

INSTITUTE FOR PUBLIC RELATIONS FIVE-YEAR STRATEGIC PLAN

Adopted by the Board of Trustees, November 8, 2007

PROFESSIONALISM IS A BRIDGE

The Institute for Public Relations' previous long-term strategic plan, adopted in 2004, was intended as a five-year plan. We substantially accomplished the objectives set forth in that plan in about half that amount of time. Thus, the Board of Trustees decided in 2006 (our 50th anniversary year) that it would develop and approve a new long-term strategic plan in 2007.

This new round of strategic discussions has validated the directions of 2004 and resulting progress. The Trustees have confirmed that *the science beneath the art of public relations*TM continues to capture our purpose. We serve by building research-based knowledge in our field and mainstreaming such knowledge into practice and education.

The discussions clearly indicated that we have energy and appetite to take this endeavor to the next level. But everyone agrees, we should proceed with ambitious new undertakings only with careful thought and strong Board support.



In the process of these discussions, a new central metaphor has emerged for what the Institute does best. We are a **bridge** that connects practitioners at the most senior level with respected academic scholars. Through senior practitioners, our knowledge resources reach high performing mid-career practitioners and even down to entry level. Through top professors, we reach other academics, graduate and undergraduate students.

The bridging metaphor applies in many ways. The Trustees have spoken of bringing research into practice, even as the practice informs researchers on what is most needed and relevant to working professionals and the business of public relations. The Institute can also bridge world regions, countries and cultures while improving the practice of public relations internationally. We have spoken of bridging various "tribes" of academics who approach communications and public relations from different perspectives. We can even reach outside the profession to build broader business and societal knowledge of public relations and the value it produces.

A bigger, more visionary board has produced bigger, more visionary ideas. This plan seeks to capture those ideas that have most potential and are doable. The plan will also include a reasonable estimate of overall resource requirements.

From 2004 to 2006, we nearly doubled total audited revenues and net assets. We have grown staff from 1.5 headcount to 2.5 – still very small for all that the Institute does. Elements of a rough business plan for appropriate growth are incorporated in this plan, but the Board recognizes that we manage our financial position year by year. No spending will occur without revenues to support it. The specifics will be articulated for Board approval in our annual operations plans and budgets.

Thus, this long-term strategic plan should be considered directional in nature, not an authorization to start spending money that has yet to be raised.

Let us further acknowledge that our relationships are a critical resource. We seek to continue working in partnership with the widest possible range of respected organizations. This includes professional and educational associations, universities and media. Ours is not a membership-based model. We are not competing with other organizations in that sense. The Institute believes it can work with any of these organizations and associations because our position benefits all and threatens none.

All of which is yet another manifestation of our bridging role and philosophy, as captured in the following mission statement.

OUR MISSION AND DECISION-MAKING PRINCIPLES

As an independent nonprofit dedicated to *the science beneath the art of public relations™*, the Institute for Public Relations bridges the academy and the profession, supports PR research and mainstreams this knowledge into practice through PR education.

To support the continued growth of the profession through this mission, program decisions will be based on the following principles:

- The research-based knowledge that we support (through funding, publication and recognition) must adhere to accepted criteria for scientific inquiry in the social sciences and address questions of manifest importance to the public relations profession.
- Our educational programs focus on mainstreaming research-based knowledge into practice. These programs primarily serve the needs of senior level practitioners (high performing, mid-career), and senior academics and their protégés, all of whom need the richer content that the Institute provides.
- When considering programs that involve payments to outside parties (researchers, instructors, etc.), our first preference will be to focus Institute monies on covering actual out-of-pocket costs. Next, we will consider reasonable stipends when appropriate to academics involved in our research and education programs. We strongly encourage practitioner involvement on a pro bono basis wherever that is possible and consistent with the aims and resources of any given project.
- All educational programs should be financially viable (i.e., more than cover their specific costs) within a reasonable period of time. This implies a robust market for the offering, an acceptable level of financial risk for the Institute, and careful management of both revenues and expenses to ensure a positive bottom line.

CONTINUING PAST SUCCESS WHILE INVENTING THE FUTURE

The focus of this plan is on the challenging new priorities and initiatives that have emerged from the Board's strategic thinking. But this focus on new initiatives should *not* be read as denying the importance of many core programs that are both strategic and successful. We must continue to do these well.

For the convenience of the Board of Trustees and others interested in our strategic plan, the overall goals from the 2004 plan – still entirely valid – and the ongoing programs are summarized next.

