Qualitative Methods for Assessing Relationships Between Organizations and Publics

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In a report published previously by the Institute for Public Relations, Linda Hon and I reviewed research showing that public relations contributes value to an organization when its communication programs result in quality long-term relationships with its strategic publics—also known as stakeholders.[2] To make it possible to demonstrate that a public relations function has value to a particular organization, we developed and tested quantitative measures of the characteristics of relationships that could be used in survey research. We identified two types of relationships and four relationship outcomes that we believe define the quality of long-term relationships. We then developed statistically valid and reliable indicators of these characteristics of relationships. These indicators can be measured periodically to monitor the overall effect of public relations programs on each strategic public and, therefore, the value that the public affairs function has to an organization. The purpose of this paper is to report qualitative methods of observing and evaluating relationships that could be used in focus groups and depth interviews.

Definitions of the Relationship Indicators

Communication researchers and psychologists have identified many characteristics that describe the nature of a relationship and the outcomes of relationships. Our list of variables is by no means exhaustive, and there are other indicators of good relationships. However, our research to date shows that these indicators provide a good measure for evaluating relationships.

In the psychology literature on relationships, we identified two types of interpersonal relationships that also can be used to assess the relationship between an organization and a public. In an **exchange relationship**, one party gives benefits to the other only because the other has provided benefits in the past or is expected to do so in the future. In an exchange relationship, a party is willing to give benefits to the other because it expects to receive benefits of comparable value from the other. In essence, a party that receives benefits incurs an obligation or debt to return the favor. Exchange is the essence of marketing relationships between organizations and customers and is the central concept of marketing theory. However, an exchange relationship usually is not enough for a public. Publics expect organizations to do things for the community and their stakeholders for which organizations sometimes get little or nothing in return—at least in the short run.

In a **communal relationship**, in contrast, parties are willing to provide benefits to the other because they are concerned for the welfare of the other—even when they believe they might not get anything in return. The role of public relations is to convince management that it also needs communal relationships with publics such as employees, the community, and the media. Public

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[2] Linda. C. Hon and James. E. Grunig, *Guidelines for Measuring Relationships in Public Relations.* Gainesville, FL, The Institute for Public Relations, Commission on Public Relations Measurement and Evaluation. The report is available online at http://www.instituteforpr.com/measeval/rel_p1.htm.

relations professionals add value to an organization when they develop communal relationships with all publics affected by organizational behaviors—not just those who give the organization something in return. Communal relationships are important if organizations are to be socially responsible and to add value to society as well as to client organizations.

This is not to say, however, that exchange relationships are bad for an organization or that public relations professionals do not attempt to develop them. Relationships often begin as exchanges and then develop into communal relationships as they mature. At other times, public relations professionals may need to build a communal relationship with a public before an exchange can occur. Nevertheless, a measure of the degree to which a public believes that it has a communal relationship with an organization is perhaps the purest indicator of the success of the public relations management function.

Researchers also have identified many characteristics that define the quality of relationships. Researchers at the University of Maryland have isolated four of these from the literature that we believe are especially important. Of the four, however, our research suggests that indicators at the top of the following list are the most central to both organizations and publics when they evaluate the quality of a relationship and that the importance of the characteristics declines as we move down the list:

- **Control mutuality**—the degree to which the parties in a relationship are satisfied with the amount of control they have over a relationship. Although some degree of power imbalance is natural in organization-public relationships, the most stable, positive relationships exist when organizations and publics have some degree of control over the other. One party may be willing to cede more control to the other, however, when it trusts the other—the next characteristic.

- **Trust—**the level of confidence that both parties have in each other and their willingness to open themselves to the other party. Trust is a complicated concept, which has several underlying dimensions. We believe three are particularly important. One of these is integrity, the belief that an organization is fair and just. A second is dependability, the belief that an organization will do what it says it will do. A third is competence, the belief that an organization has the ability to do what it says it will do.

- **Commitment**—the extent to which both parties believe and feel that the relationship is worth spending energy on to maintain and promote.

- **Satisfaction**—the extent to which both parties feel favorably about each other because positive expectations about the relationship are reinforced. A satisfying relationship occurs when each party believes the other is engaging in positive steps to maintain the relationship.

From Quantitative to Qualitative Assessments of Relationships

In the previously published document, we developed quantitative indicators of these two types of relationships and four indicators of the quality of relationships and tested them for validity and reliability. These measures can be used in questionnaires for survey research and other types of quantitative research. There are many situations, however, in which it would be better to assess a relationship using qualitative methods. Relationships cannot always be reduced to a few fixed-response items on a questionnaire. Or, one might want more detail on the nature of the relationship and more insight from members of publics and management on why they have described the relationship as they have done. Qualitative methods, for example, would be most useful for research with leaders of activist groups, government officials, or journalists who might not respond to a questionnaire or from whom more depth information can be gained. With qualitative methods, the researcher also knows who the participants in the research are, which is usually not the case with survey research. The researcher also can develop a better relationship with the research participant with qualitative methods, which usually means the participant will provide a more candid assessment of the organization-public relationship.

