# 2007 ACADEMIC SYMPOSIUM

## SUMMARY REPORT

May 22-23, 2007
Hanover, New Hampshire

---

**Background:**

This was the second Academic Symposium, hosted by the Tuck School of Business at Dartmouth College in Hanover, New Hampshire and jointly sponsored by the Arthur W. Page Society and the Institute for Public Relations. The twenty attendees included thought leaders from the academic community, as well as other leaders from corporations, agencies, the Institute and the Page Society. The objective of the Symposium is to consider a wide range of issues of interest to those involved with developing and presenting curricula in corporate communications, public relations and related fields in both schools of business and communication.

**Key Areas of Focus:**

At this year's Symposium, the group considered five principle areas; a summary of each is presented below.

**I. Credibility Trust and Ethics: How to Focus the Research**

For some time a task force organized by the Institute for PR has been considering the potential of pursuing academic research focused on the issues of Credibility, Trust and Ethics. The goal of such an effort would be to pursue a course of research to build and encourage more rigorous knowledge in these areas, with a special focus on the role played by the corporate communications and public relations profession.

Much of the discussion centered on the challenge we face in restoring our own credibility so that we are better prepared to assist our organizations and clients.

Many different related efforts are now underway: including the Page Society's collaboration with the Business Roundtable Ethics Center at the Darden School. Bill Nielsen has also been pursuing the topic of Values in the profession in several speeches and op-ed columns.

The discussion also focused on the relationship between brand and reputation and between promises and actions. A corporate brand is a promise; a positive corporate reputation is earned by delivering the promise in an honest consistent way through the actions of the organization. Communications practitioners are often thought of as being primarily involved in helping develop and disseminate the brand promise but less involved with the decision-making that affects how the company honestly delivers on the promise.

During the discussion, some suggested that we should consider utilizing simulation or experimentation methods as a component of the research. Others asked if there are meaningful existing metrics that can be used to assess existing levels of credibility and trust. Among the questions that should be considered are how we define trust; how it is established; on what basis it is developed; and what causes it to break down.

It was noted that the study of Ethics as an academic discipline is very well developed. It might serve us well to be up to date on their models and thinking as part of this research effort.

Among the potential audiences for the research findings, the following groups were mentioned: CEOs, directors and other C-suite executives; leadership in related disciplines such as advertising and marketing; influential thought leaders in the business community, and teachers, students and others in the academic world since this is a source for tomorrow's leadership.

The group reached the following conclusions:

- **We should focus the research efforts on trust as it relates to the corporate communications/public relations practice, since there are a large number of other research efforts that already focus on the general subject of trust in organizations.**
- **This research effort could possibly be connected to the Institute's Essential Knowledge Project, which seeks to capture and make accessible the current body of knowledge that relates to these subjects.**
- **The research should include a measurement component that can provide an assessment of the current state of trust of in our profession with key constituents.**
- **We should seek to identify partners who might be willing to collaborate on research of this nature. Likely candidates, in addition to the Page Society and the Institute, included the Public Relations Coalition, the Boston College Center for Corporate Social Responsibility, and the Public Affairs Council.**

**II. The Page Society Mission Task Force Report: The Authentic Enterprise**

Roger Bolton and Jon Iwata provided a summary of the Page Society Mission task force, the related CEO research, and the resulting white paper that will be released later this summer. The project is based on the foundation of the Page mission. The goal is to advance that mission by improving the understanding among CEOs, other C-suite executives and boards of the value of the Page Principles as they are practiced by organizations. The Page Mission Task Force began with a CEO survey and has developed a white paper on the evolving role of the CCO. The Page Society is also working on the Corporate Trust Project with the Business Roundtable Institute for Corporate Ethics.

The content will be used for additional opportunities for discussion around the issues of trust and the evolving role of the CCO in addressing these issues. The academic role in this rollout is not yet defined. Possibilities are conferences, seminars, etc. The group felt that the paper and related content will be useful to Page Society members to begin a discussion with CEOs and their peers in the executive team. They also felt it provided fertile ground for additional research within the academic community.

One of the questions that came from the discussion revolved around why the CCO role seems to be more dependent on the perception of the CEO as to the value of the function and/or its potential value to the organization. When a CEO change occurs, for example, the new CEO rarely if ever considers eliminating the role of the General Counsel, CFO or Senior VP of HR.  Yet in many cases, a new CEO will re-assign or diminish the role of the CCO if he or she doesn't believe the function is strategic in nature.

The group agreed there are many powerful thoughts in the white paper; and the underlying premises are quite powerful. They felt it is important to publish with the authenticity of the Page Society, and then provide useful versions that are tailored to specific audiences and needs.

Thought also needs to be given to how Page members receive this information and how well they are prepared to take it to their own organizations. It was noted that these ideas have been presented and discussed in other settings already and the responses so far would suggest that it can be presented by a large number of people, such as Page board members.

