

THE **6** RELATIONSHIPS OF HIGHLY EFFECTIVE ORGANIZATIONS



By Dale Harley

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www.friesenpress.com

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First Edition — 2019

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ISBN
978-1-5255-3911-4 (Hardcover)
978-1-5255-3912-1 (Paperback)
978-1-5255-3913-8 (eBook)

1. BUSINESS & ECONOMICS, BUSINESS COMMUNICATION

Distributed to the trade by The Ingram Book Company

*To my sons Jason & Jeremy. My most important relationships
To my late friend, business partner and relationship go-to guy,
Al Arbuckle*

—Dale

ACKNOWLEDGEMENTS

I would like to thank my sons, Jason and Jeremy, as well as my Senior Associate, Phil Hurcomb, for their edits and encouragement as I drafted this book. Their edits and suggestions, along with those of the dozen or so other friends who contributed, have hopefully helped turn this sow's ear into a silk purse. Dr. Jason Harley was very helpful at guiding me through the publishing process. Jeremy did a great job of getting the Relationship Centered Model Website up and running. Daniel Beaudin contributed greatly to the chapter illustrations and the cover.

Finally, I would like to thank my hundreds of clients, fellow politicians, media representatives and the numerous organizations for which I volunteered, for the opportunity to work with them and refine the Relationship Centered Model concept.

INTRODUCTION

What is it that separates great organizations from average organizations? The simple answer is “relationships”, or more specifically, how organizations manage their relationships with their key stakeholders.

Over my thirty-five plus years of experience as a business owner, consultant, communications instructor, media junky, politician, community activist and volunteer, I have seen many organizations succeed and many flounder. In my experience, the variable that has the greatest impact on the long-term success of any organization is how the organization (whether a private sector firm, public institution, or not for profit organization) manages its relationships and engages with key stakeholders.

This observation has prompted me to write this book to assist managers in recognizing the importance of relationships, and to share my philosophy (and methodology) for successfully integrating and managing client, media, investor, employee, community and government relations.

This is a book about making organizations effective. Many organizations focus on trying to manage the variables that are outside of their control or influence. While it is important to recognize that changes in government, new regulations, the state of the economy, the value of the dollar, unemployment rates and commodity prices must be factored into management decisions, it is also important to acknowledge that

organizations have little control over these variables. What an organization must do is manage the important variables that it controls. This focus enables the organization to maximize its effectiveness and differentiate itself from its competitors.



This is also a book on Risk Management. It introduces the reader to strategies to identify, assess and prioritize organizational risks and formulate plans to monitor, minimize and control them. This book focuses on managing the manageable so that you are better positioned to manage the unmanageable.

Many organizations focus only inward and fail to recognize the importance of engaging with various external stakeholder groups. Other organizations engage with some of their internal or external stakeholder

groups and fail to recognize how even one ineffective relationship can adversely affect their success. It is important to remember that all organizations are only as strong as their weakest relationship.

Throughout this book I examine the six key relationships that every organization should focus on. Managing these six relationships can be compared to a juggler keeping all six balls in the air at once. If there is too much focus on one ball, chances are the juggler will drop one or more of the others and the whole act will fail. With today's social media, it is easier and more likely for a disgruntled stakeholder to make their concern known to others. Fortunately, the reverse is also true. Satisfied stakeholders are also more prone to "like" or recommend an organization to others using social media.

The book illustrates the effectiveness of the Relationship Centered Model (RCM), which is a methodology that I have successfully employed throughout my life as a manager, consultant, politician and community volunteer. The Relationship Centered Model encourages organizations to focus on the variables that they can control and maximize the organization's success, instead of dis-empowering themselves and blaming the variables that can't be controlled for negative impacts.

The Relationship Centered Model has been adopted by winning organizations to effectively manage the six key relationships to ensure the long-term success and effectiveness of the organization.

These six key relationships are:

Client Relations

Client relations are the interactions that an organization has with its clients/users and how it engages with them to solicit feedback, provide information, consult and collaborate. A client is an individual, company or organization that is a recipient of a product, service or program.

Media Relations

Media relations refers to the relationship that an organization develops with media representatives to gather and disseminate information. It involves working directly with reporters, as well as persons responsible for the editorial (news and features), public service and sponsorship programming products of the media.

Investor Relations

Investor relations are the activities through which an organization consciously builds relationships with current and potential investors, funding bodies, financial analysts and the media to ensure it not only has their confidence, but access to all the funds it requires at the most favourable interest rate and lowest fees.

Employee Relations

Employee relations involve practices that impact the management and regulation of relationships between the organization, individual staff members, and groups of individuals within the organization.

Community Relations

Community relations involves establishing a two-way rapport with the community, raising and maintaining the organization's public profile and ensuring broad public input into the decision-making processes, to build buy-in and support for decisions made.

Government Relations

Government relations involve the systematic effort to influence the actions and policies of government and regulators to help achieve objectives or protect interests, in a way that reflects well on the organization and the decision-makers involved.

Who needs this book? The answer is both complex and easy, depending on the reader. For organizations that are close to their stakeholders and who are focused on meeting their needs, the Relationship Centered Model serves as a refresher regarding the importance of building strong and ongoing relationships in order to maximize the potential of the organization. It will, as outlined in Stephen R. Covey's 1989 best seller, *The 7 Habits of Highly Effective People*, help you sharpen the saw. Covey uses the common analogy of a woodcutter who is sawing for several days straight and is becoming less and less productive. The process of cutting dulls the blade. So, the solution is to periodically sharpen the saw.

For the organization that is less focused on their stakeholders, and concentrates on the bottom line, the Relationship Centered Model will teach you the importance of building and nurturing relationships that have an impact on your organization so that you maximize your success. The Relationship Centered Model supports the teachings of Stephen M. R. Covey who in *Smart Trust* outlines the dividends of trust, increased prosperity, energy and joy.

Whatever your interest, *The 6 Relationships of Highly Effective Organizations* will increase your capacity to manage the relationships that impact your organization in a holistic manner, respond to the challenges around you, and take advantage of the opportunities presented to maximize your organization's potential.

This book introduces several fictional characters who are meeting at a ski resort for their annual get together. This narrative, as opposed to a more scholarly approach, hopefully makes the book more interesting and easier to absorb. It is also intended to be read in less than six hours (or the time it takes to fly from one coast to another).