The most common qualitative methods that could be used for assessing relationships are interviews and focus groups. Both help public relations professionals grasp what motivates people and explain what people think and do in their own terms. With **interviews,** public relations professionals or researchers working for them interview community leaders, activists, journalists, government officials, or other key stakeholders formally or interact with them informally. Principles of rigorous qualitative interviewing can be used to plan and analyze these interviews. Public relations professionals also use **focus groups** to gain insights from publics and that can serve as a basis for program planning and policy making. Focus groups consist of 6-12 participants who discuss a topic in depth, guided by a trained facilitator. Discussion builds from the general to the specific—gradually focusing on the issue of concern. Focus groups are perhaps the most useful form of formative research because they make it possible for participants to build synergy with each other and develop an interactive view of a relationship, a view that is closer to the way members of publics actually behave in the real world.

A Qualitative Instrument for Assessing Relationships

To facilitate the use of qualitative interviews and focus groups to assess relationships, researchers at the University of Maryland have developed procedures and questions to gather information about the type and quality of relationships. These qualitative questions reflect the same dimensions and operational definitions of the relationship indicators as the quantitative questions and can be used as the basis for an interview protocol or moderator guide for a focus group.

For qualitative research, researchers have found that it is best to begin an interview or focus group by first asking participants what they know about the organization—to assess their knowledge of the organization and its reputation in their minds.[3] This general question will help you to understand why people assess a relationship in the way they do. Sometimes people will assess the relationship based on superficial, secondary information that they gain from others. At other times, their knowledge of the organization may be dated. And, at other times, they may have current and first-hand knowledge of the organization. After this question, you should ask a second general question about the relationship without mentioning the specific characteristics of a relationship. It is best to get participants to talk broadly about the relationship first. Usually, the participants discuss, in their own words, the same dimensions of a relationship that we have identified; and you can analyze what they say with the dimensions in mind. At times, though, participants may mention other aspects of a relationship we had not previously considered. Therefore, we recommend beginning an interview or focus group with what researchers call

[3] John Gilfeather of the RoperASW organization recommended opening a qualitative interview in this way.

"grand-tour" questions. These are broad questions that ask a research participant to talk about a relationship.

Please note that each of the questions we have developed can be used to assess a relationship from the perspective of a manager or other organization member or from the perspective of the member of a public. With qualitative methods, it is easier than with quantitative methods to assess and compare how both parties view the relationship. Thus, each of the questions listed below contains the words "(organization)(public)" in parentheses. This means that in each question, you should insert the name of the organization when a member of a public is being questioned and the name of the public (such as members of an environmental activist group) when a CEO or other senior manager is questioned.

We recommend starting with three grand-tour questions:

- Would you begin by telling me what are the first things that come into your mind when you hear the name of this (organization)(public). What else do you know about it?
- Do you feel that you have a relationship with (organization)(public)? Why or why not?
- Please describe your relationship with (organization)(public)?

The responses to the first question can be analyzed by placing the responses into categories. Look especially for the behaviors of the organization that participants recall, the products or services they associate with the organization, people or groups that they associate with the organization, and the attributes they associate with the organization. The responses to the second two questions can be analyzed using the dimensions of relationships or any new characteristics that emerge.

The researcher then should probe research participants about the six specific dimensions of relationships, unless the participants already have discussed them in responding to the grand-tour questions. The following specific questions can be asked to probe for the dimensions:

Control Mutuality

- To what extent do you believe that (organization)(public) is attentive to what (organization) (public) says? Why? Can you provide any examples that show (organization)(public) actually has taken (organization)(public)'s interests into account in its decisions and behaviors or that show it has failed to take those interests into account? To what extent do you feel you have any control over what (organization)(public) does that affects you? Why?

Trust

- Would you describe any things that (organization) (public) has done to treat (organization)(public) fairly and justly, or unfairly and unjustly? (*integrity*)
- Would you describe things that (organization)(public) has done that indicate it can be relied on to keep its promises, or that it does not keep its promises? (*dependability)*
- How confident are you that (organization)(public) has the ability to accomplish what it says it will do? Can you give me examples of why you feel that way? (*competence)*

Commitment

- Can you provide me any examples that suggest that (organization)(public) wants to maintain a long-term commitment to a relationship with (organization)(public) or does not want to maintain such a relationship?

