

Public Relations Planning

Phase 3: Tactics

The tactical phase of the planning process focuses on the vehicles of communication. This chapter gives you an overview of the many and varied ways to present the organization's message and engage its publics.

If strategy is the skeleton and muscles for your communication program, tactics are the flesh. **Tactics** are the visible elements of a public relations or marketing communication program, the specific communication venues through which an organization interacts with its publics.

Step 7: Selecting Communication Tactics

Communication tactics range from websites to video news releases, tours to billboards, blogs to podcasts, tweets to billboards. They are the visible element of the strategic plan.

Various categories have been offered for communication tactics. Media are called controlled or uncontrolled, depending on the amount of influence the organization has over the message presentation. They sometimes are defined as internal or external media, reflecting their relationship with the organization. Another characterization is as mass media or targeted media, indicating the size of the audience. Other designations include one-way versus interactive media, public versus nonpublic media, and popular or trade media. Sometimes they are designated by the means of production: print, electronic or digital media.

All of these descriptors can be useful in some ways. But for reviewing the full inventory of communication vehicles that can be used in a public relations campaign, consider a four-fold sorting as the media relate to the organization: interpersonal communication tools, organizational media, news media, and advertising-promotional media. These are the categories we'll look at here. (Some of these should look familiar to you, because they are included in the comprehensive listing of public relations writing formats at the beginning of Chapter 4.)

Interpersonal Communication Tactics

The most persuasive and engaging of all communication tactics are those associated with **interpersonal communication**. Other tactics may be more prestigious or more cost-effective in communicating with large numbers of people, but in terms of persuasive effectiveness, interpersonal venues can't be beat.

The premise underlying interpersonal tactics is that the organization takes its message directly to its publics. The tactics themselves usually are relatively inexpensive, though they often require personnel resources. These tactics are particularly useful with **information-seeking publics** (people who are actively looking for information about a topic).

Some types of interpersonal communication tactics focus on **personal involvement**. When the organization wishes to provide information and education or to engage in persuasion or dialogue, it often turns to tactics of personal involvement. These may be venues associated with the organization or audience sites.

Interpersonal tactics also include various kinds of **information exchange**. Various types of meetings provide an opportunity for both commercial and nonprofit organizations to meet fact-to-face with their publics. These include educational gatherings, product exhibitions, rallies and speeches.

Another grouping of interpersonal communication tactics involve **special events**, which are activities created by an organization mainly to provide a venue to interact with its publics. The list of special events is bounded only by the imagination of the planner. Some of the common types include civic events, sporting activities, contests, holiday events, progress-oriented happenings, historic commemorations, social events, fundraising activities, artistic events and general publicity events. All seek to gain attention for an organization or its cause.

Here is a listing of various interpersonal communication tactics:

Personal Involvement

- Organizational site involvement (plant tour, open house, test drive, trial membership, free class, shadow program, ride along, sneak preview, premiere performance)
- Audience site involvement (door-to-door canvassing, in-home demonstration)

Information Exchange

- Educational gathering (convention, council, convocation, synod, conclave, conference, seminar, symposium, colloquium, class, workshop, training session)
- Product exhibition (trade show)
- Meeting (annual stockholder meeting, lobbying exchange, public affairs meeting)
- Rally (demonstration, march, picket, boycott)
- Speech (oration, talk, guest lecture, address, keynote speech, sermon, homily, panel, debate, forum, town meeting, speakers bureau)

Special Event

- Civic event (fair, festival, carnival, circus, parade, flotilla)
- Sporting event (tournament, marathon, triathlon, outdoor spectator event, track meet, field days, rodeo, games, match, meet)
- Contest (science fair, spelling bee, beauty pageant, talent contest, cook-off, dance-a-thon)
- Holiday event
- Progress-oriented event (launching, procession, motorcade, ground-breaking ceremony, cornerstone ceremony, dedication, ribbon-cutting, tour, grand opening)
- Historic commemoration (founders' days, anniversary, centennial, play, pageant, caravan, re-enactment)
- Social event (luncheon, banquet, roast, awards dinner, recognition lunch, party, dance, reception, fashion show, tea)
- Artistic event (concert, concert tour, recital, play, film festival, art show, photo exhibit)
- Fundraising event (antique show, auction, haunted house, pony ride, murder mystery dinner theater, fashion show, house or garden tour, tasting party)
- Publicity event (photo op)

Organizational Media Tactics

A host of communication vehicles are managed by each organization and can be used at its discretion. These media generally are controlled, internal, nonpublic media such as publications, direct mail, miscellaneous print media, and audiovisual or digital media.

