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# Evaluation in Use: The Practitioner View of Effective Evaluation

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*While the academic literature has paid much attention to public relations evaluation over the past decade (Baskin, Aronoff & Lattimore, 1997; Cutlip, Center & Broom, 2006; Dozier & Repper, 1992; Walker, 1994; Watson, 2001), many studies have suggested practitioner use of evaluation methods remains limited (Gregory, 2001; Macnamara, 2002; Pieczka, 2000; Pohl & Vandeventer, 2001; Walker, 1994; Watson, 1997). Although practitioners use both formal and informal methods to evaluate their effectiveness (Walker, 1994; Watson, 2001), it is unclear how their reporting of public relations success measures up to actual achievement of organisational outcomes.*

*This study of approximately 70 practitioners builds on four major Australian studies of evaluation use (Macnamara, 2002; Walker, 1994; Watson & Simmons, 2004; Xavier, Patel & Johnston, 2004) to identify the evaluation patterns of public relations practitioners including the major focus of their evaluation efforts, the use of evaluation to demonstrate organisational outcomes and the barriers to further evaluation. Utilising the trends identified by the four studies, a set of initiatives are proposed to encourage practitioners to extend their evaluation activities and thereby support their claims to enhanced performance.*

## **Introduction**

Public relations program evaluation plays a significant role in demonstrating accountability and effectiveness (Dozier, 1990; Fairchild, 2002; White & Blamphin, 1994), and organisational impact (Radford & Goldstein, 2002). As public relations activity is often concerned with ill-defined (Murray & White,

2004) and multi-faceted problems, it is inappropriate that it should be evaluated by one single method or metric (Macnamara, 2002; Cutlip, et al., 2006; Gregory & White, 2006). Practitioners may select from an array of different methods and models to demonstrate their effectiveness but a long tradition of international research (see, for example, Gregory, 2001; Pohl & Vandeventer, 2001; Walker, 1994; Watson, 1997) suggests that practitioners fail to fully utilise the diversity of methods available or even understand how they might be applied. This study seeks to better understand the drivers of evaluation practices in Australia by exploring the opinions of professionals who have demonstrated an interest in evaluation at the national industry conference. The views of these interested practitioners will be located within the available Australian and international research on evaluation practices and will inform recommendations for industry and the academy to help progress the evaluation debate in Australia.

Center and Jackson (2003) consider that measurement and evaluation have emerged as central to effective practice, yet the reporting of public relations success against actual achievement is unclear. Research into practitioner attitudes and evaluation practice consistently reflects an opinion that evaluation is essential to practice but is still talked about more than practised (Gregory, 2001; Judd, 1990). For example, Pohl and Vandeventer (2001) found fewer than half of the respondents in their study identified formal evaluation methods in campaign plans.

While Center and Jackson (2003) suggest there is an increasing emphasis on measuring

program outcomes in terms of impact on publics, research suggests that practitioners still have limited understanding of the use of evaluation research or restrict its use to particular types (Phillips, 2001; Watson, 2001). For example, a number of studies have established that generally evaluation is restricted to program output (Gregory, 2001; Pohl & Vandeventer, 2001; Walker, 1994; Watson, 1997). While there are many potential reasons for this, such as Cutlip et al.'s (2006) assertion that this focus may be due to the convenience and accessibility of data to inform such evaluation or Wilson's (1992) and Kelly's (2001) views that practitioners' lack of knowledge underpins a narrow approach, such a constrained view of evaluation restricts the potential of public relations to demonstrate its value across the management sphere.

Research into practitioner evaluation usage suggests that no one country practises evaluation more than another (IPRA, 1994). Pieczka (2000) studied entries in the United Kingdom's Institute of Public Relations (IPR) Sword of Excellence awards spanning 13 years from 1984, and found no clear relationship between stated objectives and evaluation. In Canada, Piekos and Einsiedel (1990) found scientific research methods were seldom used for impact evaluation and similar results were reported by Dozier (1990) who found that the more scientific the style, the less frequently it is used.