Satisfaction

- How satisfied are you with the relationship that (organization)(public) has had with (organization)(public). Please explain why you are satisfied or not satisfied.

Communal Relationship

- Do you feel that (organization)(public) is concerned about the welfare of (organization) (public) even if it gets nothing in return? Why do you think so? How about (public) (organization)? Do you think it is concerned about the welfare of (public)(organization)? What has it done?

Exchange Relationship

- Do you feel that (organization)(public) gives or offers something to (organization) (public) because it expects something in return? Can you provide any examples that show why you reached this conclusion? How about (public) (organization)? Does (public)(organization) only want a relationship with (public)(organization) if it gets something in return? Can you provide examples of how this has happened in the relationship before?

Strategies for Cultivating Relationships

In addition to questions about the kind and quality of relationships, qualitative research makes it possible to ask probing questions about the strategies that a member of the public or the organization believes the other party has used to cultivate the relationship. Cultivation strategies are the communication methods that public relations people use to develop new relationships with publics and to deal with the stresses and conflicts that occur in all relationships. In research terms, they are the independent variables that affect the dependent variables (characteristics of relationships).

Since the value of public relations to an organization and society exists in the relationships developed with strategic publics, public relations professionals should develop *strategies to develop and cultivate relationships* and then measure the indicators of the *type and quality of a relationship* that result from these strategies. You can specify two types of objectives: process and outcome objectives. To specify *process objectives,* state the number and type of communication activities that you will conduct as a way of implementing your strategies to build and cultivate relationships. Then specify the type and quality of the relationship that you hope to achieve as *outcome objectives.* A public relations staff can monitor both process and outcome objectives to evaluate its communication programs—as long as research has established that the process objectives are likely to lead to the outcome objectives.

Most of the knowledge that public relations professionals possess has something to do with how to communicate with publics to develop and maintain a relationship with those publics. Not all strategies for developing and maintaining relationships are equally effective, however. Therefore, we must recognize that not all public relations strategies, techniques, and programs are equally likely to produce quality relationship outcomes. Public relations researchers have identified and classified the strategies that research has shown to be most effective. These are listed and described in the previous report published by the Institute.[4] Maintenance strategies that are symmetrical in nature generally are more effective than asymmetrical strategies. To be symmetrical means that the public relations professional communicates in a way that helps to balance the interests of both organizations and publics. To be asymmetrical means that the public relations staff strives for a relationship that benefits the organization and that it is not willing to change its behavior to improve the relationship. Usually, asymmetrical communicators try to convince the public that the relationship desired by the organization also is good for the public.

We have developed the following qualitative question to assess the maintenance strategies used by public relations professionals:

- Let's talk about things that (organization)(public) has done to develop and continue a long-term relationship with (organization)(public). These strategies to cultivate a relationship could be communication strategies, attempts to resolve conflict, or attempts to show concern for the interests of (organization) (public). Please provide as many examples as you can. Can you provide other examples of strategies that (organization)(public) or (public)(organization) has used that damaged the relationship?

Analyzing the Qualitative Data

When these questions are asked in an interview or focus group, the researcher must capture what the participants say as closely as possible. Usually, this is done with an audio tape recorder in an interview and a video recorder in a focus group. If neither type of recording is possible, then the researcher or a co-researcher must take extensive notes on what the participants say. A transcript can be made of the entire individual or focus-group interview, or the researcher can listen to the tape carefully and take notes. These transcripts or notes are the raw data for analyzing the relationships.

There are many methods for analyzing qualitative data. These methods can be found in a book written by Matthew Miles and A. Michael Huberman.[5] Most methods for analyzing qualitative data consist of looking for patterns in the results as well as idiosyncratic insights of individual participants. The qualitative researcher then organizes quotes as evidence to support the fact that the patterns exist or to show the nature of the idiosyncratic insight. In research on relationships, one would look for patterns or insights defined by the indicators of relationships we have identified. For example, a researcher might find that employees largely feel they have no mutuality of control with their employer, do not trust the employer, are not satisfied with the relationship with the employer, or feel no commitment to the employer. They might also believe the relationship is purely one of exchange in which they feel the organization has little or no

[4] See Hon and Grunig, cited in footnote 1.
[5] Matthew B. Miles and A. Michael Huberman (1989). *Qualitative Data Analysis: An Expanded Sourcebook* (2nd ed.). Thousand Oaks, CA: Sage.

communal interest in its employees. Some employees, however, might offer individual insights on why the relationship is as it is or how it can be improved.

At the same time, research participants generally will associate different cultivation strategies with different types and qualities of relationships. The pattern of relationships among cultivation strategies and outcomes will suggest which strategies should be emphasized and which should be discontinued.