, for instance, is unclear. Evaluating public relations’ effects requires a balancing act with other day-to-day responsibilities.

(3) Evaluation Methods Used in Public Relations

Many practitioners and academics are recognizing the importance of evaluating public relations outcomes. The search for accountability was the “1990s buzzword among public relations practitioners” (Kim, 2001, p. 4). Cutlip, Center, and Broom (1985) also described evaluation’s importance when they wrote, “No topic dominates the practice as does program evaluation” (p. 289). Broom and Dozier (1990) described how a 1984 edition of *PR Reporter*

states, "Evaluation is the profession's number 1 need" (p. 73). Evaluation is emphasized also in the public relations curriculum. For instance, the Commission on Public Relations Education has underscored the importance of teaching students how to evaluate programs, and an evaluation component is included in many processes for public relations planning. Grunig's model for the strategic management and planning of public relations includes as its final step evaluating how successfully programs meet their objectives (Grunig, 1992). Other public relations processes featuring an evaluation component are Duncan's (2002) communication audit, the Strategic Planning Program matrix (Hainesworth & Wilson, 1992), and Ehling's outline of public relations management (Broom & Dozier, 1990). Each of these different processes includes an evaluation step. This suggests that public relations educators agree that evaluation is the capstone to effective public relations. One can conclude that many see assessing results of public relations as a vital step in "excellent" public relations.

Specific instruments that seek to quantitatively or qualitatively evaluate public relations have been created and are in use in many public relations departments; however, both methods have advantages and disadvantages, and the debate over which method is better has not been settled, either in practice or in academic research. This literature review now describes a few of the methods that have been devised, and discusses some of their benefits and drawbacks.

Existing methods advocate evaluating public relations a variety of different ways. Kim (2001) established a model to measure the economic value of public relations by measuring its impact on reputation. He concluded that public relations expenses indirectly affect corporate revenue; however, this method does not include a way to measure the quality of specific communications activities, only communications in general. Furthermore, Hutton, Goodman, Alexander, and Genest (2001) found little correlation between reputation and overall spending on communications activities. Lesly (1986) crafted six levels of public relations measurability but advocated accepting multiple forms of public relations evaluation and implied that some public relations effects simply defy numerical measurement. Ritter (2003) devised a "balanced scorecard" which monitors communications by identifying key factors necessary for the public relations department to meet the organization's strategic objectives (p. 44). Though often used, Broom and Dozier (1990) advocated against employing advertising equivalence as a measurement of public relations effects, saying there exists no justification for it. Roberts and O'Reilly (1974) created an instrument to measure respondent behavior over time, but they were unable to relate these measurements to performance criteria. Bruning and Ledingham (2000) found satisfaction with an organization to be influenced by key publics' perceptions of their relationships with the organization, an important finding because public relations departments have long been tasked with maintaining relationships. However, researchers have questioned the very meaning of the term 'relationship' in a public relations context (Broom et al., 1997).

Hon (1998) conducted seminal research into demonstrating public relations' effectiveness. She asked public relations executives how they evaluate their efforts and found that practitioners believe public relations goals must be tied directly to organizational goals. She also learned that CEOs believe public relations' ultimate goal is communicating the organization's image. In a 1997, study Hon found that the most significant challenge facing

public relations executives is clearly articulating public relations' benefits, but only some practitioners have formal evaluation processes in place with which to do it. So, it would appear that public relations practitioners agree that evaluation is important – even though they may not evaluate.

(4) Encroachment Effects

This literature review has discussed the importance of evaluation to corporate public relations practitioners, the difficulty of evaluating initiatives effectively, and some methods currently in use. What follows is an in-depth look at the encroachment phenomenon as one possible result of the failure to evaluate public relations impacts effectively.

The difficulty of evaluation has far-reaching impacts for the corporate public relations function. One may be encroachment on the organizational communications function by other functional units within an organization, such as legal, marketing, or human resources (e.g., Broom & Dozier, 1983; Cutlip et al., 1985; Lauzen, 1991, 1992). Lauzen defines “encroachment” (or “imperialism”) as “the assignment of nonpublic relations professionals to manage the public relations function” (Lauzen, 1992, p. 61). Encroachment is harmful because it weakens communications by providing non-communicators with control over this function (Lauzen, 1992; Lauzen & Dozier, 1992). Lauzen (1991, 1992) conducted the seminal research into public relations and intra-organizational encroachment. She reported that public relations managers say that public relations departments are often encroached upon because they “cannot prove (their) contribution to the bottom line.” Without such reporting, corporate decision-makers will not understand how public relations departments provide skills and services no one else can or why they should allow public relations to influence their decisions (Lauzen, 1992; 1993). Spicer (1991) questioned encroachment onto public relations by marketing departments, suggesting public relations professionals in organizations engage in much different and more diverse communications than marketing, and that combining both departments is inappropriate. Corporate legal departments have been found to encroach upon public relations, as well (Lee, Jares, & Heath, 1999). Though many studies of encroachment exist, research specifically analyzing perceptions of evaluation practices and opinions with perceptions of encroachment is lacking.

When encroachment on public relations occurs, it clearly reflects the top executive's perception of public relations, which may be one explanation for what some frustrated public relations practitioners see as a lack of career progress (Austin et al., 2000; Petersen & Martin, 1996). Encroachment also limits the effectiveness and quality of the communications function and reduces corporate communicators to mere tacticians or technicians, thereby removing them from strategic roles and positions from which they can influence the organization's top leaders (e.g., Broom & Dozier, 1983; Kelly, 1993; Lauzen, 1991, 1992, 1993, 1995). Encroachment already has removed important tasks such as fund-raising and investor relations from public relations departments in some organizations (Kelly, 1993; Petersen & Martin, 1996).

To protect against encroachment, organizational communications practitioners must equip themselves with an understanding of how they can measure and evaluate their actions more effectively and prove their worth to their bosses (Pinsdorf, 2000). Those practitioners who do not measure their results “do not function in decision-making or even in advisory roles” (Cutlip et al., 1985, p. 193). Practitioners “won’t be invited to the table where decisions are being made” unless they have “systematically” gathered information to contribute to the decision-making process (Broom & Dozier, 1990, p. 10). Sitting at the table is vital because those communicators who are involved in active strategic issue diagnosis (i.e., who enact the “manager” role) are faced with less encroachment because as intra-organizational power increases, the chance of encroachment decreases (Lauzen, 1992, 1995).

The current study is designed to fill gaps in the existing literature. Research into practitioners’ views on a link between evaluation and encroachment levels is lacking. No previous study has examined these concepts together before, thus it contributes to the existing literature by addressing these issues within the context of what is actually being considered, implemented, and evaluated by communications executives today. Those interviewed for this study are on corporate public relations’ front lines. Perhaps the greatest value of this study, then, is that the perceptions and opinions stated here are based on real-life experiences, revealing current attitudes in real world settings towards both public relations evaluation and encroachment. This study also links two dominant theories in public relations research – systems and excellence theories.

SUMMARY AND RESEARCH QUESTIONS

As this literature review has established, the concepts of evaluation and encroachment influence the autonomy and effectiveness of any public relations department. Both qualitative and quantitative evaluation is being performed, but questions about which method is best remain and many practitioners have neglected evaluation. Encroachment prohibits public relations departments from achieving excellence and lessens the influence of public relations leaders on corporate strategy. One defense against encroachment is a more satisfactory explanation of public relations' results and effects.

