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Where the Strategic Manager Begins: Taking Stock

Chapter Contents

For communication practitioners trained more as writers than as social scientists, the new bottom-line–oriented environment presents a major challenge. Organizations want cost-effective results. Many public relations practitioners argue that the cultivation of relationships is a fuzzy business, difficult to document with numbers. The result: Public relations positions become vulnerable to corporate "restructuring."

The best insurance against cost cutters and the best way to gain credibility and mobility in management is to adopt what Broom and Dozier (1990) called the *scientific management* approach. This approach does not discount the importance of creativity and communication skills, but it does put them into an *effects-oriented* context. Say a hospital plans to open a new wing in the hope that it will increase business. For a hospital, this is a touchy subject: It does not want to appear greedy to take advantage of people's bad news and emergencies. Moreover, the promotion budget probably is

limited because many hospitals are struggling to keep up with increasing medical costs and decreasing insurance reimbursements. Hospitals also do not want to appear wasteful, particularly if financed publicly. How can the hospital increase business without causing offense and without spending too much or appearing unseemly?

In what Nager and Allen (1984) called *traditional public relations*, the communication manager would come up with creative ideas for communication vehicles such as brochures and advertisements according to the budget and staffing available and would begin with questions. Should we use two-color or four-color? Glossy or matte? The manager's decision making would focus on what looks best, sounds best, and works within the budget.

The scientific manager, in contrast, would begin with a different set of questions. Why do we need this new wing? To whom are we targeting this campaign? How much increased traffic do we need, and how much is realistic to expect? What will motivate people to take advantage of this new service? *Bottom line*: What goals should we set for this campaign?

The effects emphasis is *goal oriented*, lending itself to the bottom-line perspective of most organizations. Once you know what you must accomplish, you can focus your efforts more efficiently and to greater effect. The two major components of the scientific management approach are planning and research.

MANAGEMENT BY OBJECTIVES

The most common planning tool used by communication managers is known as *management by objectives* (MBO). MBO is an effects-oriented process for developing what are essentially campaign recipes. If you write an easy-to-follow recipe and you have skilled personnel in your kitchen, then you can have confidence that you will cook up a successful campaign. Just like writing a recipe, however, MBO requires that you make strategic decisions about what you want to serve (a meal or just a dessert), how many you want to serve (your definition of bottom-line success), whom you expect for dinner (your publics), and when they will arrive (your deadline). You can adjust the ingredients according to your budget. Not every recipe for chocolate cake needs Belgian chocolate, and not every campaign will need glossy, four-color brochures. But just as you would not leave flour out of a bread recipe, the MBO approach can help you identify which campaign ingredients cannot be compromised. Moreover, the MBO approach can provide the hard evidence and persuasive reasoning you will need to convince your key decision makers that the campaign ingredients you identify as essential really are essential. In short, the MBO approach gives the communication manager credibility, flexibility, and control.

The MBO approach sounds easy but frequently confuses managers because practitioners often have an incomplete understanding of the elements that go into MBO recipe building. If you ever have wondered what the difference is between a goal and an objective, you have a lot of company. Definitions of goals and objectives rarely are provided, even in public relations textbooks. This chapter makes those distinctions clear.

THE ACCOUNTABLE MANAGER

Let's begin by comparing the communication manager's role in traditional and scientific management approaches. As discussed by Nager and Allen (1984), the bottom line of communication programs differs fundamentally. Traditional practitioners do lots of communication activities, but they may have a piecemeal perspective. They may produce newsletters, brochures, news releases, and an occasional special event, for example, without giving much thought to how each news story or communication piece serves a specific and an overall purpose. MBO practitioners, in contrast, have lots of goals they plan to accomplish. Their perspective is more holistic. As a result, everything MBO managers do has a clear, effects-oriented purpose. Because they organize their activities according to a results perspective, they can show the need and the effectiveness of each effort more readily than traditional practitioners can. Each newsletter, brochure, news release, and special event serves a clear purpose that is part of a larger framework.