More recently, research by Gregory and Edwards (2004) into the practice of public relations by companies in the UK *Management Today* magazine's 'Most Admired' company list and by Gregory, Morgan and Kelly (2005) on 'Most Admired' companies and public sector organisations, found that a range of evaluation metrics were used (usually between four and eight), and the most frequently used metrics were informal and/or qualitative such as journalist feedback and discussions with stakeholders. It is as if the respondents were 'just checking' that everything was on track. This supports the proposition by Murray and

White (2004) that practitioners have an intuitive sense of what is working.

Industry bodies around the world have demonstrated their concern for advancing evaluation practices. While many have promoted evaluation practices through their continuing professional development programs and ensured that accredited university courses show due attention to research and evaluation methods, industry bodies in the United Kingdom decided to take a more assertive approach to assist practitioners. The IPR (now Chartered Institute of Public Relations, CIPR) in conjunction with the Public Relations Consultants Association, produced an Evaluation Toolkit in 1999, which strongly promoted the principle of embedding research within the cycle of program planning. It stated that research was needed prior to a program being devised in order to assist effective objective setting. In addition, formative or ongoing evaluation was integral to the progress of the program and summative evaluation was required to gauge its ultimate efficiency and effectiveness. Later editions of the toolkit provided more detailed metrics, particularly in the areas of media evaluation, and added to the range of metrics that could be used.

While the specific effectiveness of the toolkit in enhancing practice is unknown, further work by the Institute of Public Relations, along with the Communication Directors' Forum (CDF), has recently been undertaken to map best practice in the measurement and reporting of public relations (IPR/CDF, 2004). This study comprised telephone interviews with 100 senior public relations practitioners and some CEOs, complemented by desk and web-based research reviewing existing best practice and case studies. The results of the interviews revealed that 51 percent of respondents attempt to measure the tangible benefits and performance of public relations, still leaving a significant number of practitioners for which this was not a focus. While some respondents showed an understanding of the need for and an ability to demonstrate the value of public relations, the

research revealed that when they were being candid, many practitioners admitted that they still lacked knowledge of evidence-gathering techniques to demonstrate both the value of individual campaigns and their contribution to the organisation. Overall the researchers detected defensiveness within the industry regarding the value of its work.

A large scale international study of 1,040 practitioners across 25 countries was conducted by Gaunt and Wright (2004) in preparation for the 2004 Measurement Summit held in the United States. This study confirmed that practitioners measure outputs more than outcomes, and while a significant number recognise the limited effectiveness of the method, media evaluation remains a major force in outcome evaluation. The main barriers to measurement were seen as cost, lack of expertise and questionable value of results. However, approximately 70 percent of respondents believe they will be doing more with measurement in future.

So how does the Australian experience match international trends?

Four major studies of Australian practitioners have tracked evaluation practices over the past decade. Establishing a benchmark for evaluation practice, Walker's two 1993 surveys of Australian practitioners found a substantial gulf between practitioner attitudes and practice. Walker (1997) reported that although most practitioners agreed that research was an accepted part of public relations planning, only 55 percent of practitioners reported very frequently or occasionally evaluating the impact of their programs. Half of the practitioners surveyed did not believe that they could measure precisely public relations effectiveness (Walker, 1997). Although practitioners used a mix of evaluative measures, Walker (1994) suggests there was a focus on media coverage that lacked any sound analysis, and no related measures to validate program effectiveness were provided. Macnamara (2002) gave the first indications of status quo in the Australian industry, suggesting that evaluation had a

“patchy” track record and should be a focus in the future (p. 100). While practitioners still discussed the use of a mix of evaluative measures, there remained a focus on media coverage that lacked any sound analysis, and no related measures to validate program effectiveness were provided.