The characters in the book are:

Alex Berkley – Main character. Alex is President of RCM Consultants Inc. and a part-time professor of Communications and Public Relations at a local college. He is undertaking a consulting assignment on behalf of Highlands Construction Limited. Alex has been invited by Highlands's president to join a group of friends on their annual ski retreat and has been asked to share advice on the Relationship Centered Model with the group.

Linda Berkley – Main character. Linda is acting as the Chief Relationship Officer with the federal Department of Business. She is married to Alex and worked with him at RCM Consultants to start the firm. In her former life, Linda served two terms as an elected municipal Councillor.

Charlie Matherson – Main character. Charlie, President of Highlands Construction Limited, has hired RCM Consultants to assist his company in the integration of a recent acquisition and to help his management team develop the skills and processes to manage the expanded organization. In the past few years, Highlands had started to experience some concerns with managing this growth. Charlie had sought out the assistance of RCM Consultants to

help strengthen his management team and rebuild his reputation and market share.

Guylaine Pégeot – Supporting character. Guylaine is the head of communications of an Ontario Provincial Ministry. She had gone to business school with Charlie and they have known each other for twenty-five years. While she sees herself as an effective manager, she is interested in continuous improvement and is always on the lookout for ways to improve her communications shop.

Evan Black – Supporting character. Evan is responsible for Public Affairs at New Technologies Limited, a former hi-tech darling that is facing a serious financial setback. He is married to Mary.

Mary Black – Supporting character. Mary is the head of Personnel for a mid-size developer and builder of luxury homes. RNH is an occasional partner with Highlands Construction. Mary wants to learn more about the many improvements she has seen taking place at Highlands.

Georgina Dewar – Supporting character. Georgina is in her first term as Mayor of Port Osgoode, a mid-sized city outside of Toronto. She comes from a business background and wants to see the municipality adopt a more business-like approach to running the City.

Taki Pham – Supporting character. Taki is a government employee who volunteers in his spare time to raise money for his local Home Support Program. He is finding that his volunteer job is eating into his

real job as he struggles with the uphill battle to raise money for Home Support.

Isabelle Stiles – Supporting character. Isabelle is the Executive Director of the National Capital Construction Association. Like Mary, she has observed a significant improvement in the performance of Highlands Construction.

All characters and situations portrayed in this book are fictional.

Throughout the book, I drill into each of the six relationships and explore their relevancy to the six supporting characters. At the end of each of the six Relationship Chapters, the selected relationship is examined from a private sector perspective using the example of Highlands Construction Limited and from a public-sector viewpoint using the Department of Business where Linda Berkley is the Acting Chief Relationship Officer as a case study for the reader. Accompanying each chapter, a simple checklist is presented that assists the reader to assess the strengths and weaknesses of their various relationships from either a public or private sector perspective. The reader is also invited to go to the Relationship Centered Model website (www.RelationshipCenteredModel.com) to complete a free Relationship Self-Audit Tool that benchmarks how they perform relative to other organizations. In addition, sample tools are presented in the Appendices that are referenced throughout the book.



CHAPTER 1

Setting the Stage



CHAPTER 1

SETTING THE STAGE

The group convenes for its annual ski vacation at a private chalet located near the Mont-Tremblant ski resort north-east of Ottawa for a reunion and a kick-off dinner. Over drinks in the great room before dinner, Alex discusses with Charlie the progress of his consulting assignment. As each guest arrives, Charlie introduces Alex and Linda and they briefly discuss how the RCM model applies to each member.

The Ride Up

It was Friday night and Alex and Linda were winding their way up the mountain in their four-wheel drive sport utility vehicle. It was late January, and the roads were still snow covered from the flurries that had started to fall around noon that day. They had left home for a weekend ski retreat with one of Alex's clients Charlie Matherson, President of Highlands Construction. It had been agreed that everyone would meet at his chalet for dinner. Alex had suggested to Charlie that they meet a little earlier for a drink to give them an opportunity to discuss in private how Charlie thought things were going with his management team.

"So, what do you think?" asked Linda.

“About skiing again after all these years, or about Highlands Construction?” replied Alex.

Alex had been working with Charlie Matherson and his management team for the past eighteen months. He was originally brought in by Charlie to assist with the smooth integration of a newly acquired company. Highlands Construction Limited was a growing industry leader in the Ottawa area. The company was approximately 25 years old and had been on a growth spurt, having bought and merged three related industry companies over the past five years. This expansion had seen the company grow from 200 to over 500 employees and had seen sales triple to over \$250 million a year. This growth, while well planned and executed, was starting to tax the experience and competence of the Highlands management team. The old ways of doing things just didn't seem to work anymore. The company was starting to experience a decline in margins. Relationships with customers, local government officials and the community were being challenged. There were also emerging problems with attracting and retaining managers and staff.

Charlie had asked Alex to work with his team on a retainer basis to help address some of these emerging issues and to serve as a coach to himself and the rest of the management team.

Alex, the founder and President of RCM Consultants Inc., focussed on helping organizations build and rehabilitate internal and external relationships. Alex enjoyed working with clients in both the public and private sectors. As a part time professor of Communications and Public Relations at a local college, Alex also found great enjoyment out of taking any opportunity to apply the theory of communications management with the reality of helping organizations manage relationships.

Linda had been working with Alex for the past 25 years and had assisted in developing the Relationship Centered Model concept that they had built into a successful and thriving consulting practice. A year ago, she

was enticed by one of their public-sector clients to accept a contract position as its new Chief Relationship Officer on an acting basis.

“Actually, I was thinking about the skiing,” said Linda, “but I'd be interested in your thoughts on Highlands as well.”

“Well, I guess the answer to your question is that I'm excited about both,” replied Alex. “Most importantly, I'm hoping that I can find those old ski legs from days gone by! But as for Highlands, I am starting to think that they have turned the corner.” Earlier in the day, he had joked about wondering if he could still ski like a 20-year-old in a 60-year-old body. Earlier in the week, Alex had been impressed with some of the changes he had noticed while attending the Highlands management team meeting, which was starting to include a greater focus on relationships with internal and external stakeholders.

Drinks

Meeting them at the front door of his chalet, Charlie said, “Alex, Linda. Glad to see you made it. How did you find the drive up?” Before they could respond he jokingly added, “Hope you took the time during the ride up to compare notes on the progress we are making at Highlands, without your meters running though.”

“The drive was pleasant, and Linda and I did spend a bit of time discussing my observations about you and Highlands. It's hard to believe how much progress has been made in the past eighteen months. That being said, much more needs to be accomplished and this new-found focus on all of your key relationships must be maintained,” said Alex.