Organizational media tactics can be the most useful tools for public relations, because they allow the organization to take its message directly to its publics, along the way controlling the timing, content, presentation and feedback. These tactics are most useful with information-seeking publics. These tactics can be expensive but, because they can be targeted to specific publics, often they are cost-effective in comparison with other types of tactics.

One type of organizational media tactic involves **publications**, which are materials published and printed by the organization. These can be serial publications such as newsletters or stand-alone brochures and fliers. Reprints also fit into this category, as well as progress and research reports.

Direct mail is another category of organizational media. These involve letters, memos and postcards, as well as catalogs.

Electronic media offer many opportunities for public relations. These include audio media such as phone messages and podcasts, video media involving nonbroadcast video (also called corporate video), and electronic publishing.

Digital media allow for online publication of any of the print materials associated with organizational tactics. Digital media, which also involve mobile devices and websites, increasingly are becoming a mainstay of public relations message dissemination.

A final category of organizational tactics is **social media**, a still-emerging phenomenon that allows for much interaction with publics. These involve blogs and wikis, as well as social networking and file sharing sites. Here is a listing of various organizational media tactics:

General Publications

- Serial publication (newsletter, bulletin)
- Stand-alone publication (brochure, flyer, booklet, folder, pamphlet, tract, circular, fact sheet, FAQ)
- Progress report (annual report, quarterly report)
- User kit
- Research report
- Miscellaneous print media

Direct Mail

- Memo
- Letter (appeal letter, marketing letter)
- Postcard
- Invitation
- Catalog (retail, full-line, specialty, business-to-business)

Electronic Media

- Audio media (telephone, dial-a-message, recorded information, voice mail, toll-free line, demo tape, demo CD, podcast)
- Video media (nonbroadcast video, videoconference, teleconference, videotape, slide show)
- Digital media (presentations software, e-mail, listserv, Internet, newsgroup, websites, web home page, web-based television or radio, touch-sensitive computer, cell phone)
- Electronic publishing

Social Media

- Wiki
- Blog
- Social networking
- File sharing sites

News Media Tactics

The **news media** are communication vehicles that exist primarily as businesses that present newsworthy information to various audiences. Print media includes newspapers and magazines of various types and categories. Broadcast media include radio and television, which can be delivered over the air, on cable, digitally or via satellite. Increasingly, digital media provide for online dissemination of information and interaction between organizations and their audiences.

Whether print media, broadcast media or interactive news tactics, collectively they present many opportunities for public relations.

The advantage of working through news media is that they generally feature large and/or highly involved audiences. They offer a significant credibility to organizations they report on, offering what is called **third-party endorsement**. This means that media **gatekeepers** such as editors and news directors have considered all the information available to them and selected this information to share with their audiences). This vetting process gives credibility and prestige to organizational information disseminated through the news media.

A second major benefit of the new media is that publicity is free. There is no charge to the organization when an editor or news director decides to report news about the organization.

The downside is that the content of publicity is not controlled by the organization. With the benefit of third-party endorsement comes the loss of control over the content, timing and context. Even the decision of whether the information is published or broadcast at all is left to the media gatekeeper.

News reports generally are must briefer than the organization would write about itself.

The biggest limitation of working through the news media is that the information must be **newsworthy**. It must be something that media gatekeepers consider of relevance to their audiences, not merely information or data that the organization hopes to publicize.

Public relations practitioners provide media with **news subsidies**, a term for the information provided proactively by the organization or in response to media inquiries. Information subsidies are part of the reciprocal and symbiotic relationship between journalism and public relations. Journalists need public relations people to provide information and access so they can report the news. Public relations practitioners need journalists who provide the venue for their news releases, opinion pieces and other vehicles for information about the organization.

Here is a listing of various news media tactics:

Direct Information Subsidy

- News fact sheet (bulleted newsworthy information: who, what, when, where, why, how, quotes, background info)
- Event listing (brief about upcoming activity or event)
- Interview notes (transcript of interview with organizational expert)
- News release (news story written by a public relations practitioner and given to media gatekeepers to use edited or unedited; types include announcement, response, hometown and news brief)
- Feature release (story on background aspect of the news, written by a public relations practitioner and given to media gatekeepers to use edited or unedited; types include biography, history, backgrounder, question-and-answer piece and service article/how-to piece)
- Actuality (sound bite for radio)
- Audio news release (radio release with actuality)
- B-roll (sound bite for television)
- Video news release (TV release with B-roll)
- E-mail release
- Social media release (news report prepared for blogs, websites and other online venues)
- Media kit (collection of news releases and related material on a particular topic or news event)
- Online newsroom (organizational website with current and archived news releases and other direct information subsidies)

Indirect News Subsidy

- Media advisory (note to media gatekeepers about upcoming news opportunity)
- Story idea memo (news-oriented tip sheet informing gatekeepers of interview subject or topic)
- Query letter (promotional letter urging media gatekeepers to do an interview or use something written by a public relations practitioner)