The MBO manager, or scientific manager, focuses on six activities, as summarized by Ehling (1985):

1. *Conceptualization.* A leader must hold the big picture and be able to identify and organize the smaller elements to fit that larger picture. The goal is to identify specific tasks and responsibilities that need to be fulfilled to maintain mutually beneficial relationships between an organization and the public on which its success depends, such as budgeting, goal setting, strategic planning, organizing, administering, and evaluating (notice that these elements constitute tasks 2 through 6).
2. *Monitoring.* Monitoring is, in other words, research. The scientific manager will do much issue tracking to stay ahead of emerging trends and on top of potential crises. The goal is to anticipate and evaluate opportunities and challenges that arise out of the organization's interactions and relationships with other organizations and societies.
3. *Planning.* The manager must be able to build the recipes that will guide the organization through the opportunities and challenges identified in the monitoring process. The goal is to ensure the

achievement of measurable results that fulfill needs identified in the monitoring process.

4. *Organization and coordination.* The manager must make effective use of available resources. These include budget and personnel within the organization as well as opportunities for cooperative partnerships with other organizations that can help to achieve mutually beneficial results. The goal is the effective and efficient implementation strategies for the communication programs developed in the planning process.
5. *Administration.* The manager must fulfill the promises made in the planning process. The manager will supervise the programs to activate and adjust communication programs. Nothing ever goes exactly according to plan because resources and the environment continue to change; thus, the manager must maintain motivating, creative leadership throughout the implementation of each program. The goal is the fulfillment of communication program goals on budget and on deadline.
6. *Evaluation.* The scientific manager remains accountable. Every communication activity must have a clear purpose and an anticipated result. The manager must show results and an ability to use program successes and failures as part of the monitoring process to develop even more effective future programs. The goal is the accountability, credibility, and guidance to make future communication programs even more successful.

The MBO recipe-building process, then, parallels the four-step public relations process familiar to many practitioners (Cutlip et al., 2006).

Step 1 is defining the public relations problem. The definitional process helps the manager identify the effects campaigns need to accomplish. This encompasses Roles 1 and 2.

Step 2 is planning and programming. At this point the manager develops the campaign recipe in detail. This encompasses Roles 3 and 4.

Step 3 is taking action and communicating, or implementing the program, which encompasses Role 5.

Step 4 evaluating the program, in which the manager identifies program successes and failures for accountability and future use. This encompasses Role 6.

With the manager's roles and the planning process identified, we turn to the products the manager will use and produce at each stage. These are

FIG. 2.1. The strategic planning pyramid. The organization's mission forms the basis for strategic planning. Decisions at each level of the pyramid depend on the decisions made on the underlying levels.

the key ingredients of the recipe the manager must develop. They include (a) a mission statement, (b) a problem statement, (c) situation analysis, (d) goals, (e) objectives, (f) strategies, and (g) tactics.

THE MISSION STATEMENT

We can think of these elements as a pyramid (Fig. 2.1), for which the mission statement forms the base. Everything we do must show clear relevance to the organization's mission. A *mission statement* is the statement of philosophy and purpose for an organization. Every organization should have one, and thus your first step as a manager is to obtain a copy, or, if one does not exist, to develop one. Mission statements can take a lot of time and effort to develop and can stretch for pages. The communication manager needs some sort of summary, however, to guide the daily activities of everyone connected with the organization. Everyone associated with an organization should have a clear idea of why the organization exists—beyond "to make money"—something along the lines of an abstract or

point summary. The Robert Mondavi Winery, for example, developed a one-line vision statement to appear in every voicemail message from the CEO, in all statements to analysts, in most official statements, and at the beginning of most formal presentations to employees. The statement, "We will be the preeminent fine wine producer in the world," drives all strategic planning. Development of the deceptively simple statement required input from all employees to make sure that they would buy into it. The senior management drafted a statement and met with 6 to 10 groups of 15 to 20 employees to discuss and evaluate the statement. A second draft based on employee comments was tested the same way, resulting in the final version.

The mission statement should identify the products the organization produces, the services it provides, and the types of relationships it strives to cultivate. A regional charter airline such as Champion Air (1999) in the Minneapolis area focuses on "surpassing the expectations of our customers," reflecting its specialist status, whereas a discount passenger airline such as Southwest Airlines (2005) focuses on "low fares, lots of flights, and the friendliest service in the sky." Northwest Airlines (1999), with a global focus, aims to provide "safe, clean, on-time air transportation with luggage, in a professional and consistent manner," with attention to establishing new routes and implementing electronic services. Airborne Express (1999), meanwhile, delivers packages, not people, and so its mission is "to provide businesses customized distribution solutions at lower cost than the competition."