“Yes, sales are up year-over-year for the past two quarters, our employee retention problems have improved remarkably. Better yet, our most recent property development has gone smoothly with the neighbours surrounding the development, and approvals from city hall have gone amazingly well,” said Charlie.

Charlie took their coats and then guided Alex and Linda into his spacious great room with a roaring fire and presented them both with a crisp Chardonnay.

“What really surprised me,” said Charlie, “was the positive media coverage we received from the local press around the official opening of River Bend. It’s hard to believe that my wife and I were terrified to show our faces at church just two years ago when we first launched the rezoning process. Given the negative coverage the company had received, you would’ve thought we were proposing to clear-cut the entire 250-acre site and pave over the river’s shoreline!”

As far as Alex could tell, the River Bend project was the turning point for Charlie. Previously, Charlie had felt hurt that after contributing so much to his community: through community donations, job creation and economic development, the residents had risen with such a vengeance in opposition to his plans to redevelop and beautify a part of the city that had been declining over the past decade. This community backlash was on top of a recent decline in market share and in its reputation as a progressive and high-quality developer that Highlands had been experiencing in eastern Ontario.

“Well, it helps that you and your management team have regained your focus on all of the relationships that impact on your success,” Alex said. Then he added, “As I often say to my students, you are only as strong as your weakest relationship.”

“I must admit that when we first met you and Linda, I thought this whole “relationship centered” business model of yours was a bunch of mumbo jumbo. But I am sure glad that my banker recommended that I meet with you. Heck, who’d of thought that I would come to like you so much that I would end up inviting you two to join our rather close-knit ski gang?” Charlie then paused and sheepishly looked at his feet. “I hope it’s not too much of a bother to ask as I know you’re here to ski, but I would really appreciate it if you could share some of your ideas

with the group. While we are a relatively diverse group of individuals, I think this Relationship Centered Model thing has some applicability to each one of them.”

Turning to Linda, Charlie added, “In fact, a couple of my gang work in the public sector. I have failed to explain to them how this relationship business concept is relevant to them. Maybe you can convince them otherwise.”

“Sure. We would be more than pleased,” responded Linda.

“But before your friends arrive, let’s take this opportunity to review what progress you have made,” said Alex, excitedly. As in previous reviews, Alex referred to the Relationship Logic Model (or Road Map) developed at the outset of their contract with Highlands Construction. The model was developed in conjunction with the Highlands management team and served as a blueprint to guide the relationship building efforts of the company. Charlie had each manager post a copy of the Model, which was updated over time, in their office as well as in the company boardroom. He even had each team member keep a copy of the model on their phone and tablet so that they could constantly refer to it. They also used their personal electronic devices to manage the company’s social media presence and access and update Highland’s contact management systems, which were part of the Relationship Centered Model toolkit.

Placing a copy of the Logic Model on the coffee table, Alex walked Charlie through the six relationships.

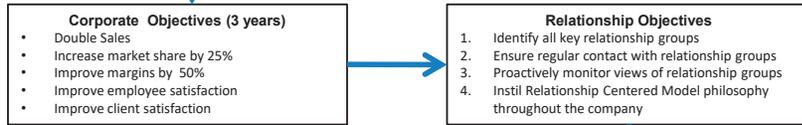
Client Relations

Figure 1 – Relationship Logic Model

Situational Assessment
Where are we now?



Objectives
Where do we want to be?



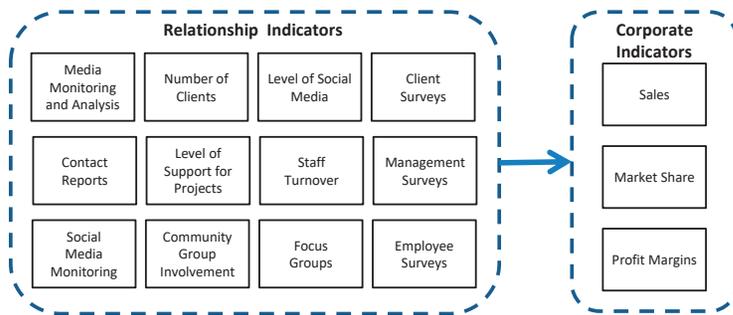
Activities
How will we get there?

Clients	Media	Investors	Employees	Community	Government
<ul style="list-style-type: none"> •Compile list of all clients •Establish contact management system •Track sales figures •Survey client satisfaction •Conduct post project reviews •Newsletter •Website •Social Media 	<ul style="list-style-type: none"> •Compile list of all local media •Establish contact management system •Monitor industry related media coverage •Media response process •Social Media 	<ul style="list-style-type: none"> •Compile list of all existing investors •Compile list of all lenders and creditors •Monitor company financial rating •Monitor industry related media coverage 	<ul style="list-style-type: none"> •Compile list of all employee contact information •Conduct employee survey •Monitor industry related employee developments •Newsletter •Intranet 	<ul style="list-style-type: none"> •Compile list of all local community groups •Establish contact management system •Monitor community meetings, events and social media •Make targeted community contributions •Newsletter 	<ul style="list-style-type: none"> •Compile list of Gov't officials •Establish contact management system •Meet annually with Gov't officials •Monitor Gov't official positions •Make target contributions •Newsletter

Intended Impacts & Effects
How will we know if we are getting there?

Increased Financial Performance	Increased Employee Satisfaction	Increased Client Satisfaction	Increased Positive Media Coverage	Increased Community Support	Increased Government Support	Improved Investor Relations
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Indicators



Client relations were the cornerstone that Highlands Construction Limited had been built on. From the very first renovation project that Charlie had undertaken twenty-five years ago he was focused on providing clients with the highest quality building standards in a cost effective and timely manner. He never undertook a project that he could not deliver on, and he never stopped looking for bigger and bigger projects to tackle. From minor basement renovations in the beginning to luxury subdivisions and commercial development projects today, Charlie always insisted that the company stay focused on the client. His theory of “Take care of the client and they will take care of you” was a solid theory, but a theory that was lacking in practice at Highlands at the time.

As the company grew, Charlie found it increasingly difficult to ensure that his client-focused philosophy was embraced by all Highlands employees. Sure, there were customer service awards from years gone by and customer focused posters were prominent in the corporate boardroom and in the various sales offices throughout the region. But this customer focus was somewhat lost on most of the labourers, and even on some of the foremen and superintendents.