Research Goal: To establish the Institute as a widely recognized leader in continuously expanding the frontiers of the professional body of knowledge in public relations through a defined mix of original work, research that we encourage or catalyze, and work that we discover and publish through our portal.

Educational Programs Goal: To mainstream the body of knowledge, providing opportunities and resources to help current professionals get better grounded in the science beneath the art of public relations.

Education-Industry Affairs Goal: To mainstream the body of knowledge by enhancing relationships between the academy and the profession, supporting undergraduate and graduate education, and helping to ensure a robust supply of new professionals who are well-grounded in the science beneath the art of public relations.

Other 2004 goals in the areas of marketing, financial, and Board/volunteers/staff were enablers supporting the three programmatic goals above. Given the Institute's growth and success over the past three years, the enabling goals need a thorough revision. That will follow the summary of continuing programs and the description of new strategic initiatives as the leading edge of what the Institute hopes to accomplish over the next five years.

EXISTING PROGRAMS THAT WILL CONTINUE

1. Use the Institute website, blog and e-newsletter as the centerpieces of our free dissemination of research-based knowledge, communicating key findings in ways that practitioners find helpful. Support these with additional audience outreach through trade articles and presentations to professional audiences in North America and abroad.
2. Continue Commission models for measurement and evaluation, international public relations, organization communications; plus other panel-directed research thrusts into diversity and public relations practice, new technology and public relations, and credibility/trust/ethics. Stay focused on big-picture research that is breakthrough and predictive in nature.
3. Present at least five Institute for Public Relations Forums annually for high-performing mid-career professionals – filling gaps in the leadership competencies of those destined to be the future leaders of public relations.
 - Public Relations Executive Forum (corporate only, presented with the Page Society).
 - Public Relations Leadership Forum East (agency and corporate, presented with the Council of PR Firms and the Page Society).

- Public Relations Leadership Forum West (extending our reach to more West Coast practitioners, also with the Council and Page).
 - Summit on Measurement.
 - Summit on Corporate Communications (with the Page Society and perhaps the Council going forward).
 - In-house seminars (to be opportunistically pursued when there is demand and our resources can accommodate it).
4. Provide enabling support, financial management and awards for the International Public Relations Research Conference, now established as the premier conference for academic research in public relations (and another example of our bridging role, since practitioners also participate).
 5. Continue the traditional Annual Distinguished Lecture & Awards Dinner in New York, and the International Distinguished Lecture event in some years at suitable international locations.
 6. Present “The Reputation Conference” each fall with Henley Management College and *PRWeek-UK* as a centerpiece of our international outreach.
 7. Utilize a stable of high-profile awards to encourage and expand the body of knowledge, including: the Ketchum Excellence in PR Research Award, the Pathfinder Award (for a leading academic), the Northwestern Mutual Best Master’s Thesis Award, the Jack Felton Golden Ruler Award (for excellence in research, measurement and evaluation), the Big Apple Best Use of Research, Measurement and Evaluation Award (with PRSA New York), and the Case Study Competition that the Institute co-sponsors with the Arthur W. Page Society.
 8. Amplify the voice of profession to influence the direction of public relations education through:
 - Participation on and enabling support for the Commission on Public Relations Education.
 - Annual networking event at the conference of the Association for Education in Journalism and Mass Communication.
 - Support – and with that, also have the opportunity to shape for the future – the continuation of the annual academic/professional symposium that began at the Tuck School with the Arthur W. Page Society in 2006 and 2007.

HIGH-PRIORITY NEW STRATEGIC INITIATIVES

The Institute intends to pursue eight major new initiatives, presented here in three broad categories: international; building/mainstreaming research-based knowledge; and spokespersonship.

International

1. Convocation of senior professionals in Europe.

Our most notable international successes in recent years (the International Distinguished Lectures and the Henley events) have all been in Western Europe, which gives rise to a bold proposal from the International Committee of the Board. European senior professionals are without organizations comparable to the Institute, the Page Society or the

PR Seminar. We have an opportunity to help create this high-quality community by focusing on issues they care about.

We might start with a small, hosted gathering of senior professionals/academics and Institute Trustees (perhaps a quarter of these should come from the US, thus creating a bridge in the very composition of the meeting). The venue may be provided by a corporate philanthropy department interested in furthering knowledge, exchange and progress on specific issues. We might also consider “piggybacking” on the Henley event.