This study addressed five research questions related to public relations evaluation and encroachment:

- RQ1 How do corporate public relations practitioners evaluate public relations effectiveness?**
- RQ2 Do corporate public relations practitioners consider impact evaluation as part of their annual public relations planning?**
- RQ3 Do corporate public relations practitioners more frequently use qualitative or quantitative research measures for impact evaluation?**
- RQ4 Do corporate public relations practitioners perceive that they are or have been the target of encroachment?**
- RQ5 Do corporate public relations practitioners perceive a relationship between evaluating public relations results and encroachment effects?**

METHOD

The data-gathering technique used to answer this study's research questions was the telephone interview method. Interviews were conducted with corporate public relations practitioners at for-profit corporations in the United States in order to ascertain what these practitioners were doing currently to evaluate communications results, as well as their perceptions of the effectiveness of these evaluations. Corporate practitioners were chosen because encroachment can be expected to occur more often in a corporate setting than in other arenas because of more frequent domain similarity, increased accountability, dependence on shared resources, and heightened competition for influence (Lauzen, 1991, 1992, 1993).

Telephone interviews are a common data collection method in social science research (Dillman, 1978; Hornik, Zaig, & Shadman, 1991). It is the method used here because of its use in previous studies on related topics, the quality of the data that can be obtained, and the cost savings that can be realized. This data-gathering technique also allows for the researcher to use probes to elicit explanatory information and to gain unprompted information on related issues (Hon, 1997; 1998). Furthermore, personal interviews may not be possible when the sample is widely dispersed (Dillman, 1978; Tyebjee, 1979). Respondents in this study were located throughout the United States, rendering face-to-face interviews impractical.

Several steps were involved in the selection of respondents for the current study.

1) A respondent sample was selected according to the following procedures: Every entry in the 2003 *Public Relations Society of America* directory was assigned a unique set of numbers. This directory was chosen because the Public Relations Society of America is the largest trade organization for public relations professionals with nearly 20,000 members. RANGEN computer software was used to provide sets of random numbers from which specific entries in the directory could be identified. Identified personnel who were associated with public relations agencies; non-profit organizations; or local, state, or federal government entities were discarded, as were personnel unaffiliated in the directory with any organization. Only personnel from for-profit companies were included in the sample. Every member listed in the directory had the opportunity to be selected by the software. If a member was unavailable or unwilling to respond, or otherwise unacceptable, the next number set was used.

2) Each identified public relations practitioner at a for-profit company was contacted and asked to participate. Information on the study's purpose was provided to offset refusal. Each potential respondent who did not reply was contacted up to three times. Follow-up emails restated the study's purpose, tried to alleviate anticipated concerns, and reiterated that no respondent names or companies would be mentioned in the results. For those who agreed to participate, a mutually convenient interview time was arranged.

3) At the start of each interview, informed consent was obtained from each participant consistent with human subjects requirements at Florida State University. Participants were informed of the study's purpose, provided with researcher contact information, told neither their name nor company would be mentioned in the study, offered a copy of the final study, and told

they could withdraw consent at any time. Participants also were informed that the interview would be recorded in accordance with laws of their state, and permission was obtained to do this.

4) The interview guide instrument was pre-tested with two interviews and no substantial changes were made. The interview guide consisted of 41 probes. These questions were designed to answer the study's five research questions. Questions were both open- and closed-ended, and follow-up questions not on the interview guide were asked during each interview to further clarify points or obtain additional salient details.

5) Twenty-one interviews were conducted. Generally, participants were questioned as to their demographics and how long they had been in their current position. Next they were asked whether or not they evaluated their public relations initiatives, why they did this or why not, the methods they used (if any), perceived advantages and disadvantages of these methods (if any), if and how they reported results to senior management and the perceived satisfaction of senior management with these results, and the financial costs of these methods. Then participants were asked their perceptions of the importance of evaluation to their annual planning, if they are or had ever been threatened by encroachment, what prevented or best defended against encroachment, and if they viewed evaluation as an effective defense.

6) Audiotapes of the interviews were transcribed verbatim and relevant comments were arranged according to the research questions they addressed. This method allowed for common themes within each research question to be discerned and for the range of opinions and perceptions provided by the respondents to be revealed (Glaser & Strauss, 1967). According to Hon (1997), conventional notions of reliability in studies such as these must be rejected, and validity of the study is dependent upon the "researcher's and respondent's jointly capturing and expressing the concepts of interest" and on the "breadth of perspectives revealed" (p. 9).

FINDINGS

The number of practitioners who met the criteria and were contacted was 136. Nine email addresses were incorrect or no longer working. The number declining to participate was 12. Four recommended that the researcher speak with someone else within the company and provided the relevant name and contact information. These personnel were then contacted. Interviews with 21 public relations practitioners from a variety of industries were conducted in the summer and fall of 2004. Practitioners who did not reply to any of the three emails seeking their participation numbered 95. Interviews ranged from 20-60 minutes, with the average length approximately 30 minutes.

The public relations practitioners and corporate communications executives randomly selected and interviewed for this study represented a broad spectrum of businesses in the U.S. The companies were located in different regions of the country and were of various types. Table 1 (See Appendix) provides additional demographic information on the respondents and their respective corporate environments.

RESULTS

RQ1 How do corporate public relations practitioners measure public relations effectiveness?

According to the senior manager of public relations at an insurance company, this is the “question of the day.” He said, “You always get that question. How do you measure [public relations]? I’ve been facing that [question] for years.” Respondents described perceived advantages and disadvantages to both quantitative and qualitative approaches, perceptions which influence respondents’ decision-making criteria.

Quantitative Methods

The main reason respondents use quantitative methods to evaluate their public relations efforts is the appeal of numeric data to corporate managers. A senior manager of public relations at a multi-state insurance company said:

The numbers method is accepted instantly because [senior managers] relate to that...the subjective thing doesn’t register quite as readily with senior people...I came to understand that CEO-types, a lot of them, only understand dollars. And if you’re going to justify your function inside a corporation, you’ve got to justify it financially or you’re not going to be a department anymore.

Similarly, a public relations manager of a real-estate company said, “[Quantitative data] is taken by the officers as a more accurate measure of how we’re doing in PR.” The public relations director of a casino operating company reiterated this theme when she said, “When I’m presenting information to our management board, they like to see numbers. They want to see, okay, we sent out 25 press releases and we received 500 articles. They want to see those numbers.” Other respondents agreed that quantitative data fit well with what corporate leaders consider important when evaluating departments. The senior vice president of a regional financial institution noted, “[The CEO] is probably more inclined to look at something that’s more quantitative.” He later added, quantitative data give one “the opportunity to demonstrate the value or the worth of the communications program on an ongoing basis.”

Other practitioners lauded a quantitative method’s ability to provide benchmark information; to deliver results that are “honest,” “objective,” and timely; to be easily and cheaply implemented; and to provide information that is dependable and relevant. The director of strategic planning at an aerospace and defense company explained:

Increasingly, we are required to justify a business case for all expenditures and since we exist to create value for the shareholders, there has to be a direct line of sight argument that says to do public relations work, you get a return on investment and you’re creating value and here’s why. And it’s typically not good enough to say, ‘Well, because

everybody feels better at the end of the day.’ It’d be much better if we had quantifiable [data].

Some respondents, however, described problems with quantitative methods and data. Several practitioners criticized quantitative clipping services for their failure to provide information on a clip’s quality. The public relations manager at a real estate company said that while counting clips may provide hard numbers, it “is very limited as a way of determining what your image is.” Others perceived that finding trends in quantitative data is difficult and complained that numbers are easily skewed. Other respondents criticized surveys. The vice president of a home décor products manufacturer said, “The problem with surveys is what do you do with the information once you’ve got it? You know, how actionable is the information that you’re getting?... What kind of action plan can you develop [from this data] to prove things or go after problem areas that are identified?” Such statements suggest that many practitioners do not know how to use evaluation tools and methods successfully and that additional training is needed.