“Client Relations was really the easiest of all of the six relationships for me to buy into,” said Charlie. “It was a real eye-opener for me. When you conducted the client survey and the focus groups, you really helped me see that our relationships with our clients were not as strong as I thought they were.”

“It has been interesting to learn about the value of compiling lists of clients, and the importance of establishing a regular contact management system,” added Charlie. Originally, the sales staff had been skeptical. However, what they thought was going to be a paperwork exercise had proven to be quite valuable. “The sales report matrices prepared by accounting were demonstrating that progress was being made in this area,” volunteered Charlie.

“You would be surprised at how many public-sector organizations fail to recognize that they have clients,” added Linda.

“They are called taxpayers aren’t they,” joked Charlie.

“Yes, but they also include external and internal users of programs and services,” clarified Linda.

“I get the external users, but I’m not sure what you mean by internal users,” said Charlie.

Linda went on to explain that public sector organizations had internal support services such as communications, legal, IT, finance and human resources that supported programs in the delivery of their services to external clients.

“Ok, I get it”, chimed in Charlie. “It would be like my fleet services that maintain and repair our trucks and construction equipment.”

“One area where you appear to be slipping is the preparation of the monthly newsletter,” observed Alex. This newsletter was an important tool, since it served as not only a client newsletter, but also an internal newsletter. The newsletter kept both internal and external stakeholders up to date on new developments, accomplishments and contributions that the company and staff were making to the community.

“Yes, I’ll admit we are falling behind on the production schedule,” agreed Charlie. “It is taking a lot more effort than we had originally envisaged. Possibly we should consider cutting back to a quarterly newsletter.”

Media Relations

“I now see why we need to work a lot harder to build relationships with the city hall and business reporters,” said Charlie.

The company had originally thought that the purchase of advertising space would guarantee positive media coverage. In reality, the

company had failed to tell its story to the local media. Even more critically, they did not proactively respond to concerns raised by others about some of the developments and acquisitions in which Highlands was involved. In addition, Highlands Construction had virtually no social media presence.

“Media relations are probably even more important in the public sector where the media are both a target audience as well as a channel of communications,” added Linda.

“Your efforts to seek out interviews with local media to explain your vision and rationale for developments and expansions has proven to be very helpful in garnering more positive, or at least balanced coverage,” said Alex.

“It’s great to see that the media seeks you out for comments about stories prior to running them,” added Linda.

“The increased emphasis on media relations proved to be a godsend after the unfortunate fatality we experienced last fall,” admitted Charlie.

Investor Relations

After freshening everyone’s glass of wine, Charlie pointed to the investor activities box in the Logic Model, smiled and admitted, “At least I now have ready access to capital to fund those developments and acquisitions.” Because Highlands had historically ploughed back its profits into the company, its growth during the first 20 years was financed internally. They had sought outside financing for some of the companies’ more recent growth and acquisitions but had not spent much time courting the banks and potential investors. Charlie had confessed to Alex when they first discussed this relationship that he had not even considered the business media as a group to be concerned with when it came to investor relations.

“The ironic thing is, now that our reputation has improved so much because of our relationships, investors and new partners are beating a path to our door with offers and proposals,” said Charlie. “Old Frank at the bank must be kicking himself for introducing me to your consulting firm. Just think of all of the loan interest and bank fees he is missing out on.”

“Well, that would be one part of this Relationship Centered Model thing that would not be relevant to my public-sector friends,” stated Charlie.

“I politely disagree,” said Linda and then added, “Public Sector organizations also have investors. Departments must convince Cabinet and Treasury Board that they need the budgets to operate and individual branches need to convince the Deputy Minister and the Senior Management Committee that they need the people and the financial resources to function.”

Employee Relations

“One of the areas where I feel that we have made a lot of progress is employee relations,” volunteered Charlie.

“Yes,” agreed Alex, “but it is also one of the areas where you need to stay focused.” Linda pointed out that the challenge with employee relations was even more daunting in the public sector, given the size of departments, the large geographic dispersion and the existence of unions.

The focus on employee relations was one of the early successes with Highlands Construction. Charlie had invested a considerable amount of effort in making sure that his company took positive steps to address recruiting and retention challenges.

One of his first actions was to undertake a company-wide confidential employee survey. The survey focused on what employees thought about working for the company in general, their opportunities for

advancement, communications, quality, customer service and safety. The survey results proved to be a real revelation for Charlie.

In response to several of the issues raised by the employee survey, Charlie wanted to ensure that his management team received the necessary training and insight to become better managers. Alex started by having all the management team complete Myers-Briggs Type II personality assessments to help them understand their individual personality types, as well as to understand the profiles of the other members of the management team. This greater insight along with some team building helped them deal more effectively as a management group. Charlie had shared that two of his senior managers had not gotten along in the past but then realized they had different personality types which led them to try and resolve the problems by combining their two distinct perspectives. As a result, they found they were able to discover new solutions that neither would have thought of.

One of the major issues that emerged from the staff survey related to a lack of communications, both the dissemination of information as well as the listening side of communications. The launch of the newsletter was one of the early initiatives of the company. “What are also really helping are the email blasts and updates to the Intranet that we use to communicate important news and developments directly to all our employees,” said Charlie.

Community Relations

Because of the community’s negative response to the River Bend proposal, Charlie had specifically asked Alex to investigate ways to improve relationships with the households and businesses surrounding the proposed development. Locals had caught Charlie off-guard with their passionate opposition of the proposed project.

Based on his initial research, Alex was surprised to learn that Highlands Construction and Charlie had been relatively active in responding to the community's requests for assistance in terms of fundraising. Charlie had long believed that you got out of your community what you put into it and had been heavily involved in the community both as a volunteer and as a generous donor. However, he had done little to blow his own horn. Furthermore, Highlands just adopted the minimal municipal requirements for public consultations around their projects.

Linda had pointed out that Highlands Construction needed a more holistic approach to building relations with the local community. She noted, "It is critical for Highlands to define themselves in the community rather than letting someone else do it for you." As a two-term politician herself, she had seen the importance of managing one's reputation instead of responding to someone else's misinformation. She had also seen her public-sector clients face huge public outcries when they were opening, expanding or closing federal offices and facilities.

"Your effort to proactively identify and meet with various community groups in the areas surrounding your projects and increased social media presence has paid some serious returns," observed Linda. "This is just as important for public sector projects as it is for private sector ones," she added. Linda went on to explain that some public institutions such as correctional centres, military bases or research facilities are obvious candidates for proactive community relations, but virtually any public-sector office, particularly those not located in major metropolitan centres would benefit from some community outreach activities to help explain what they do and the economic impact they make.