The intent is to provide a “safe space” for an authentic and broad discussion of corporate reputation issues. It shouldn’t be just PR people talking to PR people. We will seek to engage CEOs, other top officers and high potential managers from participating companies. Possible topics might include:

- Reputation as it relates to corporate strategy, the needs of the new era CEO and corporate board.
- Environmental and food issues.

The best way to credibly reach European business leaders may be via top European business schools. The academic/professional bridge is taken seriously in Europe. We should look to the likes of IMD, INSEAD, St. Gallen, London School of Economics, and London Business School – institutions to which major corporations send their rising stars for executive education.

After reaching the senior professionals, we may follow up by creating a next generation PR leaders program in Europe, with appropriate interaction with next generation leaders from North America and elsewhere in the world.

2. **Other international partnerships to build presence beyond Western Europe.**

By standardizing learning, we can help create a more predictable playing field in international public relations. The Institute will pursue a model where others take the risks and we provide content, thus expanding our reach while at least covering our costs. We will look for PR association partners as well as business organizations, business schools, major companies with development needs.

We will also encourage international speaking invitations where travel expenses are covered, reaching audiences around the world and tracking subsequent interest and interaction with the Institute.

Building/Mainstreaming Research-Based Knowledge

3. **Institute Research Fellows.**

A Board proposal will be developed for an exclusive group of IPR Research Fellows with international reputations built on their expertise in academic and practitioner research. This group would guide the total Institute research program, bringing to life the promise of our mission and decision-making principles – that the basic and applied research we support must adhere to accepted criteria for scientific inquiry in the social sciences and address questions of manifest importance to the public relations profession. The influence and credibility of these Research Fellows would be leveraged as a primary driver to enhance the breadth and the resources of the Institute’s research program.

4. **Research matrix/clearinghouse.**

The Research Committee, which has included not only Institute Trustees but also representatives from other PR organizations in North America and abroad, produced the first iteration of this matrix/clearinghouse project in 2007. The intent is to publish the results, encourage other parties to contact us with additions, and expand the report on an ongoing basis. We also hope to use this clearinghouse function to help generate partnerships on research projects of mutual interest.

5. **Essential Knowledge Project.**

While the ultimate dimensions and style of this initiative remain unknown at this time, the Board agrees that it has the potential to “become the Institute.” By providing a portal to research-based knowledge across our field – and “translating” this knowledge to make it applicable for a broad range of practitioners (and scholars and students as well) – this could well become the centerpiece of *all* Institute programming. But to find a practical path to that goal without putting the survival of the Institute itself at risk (the commitments could be that large), we will:

- Create an incremental “resource light” pilot that will allow us to demonstrate in prototype what this project can deliver.
- Include a capability that allows users to rate the knowledge, providing feedback to the expert editors and contributors as to what is most useful.
- Tee up a decision on whether to add a headcount specific for these duties is appropriate, or whether some other model (such as a selection of paid part-time academics and professionals to serve as expert editors would) make better use of the resources.
- Build on the already committed funds to have financial support ready to proceed when the prototypes have sufficiently demonstrated the viability of the project.

6. **Consider opportunities for more involvement in “PR operations research.”**

The Institute’s research focus in recent years has been true to our mission of *the science beneath the art of public relations* – and there it will remain. However, as resources allow, we may also want to address “operational” research, relating to better management of agencies and corporate public relations departments. We will consider this in situations where there are gaps in what is available from other sources, and where the issues are connected to the effective use of research-based knowledge.

Since this will not be our primary area of research, the opportunity must be carefully vetted, cost-effective – and funded. Thus, we will emphasize partnerships for this kind of research.

Spokesmanship and Outreach

7. **Reaching the campus through a formal guest lecture program.**

Institute Trustees make volunteer pilgrimages every year to college campuses around the US and the world, serving as guest lecturers. But we have not had an organized program of identifying Trustees (and perhaps other senior speakers) who are willing to do this, the topics on which they’d like to speak, the schools most worthy of (and needing) their help, and the preparation they may need to be fully comfortable and effective in this role. To accomplish this, the Institute will establish a Trustee-led program to:

- Identify subjects where Trustees are comfortable describing a framework (theory) and sharing their own experiences/cases (practice).

- Fill identified needs for classroom speakers on topics including crisis communications, IR, budgeting, the business of PR, why math/science phobia is no longer acceptable in our field.
- Provide volunteer guest lecturers with guidance/ templates on how to present for best effect in classroom.
- Offer to universities with respected public relations and corporate communications programs.
- Encourage schools to in turn educate the lecturer about how public relations is being taught on campus, so the learning will be two-way.
- Capture lectures and present with streaming video on website and as case studies/teaching modules available to educators.