Some criticism of quantitative methods suggests practitioners prefer qualitative methods, but use quantitative tools because they feel compelled to do so. The public relations senior manager at an insurance company said, “[A quantitative method] is kind of a survival mechanism...and most practitioners don’t like it, but they do it anyway.” These comments suggest that some practitioners may be required by senior managers to use certain evaluation methods despite their own preferences.

Qualitative Methods

Those using qualitative methods reported several advantages. Some respondents reported they prefer the “subjective” data because they are more “accurate,” “meaningful,” and “reliable;” tell them where their “strategies ought to be” and where they need to focus; enable them to study trends; and allow them to “test the waters on different issues” and monitor opinions “quickly and easily.” The senior public relations manager at an insurance company calls local reporters and asks them “what they think about things” to measure the effectiveness of media relations. A communications manager at a financial institution prefers qualitative evaluation methods because of his journalistic background (he thought “words” were more important than numbers) and questioned the real validity of quantitative formulas: “I have more concern about the numbers that are being put into [the formula] to know if [the formula] actually reflects anything of value.” He added, “Whereas with messages or the written word, you can kind of understand the theme or the attitude or the opinion of the person being surveyed.” Ultimately, this manager said, “In many communications [projects], you just kind of do what you think feels right and there is no quantifiable measurement to it.” The informality of such qualitative methods appeals to several practitioners. The vice president of corporate communications at a home décor manufacturer said, “The only other method that we use is the sort of stick your finger in the wind and see which way it’s blowing, which is [to say] you go around and you talk to people.”

Many respondents expressed reservations about qualitative methods and data, however. Some said qualitative data take too long to analyze. Again, this might suggest that some practitioners are not trained adequately in evaluating public relations effectively and do not possess the necessary skill set to plan and implement qualitative evaluation methods. Additionally, the executive director of public relations at an aerospace and defense company spoke of the concerns many business people and engineers have with “subjective” measurements. The communications manager at a financial institution said, “[senior managers] are very accepting of [qualitative data], but they want to understand what it means and they are thrilled if there’s science behind it and numbers.” Another aerospace and defense company’s director of strategic planning and communications mentioned cost: “Quite frankly, [a qualitative method] is an expensive process to go through.”

Obstacles to Evaluation

In responding to this research question regarding “how public relations is measured,” respondents described many obstacles influencing their decision to evaluate. A manager of community relations at a worldwide automotive manufacturer said, “There is a certain amount of understanding certainly among our group that [evaluation] is not an easy thing to do.” A vice president of corporate communications at a home décor products manufacturer said, “The communications function has always been challenged to come up with measurable results...some of the things you just simply can’t quantify.” The difficulty of evaluation has not seemed to lessen over the years. Practitioners’ responses would suggest this is because of the intangible nature of public relations’ effects.

Respondents described other obstacles to evaluation as well. Such obstacles included the CEO’s perceptions of evaluation methods, specific project or corporate requirements, and corporate attitudes towards communications. Also, industry requirements and differences in intended audiences can influence how senior managers perceive value, and thus, which evaluation method is used. Practitioners also believe that resource constraints hinder a public relations department’s ability to measure their efforts effectively. The senior director of public relations at a national restaurant chain said, “[To produce hard measurements] costs money...and it’s not an expenditure that companies traditionally like to spend.” The senior manager of public relations at an insurance company noted, “[Evaluation] is just one of those things that just, practically speaking, given the demands of an average day, we don’t have time to do.” The regional public relations director of a construction services company shared these concerns, saying “When it comes down to it, our jobs and our time schedules are so compacted that just doing our jobs often becomes much more important than doing a report about doing our jobs.” The director of public relations at a multi-state restaurant chain said that analyzing the results is the difficulty for him. “We just don’t have the bodies or the resources to slice and dice everything... We just don’t have the time to [analyze data] ourselves or the money to have somebody cut it all about so many different ways for us.” Interestingly, each one of these

practitioners had at least 13 years of experience in public relations, suggesting that this opinion does not lessen over time or with experience.

Still, despite the difficulties outlined here, most respondents report using some sort of quantitative or qualitative evaluation tool or some combination of both; and they prefer methods that produce immediate results, are relatively cheap, can be done routinely, and provide a wealth of information.

RQ2 Do corporate public relations practitioners consider impact evaluation as part of their annual public relations planning?

While many practitioners view evaluation as important in general, when it comes to budgeting time and resources and to planning processes for it, evaluation ultimately loses its importance. The public relations director of a casino operator illustrated this view when she explained, “The [public relations] strategy that I just put together [is] 15 pages long and [of that] I think the evaluation [section] was about a quarter of a page.” The senior manager of public relations at an insurance company said evaluation is “not at the top of the priorities” when it comes to annual planning, and a senior vice president of a financial institution said, “I’m going to spend much more of my time [on evaluation] when it’s time to do reports and not a whole lot of time on it when it’s not.”

Furthermore, when asked to indicate how much they spend on evaluation on an annual basis according to a specified scale (\$0-\$50,000; \$50,000-\$100,000; \$100,000-\$500,000; or \$500,000 and above), all but one respondent said they spend less than \$100,000. This further indicates evaluation planning is lacking.

Practitioners seemed to agree, however, that, in general, evaluation is extremely important in public relations work. For example, the public relations manager of a real estate company said, “I think [evaluation] is crucial” and the vice president of corporate communications at a manufacturer of home décor products said, “[Evaluation] is just something that you constantly have to do.” The public relations manager of a printer manufacturer said, “The smart PR professional is going to be able to somehow show measurement.”

RQ3 Do corporate public relations practitioners more frequently use qualitative or quantitative research measures for impact evaluation?

Respondents described using a variety of methods to evaluate their efforts, both quantitative and qualitative. The most interesting theme that emerged was that some practitioners regard an approach featuring both quantitative and qualitative methods as the most effective means of evaluation.

Qualitative Tools and Approaches

Those using qualitative methods to evaluate their public relations efforts described several tools and approaches, including focus groups; conversations with reporters, employees, and other publics; and low-cost, informal assessments of newspaper editorials and radio messages. The senior public relations manager at an insurance company uses focus groups because they “tell [the public relations department] an awful lot about where [participants] are getting their information from and what they think about us.” The director of strategic planning for an aerospace and defense company described his department’s efforts to measure employee communications by conducting periodic audits during which his public relations practitioners “got out to one of the ...shop areas and basically test[ed] the folks on the floor to see how many of the key messages that we got out they [could] recite.” Other qualitative methods mentioned include assessing editorials in the local paper and evaluating analyst statements. One respondent said she uses air checks of radio stations to see how corporate messages were coming across. “That’s really the low-cost, down-and-dirty way,” she explained.

Quantitative Tools and Approaches

Respondents mentioned that they use quantitative methods such as surveys, website tracking tools, and clipping services, as well. Respondents said they like surveys’ potential immediacy and that they provide information on attitude and awareness. The senior manager of public relations at an insurance company tries to estimate his company’s time on radio and television. He further explained, “I don’t like that particularly, but it’s part of business reality today. Our senior people like to see that kind of thing.” This suggests, again, that there is conflict between what practitioners feel they have to do and what they want to do.