Organizations that appear somewhat similar may have missions that differ in important ways. Religion, for example, can infuse faith-based hospitals with a variety of emphases that best suit their clientele and communities. The mission of Jewish Memorial Hospital and Rehabilitation Center in Boston (2005) is "to deliver quality rehabilitation and extended acute medical care in a manner both respectful and reflective of the diverse communities that we serve." Meanwhile, Florida Hospital (2005), run by the Seventh Day Adventist Church, states that its "first responsibility as a Christian hospital is to extend the healing ministry of Christ to all patients who come to us. We endeavor to deliver high-quality service, showing concern for patients' emotional and spiritual needs, as well as their physical condition." Fort Defiance PHS (Public Health Service) Hospital in Arizona (2005) aims "to promote family values, strength, and harmony. We are dedicated to uphold and build the traditional Navajo Ke concept (Personal Identity and Self-esteem defined by family and clan structure). Our health services are comprehensive, accessible, and culturally and linguistically sensitive."

Differences in mission can present difficult challenges for communication managers when organizations merge for financial or other reasons. A particularly dramatic situation can arise in communities such as

Springfield and Eugene, Oregon, that have very different community norms but now share a Roman Catholic hospital. A diverse community might expect a hospital to provide whatever services the community members desire, but the teachings of the Catholic church preclude services that conflict with its values regarding family planning.

MISSION VERSUS VISION AND VALUES

Whereas the *mission statement* sets out a strategic focus for accomplishing a long-term outcome, the *vision* conveys this long-term ideal. Organizations frequently develop a vision statement as a short abbreviation of the mission suitable for publication on websites, business cards, and stationery. The *vision statement* includes the following purposes:

- shares the organization's values and intended contribution to society
- fosters a sense of community and purpose within the organization in order to challenge members of the organization to work together toward a long-term aim
- articulates how the organization should look in the future, presenting the ideal, or an ambitious, long-term goal

Some organizations also articulate a set of values intended to help support their mission. Citrus Memorial Hospital (2005) in Inverness, Florida, for example, encourages employees to embrace seven organizational values—caring, communication, cost-effectiveness, pride, professionalism, progressiveness, and teamwork—"to maintain an efficient, effective and economical operation that provides and stimulates continuous quality improvement in health care."

The Atlanta VA Medical Center (2005), meanwhile, has a more specific focus. To "provide timely and compassionate healthcare, which contributes to the well-being and quality of life of our veterans," the hospital pledges its commitment to a different set of core values that include "putting veterans first" by exhorting its employees to act **respect**ful, **trust**worthy, professional and **compassionate**; to emphasize **quality**; to provide **customer service** "dedicated to the unilateral well being of all veterans, without exception"; to value **diversity** of both people and ideas; and to achieve increased **productivity** with regard to the variety of services they can provide.

Medical City Hospital (2005) in Dallas, Texas, has distinguished among its mission, vision, and values as follows:

> **Our Mission** Above all else, we are committed to the care and improvement of human life. In recognition of this commitment, we will strive to deliver high quality, cost-effective healthcare in our community.

Our Vision By 2007, Medical City must be the quality healthcare leader in our community . . .

Trusted by our patients and their families to create a caring, compassionate healing experience;

Respected by our fellow employees as important members of the team;

Valued by our physicians as colleagues in providing quality care for our patients;

Accountable to fulfill our commitments and invest in our organization;

Recognized as the premier healthcare resource . . . and inspiring other organizations to join in our passion for excellence and innovation.

Our Values

We recognize and affirm the unique and intrinsic worth of each individual.

We treat all those we serve with compassion and kindness.

We act with absolute honesty, integrity and fairness in the way we conduct our business and the way we live our lives.

We trust our colleagues as valuable members of our healthcare team and pledge to treat one another with loyalty, respect and dignity.

Displaying the mission or vision statement prominently on internal and external communication pieces ensures that everyone with whom the organization has a relationship will have a clear understanding of what the company has on its list of priorities. Unfortunately, many companies fail to do this. Because the mission statement provides the organization's justification for existence, communication managers can effectively justify their importance as a department and as individual staff members by showing how communication programs enhance the organization's mission. Using the mission statement, communication managers can show how the communication department's activities are central to the organization's success. Public relations is no longer marginalized, and the result is that public relations departments become much less vulnerable to the budget axe.