While Walker (1997) reported that 96 percent of respondents believed “that public relations research, measurement and evaluation projects will almost certainly grow in importance during the 1990s” (p. 108), a major study of Australian practice ten years later confirmed the earlier indications of limited change in practitioner focus. The study of 118 awards case studies over five years to 2001 from the Australian Golden Target Awards confirmed that practitioners still favoured output evaluation methods over outcome evaluation methods, with a strong preference for media evaluation including media monitoring and media content analysis (Xavier et al., 2004). Research across the five year period showed no trend to greater use of evaluation, nor for greater use of any particular methods.

Examining the practitioner perspective through online survey research, Watson and Simmons (2004) found that practitioner views on evaluation appear to be driven by a lack of knowledge and skills, time, and confidence illustrated by an inability to make a case for evaluation budgets with their clients or managers, and the frustration at decision-makers' misunderstanding of public relations.

With direct access to interested practitioners, this study sought to provide guidance on the following research questions:

- RQ1: How do Australian practitioners undertake public relations evaluation?
- RQ2: At what level do practitioners evaluate public relations programs?
- RQ3: How do practitioners use evaluation to demonstrate achievement against organisational objectives?
- RQ4: What are the barriers to evaluation?

## Methodology

In order to identify the evaluation patterns of public relations practitioners, this study developed and implemented a survey to understand behaviour related to public relations evaluation. The survey posed a series of questions about practitioner use of and methods for evaluation, the levels of evaluation, and barriers to evaluation. These questions were developed in line with recent literature in public relations evaluation (see for example, Gregory, 2001; Walker, 1994; Watson, 2005; Watson & Simmons, 2004; Xavier et al., 2004; Xavier, Johnston, Patel, Watson & Simmons 2005).

Data were collected using group audience response technology. The survey questions were posed to an audience at the beginning of a conference presentation on evaluation at the Public Relations Institute of Australia's (PRIA) national conference in Brisbane, Australia in October 2005.

Attendees were asked to reflect on their personal experience in addressing the questions. Audience responses were individually captured electronically and were instantly displayed in graphical format for the audience to see, confirm, and use as further discussion points. Individual responses were stored for review after the presentation while still maintaining the anonymity of individual participants. Such a data collection system ensures high response rates and is not limited by cost, completion time, or access like other forms of surveys.

The sample for this research consisted of 70 public relations practitioners from government, corporate, and consultancy, and education. This sample was purposive in that it allowed researchers to access members of a specialised population who showed interest in public relations evaluation.

## Limitations

While there are benefits to the data collection procedure, this paper is limited by the finite number of questions that could be addressed in a conference presentation of 60 minutes which

attempted a comprehensive overview of the status of the evaluation debate. Further, while the data collection procedure captured the number of responses from the audience, the system was unable to determine the validity of these responses. Thus, if respondents answered the question in more than one way, both responses would count towards the response rate. Clear instructions were given to mitigate such a situation. Although the sample of this conference allows access to practitioners with an interest in evaluation, the nature of data collection did not allow the identification of the roles held by respondents, that is managerial or technical, or their level of experience.

## Results

### How do Australian practitioners undertake public relations evaluation?

For this sample of practitioners, evaluation of public relations programs is as much a part of practice as it is not. Fifty percent of respondents (n=68) said they evaluate most public relations programs with the other half indicating they do not evaluate most public relations programs.

Despite this lack of consistency in evaluation, respondents suggested that evaluation can be undertaken in three ways: using other's 'good practice' processes, devising their own methods, or using professional bought-in services. A low number of participants used professional research services to evaluate campaigns. This finding is likely to be a reflection of the time and financial cost of evaluation. The results are displayed in **Table 1**. Those who had indicated that they did not evaluate most of their programs were asked to indicate which method they used when they did evaluate their work. The researchers recognise that there may be some practitioners who never evaluate who might have responded to this question, however, it is a reasonable assumption that these respondents would indicate the methods they would use if undertaking evaluation. Overall, the responses show a preference for practitioner use of good practice tools which have been devised by others.