Opinion Subsidy

- Position statement (factual background with opinion-based conclusion; types include position paper, white paper, position paragraph and contingency statement)
- Letter to the editor
- Guest editorial or op-ed piece

Interactive Media Engagement

- News interview (question-answer session by reporter one-on-one with organizational news source)
- News conference (organizational announcement with group interview of organizational news source by various reporters)
- Studio interview (hybrid between interview and news conference; often reporter or commentator with individual or panel of news sources and opinion commentators)
- Satellite media tour (in-studio interview mediated by satellite, with reporter/commentator in one location and interviewees elsewhere)
- Editorial conference (meeting between organizational news sources with editors and editorial boards of newspaper or other news media)

Advertising and Promotional Media Tactics

The final category of communication tactics involves media associated with advertising and promotion. The advantages are that these media can provide a large and/or highly specialized audience, and the organization can control the content, timing and presentation style.

The disadvantage is that these media are tremendously expensive. For example, a full-page in the New York Times can cost \$158,000, £30,000 for the Daily Mail in the UK, \$51,000 for the Australian, €417,000 for Bild newspaper in Germany. Television can cost £250,000 for a 30-second commercial in England, while in the US a half minute of network primetime advertising on a top-rated series can range up to \$500,000. Cable network advertising targeted at key publics is considerably less.

When ad costs are considered on the basis of the number of viewers, media advertising can deliver a low cost-per-impression. But generally the advertising message spills over to many people who are not key publics for the organization and who have little or no interest in the message, thereby creating a significant waste of advertising money. Targeted media thus can be more cost effective.

Here is a listing of advertising and promotional media tactics:

Print Advertising Media

- Magazine advertising (full/partial page, center spread, advertorial, breakout ads that vary with geographic region or audience profile)
- Newspaper advertising (display ad, classified ad)
- Directory advertising
- House advertising (such as program brochures)

Electronic Media Advertising

- Television commercial (network placement, spot local commercial, infomercial)
- Cable TV advertising (network placement, spot local commercial, cable crawl)
- Radio commercial (network radio, spot local commercial, online ad)
- Digital media advertising (pop-up ad, virtual ad)

Out-of-Home Advertising

- Outdoor poster (billboard, poster, digital billboard, wallscape)
- Arena poster (print or electronic ads in sport venue)
- Signage
- Out-of-home video
- Transit advertising (bus sign, train/subway car card, station poster, shelter poster, mobile billboard)
- Aerial advertising (blimp, airplane tow, skywriting)
- Miscellaneous media, such as outdoor public furniture, street fixtures and pavement

Promotional Items

- Clothing
- Costume
- Office accessory
- Home accessory

Worksheet for Step 7

In Step 7, you created a list of communication vehicles to carry your organization's message to your publics, selecting among various tactics associated with interpersonal communication, organizational media, news media, and advertising and promotional media.

Here are the basic questions for this worksheet:

- 1. What interpersonal communication tactics will be part of this strategic plan?**
- 2. What organizational media tactics?**
- 3. What news media tactics?**
- 4. What advertising and promotional media tactics?**

Planning Example for Step 7

G^X will use the following interpersonal communication tactics:

- Client-site seminars about the exchange program
- Speeches before business-civic organizations
- Sponsorship presence at golf tournament for junior and mid-level business professionals
- Historic commemoration luncheon for 25th anniversary of the first G^X-sponsored exchange

Organizational media tactics:

- Annual progress report for donors, sponsoring organizations, and prospective exchange candidates
- Survey with follow-up research report on attitudes and opinions of area leaders in business, nonprofits, higher education and government on the value of international insight and experience
- Online catalog of exchange possibilities
- Enhanced website with exchange information, testimonials and placement opportunities
- Online video presentation of 10-minute documentary of G^X programs

News media tactics:

- News release to local newspapers, business publications, business radio programs and television stations announcing exchange opportunities (3/year)
- Story idea memo for interview opportunity with returning exchange participants
- Feature release focused on returning exchange participants
- Guest editorial on value of international experience for local businesses

Advertising and promotional media:

- Advertisement in local business newspaper
- Advertisement on local radio business program

Step 8: Implementing the Strategic Plan

Now that you have a full plate of ways to present your message and engage your publics, turn your attention to implementing these tactics. Try to turn the inventory of tactics into a logical and cohesive program.

The task here is to create a program or theme to bind the tactics together in a way that will appeal to the organization's publics. When you read a restaurant menu, you often make selections based on a particular culinary focus: Japanese, Tex-Mex, Southern, Italian, Middle Eastern and so on.