The most prevalent quantitative tool used was the clipping service, supporting previous research (e.g., Austin & Pinkleton, 2001). The regional public relations director of a construction services company summarized this trend when he said, “I think that our quantifiable objectives often come in the way of news placements.” Several respondents use ad rates to convert their media exposure into dollars. Most often, clippings are compiled on a weekly, monthly, or quarterly basis by third-party vendors. The executive director of public relations criticized clipping services this way:

You know, they’d send you how many articles appeared in the paper this week and how many, you know, mentions did you get...So it was more of a measure of activity more than effectiveness. And there was no analysis as to if anybody really ever read any of those things. Then if they did, [there was no analysis of] if they changed anybody’s mind about anything.

Although some clipping services do offer this type of analysis, the failure of media clipping services to qualify in some way the clippings they compiled was a frequent criticism of the press clipping method.

A Combined Approach

Many respondents appreciate the advantages of both methods. The manager of community relations at a global automotive manufacturer said, “I think [both methods are] useful.” Respondents indicated that they want more than just numbers; they want to know what the numbers suggest. For example, respondents want more than just the number of clippings they receive during a certain time period. They want to know the tone of each clipping, its location in the publication, how prominent the company’s name is in the article, and other specific qualitative information. Such attitudes suggest that subscribing to a service that does qualitative analysis too may meet practitioner needs more fully.

Several respondents described methods that incorporate both qualitative and quantitative methods into an integrated evaluation strategy. The director of public relations at an international electronic and electrical engineering company described her company’s use of a website that both tracks media mentions of her company and then qualifies each mention as positive, negative, or neutral. She further explained, “So it’s not just the number of clips but it’s the quality of the coverage that we get.” Other respondents reported they use computer-assisted software for this task as well. Some respondents explained that they use a combination of separate evaluation methods, some qualitative and some quantitative, to obtain a broader perspective of their efforts. A public relations manager of a regional financial institution described the rationale behind such an integrated approach:

Perhaps the best situation is to have the best of both worlds. You know, there [are] things that I think you can pull from qualitative that you can’t necessarily get from quantitative and vice versa. And either way, maybe one can help validate the other.

RQ4 Do corporate public relations practitioners perceive that they are or have been the target of encroachment?

Though most practitioners do not regard encroachment as a serious threat, there were enough comments to suggest that such concerns might develop if, for example, there were changes in the economy, corporate management or ownership, or public relations’ leadership. These comments suggest that public relations’ independence might not be as secure as some practitioners stated. The senior vice president of a financial institution echoed this belief when he said, “I think there’s always something in the back of your mind. You’re always kind of being a little bit of a paranoid schizophrenic and looking over your shoulder. I think that’s natural.” Also, many practitioners have witnessed encroachment onto public relations first-hand at some point in their careers and provided specific examples. Furthermore, other concerns about the public relations department’s power and security, though not related strictly to encroachment, were voiced.

Still, many respondents said they were not concerned about the possibility of encroachment onto their department, nor did they perceive that they were current targets of encroachment. The senior public relations manager of an insurance company noted,

“[Encroachment is] something I keep an eye on, but it’s not a big issue... We do things collaboratively here and it’s a corporate value to collaborate successfully with other departments.” Similarly, a senior vice president at a regional financial institution, when asked about his department’s relationship with marketing, said, “We work pretty closely together. The only thing we have to do is keep bugging them to make sure they keep us in the loop on stuff they’re working on.” The CEO’s understanding and support of the communications function was also mentioned as an important defense against encroachment. One practitioner said, “That’s the number one thing – are you supported from above? And we are.” A director of public relations at a multinational electronic and electrical engineering company was unconcerned about encroachment because senior managers “value what we do and they value our expertise and...if anything, I think our level of influence is growing.” Another reason practitioners do not worry about encroachment onto public relations is the corporate office’s small size. Others say the difficult nature of public relations protects them. A state marketing manager of a broadcasting and cable TV company said, “Frankly, I haven’t had the encroachment problem. I don’t think [other departments] want to take on that [public relations] animal.”

A few respondents went so far as to say they welcome encroachment from other departments, though in their minds this encroachment is perceived as an aid or collaboration rather than any potentially threatening assumption of functions and power. The public affairs manager at a tobacco company said his group “invited the participation of [the] legal [department]...because often court cases have very complex issues...It’s important that we work with them, even on the drafting of the release, to make sure that we have the information correct.” When asked if such participation in communications by the legal department raised any concerns about his department’s independence, the manager replied, “Not at all.” When asked if he perceived that his group was or ever had been the target of encroachment, the vice president of public relations at a North American power company said:

I kind of look at it as more of a collaboration or cooperation than anybody getting excited about protecting their turf. For example, there’s always been a very close relationship in employee communications between HR and the public relations department. And that’s necessary.

Such a balance seems to be possible if interpersonal relationships between department leaders are collegial rather than combative. The avoidance of turf wars, the sharing of information and tasks, and agreement on a common goal are some of the ways such relationships can develop. A regional public relations director at a construction services company said:

We try to avoid [turf wars] by taking the better tasks, taking the tasks that are more important to the CEO and the company president...And making sure that we’re taking care of what they need is much more important than managing every single activity that could be in the public relations department’s realm company-wide.

Still, some respondents expressed concern about encroachment onto public relations. A communications manager at a financial institution said encroachment was a concern for him because of “a matter of orientation” within his company. He added, “Our company is a very large company and so it’s a matter of making sure you can communicate to the people who

could potentially be doing some similar job, that there's a process of communications," and that "sometimes communications has to be willing to let go." The marketing department was mentioned by several respondents as a source of potential encroachment efforts, supporting previous studies suggesting this was a main source of encroachment (e.g., Lauzen, 1993). The public relations director of a casino operator said, "I think the hardest part right now is working with marketing and letting them know what I do so they're not doing the same thing."

Respondents mentioned lack of awareness of public relations' role and function, weak public relations leadership, or a poor economy as potential causes of encroachment. The vice president of corporate communications of a manufacturer of home décor products hinted that encroachment might be more common on the public relations function than on other departments because "communications always used to be the jack-of-all-trades, master of none," and is thus perhaps a harder function to justify and explain. He believes public relations encroachment is due to weakness in leadership, the reshuffling of management talent in corporate America, or the tendency towards "streamlining functions and just getting rid of layers of management that you don't need." Several respondents said they might start to worry more about the independence of their departments if companies reorganize, are acquired by other companies, or if the economy suffers. One respondent said, "I don't worry about [encroachment] from a corporate perspective or a PR perspective...I worry more about business issues that are particularly affecting my company." The senior director of public relations at a national restaurant chain said that when the economy dips, "one of the first places company's cut [is] in their PR department."

Specific Examples of Encroachment

Respondents provided several specific examples of encroachment that they had witnessed or experienced. These examples fit neatly into the three forms of encroachment that have been identified by earlier research, namely "authority" ("involves assigning wrong personnel to manage a public relations department or unit"), "structural" (subordinates the public relations unit to other units in the organizational hierarchy), and "functional" ("occurs as other departments or units take on activities that expand into the traditional operational realm of public relations") (Lee, 2005, p. 279). Marketing departments were mentioned often as sources of encroachment onto public relations departments. The senior corporate communications executive at a waste management company mentioned that her boss is the Director of Sales and Marketing, indicating public relations is under the marketing department (an example of "authority" encroachment). An executive director of public relations also described his relationship with marketing:

Back when we were a stand-alone company, the Vice President of Marketing and I had a real spirited exchange of difference of views about what the role of the communications department ought to be, especially as it regarded the marketing department...I had several of those situations occur.