**Table 1: Evaluation methods**

<b>Evaluation methods</b>	<b>Response frequency</b>	<b>Percentage</b>
Using other's good practice tools	37	52.9
Devising one's own tools	29	41.4
Using a professional service	4	5.7
Total	70	100

**At what level do practitioners evaluate public relations programs?**

Practitioners evaluate at multiple stages of public relations programs. While the literature argues strongly for evaluation of public relations outcomes, that is the degree to which the campaign has achieved change in attitude, opinion, or behaviour, research shows that evaluation more commonly occurs at the output level. Output evaluation is the simplest to undertake measure of public relations where practitioners measure what messages, most commonly media-related, are distributed and their degree of exposure and audience reach.

Consistent with US and UK findings, this study shows that evaluation most commonly occurred at the output level (43.1 percent) with only 27.7 percent occurring at the outcome level (see **Table 2**). After output and outcome level evaluation, the next most common stage was outflow evaluation, which measures the long term effects of public relations work, including the overall reputation of the organisation among stakeholders. A limited number of practitioners evaluated at the input level, which measures practitioner time and resources dedicated to the production of tactical material and the outtake level, which measures audience awareness and understanding of messages.

**Table 2: Public relations evaluation stages**

<b>Stage of evaluation</b>	<b>Response frequency</b>	<b>Percentage</b>
Inputs	4	6.2
Outputs	28	43.1
Outtakes	7	10.8
Outcomes	18	27.7
Outflows	8	12.3
Total	65	100

**Do practitioners use evaluation to demonstrate achievement against organisational objectives?**

Given that a limited number of respondents claimed that they evaluated the outflow or reputation of organisations, limited

demonstration against organisational objectives was expected. However, 66.2 percent of respondents (n=65) said that they tried to measure the overall contribution of public relations to their organisation or clients, leaving 33.8 percent of respondents that do not measure the organisational contribution made by public

relations programs. This result is difficult to explain and was not followed up at the event itself. Therefore, the authors are left to speculate on the reason for this dichotomy: If 27.7 percent of respondents indicated that they evaluate at the outcome level, how can 66.2 per cent claim to measure overall contribution to the organisation? There may be a number of explanations. Firstly, practitioners and/or their organisations may not understand the requirement to measure outcomes in order to gauge the public relations contribution to organisational outcomes. Secondly, practitioners and/or their organisations may believe that outputs such as press cuttings demonstrate organisational contribution. That is, practitioners substitute or confuse outputs for outcomes. And thirdly, respondents answered the question on what stage they undertook evaluation at a higher level than they actually do in practice. That is, they claimed to evaluate at the outcome level when in fact they evaluate at the output level.

In measuring the organisational contribution of public relations, practitioners used a range of evaluation tools including reputation, return on investment (ROI), and relationship indicators (see **Table 3**).

**Table 3: Public relations evaluation tools**

Evaluation tool	Response frequency	Percentage
Reputational impact	20	34.5
Return on investment	12	20.7
Relationship quality	12	20.7
Public relations dashboard	5	8.6
Balanced score card	3	5.2
Other	6	10.3
Total	58	100

### What are the barriers to evaluation?

While a number of studies have indicated several barriers to evaluation, respondents of this study claimed that accountability is not feared or perceived as a barrier to evaluation. While these results do not contradict other studies including Watson (1997), it is interesting that the respondents in this sample universally agreed that accountability was not an issue for them. Given this study reported on what practitioners *say*, it might be that they are not prepared to acknowledge that accountability is an issue when in fact it is. In this study the most common barrier to evaluation is a lack of time followed by a lack of money, and lack of knowledge. **Table 4** displays these results.