It's unlikely that you would start with tuna sashimi, add lamb-and-saffron harira soup with pita, feature jalapeño chili relleno as main course, add sides of grits and ravioli, and end with a flaming cherries jubilee for dessert, served with ouzo and Pepsi Max. Gastric nightmare!

Rather, you'd probably develop a culinary theme. You would creatively package your choices to concoct a special dining experience fitting the occasion, appropriate for your dining companions, and suitable to your resources, needs and interests.

The same is true with strategic planning for communication. Package your tactics to achieve your objectives. Make this more than a simple "to do" list. Consider how various tactics can be woven together, and group them around the themes associated with the strategic planning from Steps 5 and 6.

Think creatively as you approach this step. For example, if you have a new organizational logo to unveil, consider making it a real unveiling. How about a ceremonial removal of a sequined cloth covering the logo? One nonprofit organization introduced a new logo by involving five local political and media celebrities who each gave a short testimonial about the organization and then, one by one, placed together cut-out pieces of a giant jigsaw puzzle to create the new logo.

Some organizations have specially designed vehicles used for promotion and other public relations objectives. United Parcel Service has a miniature delivery truck to give Big Brown visibility with potential customers. UPO uses these trucks in athletic arenas to deliver a coin for the ceremonial coin toss, such as at the start of football games.

Some award-winning campaigns have found their success through such creativity, such as the "man sled" race by Snausages (see Step 3, special events). Here are some other examples.

ORGAN DONOR PROGRAM. *"Organ donor" is a negative reference to motorcycle riders, generally by four-wheeled folks who don't understand the passion for biking. But the nonprofit Lifeline of Ohio creatively embraced the term as a double entendre, changing it from an insult to a positive.*

Its "Live on – Ride on" campaign involved face-to-face communication through booths set up at various biker events. The campaign also provided bold graphics, including a logo that could be added to motorcycles, as well as patches, T-shirts and other material for cyclists clothing and gear.

The campaign received significant media coverage both in newspapers and on several blogs and other websites. It also had support through social media such as the group's Facebook page, creating new Facebook friends and Twitter followers. Search-engine traffic increased 91 percent during the campaign.

The result was that "Live on – Ride on" registered 3,000 new organ donors among motorcyclists in Central and Southeastern Ohio in its first year, with thousands more expected over the four-year cycle for renewing driver's licenses.

Since 2010 when Lifeline of Ohio won a Silver Anvil from the Public Relations Society of America for its campaign, similar donor-procurement programs in other states have look at "Live on – Ride on" as a model.

SWINE FLU. *AMResorts and its public relations agency got creative to combat health worries. The company's Mexican resort hotels were only half-full in 2009 because of fears of H1N1 swine flu pandemic.*

The company was convinced that the media-fueled fear was unfounded. It was so sure of this that it issued a "flu-free guarantee." The guarantee promised that any guest who contracted swine flu at one of its resorts would get free return visits over each of the next three years. Bookings shot up 140 percent.

Several other resort chains imitated the guarantee, and the Mexican government praised AMResorts for helping get Mexico's economic back to recovery.

CONFUSED.COM. A public relations agency in England helped raise brand awareness of Confused.com, an auto-insurance company. Goals included driving traffic to the company website, increasing visibility and generating requests for insurance quotes.

Company statistics identified the most accident-prone street in the United Kingdom: Somerville Road in Worcester. Eight people worked 12 hours to bubble wrap the entire street. Nearly 1,800 square yards (1,500 square meters) of bubble wrap covered cars and trucks, houses, bicycles, dog houses, swing sets, trees and shrubs, even garden gnomes.

The light-hearted publicity event carried a serious message about the dangers of winter driving, raising it well above the level of a mere publicity stunt. Rather, it was a means of attracting media attention to a serious issue of public safety.

The public relations planners contacted established news media, including major national newspapers. They engaged social media by posting photos on Twitter, Flickr and Facebook.

The combined buzz attracted more than 125 million viewers to blogs and articles, and the story was picked up by international news media in Australia and North America. The company website saw a 20 percent increase in visitors on the first day of the publicity event, which passed its objective of generating an additional 4,000 requests for insurance quotes.

In a final burst of publicity, the bubble wrap was donated to Oxfam, the international food-aid program, that used it to package aid being sent to earthquake victims in Haiti.

OXFAM. Oxfam is an international confederation of organizations to provide famine relief, coordinate response to humanitarian crises, and work toward long-term solutions promoting sustainable livelihoods

To call attention to an international conference on global climate change in Copenhagen, Oxfam wanted to highlight the danger of climate change in a creative way.

The organization set up the scene of a family living underwater, with a living room installed at the bottom of a shark tank at the London Aquarium. It was a typical family enjoying a meal together, except that parents and kids were wearing scuba masks and air tanks.