The public affairs manager at a tobacco company explained that in his company there is a corporate communications division separate from the public relations department that is under

the Human Resources department (an example of “structural” encroachment). The director of public relations at a multi-state restaurant chain, who was “not really” worried about encroachment, said, “PR has always been a marketing function [in this company], so I am part of the Marketing department...” Furthermore, the senior director of public relations at a national restaurant chain reported that the operations department, not the public relations division, handles operational communications to the franchisees in her company (an example of “functional” encroachment). “We went through a cycle where everything was parceled out. And the communications department was down to a very core, small group of people.” The vice president of public relations at a North American power company spoke of encroachment by describing his division’s autonomy in relation to that of other divisions:

Since everybody [does] everything, it’s not a clear smokepipe of what PR does, what IR does, what HR does, you know. They all kind of get mixed up together; everybody’s doing a little bit of each other’s business...It seems to work for us okay.

RQ5 Do corporate public relations practitioners perceive a relationship between measuring public relations results and encroachment effects?

Many practitioners said that evaluation by itself is not a panacea defense against encroachment, rather it is only one component of an overall strategy to prove the department’s worth.

Some respondents, however, said their evaluation does influence specifically their current independence. The public relations manager of a real estate company said, “Yeah, I think [evaluation] influences what people think about how we’re doing in PR.” A public relations manager at a printer manufacturer also described his perceptions of the connection between public relations evaluation and levels of encroachment:

[Senior managers] are learning about what public relations is and what it can do for the company. At this point, a lot of people still do not understand the full function of public relations. They’re starting to but they don’t fully comprehend it. So at this point a clip book or a media coverage guide...they see that as growth, they see that as positive.

A senior vice president at a financial institution agreed with the connection between evaluation and encroachment levels “to an extent:”

As you are able to track against your plans and use your metrics, and as the CEO gets more comfortable that you’re doing what you said that you were going to do, they’re going to give you a little bit more of a leash.

A public relations director at a casino operator said she “absolutely” feels evaluation is related to her department’s independence and said:

If you prove what [you] are worth, they’re going to have a hard time getting rid of you...I really think [evaluation] is key...you need to show people what you do and say, ‘Hey, listen, I am worthy...this is what I do, [these are] the results we got.’

Still, many practitioners feel there is not a link between public relations’ independence and evaluation efforts. The vice president of corporate communications at a home décor products

manufacturer said, “For one, because we don’t [evaluate] enough... We’re not constantly sending out...the latest numbers confirming that we’re doing a great job. I mean, people see our product, they see our work, and it speaks for itself.” The director of public relations at an electronic and electrical engineering company said such a link is “too much of a stretch.” A senior vice president at a regional financial institution said evaluation is “one arrow in the quiver,” or one of several potential defenses against encroachment, and that “if you’re just relying on [evaluation] to show your value and your worth, you’re going to be in trouble.” A regional public relations director at a construction services company said his senior managers are not concerned with specific evaluation data as long as the end result is good. He attributed this to senior management’s understanding that public relations performs an important function. Elaborating further, he said, “Being an expert prescriber or being at the table when they make those decisions is really where we want to be. But we don’t necessarily need to do a bunch of reports to get them to understand why we should be there.” A public relations manager at a regional financial institution agreed that linking his independence and autonomy to evaluation was “a bit of a stretch” and that “it might be one of the top 10 reasons, but definitely not in the top 5.” He then added:

I guess it really depends on the situation, because all of a sudden trying to pull out stats where you weren’t before I guess could be perceived as defensive or increasing hostility between departments.

These responses show that evaluation is but one component of an array of defenses against encroachment and that one defense on its own is not as effective as using several to stave off encroachment.

Proposed Defenses Against Encroachment

In responding to this research question about encroachment, respondents proposed several defenses against it. Importantly, this suggests that evaluation is not the most important or even the best defense. The senior manager of public relations at an insurance company said, “The trend has been to successfully deal with [encroachment] by enhancing the reputation of the PR function itself. I mean, sometimes PR people are the worst at explaining themselves.” Thus education in general is an important defense. Collaboration with other departments was also mentioned, as was “buy-in [of public relations] at the senior most levels of the company.” The executive director of public relations at an aerospace and defense company said that to defend against encroachment:

You have to be part politician... You have to be responsive. You have to realize that these other functional areas and the guys at the heads of the various lines of business are your customers. One of the things that I started doing with the public relations organization here... was to set us up as sort of an internal public relations agency. And that was how I stopped a lot of the encroachment.

Another defense is strong leadership. One public relations practitioner said her manager is seen as a counselor, “so we’ve gained a level of trust with our operating companies and with

our executives at the company.” According to another practitioner, simply knowing one’s job and doing it well is another defense. “As long as we know [the job] and can understand the media better than [others in the company] do, we can protect ourselves from that encroachment by simply being right, over and over again.”

DISCUSSION

This study was designed to contribute to existing literature and address limitations in systems and excellence theories by examining practitioner perceptions of evaluation and encroachment – and any relationship between the two – in applied, corporate settings.

Respondents provided much information on the factors affecting their decisions to evaluate or not. Figure 1 (See Appendix) outlines several obstacles, including public relations' tangibility, resource constraints, the nature of the project, the CEO's perceptions, and corporate and industry cultures. What this model depicts is the range of variables associated with evaluating public relations outcomes. It explains why evaluation is so difficult and sometimes ignored in corporate settings. Interestingly, the model helps explain why some practitioners use a particular research method even though they may perceive it to be ineffective – namely, because it represents that which the CEO wants or understands. These obstacles and ultimate decisions suggest that additional education and training on evaluation methods, time management, selling and persuasion, and management may be needed for public relations practitioners in corporate settings. The fact that all of those practitioners who specifically mentioned these various obstacles to evaluation have at least seven years in public relations underscores this need. Experience alone is not enough to teach practitioners how to overcome the various obstacles and evaluate effectively. The obstacles also suggest enhanced awareness on the part of CEOs as to the difficulties of public relations evaluation may be useful. Perhaps this conflict also underscores CEOs ongoing unwillingness to trust public relations practitioners' skills and the overall value of the public relations function.

Respondents also described factors that influence their decision to use a quantitative or qualitative (or both) evaluation method. Figure 2 (See Appendix) outlines the factors influencing this decision process. Practitioners' specific desires regarding the type of data they receive, what they want to use the data for, how quickly they want the data, and the type of data their CEOs prefer dictates the type of evaluation method used. Practitioners appreciate that more CEOs demand quantitative data and that such data are objective and easy to analyze. On the other hand, many practitioners seem to prefer qualitative methods rather than the strict numbers of quantitative ones in measuring public relations. Figure 2 suggests that a qualitative method that can be cheap and easy to use, or easily performed on an ongoing basis, or provides data that is objective and easy to analyze may be very popular to practitioners in corporate settings. Overall, practitioners want the advantages of both quantitative and qualitative methods. It would seem then that such a combined approach may be the most effective means of evaluating public relations. Such a combined approach, however, would still need to pass through the array of obstacles depicted in Figure 1 for practitioners to implement it. It seems that gender plays no discernible role in the type of evaluation method used, nor does length of time in public relations.

Excellence theory provides a benchmark with which to assess the quality of a public relations department. Excellence theory also suggests that excellent departments are independent and influential members of the dominant coalition of the company (Grunig & Grunig, 2002).