"Yes, I can agree with that!" replied Charlie. Charlie had originally questioned the time and effort of identifying and meeting with the various formal and informal community groups, but early results were changing his mind. He admitted that the formation of the River Bend Public Liaison Committee had been very effective at smoothing out opposition to his proposal. Because of meeting with community leaders, listening

to their concerns and explaining in detail the process and studies they would be undertaking to prepare their subdivision and industrial parks, a considerable amount of misunderstanding had disappeared.

Government Relations

The final relationship that Alex wanted to discuss was government relations.

The extent of the old Highlands Construction GR program was solely based on the relationship that Charlie had with his local municipal councillor. Over the years, Highlands Construction and Charlie had made regular contributions to the election campaigns of the councillor and were always there to support his special community projects. In return for his support, Charlie expected the councillor to return his phone calls and put forward his position when debates came up at Council. Charlie also relied on the councillor to put forward the Highlands position with the other councillors and the mayor. In addition, he had totally failed to put any effort into building relationships with upper-tier government officials.

Alex had convinced Charlie that a good government relations program involved much more than maintaining a relationship with the local councillor. He had Highlands establish an ongoing contact program with all local politicians and senior staff. This involved creating a database of politicians' and senior staff at all three levels of government. It also involved providing politicians and senior staff with a copy of the company newsletter and setting up one-on-one meetings and tours with them to explain the projects and contributions of Highlands Construction Limited and to identify the issues and priorities of the officials.

"Our meetings with the local municipal, provincial and federal politicians to date have been a real eye opener for me," said Charlie. "I was

surprised just how little they knew about us and the misperceptions they had about our organization.”

In addition, being aware of political issues, priorities and concerns enables an organization to put forth more proactive and responsive proposals. “It’s a real turnaround when politicians start contacting us to give us a heads-up on a resident’s concern so that we can quickly address it,” said Charlie. The ability to do this had proven to be very beneficial at reducing costs and the time it takes to fix a situation rather than responding to it after it blew up in the community and the media.

“So how do public sector organizations lobby government,” asked Charlie? “You would be surprised,” said Linda. “Not only do federal members and their senior bureaucrats need to lobby their Cabinet colleagues and central agencies, they also have to engage with provincial, territorial and municipal governments, as well as aboriginal groups.”

“Well, I’ll be damned,” said Charlie. “I never thought of it that way.”

The Guests Arrive

“Overall, I think we’re making good progress,” concluded Charlie.

“Yes,” replied Alex. “But we have some ways to go yet!”

Just as they were wrapping up their conversation, the first of Charlie’s ski friends were led into the living room by Charlie’s household help.

“I think it might be useful if you two were to share some of your insights on the Relationship Centered Model and what you have been doing with me and Highlands Construction with my friends that will be joining us shortly,” suggested Charlie. “And you Linda have convinced me that this relationship thing is just as relevant to my public-sector friends.”

“Actually,” piped in Guylaine Pégeot, catching the last part of their conversation as she was led in said, “I most certainly would like to pick

your brain Linda. I am curious if I can apply this concept in my world as a government communicator.”

Guylaine was followed quickly by a very athletic looking couple. “Happy anniversary!” called out Evan as he and Mary entered the room. Evan and Mary Black had been friends of Charlie’s since university days. The anniversary that Evan was referring to, was the fact that the group, in one form or another, had been skiing together for the past 20 years. In fact, it was Evan that was the catalyst behind the ski group. As a former racer and ski instructor, he was the de facto coach and trainer for the friends.

After a brief round of hugs and kisses, Charlie proceeded to make introductions. He started by introducing Evan and Mary as two dear old friends. Evan was VP of Public Affairs with New Technologies Limited, while Mary was Director of Personnel with RNH Incorporated, a mid-sized developer and builder of luxury homes in the Ottawa area. While Charlie admitted that his firm sometimes competed with Mary’s company, they also partnered on some developments. “Besides, I got my revenge on Mary years ago when I introduced her to Evan,” laughed Charlie.

The next to arrive was Georgina Dewar. Georgina was in her first term as mayor of Port Osgoode, a mid-sized city just outside of Toronto. She knew Charlie and Evan from university days when they all went to business school together. “Madam Mayor, may I introduce you to two of the wisest people I know, Alex and Linda Berkley. They are the two I have been telling you about,” said Charlie. “Don’t let the title scare you two; Georgina built her reputation as a business leader, not a politician,” he laughed.

“Thanks, I think,” said Georgina. “The jury is still out on my reputation as mayor. It has been a very steep and interesting learning curve moving from the boardroom to the council chambers.”

“Yes, I can relate to you,” said Linda. “I spent two terms as a city councillor myself many years ago. I found that it was an excellent opportunity to apply what I did for a living to my role as a councillor. Being a councillor also helped me become a better consultant. Talk about a real-life lab to explore the dynamics of the relationships between community, media, government, clients, employees and investors.”

“Investor relations?” queried Georgina. “You and I are definitely going to have to talk about that.”

The final two friends to arrive were Taki Pham and Isabelle Stiles. Isabelle was the Executive Director of the National Capital Construction Association in which both Charlie and Mary were involved. Isabelle joined the ski group about five years ago during Alex’s term as the volunteer president of the local construction association. Taki, who was a federal government employee, had grown up with Charlie. They had been best friends virtually all their lives. “Don’t get suspicious,” smiled Taki mischievously while gesturing at Isabelle. “We ran into one another in your driveway.”

After a brief introduction of Taki and Isabelle, Charlie suggested that they head into the dining room for dinner. He had arranged with one of the village restaurants to cater that evening’s dinner to give Charlie the flexibility to visit with his friends. Over dinner, Charlie made a detailed introduction of Alex and Linda to the group and explained what RCM Consulting had been doing for Highlands Construction over the past 18 months. Charlie had nothing but praise for what had been accomplished to date. He encouraged Alex and Linda to give the group a brief overview of their Relationship Centered Model concept and suggested that each member of the group take the time over the next couple of days to pick Alex or Linda’s brains and explore the relevance of the model to their individual circumstances. After coffee and dessert, Charlie suggested that they all call it an early night so that they would be fresh for the slopes the next morning.