Oxfam invited news organizations and photographers to record the spectacle. The creative tactic was a top news story on BBC, Al Jazeera and Sky News beamed throughout the world. Blogs and Internet news sites featured it, as well as newspapers in the US, China and Australia.

Putting the Program Together

Review the information gathered during the Research phase (Steps 1, 2 and 3), and the first part of the Strategy phase (Step 4). Then consider several different ways to package the tactics you have chosen. No particular format is best for every issue, so let common sense be your guide. Consider the most distinctive element of your program, and select the format that is likely to make the best impression on your colleagues, boss or client.

- **Packaging by Media Category.** This approach lists each tactic according to the outline of media categories from Step 7 (interpersonal, organizational, news and advertising/promotional tactics). With each tactic, list the relevant publics and objectives. This format may be a good starting point in organizing the tactics and in making sure that all publics and objectives are covered. But it usually is not the most creative approach.
- **Packaging by Public.** If the main focus of the campaign is appealing to several different publics, it may make sense to package the campaign that way. List the objectives and associated tactics for Public A, then for Public B, Public C and so on. This format clearly distinguishes among the various publics (for example, a hospital fundraising campaign that is reaching out both to former patients and to philanthropic donors).
- **Packaging by Goal.** If the plan has two or more significant goals, look at that as the distinguishing characteristic. For example, if a nonprofit organization has a campaign to increase visibility for a new program and to raise funds to support it, list the publics, objectives and tactics associated with each of the two goals.

- **Packaging by Objective.** Similarly, if the plan is built around a single goal, perhaps the various objectives supporting it provide the best framework. List publics and tactics for each objective (awareness, acceptance and action).
- **Packaging by Department.** Sometimes the internal structure of the organization suggests a way to distinguish among the distinctive elements of the plan. Consider identifying goals, objectives, publics and tactics as they relate to various departments, divisions or organizational programs.

Campaign Plan Book

The **campaign plan book**—or more simply, the book—is the formal written presentation of your research findings and program recommendations for strategy, tactics and evaluation. This report should be concise in writing, professional in style, and confident in tone.

The plan book should include a title page, executive summary, an optional table of contents (if the plan book is detailed enough to warrant this), situation analysis (summarizing Steps 1, 2 and 3), strategic approach (summarizing Steps 4, 5 and 6), tactical program including schedule and budget (Steps 7 and 8) and evaluation plan (Step 9).

The book often ends with the consultant's credentials and resources, and sometimes includes a statement of principles indicating the philosophy and professional ethics that undergird the campaign.

Here's an example of a hypothetical outline for one tactic, an open house as part of a campaign proposal for a new graduate program in architecture at a university in a mid-sized city. This shows the internal linkage between the tactic, previously identified publics, already determined objectives and strategy, administrative details such as budgeting, and subsequent evaluation methods.

- *Public:* Professional architects (specifically, approximately 145 practicing architects within a three-county area).
- *Objective:* To increase the understanding of professional architects about the new program (50 percent of the professional community prior to beginning the academic program; with 25 percent attending open house).
- *Strategy:* Attract attention of the professional community and create a core of opinion leaders; give specific attention to leading architects, particularly those who have received recognition from the Midstate Association of Professional Architects.
- *Tactical Elements:*
 1. Publicity elements including news release and fact sheets (no cost)
 2. Promotional materials including news release, e-mail invitations, Facebook note, and outreach to appropriate blogs (\$100).
 3. Advertising: 1/8-page ad in local business/professional weekly newspaper (\$500 value; actual cost \$350 with nonprofit/education discount)
 4. Information materials including an eight-minute video (\$15,000 value; actual cost \$1,000 with in-house production by broadcasting students).
 5. Information packet for visitors, with parallel information at website (\$200).
 6. Open House logistical support including reserved space and parking arrangements (\$100 for two student police aides)
 7. Open House hospitality: snacks and beverages (\$1,000 value; actual cost \$500 with catering by university students majoring in Culinary Arts as a promotion for their new catering service).
- *Budget:* \$19,900 value; actual cost \$2,250.
- *Evaluation Methods:* Attendance figures; follow-up mini-survey conducted as part of a telephone thank-you for attending.
- *Oversight:* Assistant Director of Community Relations

In a complete proposal, each tactic would receive similar treatment. Even individual tactics might have multiple components. For example, the open house noted earlier might have additional publics, perhaps donors or potential students. Each of these would require its own statement of objectives and strategies, though the budget and evaluation methods may remain constant.

Campaign Schedule

Implementing the strategic plan calls for establishing a timeline of when various activities need to be done. This involves two considerations: (1) the pattern and frequency of the communication tactics and (2) the actual timeline of tasks to be accomplished at the tactics are implemented.