8. **Reaching the profession and beyond.**

By now, the strategic importance of our policy of free distribution of research (e.g., through the website, the Institute blog, emails to our broad “friends and supporters” list, presence in trade media and professional conferences, etc.) is well demonstrated through the successes of the last five to 10 years. All this will continue.

But while speaking *to* the profession, could we also serve by speaking *for* the profession to broader audiences? That role is something that some Trustees believe is sorely missing from our field – an institution to take the lead in raising awareness across the business world and our societies of what it means to be a professional in our field. While there is no denying the risks of this undertaking – including getting “consumed by bad things” as one Trustee has said – the Institute may have fewer constraints than membership associations to serve as this spokesperson. Thus, we will begin cautiously by:

- Focusing on thought leadership and research-based knowledge, acting as an analyst who brings things to a higher level (our university ties help us in this regard).
- Staying out of commenting on a particular company’s situation while emphasizing best practices, research and broader themes.
- Picking issues carefully; using the marketing committee to focus on particular topics and conduct the outreach to major business and general media.

ENABLING RESOURCES AND EFFORTS

The above represent our continuing and new program initiatives, but they cannot happen without the energy and resources of our Board, staff and volunteers.

Structuring Board to fulfill ambitions

Having reached a Board size of 45, we will grow slowly now, expanding mainly for geographic and other types of diversity. We currently have no representation from Eastern Europe, Asia/Pacific, Latin America, Middle East or Africa, and little from the western US.

As Board terms expire, Trustees will be asked to confirm their commitment to the requirements of the role, especially if they have changed jobs since becoming a Trustee. Renewal should not be automatic, but we will not establish term limits. We want to retain excellent Trustees and Board stability over many years.

To increase Board engagement, we will explore using video-conferencing for Board meetings rather than telephone alone for Trustees who cannot attend in person. Agendas

will continue to be structured around strategic action items and research relevant to the Board.

While we want to continue developing a Board of the highest level in the professional and academic worlds, we also want to engage more young leaders. This will help us (along with our Forums and other activities) to communicate our messages to an up-and-coming group. Trustees are encouraged to ask their immediate subordinates to serve on Institute committees, commissions or panels. Some Board meetings may be structured so that Trustees may bring their second-in-command as a developmental opportunity.

Finally, the Board wishes to continue conducting an annual performance review each year where each Trustee does a self-appraisal of his/her performance in Trusteeship as well as of the Board's and Institute's performance as a whole.

Structuring staff to fulfill ambitions

The Trustees have suggested building a staff as large as five (currently 2.5) over the planning period. The five would include these positions:

- President and CEO
- Director of Development
- Full-time administrative staff person
- Essential Knowledge Project leader
- Program director

The approval of this long-term strategic plan is considered directional only, not authorizing an increase in staff at this time. We will expand staff only as resources allow, as approved in annual operations plans and budgets.

As the Institute staff and programs grow, the organization may need its own offices. When and where are open questions.

The Governance & Audit Committee has responsibility for succession planning for the staff, and other Trustees may want to participate in such discussions as well. This should be given the highest priority, since we have little or no back-up capacity for critical functions at this time. Also under the Governance & Audit Committee's leadership, the Board will conduct a yearly written performance review on the performance of the CEO and staff.

CONCLUSION AND COMMITMENT

To recap the major new initiatives that this five-year strategic plan adds to the successes achieved based on the 2004 plan, they are:

International

1. Convocation of senior professionals in Europe.
2. Other international partnerships to build presence beyond Western Europe.

Building/Mainstreaming Research-Based Knowledge

3. Institute Research Fellows.
4. Research matrix/clearinghouse.
5. Essential Knowledge Project.
6. Consider opportunities for more involvement in "PR operations research."

Spokesmanship and Outreach

7. Reaching the campus through a formal guest lecture program.
8. Reaching the profession and beyond.

We do not seek increased resources in the coming years for the sake of growth absent strategy. All essential resources – Board, staffing, volunteers and funding – must be developed and directed toward the accomplishment of our strategic goals.

As a new Institute ad says, “Professionalism is a bridge.” The Institute for Public Relations must continue to lead, as an independent nonprofit organization that seeks to provide a bridge between theory and practice, academics and practitioners.

For everyone who shares our belief that this is critical to the professional standing of public relations, there is work to do. The Board of Trustees and the staff stand ready to do it.