CHAPTER 2

Client Relations



CHAPTER 2

CLIENT RELATIONS

Client relations are the interactions that an organization has with its clients/users and how it engages with them to solicit feedback, provide information, consult and collaborate. A client is an individual, company or organization that is a recipient of a product, service or program.

Breakfast Next Morning

Early the next morning Alex and Linda came downstairs and entered the bright and spacious dining room to find Guylaine Pégeot sitting by the window surveying the hill and having coffee. “Can we join you?” they asked. “Yes, please do,” responded Guylaine. She was the head of communications at a provincial ministry in Toronto. As a senior provincial government official, she was responsible for managing a staff of over 40 communications, media and marketing professionals spread across the province. While she saw herself as an effective manager, she was interested in the concept of continuous improvement and was always on the lookout for ways to improve her communications shop.

“Based on dinner last night, it would appear that things have certainly fallen into place on Charlie’s new development project over the past

year. I can't believe how River Bend has turned around after such a rocky launch," said Guylaine.

"Yes, it does sound like it is going to be a success," said Linda. "Just like all the other Highlands projects," added Alex. "A big part of that success, not just with River Bend but with the company as a whole, has been the refocused approach on client relations."

Throughout his years of experience, Alex had seen the consequences of poor client relations. He was very aware of the statistic that one dissatisfied customer on average talks to ten potential customers. In addition, he knew how much more difficult it was to win back a customer than it was to first attract one.

"Now might be a good time for me to say how highly Charlie thinks of you two. I must say that your Relationship Centered Model concept has proven to be a Godsend for Highlands Construction. I just wish I could find something comparable for the public sector," said Guylaine.

"Actually, I would be pleased to share with you how I have been integrating the Relationship Centered Model at the federal Department of Business who seconded me for a year to be their Chief Relationship Officer," said Linda. "That would be wonderful," replied Guylaine.

Linda explained that for departments and agencies to achieve their mandates, they must build, rehabilitate and maintain relationships with internal and external clients, at a variety of levels, across vast geographic areas and often with differing objectives. Given this complex operating environment, it can be expected that gaps in how engagement and relationships with various clients are managed can easily develop. She pointed out that ongoing, accurate and up-to-date feedback from clients enables organizations to evaluate the impact of its specific programs and services on clients as well as the effectiveness of its relationships over time. Wide-reaching, inclusive, and responsive client engagement activities underpin lasting relationships. These relationships enable organizations to effectively and efficiently

mitigate risks as well as design and deliver their strategic, program and operational priorities.

"Given the importance of managing both internal and external client relationships, it is critical that departments and agencies coordinate their efforts to plan, develop, deliver and evaluate their engagement efforts to strengthen interactions with key customers," said Linda.

Linda explained that public engagement is an important part of the democratic process and enables departments and agencies to fulfill key responsibilities including:

- Listening to feedback and perspectives from individuals and groups to develop an understanding of issues, concerns, priorities and gain feedback on the performance of government policies, programs, services and regulatory initiatives. The focus is on **who** is saying **what**.
- Providing information to affected clients to enable informed decision making and actions. The focus is on **this** is what will be happening.
- Consulting with clients to facilitate information exchange and knowledge sharing to improve the understanding of issues and the building of relationships among interested and affected parties. The focus is on **how** things will be done.
- Fostering collaboration between the government entity and individuals, groups and organizations to provide opportunities to shape government policies and decisions. The focus is on **what** needs to be done and **why**.

"Ok. I get most of that," said Guylaine. It's actually an extension of what I do in communications," she added. "What I would like to learn more about is this Chief Relationship Officer position you are talking about."

“Engagement within the federal government, like communications, is a shared responsibility. However, like communications, it is critical that it be coordinated, and we feel the establishment of a CRO is the best way to do this,” said Linda.

Linda then went on to explain roles and responsibilities for stakeholder engagement:

Chief Relationship Officer (CRO)

- Develop an Annual Engagement Strategy and update it on a quarterly basis
- Develop a Policies and Procedures manual for Internal and External Engagement
- Provide expert advice and support
- Provide horizontal coordination
- Develop and maintain a central engagement/stakeholder inventory
- Keep a finger on the pulse of the internal and external public environment
- Track and record results of consultations and engagement activities
- Support consultation and engagement planning
- Manage web-based tools to support online engagement
- Respond to engagement queries, Ministers Office, Privy Council Office, etc.
- Liaise/coordinate with central agencies and related government working groups

Program Managers

- Lead on specific consultations and engagement activities
- Advise the CRO of engagement and consultation requests/opportunities
- Provide information on stakeholders and engagement activities for central inventory
- Work with the CRO to draft consultation and engagement plans
- Record consultation and engagement activities and stakeholder feedback in central Contact Management System
- Lead routine day-to-day engagement and consultation activities

“One of the challenges of establishing a Chief Relationship Officer is determining where the office should be located. Some feel that it should be part of a Corporate Services function, while others feel it should be part of the organizations Policy Branch,” said Linda. “My view is that it should be part of the Communications shop. The division of responsibility that I just laid out for you is consistent with the Federal Government Communications Policy that states with respect to consultations and public engagement, heads of communications are responsible for the following:

- Providing communications advice, support and guidance at all stages of consultations and public engagement initiatives; and
- Ensuring that information about external consultations and public engagement initiatives are posted on the Government of Canada’s web presence.

“However,” Linda added, “regardless of where the CRO is located, the important thing to remember is that engagement with clients is coordinated.”

The Relevance of the Model to Government

“I must confess that I have tried to reconcile the similarities and differences between your Relationship Centered Model that I learned about last night and the Client Centered Model that I have introduced to my management team and staff at my Provincial Ministry over the past year,” said Guylaine. “Are you aware of the Client Centered Model?” she enquired.

“Yes, I believe so,” replied Alex. “Maybe you can start off by sharing with me a bit of background on your Client Centered Model.”

Alex was playing devil’s advocate with Guylaine. The concept of a client-centered focused organization was not new to Alex; however, he also knew that by focusing solely on client relations, organizations were leaving themselves vulnerable to a breakdown with other key relationships. He sometimes compared a Relationship Centered Model practitioner to a juggler keeping six balls in the air at once. If you focused too much on one, chances are you will drop one or more of the other balls and the whole act would fail.

Client Centered Model

According to Guylaine, the Client Centered Model has, as its key feature, a single window of access for the internal Ministry Communications clients. In this model, this “window” is referred to as a primary point of contact. Designated communications advisors are the account executives, and each is dedicated to one or more of the Ministry’s branches.