Two concepts drawn from marketing and advertising are helpful in the implementation stage of a public relations plan. Message **frequency** deals with the number of times and the pattern (continuous, pulsing and so on) in which messages are presented to a particular public. Message **reach** refers to the number of different people who are exposed to a single message.

Research into message frequency shows that one presentation is never enough. That's why public relations practitioners look for multiple and overlapping ways to communicate with and otherwise engage their publics. The same message should be repeated and reinforced through various media and over time. Too-frequent repetitions seem unnecessarily redundant, but messages that are given only infrequently often fail to build awareness.

Your decision here is about how much and how often to communicate. If you are not sure, err on the side of too much (because it's almost impossible to communicate too much).

Planners also develop timelines of tasks, often working backwards from a key implementation date. For example, if a brochure is to be mailed by June 1, it may need to be received from the printer by May 21, with time remaining to add address labels and prepare it for mailing. To achieve this, copy would have to be delivered to the printer May 15, final copy approved May 10, first copy draft completed May 1, writing and design work begun April 15, and approval for objectives and budget by April 7. Thus planning would need to begin no later than April 1.

Campaign Budget

Identifying resources needed for each tactic is an important part of the implementation stage. At every turn of the planning process, you need to be practical. Consider budget constraints and limitations so the recommendations will be realistic, practical and doable.

Budgeting is about more than money. It deals with all needed resources, including personnel, material, media costs, equipment and facilities, and administrative costs. Here's how each category factors into the final budget.

Personnel items in a budget include the number of people and the amount of time needed to achieve the results expected of the tactic and the cost of this. Include both organizational and outside people (consultants, agency staff, subcontracted specialists and freelance workers). Make sure to account for salaried public relations staff within the organization. Though they may already be on salary, the value of their time associated with each particular tactic should be included in the full campaign budget.

Material items in a budget are the tangible "things" associated with each tactic. This may be paper for brochures, banners and food for an open house, media kits for a news conference, software for an online newsroom and so on. Each of these carries a price tag. A good budget itemizes each separately, allowing planners to make adjustments if the total cost estimate comes in over the expected budget.

Money needed to purchase time and space for advertising is part of the **media cost**. These costs are set by the publication, station or other advertising venue. The basic cost (such as the per-column-inch rate in newspapers or the per-second cost for air time) varies as placement frequency increases.

Budgets often include a 15 percent surcharge as a commission or agency fee or to cover in-house overhead expenses. Public relations agencies sometimes bill all out-of-pocket expenses at cost plus 15 percent.

There also may be costs for **equipment and facilities**. This budget category includes the cost of new computers or scanners needed for a newsletter, for example, or software to create a blog. Because these often are one-time expenditures, they might be calculated on a percentage basis to amortize the cost

over potential uses after this campaign is completed. This category might also include expenses such as transportation fees for a portable outdoor stage or the cost of leasing a banquet hall.

Finally, **administrative items** also are included in the budget. These include the cost of telephone, delivery, photocopying and travel costs. Some organizations add a 15 percent surcharge to cover standard office expenses, often with a separate category for travel-related costs.

Make sure to include the **full cost** of all the tactics, even if some do not have a specific price tag. Note donated or contributed services, such as the value of volunteer time. Also figure financial support that nonprofit organizations sometimes receive, such as support from a corporation that offers to print its brochures, discounted consulting fees, or the actual cost of a video production that is produced pro bono by a media sponsor.

Also, try to provide a **range of costs** for tactics. This will help if the organization needs to trim costs. Rather than eliminate entire tactics, a cost range might allow the organization simply to choose some less-expensive options. For example, you might cost out a brochure for both one color and full color.

Finally, determine just how much success is necessary. Calculate this as the **break-even point**. Identify the total project cost; determine the dollar value for each desired outcome; and divide the total cost by that value. Let's say a private college will spend \$160,000 of its recruiting budget for brochures, an informational video, paid radio commercials and billboards. Let's add \$10,000 for salaries and freelance fees associated with the projects. Add another \$10,000 for postage, travel, and other administrative costs. That's \$180,000 for the total project cost.

Now let's presume that tuition at this college is \$35,000. Apply the formula: cost \$180,000 divided by outcome value \$35,000 equals five-plus. That's the break-even point. Thus the brochure/video/commercial/billboard program has to recruit six new students just to pay for itself. After that, the income is profit.

Another useful tool is the **per-capita cost**, the total cost associated with the number of people needed to cover that cost. Using the college scenario, divide the project cost by the number of new recruits (let's say that's 1,600). Apply the formula: \$180,000 divided by 1,600, which equals \$113—the amount of money the college spends to recruit each new student through these tactics. That's about a third of a penny for every dollar received in tuition.