The group reached the following conclusions:

- **Agreement that the white paper and CEO research provide a powerful platform on which to build.**
- **The work needs to get attention beyond the usual constituents.**
- **Page Society members are a critical primary target audience.**
- **The paper could help in addressing the current lack of continuity that we see in the profession, both in the practical and academic worlds.**
- **We need to create a process for dissemination of the research in the academic community.**

## III. Revamping the Communications/Public Relations Curriculum

Rob Flaherty of Ketchum and Don Wright of Boston University led the discussion on this topic. The topic first emerged at last year's conference. The reality of a rapidly-changing world presents numerous opportunities for those in the Public Relations profession. But there are gaps in our current curriculum that will inhibit the ability of those entering the profession to make the most of these opportunities. Some of the gaps that were mentioned included those focused on enhancing business relationships; the development of magnet content; the use of storytelling; better understanding of context and multiple channels; planning and cross-platform writing.
Other areas where new skills are needed include: development of business insight; use of metrics; defining business imperatives; understanding influence and mutuality; and utilizing new networks.

It was also noted during the discussion that many of the leading academic programs in corporate communications and public relations are highly dependent on the individual department chair or dean in much the same way that some corporate communications departments are defined more by the individuals who lead them than by the value of the function itself.

There are thousands of graduates each year in PR and related communication majors, yet many are ill-equipped to enter the practitioner's world. The rapidly changing world of business and communication presents both opportunities and risks for the PR profession. The risk is that other disciplines such as marketing will seize the relationship-management function.

A comprehensive survey of both practitioners and educators was conducted to determine what those in the field felt were important components of the communications curriculum. The existing curriculum fared better than was expected. But this may or may not be meaningful. Some of the educators may be resistant to change because they aren't sure how they could change their existing approaches. They may also be more cognizant of the barriers, financial and otherwise, to adding new course areas. Some felt the existing survey may be too insular in that we were talking too much to ourselves in seeking opinions about what changes may be needed to better prepare new entrants to the field.

It was also observed that there is currently a wide disparity in curriculum needs between the Communication Schools and the Business Schools. Historically, most PR education grew out of journalism schools and was oriented more toward publicity. While that has changed at many institutions, some of the old stereotypes persist.

There is a resistance factor to change and a lack of cooperation between different schools in some cases. Some schools are encouraging students to utilize a dual major to address this issue. Some feel that a student who gets a finance degree along with a communications degree is better prepared than one who has a finance or communications degree alone.

There was also a discussion of the difference between undergraduate and graduate degrees and the requirements for each one. Public relations education is often a cash cow for the university. Many of the graduate students are coming from non-PR backgrounds. Some have one year programs and some have two year programs.

The group reached the following conclusions:

- **The data as presented didn't provide conclusive research-based answers to what is most needed in the current curricula.**
- **Some felt that additional research was needed, especially adding some other critical audiences.**
- **Several attendees suggested that we should not confine our consideration of this topic solely to the PR curriculum since many of the leaders in the field come from other academic disciplines.**
- **The outcome being sought by the research needs to be more clearly stated.**

**IV. Case Study Writing, Teaching, Judging**

Stephen Greyser of the Harvard Business School and Paul Argenti of the Tuck School led this discussion.

Greyser began by contrasting case studies with case histories (which are often mistakenly called case studies). A case history has a beginning, middle and an end. The outcome is known and it based on what actually happened in the case. It is often related by a practitioner based on that person's own experiences. A case study, by contrast, does not have a pre-determined outcome. Case studies are sometimes referred to as participant-centered learning, indicating the important role in the discussion played by the students. Case studies generally focus on key decision points. Excellent case studies reflect the complexities of real life where the correct decision is not so evident, or where there can be many more than one right answer.

Sources of cases include the field, public sources, so-called "armchair" cases (which are created simulations of reality), and student reports. To write a good case you need adequate funding, since it takes substantial funding to actually go to the site of the case and interview people. You also need access to key players in the case, a template based on best practices, and research and writing support to develop the case.

In developing a good field case it is important to gain the cooperation of the company at the center of the case. This can sometimes be done by promising confidentiality, using credible disguises for the company and the individuals involved (though this is often not practical), and gaining company permission (possibly with some defined limitations on use).

A really good case includes these questions:
- Is there a problem?
- Is there a decision to be made or an evaluation to be made?

- Is access possible to the company being considered and the key players?
- Is the information clear and sufficient for analysis?
- Is there analysis to be done by students?
- Is there a plausible argument…pro or con?

An appropriate teaching note for the case study includes a description of the purpose of the case, a synopsis of the case, study questions, a more comprehensive analysis (that can resemble a research paper), and related teaching plans that include the sequence, any pitfalls, a lesson board plan and addenda.

The current Page-Institute Case Study Competition criteria include:

- Purpose; relevance; timeliness
- Significance of business problem and the critical issues
- Balance, fairness absence of bias
- Factual/accurate nature
- Style, tone, quality of expression
- Quality of teaching note
- Quality of PowerPoint presentation

From the discussion, most felt that the takeaway from the case should be directly related to the Page Principles. Why should a case win if it can't be used in the classroom? One of the biggest problems is that the teaching note sometimes includes an analysis that isn't reflected in the case.

Another significant issue is that the current criteria for the business school cases and the journalism/communication cases are the same which most feel is not really fair. B-school cases tend to focus on business problems and outcomes. There is also a need for clarification of who is responsible for assisting the student in preparing the case. What is the role of the professor?