**Table 4: Factors that discourage evaluation**

Barriers to evaluation	Response frequency	Percentage
Lack of time	33	55.0
Lack of money	12	20.0
Lack of knowledge	10	16.7
No one makes me	5	8.3
Don't want to be accountable	0	0.0
Total	60	100

### Discussion

The results of this study suggest that evaluation practices are yet to be embedded as a critical component in all public relations work. With a sizable proportion of practitioners in the sample suggesting they evaluate infrequently, the need or value of evaluation has yet to be firmly established. Whether this is driven by practitioners not seeing the need or value, or their organisations not requiring either, is

unclear. When evaluation is undertaken, the sample appeared split on whether to use pre-established methods of evaluation or to design their own with the majority preferring the former. Watson and Simmons (2004) reported a call within their sample of practitioners for more guidance on available tools. The UK CIPR's latest Evaluation Toolkit has received limited promotion in Australia and may go some way towards answering the needs of those who are looking for guidance in this area. However, the evaluation methods in the Toolkit still need to be adapted for individual use to maximise effectiveness, requiring practitioners to have at least some familiarity with research methods and their limitations.

Respondents claimed that lack of knowledge was not a strong barrier with this sample of practitioners, although their individual knowledge of research practices was not tested. Instead, lack of time appeared to be the key barrier to enhanced evaluation practice. This confirms the practitioner paradox identified by Pohl and Vandeventer (2001) where the pressure to keep performing meant that no time was available for evaluation to demonstrate that performance. While all management functions would prefer more resources to undertake their activities, the focus on lack of money may suggest an underlying questioning of practitioners, and their superiors, as to the value such research and evaluation may bring.

Despite the almost universal positioning in key texts of public relations as a management function contributing to organisational goals (see for example, Cutlip et al., 2006), approximately one third of the practitioners surveyed appeared to consider their work in isolation from the overall goals of their organisational employer or client. If the demonstration of achievements against organisational goals is not the focus of public relations evaluation, the significant focus on outputs becomes easier to explain as this level of evaluation focuses on the tangible artefacts of public relations campaigns and programs, rather than on the impact such artefacts have on stakeholders and publics. One of the dangers of

this focus on output evaluation as seen in studies by Walker (1994) and Xavier et al. (2005) is that when practitioners either decide to or are required to demonstrate their organisational value, they fail to recognise the limitation of such methods in demonstrating higher level goals and therefore make success claims that are unsubstantiated by the evaluation data.

If it is accepted that the demonstration of achievements against organisational goals should be the focus of public relations evaluation, then the significant focus on outputs can be explained in one of three ways. First, practitioners do not know that they should do this; second, practitioners do not know how they can do this, i.e. they do not have the knowledge or skills; and third, they believe campaign or output success is equivalent to organisational success.

In this research, the emphasis on reputational impact, ROI and relationship quality reflects international thinking on the need to develop more sophisticated evaluation tools to meet higher level management goals. A variety of approaches have been proposed. The balanced scorecard, first proposed by Fleisher and Mahaffey (1997) has been embraced by European practitioners (Putt & Van der Waldt, 2005; Zerfass, 2005). Dashboards are popular in the US (Paine, 2005), as is the work on reputation measurement spearheaded by academics such as Fombrun and Van Riel (2003) who developed the Corporate Reputation Quotient with Harris Interactive.

Recently, most discussion has been generated around the notion of developing an ROI measure for public relations. In the view of the authors this has come about for two main reasons. Firstly, a desire by practitioners and their superiors to justify budgets and second, to accrete the language of accountancy to claim respectability and to demonstrate that public relations is a serious management discipline which contributes to the bottom line. The IPR/CDF (2004) study alluded to earlier concluded that there could be no single ROI metric and indeed ROI was an inappropriate

measure for much public relations work. It could be used in limited circumstances where it was clear that public relations campaigns were aimed at generating revenue or profit. However, just as there is increasing recognition in business that intangible assets are even more important than financial tangible assets (note the recent sale of Gillette where tangible assets were £4 billion, yet Procter and Gamble paid £31 billion for the company (Fisk, 2005) – the difference being the value of the intangible assets), so the IPR/CDF (2004) study recommended that practitioners should not try to reduce public relations' contribution to a single ROI measure, but seek to demonstrate evidence-based contributions, using measures that were suitable for the particular situations being addressed. The evidence required is that objectives are being met.

Despite numerous claims that the status of evaluation practice will change, change appears to be incremental within this sample of Australian practitioners and within the wider community of practice if the other recent Australian studies are taken into account.