Developing a Long-Term Budget for Public Relations

Budgeting is more than merely adding up the costs of various tactics for specific projects. It's part of the strategic management of an organization.

The question often comes up: How much should an organization spend on public relations? There is no simple answer, no one-size-fits-all formula. That's because so much depends on variables: the nature of the issue being addressed, the current relationship of the publics, the objectives sought, the tactics employed and so on.

Here are some various approaches to budgeting for public relations:

- **Competitive Parity.** This approach bases the budget on the level of similar activity by major competitors. Hospital A may set its budget for attracting new patients by matching the apparent budget of neighboring Hospital B. That involves guesswork, and it doesn't take into account the varying circumstances of each hospital.
- **Same-as-Before Budgeting.** This approach looks at how much the organization spent on a similar recent project and allows the same budget, perhaps adjusted for inflation. This presumes the first project was successful and worth imitating. It also assumes that the two projects are similar enough for the first to be a benchmark for the second.
- **Percentage-of-Sales Budgeting.** Drawn from marketing, this approach uses a percentage of income. For example, a university may earmark 2 percent of this year's tuition for next year's

recruitment drive. The problem is, this can create a downward spiral. If recruitment was weak last year, probably more effort at more cost is needed, not less as this approach would provide.

- **All-You-Can-Afford Budgeting.** This approach works best in good times, providing more resources when the organization's financial condition is stronger. Again, the real need may call for just the opposite, more funding when the organization is weak.
- **Cost-Benefit Analysis.** A budget based on this approach identifies the cost of implementing each tactic, and then compares this to the estimated value of the expected results. If an animal-protection group trying to raise \$500,000, for example, calculates that spending money on social media could yield the same results as a more expensive TV advertising campaign, it would make sense to go with the social media approach.
- **What-If-Not-Funded Analysis.** This approach forces the planner to look at expected outcomes and to consider alternative ways to reach the same objective, or to re-think the relative priority of the objective in light of limited available funds.
- **Stage-of-Lifecycle Budgeting.** This approach looks closely at the phase of development of the issue. Starting new programs, for example, generally requires more financial resources than maintaining existing programs.
- **Zero-Based Budgeting.** This technique is rooted in current needs rather than past expenditures. Each tactic is ranked according to its importance. The cumulative cost of the tactics is calculated, and a cut-off line of a predetermined budget indicates the point at which the client or organization has run out of money. The disadvantage of this approach is that it allows pre-set budgets and calculators or computer formulas to determine what tactics can be undertaken, though an advantage is that zero-based budgeting can serve as a catalyst in re-evaluating priorities.

All of the above approaches to budgeting have problems. Some are arbitrary. Some fail to consider important variables. Some don't provide a way to rework a budget when the total is too high. But there is another way to budget that respects the decisions and priorities already made in part of this planning projects.

This approach, more enlightened for public relations planning, is called **objective-based budgeting**. By focusing on objectives, this objective-based budgeting deals with already identified needs and goals. It aligns with decisions already made by the organization or client, building on the consensus check that concludes Step 4.

Because the tactics simply provide ways to achieve what already has been adopted as the objectives, the cost of these tactics is not seen as additional budget items for the organization. Rather the budget is an extension of these prior strategic decisions (and the implicit commitment to paying for them).

This suggests that the organization will assign needed resources to carry out tactics needed to achieve those objectives and the tactics that subsequently will impact them. Or the organization may need to scale back objectives. Either way, objectives-based budgeting puts the responsibility on the organization or client to establish objectives that it will support with appropriate tactics.

Worksheet for Step 8

In this step, you develop the creative theme that pulls together each of your proposed tactics and packages them in an effective way for both dissemination of information and eventual measurement of their impact.

Here are the basic questions for this worksheet:

5. **What is the creative theme that links all the tactics?**
6. **How will be tactics be packaged?**
7. **What is the schedule for implementing the plan?**
8. **What is the budget for each tactic?**
9. **What is the total budget, both its full value and its actual cost to the organization?**

Planning Example for Step 8

G^X will present a comprehensive program focused on each of the three key publics identified in Step 3: Young professionals; businesses, nonprofits and professional organizations; and media. It will unfold as a year-long program for the upcoming calendar year.