Still, excellence theory does not address specifically how a public relations department can maintain its independence. This study extends excellence theory by obtaining practitioners' perceptions of why they believe encroachment might occur (Figure 3). Such causes augment excellence theory by suggesting areas on which practitioners should focus their efforts to defend their independence. Practitioners can defend their independence by educating others on their role, establishing effective interpersonal relationships, and ensuring strong leaders effectively manage public relations and actively seek to obtain senior management's support. Perhaps such actions can lessen the impacts of the other important causes of encroachment offered by practitioners – a poor economy and a trend toward streamlining functions.

Such practitioner perceptions of the causes of encroachment also help to expand systems theory, namely by offering greater detail for the current Open Systems Model created by Cutlip, Center, and Broom (1985). This model describes how open systems engage in two-way communications with external stakeholders. By doing so, the system is able to monitor and adjust if necessary the system's goal state. Figure 3 (See Appendix) depicts an enlarged section of the "Management/Decision-Maker(s)" section of the Open Systems Model in order to reflect practitioners' perceptions of causes of encroachment. The reasons depicted in Figure 3 illustrate how communications in a department may be de-valued in the form of encroachment onto the public relations department and thus addresses a topic the model neglects. In systems theory, communication "serves as a major determinant of...the overall functioning of most systems" (Broom, Casey, & Ritchey, 1997, p.92). Yet it is undeniable that many companies de-value communications and lessen its role in the form of encroachment, and systems theory does not address such de-valuing. Figure 3 addresses why practitioners feel some companies do not value communications, despite its importance. Thus, findings offered here extend systems theory by outlining why practitioners perceive communications is de-valued in some companies.

This study sought to determine if evaluation is an effective defense against encroachment. Figure 4 (See Appendix) shows some of the factors contributing to public relations' respect and independence in a company; factors which combat the causes of encroachment depicted in Figure 3. Practitioners were asked if they perceived evaluation to be an effective and real defense against encroachment – and most replied "no" – that the issue is far more complex than that. Practitioners' perceptions suggest that one defense is not as effective as an array of defenses against encroachment and no one defense should be used exclusively. Figure 4 depicts this perception. The two most important defenses, according to practitioners, are creating collaborative relationships and educating others on the role of public relations. Educating others includes the CEO and senior managers. Some of the respondents who specifically mentioned they have good relationships with other departments or know how to work collaboratively with other departments have been with their organization for as little as two years. This suggests that practitioners should not wait to improve their relationships with other departments and to educate others on public relations' role. This should be done almost immediately after joining the company. In general, this study's findings suggest that while academics may worry about encroachment's impact on public relations, encroachment is not an overriding concern for practitioners in corporate settings – at least not for those interviewed here.

Gender does not seem to influence encroachment, as only two of the seven women interviewed for this study expressed any encroachment concerns. Length of tenure with a company does not influence one's encroachment concerns, either. Of the nine respondents who had been with the company three years or less, only two were worried about encroachment.

Many responses suggest that, simply put, evaluation is unimportant or unnecessary in some places. Some practitioners are not pressed or expected to prove their value by evaluating their public relations programs' outcomes. Other respondents expressed a conservative, almost tentative, mindset towards evaluation, saying other departments might view statistics and figures as defensive or even hostile. However, evaluation's importance, though not as strong as perhaps thought, should not be disregarded. In general, practitioners in both public and private companies believed evaluation is important to public relations and that attempts to evaluate their efforts should be made. This is apparent not only in practitioners' comments to topic guide probes posed to respond to a specific research question, but in their descriptions of their efforts to evaluate their results despite evaluation's many difficulties and hindrances. One can conclude that evaluation is important, but only to the extent that it is one defense among many others – all contributing to public relations' independence.

This study is not without limitations. When data are obtained through interviews and somewhat unpredictable conversations, the goals are a range of opinions and perceptions, not external validity or reliability. No attempt was made to reveal any specific causal relationships between evaluation and encroachment levels, only to gather perceptions about such relationships via self-reports by practitioners who could reasonably be expected to know of these matters and have opinions on them. Furthermore, some practitioners may display a halo effect regarding program evaluation and/or view admitting concern about encroachment as suggestive that their department is deficient.

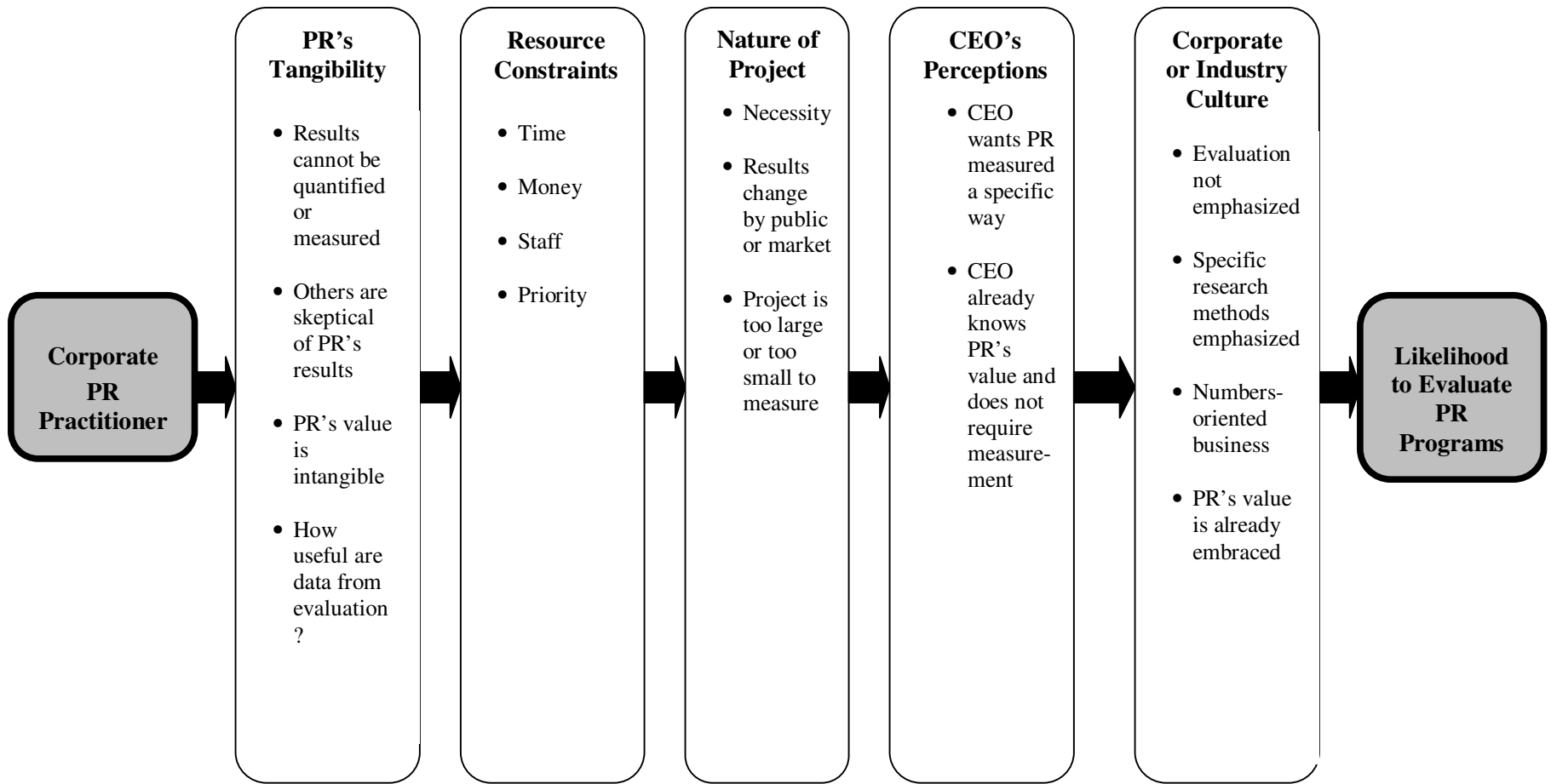
The perceptions of practitioners in a variety of industries provide several avenues for further study. Additional research might focus on public relations evaluation practices in one particular industry. Also, identifying characteristics of public relations departments not threatened by encroachment might provide a sort of "best practices list" that could aid others concerned about autonomy. Furthermore, this study's findings have revealed that it might be helpful to know what influences the attitudes and perceptions of CEOs towards public relations – in the spirit of Hon's 1998 study of both practitioners and their CEOs with regard to public relations evaluation. Research discerning why some corporate leaders, regardless of industry, understand the value of public relations and why others do not could explain what public relations practitioners need to do to educate leaders, help them understand the value of good public relations, and defend public relations against encroachment. Additional research on unique qualities of corporate settings may help practitioners to deal with colleagues across subsystems who value only quantitative data. It is important for practitioners' colleagues and corporate leaders to understand that evaluation done poorly, or done through inappropriate or ill-conceived methods, contributes nothing.