Once the client learns who the advisor is, he or she will contact that same advisor for all future requirements.

In a typical scenario, a departmental manager contacts the communications advisor, who is the account executive for that manager’s branch, and makes a request for advice or assistance in communicating a program initiative.

The communications advisor will determine the scope of the client’s request and, in many cases, will draft a communications strategy. The strategy describes the public environment, the client’s initiative, the target audiences, key messages, strategic considerations, selected communications products and activities, budget and an evaluation plan. Once the strategy is agreed on, the communications advisor then begins to assemble a team of communications branch colleagues who will be involved in the project. This may include colleagues from issues management, social media, marketing, media relations, public opinion research, editorial services and other areas. Who is on a team will vary from project to project and depend upon the complexity and nature of each request.

The communications advisor, in each case, acts as an “account manager” in that they liaise with the other members of the team as well as with the client. At all times, clear, frequent and coordinated communication between, and among all members of the team is important.

“Of course, there is flexibility in the model,” concluded Guylaine. She went on to explain there will be many instances in which the client may directly contact another communications branch employee with a routine request. For example, the request might be to post a new tweet, order more copies of a fact sheet, or to change the name of a contact on a web page. However, for new requests or substantial changes, the communications branch employee who is first contacted should liaise with the appropriate communications advisor and ask him or her to contact the client.

Client Centered versus Relationship Centered Model

“Very interesting,” said Linda.

“I trust the implementation of this concept is going well?”

“I think so,” replied Guylaine. “It is probably a little too early to tell.”

Linda suggested to Guylaine that before tackling the question of client relations they should first discuss the applicability of the Relationship Centered Model to a government organization by examining the other five relationships. They would then go back and tackle the question of how well the organization’s client relations were going.

“You know I am often challenged on the applicability of the model to government institutions, and even non-profit organizations,” volunteered Alex. “But the truth of the matter is that the Relationship Centered Model is as relevant to your Ministry, or the Department of Business as it is to Highlands Construction Limited.”

Linda and Alex then proceeded to explain each of the five remaining relationships applicability to Guylaine.

Media Relations

Alex thought a big part of any Communications shop, whether it is in the public, private or not-for-profit sectors, is to build relations with the media. This includes providing reporters with information and monitoring how the media reports on and portrays the organization in its coverage. Guylaine agreed that knowing who to talk to in the media and having timely, accurate, complete and balanced coverage of her Ministry’s programs and policies was a critical part of her job. The media is both a target audience and a communications vehicle. The trick is to market the right information to the right reporters to meet their needs so that they in turn can report to their audiences.

Investor Relations

Guylaine at first had difficulty with the concept of investors in the public sector. However, once she viewed taxpayers and voters as investors she started to come around. After Linda explained in detail that government central agencies, and the Ministry’s senior management, could also be viewed as current and potential investors, she bought into the concept. As Linda pointed out, “how government and central agencies, as well as the ministry, allocate their limited financial and personnel resources is critical to the success of your Communications Branch.”

“You’re right,” agreed Guylaine. “If I can’t convince senior management that my staff is best positioned to assist them in their mandate, they are not going to give me the resources I need to do my job. Worse yet would be for them to go elsewhere to have their communications needs met.”

Linda added that it is critical to ensure the Communications Branch was compliant with ministry policies and procedures and that the staff tracked their performance so that when they were audited or evaluated they would be able to demonstrate their effectiveness.

Employee Relations

Guylaine pointed out that the Human Resources Branch was responsible for human resources, and thus employee relations were not relevant to her as the Head of Communications.

“That’s one way of looking at it,” said Alex, “However, as a manager, you are still responsible for your management team and the rest of the branch employees. Their morale, understanding and support are critical to you in the delivery of your communications programs and services. Is information from you about priorities and directions flowing through your management team to the employees? Do you really know

what is going on throughout your Branch, or are managers blocking, repositioning and repackaging information?”

Once again, Guylaine had to admit that Employee Relations was relevant to her. If relations with Communications employees were weak, it would be safe to say that the effectiveness of efforts with other key stakeholder groups and clients would also be weakened.

Community Relations

“Community relations are an easy one to buy into,” agreed Guylaine. She noted that an important job of the Communications Branch involves engaging with external stakeholder groups (clients, special interest groups, other levels of government, the media and taxpayers). Raising and maintaining her Ministry’s public profile to ensure broad public input into the decision-making process and to build buy-in with and support for decisions made, was a critical job of her Communications Branch.

Government Relations

The concept of Government relations proved to be a bit of a stretch, at least initially for Guylaine. In response to Guylaine’s initial skepticism, Alex started by defining Government Relations as the effort to influence the actions and policies of government to help achieve objectives or protect interests in a way that reflects well on the Ministry and on the politicians and central agencies involved. “So, if you can help your Ministry gain support among central agencies and other levels of government and help convince the government of the day that they should be allocating more of the overall government’s budget to the Ministry do you not think that is a good thing?” asked Alex.

With a smile and a nod, Guylaine replied “yes” and the debate about the relevance of Government relations was over.

Client Relations

“Ok, so you agree that the other five relationships are relevant to your ministry as well as your Communications Branch,” said Linda. “Let’s go back to where we started and examine client relations.”

“The one relationship that I have found to be particularly relevant to Communications shops in government is Client Relations, and this is one relationship that I would like to examine in more detail if you are interested,” volunteered Linda.

With a simple nod of her head, Guylaine invited her to continue.

“First of all, Guylaine, I would like to ask you a series of brief questions,” said Linda.

“Go ahead,” responded Guylaine somewhat skeptically.

“Do you have clients?” asked Linda.

“Of course,” replied Guylaine. “We have internal clients such as senior Ministry managers as well as external clients, associations, partners, media and the like.”

“Fine,” said Linda. “Do you know who your communications shops most important clients are?”

“I think so,” replied Guylaine.

“Do your clients know who they have to contact to access your services?”

“I hope so,” responded Guylaine becoming somewhat less confident in her responses.

“Do you have regular communications with your clients? Are you letting your clients know how much you value the relationship you have with them?” continued Linda. “Are you doing all you can possibly do to expand your client base? And are you doing enough to hold onto the clients you have?”

“Well because we are government they have to use my shop,” responded Guylaine somewhat defensively. “They really don’t have a choice,” she added.

“Really,” quizzed Linda. “Could they do the work themselves, or possibly hire an outside firm to help them? Or worse still, just not undertake the important work that needs to be done?”