THE PROBLEM STATEMENT

Because public relations is the construction and maintenance of mutually beneficial relationships, the mission statement provides the guidelines for all strategic planning and monitoring. In particular, it enables the manager to produce the *problem statement*. To do so, the manager must address two key questions: How do you know a problem when you see one? and What is a problem statement?

A *problem* occurs when the organization encounters something in its environment or in its relationships with key publics that threatens its ability to fulfill its mission. The hospital, for example, may have encountered new insurance rules regarding maternity hospitalization that cut in half the number of days patients may stay following a healthy birth that is free of

complications. The average stay in 1996 had shrunk from 2 weeks to 1 week to 3 days to 2 days to about 1 day, finally prompting legislation to require a 48-hour minimum stay in most states. In addition to the potential threat to maternal and infant health, the increasingly empty beds in the maternity ward could threaten the hospital's ability to maintain a healthy bottom line. This does not give the communication manager anything substantive to guide planning, however. "We need to make more money" provides no clues to identify which ways of making money are appropriate for the hospital, nor does it provide any reason why key publics inside and outside the organization should feel motivated to care whether the hospital makes its money. The manager needs to know the *philosophy and purpose* of the organization—its mission—to guide planning and to build mutually beneficial relationships.

So, what is the mission of a hospital and how would the reduction in insurance coverage for maternity care threaten this mission? Some hospitals take a broad focus, providing high-quality care for the community, and some hospitals serve communities that have higher birth rates or more uninsured individuals. Some hospitals also have a research-related mission or a teaching-related mission, as shown in Sidebar 2.1. Some have quite specialized missions that might make the changes in maternity policies irrelevant. These statements help the communication manager identify publics and activities that are appropriate.

If the mission statement represents the organization's foundational guiding document for all of its operations, the *problem statement* becomes the communication manager's foundational document to guide a communication campaign. The problem statement summarizes the key elements of the issue or opportunity and how it relates to the organization's ability to fulfill its mission. The problem statement is concise and specific, much like the lead of a news story. According to Kendall (1996), it should be 18 to 25 words, phrased in a simple subject–verb–object construction. Kendall noted that, in some cases, the problem statement may be more appropriately considered an opportunity statement. Armed with no information other than the problem statement, a manager should be able to at least rough out some ideas for a successful campaign.

The problem statement comprises six elements (Fig. 2.2):

1. What is the problem, issue, or opportunity? The problem may be one of reputation, of financial difficulty, of declining membership, of impending legislation, and so on.
2. Where is this problem occurring? This may represent an internal problem, a regional issue, a national issue, or even an international issue.
3. When did this become a problem? Perhaps this issue always has been a problem, or perhaps this problem is getting better or worse or is cyclical.

SIDEBAR 2.1
Hospital Mission Statements

A mission statement should identify the products the organization produces, the services it provides, and the types of relationships it strives to cultivate. Note that statements differ according to the type and size of community served, the affiliation of the hospital, and the emphasis of the hospital on training, community outreach, or a specialized type of medicine.

UNIVERSITY/TEACHING

The University Hospital, Cincinnati (1999)

To strive to provide care of the highest quality to all persons seeking treatment in our facilities. This includes a blend of human concern and clinical expertise, while promoting excellence in education, research, and technological progress.

New York University Medical Center, New York University School of Medicine (from the original statement, 50 years ago) (1999)

The training of physicians, the search for new knowledge, and the care of the sick. The three are inseparable. Medicine can be handed on to succeeding generations only by long training in the scientific methods of investigation and by the actual care of patients. . . . Our current interpretation of this statement is that the appropriate teaching of medicine and the training of physicians must be accomplished in a setting of excellence at the highest level of human achievement. With this understanding, we strive to provide a rich environment for scholarship, research, and patient care where the faculty understands that the students, as our successors, should not merely replace, but surpass.

St. Francis Health System, Pittsburgh, Pennsylvania (2005)

1) to establish and maintain a hospital for the care of persons suffering from illnesses or disabilities, without distinction as to their religious beliefs, race, national origin, age, sex, handicap or economic status; 2) to carry on educational activities related to rendering care to the sick and injured or the promotion of health; 3) to encourage research related to health care; 4) to participate, as far as circumstances may warrant, in any activity intended to promote individual and community health.