**APPENDIX A
TABLE AND FIGURES**

Table 1: Demographic Descriptions of Respondents

Respondent	Industry	Location of Company by Region*	Ownership of Company		Tenure with Company (in years)	Length of Time in PR (in years)	Gender of Respondent	
			Public	Private			M	F
1	Tobacco	South	X		3.5	9	X	
2	Restaurant	South	X		9.5	20		X
3	Insurance	South	X		2	30	X	
4	Auto Manufacturing	South	X		17	25		X
5	Home Products Manufacturing	South		X	16	20	X	
6	Lawn Care	South		X	3	4		X
7	Restaurant	West		X	1.25	14	X	
8	Aerospace & Defense	South	X		13	32	X	
9	Real Estate	West		X	14	30	X	
10	Electronics & Electrical Engineering	Northeast	X		2.5	13		X
11	Printer Manufacturing	Northeast	X		2	10	X	
12	Finance	West	X		4	25	X	
13	Casino Management	Midwest		X	5	7		X
14	Finance	Midwest	X		.75	13	X	
15	Construction	South	X		3	13	X	
16	Waste Management	Midwest		X	5	7		X
17	Aerospace & Defense	South	X		24	15	X	
18	Cable Television	South	X		2.5	18		X
19	Power	West	X		5	30	X	
20	Finance	Northeast		X	1.5	8	X	
21	Media Content Distribution	South	X		4	11	X	
Mean	-	-	67%	33%	6.6	16.9	67%	33%