The group discussed the need to create a subcommittee to re-examine the criteria and consider creating two categories that are appropriate for business schools and journalism/communications schools.

The group reached the following conclusions:

- **In the writing of the cases, more value should be attached to field based sourcing than public sourcing.**
- **In teaching, a good case study needs to sustain the discussion well beyond the first 10 minutes; it should contain multiple layers of inquiry and decision-making.**
- **A task force from the Page Society and the Institute should revisit the existing criteria being used in the Case Study Competition, both for students and judges.**
- **We need more case studies that portray "real world" situations.**

- **There has also been a request for any data that indicates we are hitting the target with the case study competition. For example, do we track the number of downloads of cases from the Page Society website? Are there any other indications of actual use of the cases in the classroom or by Page members? Such information would be helpful in deciding what should happen with this program going forward.**

## V. Shared Objectives between Corporate Communications departments and PR Agencies

James Rubin of the Darden School at the University of Virginia led the discussion that centered on the presence or absence of shared objectives and goals between PR agencies and in-house departments. In the past decade, we have witnessed an increased focus on concepts such as corporate reputation, corporate social responsibility, corporate branding, and environmental reporting that may be moving us closer to a sense of shared objectives.

Others noted a proliferation of different organizational structures that follow the trends in corporate communications, such as “Vice President of Corporate Social Responsibility.”

The agency model has flaws in the sense that what most corporate communicators are seeking is “sage advice.” But what they often get are tactical ideas that generate billable hours for the agency. The goal of the in-house counsel is to work with the rest of the management team in pursuing the goals and objectives of the organization. The agency sometimes is supporting these same goals but often is more focused on growth and profitability of the agency itself. This is driven in part by increasing accountability to large communications holding companies.

More and more internal departments are moving toward a more fully-integrated model, managing multiple stakeholder relationships. The traditional agency relationship may not fit this new model.

Concepts of corporate branding and “CSR” go back to the turn of the 20$^{th}$ century. Consumer movements and consumer awareness of the 1960s added impetus to the need for corporate communications in the 1990s and later. Other factors: corporate malfeasance, rise of the celebrity CEO and associated focus on executive compensation, the evolution of the 24/7 news cycle, and other factors.

Impact of the 1970s oil crisis was one of the factors that led to the rise of business ethics courses in business schools. Business ethics and corporate communications share the same concerns, but there are differences as well:

| Ethicists | Corp. Comm. |
|---|---|
| • Stakeholder theory | Aligning and understanding interests of constituents |
| • Focus on crises/ethical lapses | Crisis as issues management, as misalignment |
| • Strategy as evolution | Strategy as action and articulation |

Ethics has a growing interest in the areas of reputation management, corporate branding, CSR and environmental sustainability. Anecdotal case studies suggest that strong cultures can absorb multiple centers of responsibility. UPS having a VP of CSR; Novo Nordisk VP of Corporate Branding; J&J – VP of Corporate Equity; NBC/Universal-VP Strategic Communication. This raises the potential issue of fragmentation or confusion as to who owns the function of brand, reputation and relationship within organizations.

The academic world similarly faces this confusion in where the function is taught and where it resides in the university. The function is not universally valued in either the business school environment or the Journalism/Communication schools (the PR discipline). Courses tend to be dependent on the individual more than the program. One issue this raises is that our function is not well understood nor is it properly valued. If it were it would be more sustainable and valued in organizations and in the academic world.

Potential areas of focus for additional academic study:

- Clearer definition of strategic communication
- Research into structure of "in house" function and agency practices
- Alliances with business ethics programs
- Benchmarking best practices

The group reached the following conclusions:

- **Agencies and Corporate Communication departments may not share the same objectives which makes it difficult for the function to be taken seriously at the decision making table.**
- **In some cases our focus has been blurred by the rising emphasis on other areas such as Corporate Social Responsibility and corporate branding.**
- **Business ethics as an academic discipline has some clear similarities but many important differences from Corporate Communications that must be considered in any new research.**
- **New models are emerging that present significant challenges to this evolving relationship between in-house function and agency.**
- **There are troubling signs of the marginalization of the profession that must be considered in relationship to this area.**

**Next Steps:**

As a result of discussions that took place during the Symposium, the following actions are being taken:

- **Frank Ovaitt will assign the task of collecting existing research relating to Ethics, Credibility and Trust and will work with the Institute board and others to determine the focus of additional research efforts in this area.**

- **Roger Bolton will determine the process for the academic dissemination of the Page Society white paper and associated CEO research.**
- **Don Wright, Michelle Hinson and Rob Flaherty will add other audiences to their research on PR curriculum.**
- **Roger Bolton and Frank Ovaitt will assign a joint subcommittee to review the Case Study Competition student and judging criteria.**
- **Paul Argenti and the group will consider the potential of future symposia of this nature. The consensus of the group was that timing and location aren't as critical as the need for multi-disciplinary attendees, drawn from all parts of the profession; keep group size small enough to encourage discussion; solicit active practitioners and agency leaders to balance the academic representation.**