URBAN COMMUNITY/TEACHING

Detroit Medical Center (2005)

Committed to improving the health of the population served by providing the highest quality health care services in a caring and efficient manner. Together,with Wayne State University, the DMC strives to be the region's premier health care resource through a broad range of clinical services; the discovery and application of new knowledge; and the education of practitioners, teachers and scientists.

SIDEBAR 2.1 (Continued)

Detroit Receiving Hospital (2005)

Committed to being one of the nation's premier emergency, trauma, critical care and ambulatory centers providing high quality services to all patients within the communities serviced, regardless of the person's religious, racial or ethnic identification or economic status. In collaboration with Wayne State University, Detroit Receiving strives to provide leadership in the education and training of health care professionals and in the development of new diagnostics and treatment modalities that enhance the quality of life.

Saint Joseph Hospital, Denver, Colorado, owned by the Sisters of the Charity of Leavenworth, Kansas (2005)

To provide a continuum of healthcare services—ambulatory through tertiary—in partnership with the medical staff. The hospital, which is sponsored by the Sisters of Charity of Leavenworth and operates under the direction of the Health Services Corporation, intends to provide these services in a healing environment which meets the physical, emotional, and spiritual needs of its patients and their families, other visitors, donors, and employees. Superior service and fiscal and environmental responsibility are cornerstones of the excellent care Saint Joseph Hospital strives to provide to residents of the Rocky Mountain Region. The hospital is committed to providing graduate medical education, to caring for the medically indigent, to improving community health, and to continuing its leadership role in Colorado healthcare.

REGIONAL/SUBURBAN

Medina General Hospital, Medina, Ohio (2005)

The leader in providing ethical quality care for the individual and in promoting a healthy community.

Jefferson General Hospital, Port Townsend, Washington (2005)

To provide quality, cost-effective medical care and health services to residents and visitors of Eastern Jefferson County and adjacent areas.

St. Elizabeth's Hospital, Belleville, Illinois, Hospital Sisters of the Third Order of Saint Francis (2005)

To minister to those in need of healthcare in response to God's call to serve each other, especially the poor. In the performance of its mission, St. Elizabeth's Hospital will foster the values of love, compassion, competence, and reverence for life. St. Elizabeth's Hospital is committed to performing its mission through ecumenical cooperation with other healthcare providers and the community, whenever possible.

(Continues)

SIDEBAR 2.1 (Continued)

RURAL COMMUNITY/REGIONAL

Clearwater Valley Hospital and Clinics, Inc., Orofino, Idaho (North Central Idaho) (1999)

Providing competent, compassionate health and wellness services in an environment which enhances human worth. The mission is accomplished through the implementation of the values *respect, hospitality, justice, and stewardship*. The Hospital and Clinics are committed to witness God's love for all people, with a special concern for the poor and powerless.

Mary Lanning Memorial Hospital, nonprofit regional health center in South Central Nebraska (2005)

Committed to a tradition of excellence through leadership in the provision of quality medical services and health education for the people of South Central Nebraska.

SPECIALIST

Glenrose Rehabilitation Hospital, Edmonton, Alberta (2005)

To work with our patients and their families as they meet the challenges of disability and seek fulfillment in their lives; share knowledge and experience with those who are involved in the process of rehabilitation; engage in research to advance knowledge and contribute to rehabilitation practice in the community at large.

Mary Free Bed Hospital & Rehabilitation Center, Grand Rapids, Michigan (2005)

To provide people with disabilities the opportunity to achieve independence through rehabilitation. We seek excellence through innovation, leadership, and advocacy.

Children's Hospital and Health Center, San Diego, California

To restore, sustain, and enhance the health and developmental potential of children.

Woman's Hospital, Baton Rouge, Louisiana (2005)

To create opportunities that improve the health status of women and infants.

FIG. 2.2. Elements of the problem statement. A statement of the public relations problem is incomplete unless it includes all six of the elements portrayed.