*Regions listed according to the United States Census Bureau



*Obstacles are listed in no particular order

Figure 1: Obstacles Affecting Practitioners' Decision to Evaluate*

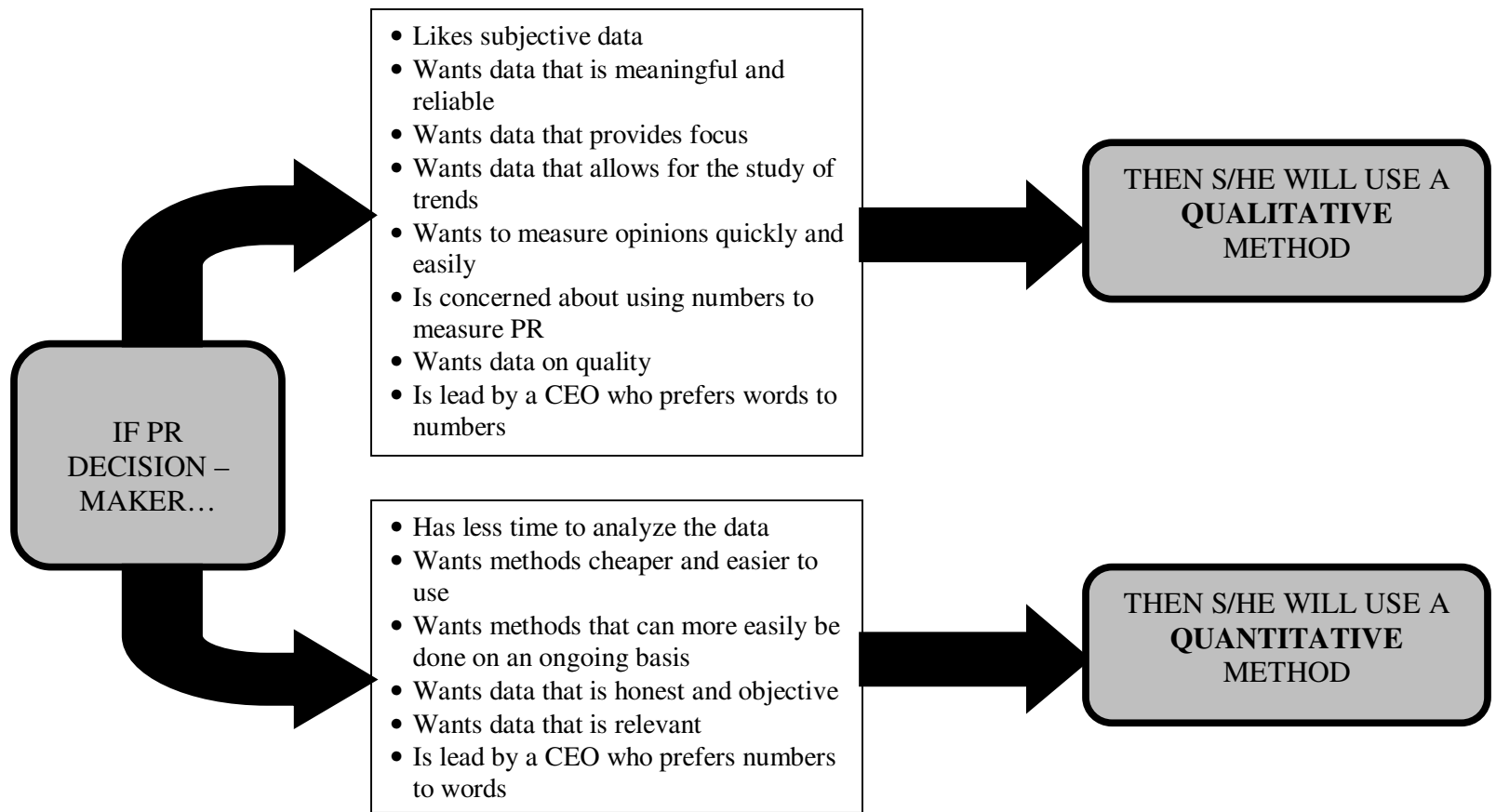


Figure 2: Factors Influencing Evaluation Method Used

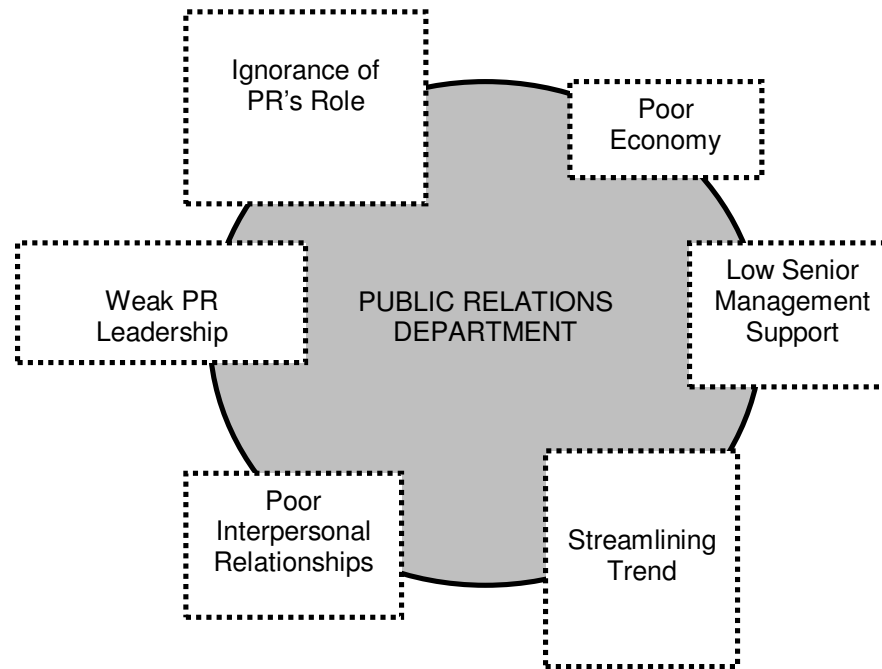


Figure 3: Encroachment Effects on Public Relations Departments: Enlarged “Management/Decision-Maker(s)” Oval from Cutlip, Center, & Broom’s (1985) Open Systems Model



Figure 4: Potential Defenses Against Encroachment

APPENDIX B

THESIS PHONE INTERVIEW QUESTIONING GUIDE

I wanted to thank you again for agreeing to answer my questions. I believe I'm doing some important work on analyzing corporate communications evaluation and its effects.

Q: I understand you are the (title). Is this still your title and do you still serve in this position?

Q: What are your main responsibilities in this role?

Q: Would you say that you are your company's public relations executive?

Q: How long have you been with the company?

Q: How many years of public relations/corporate communications experience do you have?

Q: What is your experience with the company? What position did you occupy before you were named head of the public relations department?

Q: Can you identify 3-5 major goals of your department?

Q: Is evaluation of results part of your job description?

Q: Do you or someone in your department measure the results or outcomes of your department's work?

IF YES:

Q: Why?

Q: What is it exactly that you measure?

Q: What influenced you to start taking these measurements?

Q: How much of your time do you spend on evaluating public relations versus all other activities you perform?

Q: How do you measure these results? What method(s) or instrument(s) do you use? Do you use formal methods (clip counts, media hit ratings, expenditure tracking, surveys) or informal (personal judgments, eyeballing, etc.)

Q: Why do you use this method to take these measurements?

Q: How long have you been using this method?

Q: What are some of the advantages of this method?

Q: What are some of the disadvantages of this method?

Q: How often do you obtain these measurements (weekly, monthly, quarterly, annually)?

Q: Do you measure individual programs and initiatives or just the public relations department as a whole? How does this work (please provide more detail)?

Q: On a scale of **important, neutral, or unimportant**, how important a part of your department's annual plans do you consider public relations evaluation to be?

Q: To whom, if anyone, do you report these results (CEOs, accountants, co-workers, other PR employees)?

IF HE/SHE REPORTS RESULTS:

Q: How do you report these results (written report, oral presentation, etc.)?

Q: In your opinion, are CEOs and corporate accountants (or others to whom you report these results) satisfied with these measurements? Why or why not?

Q: How do you know they are satisfied/not satisfied? How is this shown to you (renewed or increased/decreased budget, more/less employees, more/less responsibility, more/less autonomy)?

IF NO:

Q: Why not? Is there some other way you prove your department's worth or effectiveness to others in the corporation?

Q: Is there something that prevents you from measuring results or outcomes?

Q: Have you ever tried to measure these results or outcomes in the past?

Q: What are your perceptions of your department's autonomy and independence?

Q: What are your perceptions of your department's security?

Q: On a scale from **important**, **neutral**, or **unimportant**, how important are concerns about encroachment (functions and responsibilities of the public relations department being taken over or assumed by other departments in the company)?

IF IMPORTANT:

Q: Why are these concerns so important to you?

Q: Have any functions or responsibilities been taken over in the past?

IF YES:

Q: What are they?

Q: Which group took over these functions (legal, finance, marketing, human resources)?

Q: Do you think it could happen again?

Q: Do you have any mechanisms in place to prevent encroachment or your department's loss of security? IF YES, What are they? IF NO, what prevents encroachment on your department?

IF NEUTRAL OR UNIMPORTANT:

Q: Why are you unconcerned about encroachment?

Q: Have any functions or responsibilities been taken over in the past?

Q: Do you think encroachment/loss of security is likely in your department in the future? Why or why not?

Q: What do you think prevents this from happening to your department?

APPENDIX C

IRB APPROVAL LETTER



Office of the Vice President For Research
Human Subjects Committee
Tallahassee, Florida 32305-2763
(850) 844-8673 - FAX (850) 844-4392

APPROVAL MEMORANDUM

Date: 6/24/2004

To:
Everette Laborde
2144 Sand Dune Ct.
Tallahassee, FL 32308

Dept.: COMMUNICATION

From: John Tomkowiak, Chair

A handwritten signature in cursive script that reads "John Tomkowiak M.D.".

Re: Use of Human Subjects in Research
Somewhere Between Myth and Reality : Practitioner Views on Encroachment Effects
Corporate Public Relations Evaluation

The forms that you submitted to this office in regard to the use of human subjects in the proposal referenced above have been reviewed by the Secretary, the Chair, and two members of the Human Subjects Committee. Your project is determined to be Exempt per 45 CFR § 46.101(b) 2 and has been approved by an accelerated review process.

The Human Subjects Committee has not evaluated your proposal for scientific merit, except to weigh the risk to the human participants and the aspects of the proposal related to potential risk and benefit. This approval does not replace any departmental or other approvals, which may be required.

If the project has not been completed by 6/23/2005 you must request renewed approval for continuation of the project.

You are advised that any change in protocol in this project must be approved by resubmission of the project to the Committee for approval. Also, the principal investigator must promptly report, in writing, any unexpected problems causing risks to research subjects or others.

By copy of this memorandum, the chairman of your department and/or your major professor is reminded that he/she is responsible for being informed concerning research projects involving human subjects in the department, and should review protocols of such investigations as often as needed to insure that the project is being conducted in compliance with our institution and with DHHS regulations.

This institution has an Assurance on file with the Office for Protection from Research Risks. The Assurance Number is IRB00000445.

Cc: Dr. Donnalya Pompper
HSC No. 2004 421

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BIOGRAPHICAL SKETCH

Everett Justin Laborde received a Bachelor of Arts degree in English from Washington & Lee University in 1998. This thesis completes the requirements for a Master's of Science degree in Integrated Marketing & Management Communication from Florida State University. Mr. Laborde worked as a Systems Operations Analyst and as a Technical Analyst at First Union National Bank in Charlotte, North Carolina from September, 1998, to January, 2000. He then served as a Corporate Communications Project Manager at First Union National Bank from January, 2000, to May, 2001. Mr. Laborde then relocated to Washington, D.C. where he worked as a Communications & Research Analyst for Energetics, Incorporated, a consultancy for the United States Department of Energy. He left Energetics in September, 2002, and started work for ClientLogic in Nashville, Tennessee as a Communications and Research Analyst.