This may appear surprising considering research and evaluation practices are a feature of all accredited university courses in Australia and, thus graduates from the past decade should have a reasonable grasp of the fundamentals needed for effective evaluation. Similarly, numerous CPE events have been held in Australia to raise awareness of the need for more effective evaluation. Despite these efforts, only limited change can be detected.

Based on the combined experience of this paper's authors, we believe an integrated approach with industry and the academy is needed to continue the drive for enhanced evaluation practice. In the immediate term, Australia could look to adopt some of the tactics of our international partners to refocus attention on evaluation practices. For example, the PRIA and its special interest group, the Registered Consultancies Group, could consider the UK CIPR policy statement as a model for its own statements and should push for early adoption of

its principles. In addition, the UK initiated CIPR Toolkit could be reviewed for its applicability in Australia and a licensing agreement reached to ensure its wide distribution to interested parties. If this is not possible, then a similar kit could be developed by local practitioners.

If available resources permit, the PRIA could commit itself to some stretch targets on evaluation practices for its members to be tested through an annual survey of practice. This would highlight the pace, or lack of change thereof, and would provide a systematic method for assessing practice across the country and provide information on which to build its CPE provision. In parallel to this, the PRIA should undertake a detailed review of its CPE provision to both embed evaluation as a core element of all public relations work and to ensure its specific evaluation courses are providing realistic and comprehensive methodologies to enhance all aspects of evaluation.

The PRIA frequently utilises its award winning cases in CPE programs however, these cases often demonstrate limited evaluation practices as evidenced by a recent study of more than five years of Golden Target Awards (Xavier et al., 2004). The entry criteria could be reviewed to ensure more rigour is required of those seeking awards. Based on practitioner interest, a special category for research and evaluation could be introduced to highlight its importance in campaign planning.

Future CPE events could focus on collaborative efforts with industry and the academy to show how program improvement could be achieved. These events could incorporate the latest methods and best practice research drawn from both academia and practice. This would also provide a useful forum for practitioners to debate the perceived barriers to more effective evaluation and help the industry body design future programs on evaluation.

Australian case studies form part of a wider network of exemplars showcased by international public relations associations. The

influential Global Alliance of Institutes of Public Relations and Communication Management could take a lead role in this area creating a worldwide database which would expose practitioners to international practices in evaluation.

While much evidence is available at the macro level of trends in evaluation practice, action research at the practitioner level would help to identify the specific challenges faced in daily practice and provide information for and test the value of the initiatives implemented by the industry body and the academy. Action research projects run in different parts of the country could involve a select number of practitioners within various sectors and at varying levels of seniority and experience. Specific knowledge of evaluation practices could first be tested, mapped, common scenarios identified, and, supported by relevant education intervention, the PRIA could devise a number of guides and advice protocols for use by practitioners.

### Conclusions

The debate and the literature on public relations evaluation reveals little that is new over the last 20 years. Gregory and White (2006, forthcoming) suggest that:

the debate about evaluation in public relations can seem like a car, stuck in the mud, trying to move forwards. The engine revs, the wheels spin, exhaust fumes and friction smoke clouds the scene, but – in the end – the car remains stuck. So, too, the evaluation debate: a great deal of discussion but no forward movement.

The same themes recycle. Practice seems stuck at the point of outputs. There is a constant searching for a single solution Holy Grail. Although there is no Holy Grail, the solution is fairly clear. To begin with, practitioners need to understand the contribution of public relations at the societal, organisational, program and individual level. They need to set objectives appropriately depending on the nature of the

work in hand and then they need to evaluate against those objectives.

There is value in evaluating inputs, outputs and outtakes, but the real value depends on practitioners being able to evaluate outcomes and outflows. While the tools to do this already exist, further work will refine them so there is no excuse for the debate to be stuck in the mud. The key issue is for practitioners to learn methodologies and move forward in line with other professions. The initiatives included in this paper provide a series of practical suggestions to make this aspiration a reality.

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