4. How did this become a problem? Your problem may have developed because of a lack of awareness, poor product quality, or ineffective customer or member relations.
5. For whom is it a problem? Your problem most likely does not affect everyone in the world but instead involves certain key publics with whom your organization's relationship is threatened.
6. Why should the organization care about this problem? In other words, why does this threaten the organization's ability to fulfill its mission? Many organizations neglect to answer the "so what" question. If your problem has no easily identifiable "why," you probably will find it difficult to get key decision makers in your organization to buy into the need for your campaign.

Your problem statement, in short, provides the justification and the framework for your campaign, all in one or two sentences. Your goal,

as discussed in chapter 3, will be to negate the problem (or maximize the opportunity).

THE SITUATION ANALYSIS

Frequently, the communication manager receives a request to develop a campaign based on an initial issue statement that contains few of the elements necessary for a complete problem definition. To develop a complete problem statement usually requires formative research to flesh out the details. These details are known as the *situation analysis*.

The *situation analysis* is a detailed explanation of the opportunities and challenges (sometimes called *opportunities and threats*) that exist within the organization and in its environment. Sometimes the analysis of opportunities and challenges is called *SWOT analysis*, for *s*trengths, *w*eaknesses, *o*pportunities, and *t*hreats. Referring to "threats" can seem defensive, whereas referring to challenges communicates more confidence. Both approaches emphasize the need for the manager to find out as much as possible about the problem, the relevant publics, and the environment.

A situation analysis usually begins with the problem statement, followed by a discussion of the history of the problem and how it conflicts with the organization's mission. The situation analysis then includes a discussion of the relevant publics as well as a discussion of opportunities that should help solve the problem and challenges that could pose barriers. Assumptions must be made clear, and all assertions must be backed up with evidence: data, theory, management and communication principles, expert sources, and other relevant information. The situation analysis represents everything you have been able to find out about the problem. It shows your familiarity with the organization, its publics, the environment, and the problem. It also helps you identify what additional information you may need to design a successful campaign.

The situation analysis makes it possible for the communication team to develop hypotheses, or hunches, about possible causes and solutions for your problem. You may conclude from your analysis that a problem initially presented as poor communication is an informed lack of public support for a company's vision. On the other hand, research might reveal that an apparent lack of support stems from the noisy complaints of a small minority, with the majority unaware of the issue but ready to mobilize on the organization's behalf. These discoveries will affect the type of communication program an organization designs.

The situation analysis can spark creative problem solving by helping practitioners to organize seemingly disparate bits of information or to identify seemingly unrelated organizations that share similar concerns. The Arkansas Rice Depot, for example, a food bank based in Little Rock,

identified a serious problem among disadvantaged schoolchildren: A school nurse had raised the concern that even if children received free school breakfasts and lunches, they often suffered hunger over weekends and holidays. The food bank and the school had operated independently, but they realized they needed to join forces. To make sure their food got to the children, the food bank began sending food home in the children's school backpacks. America's Second Harvest adopted the idea and the program has spread to at least 12 of its affiliates nationwide. They hope to secure funding to enable more schools to participate.

SOURCES OF INFORMATION

The development of a situation analysis requires a thorough understanding of the issue or problem, the client organization, the environment, and the relevant publics. Original research often is necessary, such as surveys and focus groups, but library research and an examination of organizational records also can provide important information. The communication manager's ability to solve a problem depends on available resources (e.g., time and funding), available expertise, political realities, and the reasons for the problem. The manager's challenge, therefore, is to gather as much background information as possible, as quickly as possible, to determine the scope of the problem as well as the challenges and opportunities that will affect problem solving. Forces for and against change exist both within an organization and outside in the political and social environment. Along with the internal and external factors, the practitioner may find Hubbell's Helpful Questions useful, developed from the lessons of Ned Hubbell, retired director of Project Outreach, Michigan Education Association, as a set of questions to ask before beginning to plan (Sidebar 2.2).

Internal Factors

Often, an organization attributes its problems to outside forces (the media are a favorite target for blame), but the communication manager must begin to understand the problem by developing an understanding of the organization itself. Important types of information include the organization's mission, its decision-making and operating structure, its evolution and history, and its culture. Sources of information include the following:

- Written documents such as mission statements, charters, and bylaws
- Biographical statements of key members of the organization
- Descriptions of products and services
- Records regarding budgets, expenditures, and staffing levels
- Records regarding business policies and procedures

SIDEBAR 2.2
Hubbell's Helpful Questions (or 30-something questions you should ask before planning)

I. Organizational History
   A. Why was the organization established?
   B. When was the organization established?
   C. Were there any problems to overcome in the development of the organization?
   D. Have there been any major changes in organizational direction or policy?
   E. What is the organization's status in the community?