Public: Young professionals

1. **Seminars.** G^X will solicit invitations from area businesses and nonprofit organizations for client-site seminars. These will take G^X speakers to the workplace of young professionals and graduating university seniors who have expressed an interest in the exchange program. Presentations with video or PowerPoint will include extensive question-answer period.
Time: Six to be scheduled in consultation with businesses.
Cost: No cost
2. **Golf Tournament.** G^X will sign on as a sponsor for a local golf tournament marketed primarily for junior and mid-level business professionals. This will allow G^X to be part of a leisure activity involving members of this key public.
Time: May.
Cost: \$3,000 value (\$1,500 sponsorship fee; \$1,500 hors d'oeuvres) [May be no cost; board members will seek corporate underwriter]
3. **Invited Informational Presentation.** G^X will solicit invitations to provide speakers for business-civic organizations with significant proportion of young professionals. This will provide opportunities to discuss exchange opportunities and benefits in venues with young professionals who are actively seeking for ways to enhance their professional lives.
Time: Varies; Rotary International, March. Urban League Young Professionals, July. Jaycees, October.
Cost: \$300 for handouts and miscellaneous costs
4. **Self-sponsored Informational Presentation.** Similar to the invited information presentations, G^X will sponsor a public presentation for young professionals who may not be part of an organization and graduating university seniors.
Time: November.
Cost: \$800 value for venue (may be no cost; board members will solicit site from participating organization) \$100 for handouts and miscellaneous costs

Public: Businesses, nonprofits and professional organizations

1. **Progress report** G^X will research, write and publish a progress report, with emphasis on the past year and current activities, with a summary of the organization's 25 years.
Time: January
Cost: \$1,000 for 500 copies (May be no cost; board members will seek corporate underwriter). \$100 distribution cost.
2. **Anniversary luncheon.** G^X will invite approximately 250 current and past corporate representatives and exchange "alumni" to a luncheon, with an expected turnout of 150. The

luncheon will commemorate the 25th anniversary of the business exchange program.

Time: February

Cost: \$4,000 for food; \$500 entertainment; \$1,200 value for venue rental (no cost if luncheon/meeting space can be successfully solicited from participating corporate sponsor)

3. **Survey.** G^X will conduct a survey on attitudes and opinions of area leaders in business, nonprofits, higher education and government on the value of international insight and experience among professional employees. Board members will be asked to identify a researcher from a local business or university to do the survey pro bono.

Time: July-September

Cost: Pro bono \$4,000 value; \$100 in miscellaneous actual cost to GX

Public: Media

1. **Editorial board meeting.** G^X will solicit invitations from the local metropolitan daily newspaper and from the weekly business newspaper to meet with reporters and editors to explain the organization's work and the benefits it offers to the local community
Time: n/a
Cost: \$100 for leave-behind materials
2. **News release.** Various topics including survey report, golf tournament, progress report, anniversary luncheon, upcoming public events and corporate/organizational presentations, application dates for exchange programs, and other relevant topics of newsworthy activities.
Time: Varies
Cost: No cost
3. **Story idea memo.** G^X will provide ideas for interviews and feature stories to reporters at the local metropolitan daily newspaper, weekly business newspaper, business radio programs, and television newsrooms.
Time: April, September
Cost: No cost.
4. **Feature release.** G^X will write and disseminate feature releases about area young professionals who are returning from an exchange visit. Following direct distribution to news media, feature releases will be posted at G^X website.
Time: Varies
Cost: No cost
5. **Guest editorial.** G^X will solicit an invitation from the local metropolitan daily newspaper to write a guest editorial on the advantages that international exchange activities offer to local businesses. Following publication (or if publication is denied) G^X will post the editorial at its website.
Time: Varies
Cost: No cost

Communication support

1. **Progress report.** See above.
2. **Website.** G^X will enhance its present website with a relaunch for its 25th anniversary. The new website will add a media/information page that will house contact information, news and feature releases, editorials and other opinion matter. The site also will catalog all past exchange programs with names of companies/organizations and individual participants (with some testimonials), as well as a current list of exchange opportunities.
Time: April, with continual updates
Cost: \$600 value. No cost to organization (board members will solicit pro bono web designer from participating organization to work with G^X staff on website project)
3. **Video.** G^X will invite a local university class in public relations production or broadcast documentary production to create a video of 7-10 minutes to showcase the organization's

exchange programs. This video will be posted at the G^x website as a YouTube video and will be used in speeches and seminars sponsored by G^x.

Time: January-March

Cost: Pro bono \$5,000 value; \$200 actual cost

4. **Newspaper advertising.** G^x will purchase a 2x4" ad in the weekly business newspaper to invite participants to its self-sponsor public presentation on the exchange program.

Time: November

Cost: \$1,600 value; actual cost \$1,080 with nonprofit/educational discount

5. **Radio advertising.** G^x will purchase a six-day run of 30-second announcements on the top-rated business program on local radio to promote its self-sponsored public presentation on the exchange program.

Time: November

Cost: Pro bono \$200 value for production; radio station will donate this at actual cost; \$600 value, with actual cost of \$425 with nonprofit-educational discount

Budget Total

- Value: \$23,310
- Actual cost to organization: \$11,815-\$22,935 (representing a 2 percent to \$49 percent saving) depending on board success in obtaining personnel and sponsorships from participating organizations