II. Organizational Structure
   A. Is there an organizational chart available?
   B. What is the total number of staff?
   C. How are responsibilities divided?
   D. What functions are handled in each department or section?
   E. What importance does the organization attribute to each function and why?

III. Organizational Philosophy/Mission/Goals
   A. What is the purpose of the organization?
   B. What is the stated mission of the organization?
   C. Is there a dominant organizational philosophy?
   D. Does the organization have any set goals?

IV. Organizational Policies of Operation
   A. Who constitutes the board of directors? How was the board selected?
   B. Does the organization have any advisory panels or committees?
   C. Who determines how the organization operates?
   D. Who must be consulted before decisions are made? Why?
   E. What government regulations (if any) impact the organization?
   F. What mistakes has the organization made in the past? What have these mistakes taught the organization?
   G. What is the agency's operational budget?

V. Competitive Posture
   A. Where does the agency rank in the industry?
   B. Where does the agency rank in the community?
   C. What is the agency's reputation?
   D. Whom does the agency compete with?
   E. Does the agency have any opponents? If so, who?
   F. Does the agency have any allies? If so, who?
   G. Are there important neutral parties to be considered?
   H. What additional factors are impacting competitive posture?

VI. Situation Analysis (Trends)
   A. What are the perceived key changes taking place outside of the organization?

SIDEBAR 2.2 (Continued)

B. What are the perceived key changes taking place within the organization?
C. What issues are emerging in the industry? How will these impact the agency?
D. Are there broad social trends impacting the agency?
E. Are there any developing innovations within the industry that may impact the agency? Is the agency working on any innovations?
F. Are agency funding sources secure?

- Published documents such as annual reports and newsletters
- Specific records related to the problem, such as memos
- Records regarding organizational calendars of events
- Decision makers and other staff knowledgeable about the issue
- Existing surveys or other research of internal publics
- Websites, listserves, and records related to web use

External Factors

Sources of information outside the organization can provide an understanding of opportunities and challenges that the organization needs to anticipate or that it has encountered in the past. Regulations enacted by the Food and Drug Administration to protect the safety of the nation's blood supply, for example, have made it more difficult for prospective blood donors to qualify. People no longer can give blood, for example, if they have had a headache during the past week or if they lived in England for three months between 1980 and 1996. Blood banks must find a way to maintain sufficient reserves under increasingly tight restrictions (Manning, 2003).

Important types of external information include publics who come in contact with the organization, information networks linking individuals inside and outside the organization, portrayals of the organization by key individuals and the media, and information about political, social, economic, and environmental issues that can affect the organization's ability to control an issue. Sources of information include the following:

- Consumer and trade publications in which the organization or the issue is mentioned
- Publications in which competing organizations or their issue positions are mentioned
- Records of broadcast news coverage of the organization or the issue

- Records of Internet sites relevant to the organization or issue
- Individuals and organizations that favor or criticize the organization or its stance on an issue (sometimes an organization has lists of key contacts, friends, or critics)
- Individuals at key media outlets and *bloggers* (writers of web logs) who cover the organization or the issue
- Calendars of events for the community and other relevant regions
- Existing surveys of relevant publics from national, regional, or specialized sources
- Lists of relevant government agencies and key contacts that deal with the organization and relevant issues
- Records of relevant government regulations that are pending, current, and repealed

FINAL THOUGHTS

Once communication managers have reviewed existing background information, they can assess the situation more effectively. The exercise of drafting the problem statement can reveal information gaps that require further investigation. Only when all of the elements of a problem statement can be written with specifics can the manager determine appropriate strategy.

This means that a significant part of program planning depends on research. The manager's confidence in the effectiveness of a program plan and the manager's ability to demonstrate accountability to a client increases with each bit of relevant information obtained. Public relations programs exist in an environment filled with uncertainty and variables that managers simply cannot control. The better the manager's understanding of all elements of the situation, the more control—or at least predictability—the manager will have over the result of a *communication* program.