By now, Guylaine was shifting somewhat uncomfortably in her seat.

“Now the big question,” said Linda. “Do you know how satisfied your clients are?”

Putting her hands up in a jester of surrender Guylaine conceded that Client Relations was critical to her organization.

Client Satisfaction Survey

Jumping into the conversation, Alex said, “To tell you the truth Guylaine, you are not the first public sector manager to express apprehension about the Relationship Centered Model, and the relevance of client relations.”

“While client relations is critical to a private sector organization, its relevance in the public sector is not well recognized,” said Alex. “Many public-sector organizations see themselves as holding a monopoly on the provision of their services, and therefore do not have to worry about competing for clients or having to maximize client satisfaction.”

What had become increasingly clear to him was that by adopting a coordinated approach to engaging with public sector clients (taxpayers, program recipients, and service delivery partners) they were more responsive, and it was easier to serve them.

Alex noted, “At the same time, public sector common services functions, such as Communications, Human Resources, Legal Services, Finance and Information Technology, also have internal clients. It was

important that the internal users of these activities were satisfied with the services provided so that the internal function received continuous demand, recognition, support and funding.”

RCM Consultants had been administering client satisfaction surveys since the early days of the business. He frequently quoted one of his research directors who liked to say, you are what your clients say about you. “So, Guylaine, what are your clients saying about you?” asked Alex.

Alex explained, “While financial statements may serve an organization as a business thermometer by telling you the current health of the organization, client satisfaction tracking surveys act as a business barometer, in that they tell you what is coming.”

He then proceeded to tell her about the communications client satisfaction survey program RCM Consultants had developed.

“RCM Consultants had been involved a few years ago in a review of a number of federal government communications shops. The study involved conducting a survey of users and potential users of communications services.”

The purpose of this study was to assess the level of importance, use and satisfaction of internal clients with core communications products and services in individual departments. A common research tool was administered to all managers within the participating departments. The survey examined the respondent’s level of utilization and satisfaction with the services provided by the department’s communications shop. The analysis performed on the results compared client satisfaction with communications between departments as well as between program areas and regions within an individual organization. The results of the study established strategic direction and service standards for communications within each organization. (A copy of the sample client survey can be found in Appendix A).

“This really sounds like it could have relevance to my communications shop,” said Guylaine. “Do you think it would be possible to share a copy of the survey with me?”

“No problem,” replied Alex. “With one condition,” he added.

“What’s that?” she asked.

“That you promise to try it at your Ministry,” replied Alex. He went on to say that if she made use of the same survey, he would share the aggregate results (without sharing individual client results, or identifying, which organizations had participated in the study) from the RCM communications satisfaction survey. Having baseline results, or peer organization results to compare to always added a valuable matrix against which to compare your performance.

“You’re on,” replied Guylaine.

As Guylaine and Alex were shaking hands to seal their agreement, Evan Black came into the dining room and joined them.

“Looks like I just missed something important,” said Evan.

“Actually, you did,” replied Guylaine. “Linda and Alex just shared with me the relevance of the Relationship Centered Model to public sector organizations such as mine and have promised to share with me a copy of a survey undertaken with a number of communications shops. I really think that this is going to be valuable to me at my Ministry.”

“Well, I must admit that Alex and Linda really caught my attention last night,” said Evan. “I couldn’t get your damn model out of my head when I retired for the night, and then I went for a long run this morning to try and match its relevance to me and my situation at New Technologies Limited. Would you mind if I picked your brains sometime this weekend?” asked Evan.

“No problem,” replied Alex. “Why don’t we share a chair up the hill this morning for a few runs and we can bat things around.”

Client Relations @ Highlands Construction Limited

As outlined in the Relationship Logic Model presented on page 6, one of Highlands Construction corporate objectives was to improve client satisfaction. Achieving this objective would also contribute to the corporate objectives of doubling sales and increasing market share by 25% over the next three years.

While client satisfaction was an objective and a cornerstone of Highlands Construction, Charlie found it increasingly difficult to ensure that his client-focused philosophy was embraced by all his employees. The company motto “***Never satisfied until you are***” may have graced the glossy sales literature, but increasingly the company was failing, as they say, to “walk the talk.”

Based on the management team meetings conducted at the outset, the following client relations activities were planned in support of the objectives:

- Compile a list of all clients
- Establish a contact management system
- Track sales figures in a more meaningful and timelier basis
- Survey client satisfaction and analyze results to identify areas for improvement
- Conduct post project reviews
- Develop a company newsletter
- Expand and maintain the company website
- Establish a social media presence

One of the early assignments that RCM Consultants undertook for Highlands was a client survey of past customers and a series of focus groups with current and past residential development and commercial clients. What this research revealed was that Highlands Construction

was not delivering on its promises to customers—that customers' expectations were not being met. In fact, the priority that different types of clients (homeowners, versus industrial park, versus retail chains) were placing on delivery dates, quality of workmanship and price attributes varied greatly. The survey results when compared to the results of employee surveys (See Appendix H for a Sample Employee Survey) and management surveys showed that Highlands had really lost track of its clients' priorities and was focusing on issues that were not as critical to their customers.

Because of this research, a series of management action plans were developed to address these discrepancies (See Appendix F for a Blank Management Action Plan). Another wave of client surveys was planned for the spring to track progress towards the necessary improvements.

Another form of client relations research suggested was the idea of conducting post project reviews two months after a customer had moved into a new home, or one month after a commercial construction project was completed. These one-on-one interviews would move much beyond simply addressing construction deficiencies, to explore in more detail the customers' complete buying experience, including meeting deadlines, quality of workmanship, staying within budget, and availability of appropriate managers/supervisors to answer questions during the project.

To establish a contact management system, it was necessary to compile a list of all clients. These databases included tombstone information on all clients as well as a record of interactions with them and bring-forward activities. Originally, the management team had questioned the amount of time and effort that this initiative would take. However, what they thought was going to be a paperwork exercise had proven valuable in mining existing clients for more work. It also demonstrated to customers how important they were to Highlands and helped Highlands follow up with commitments they had made.

The company had successfully launched not only a client newsletter, but also an internal newsletter. This dual-purpose newsletter was distributed electronically to all clients and suppliers in the database, used as a handout for public meetings, and used to keep politicians up to date. All staff also received the newsletter, which was available as a hard copy as well as on the company Intranet site. Highlands was having trouble producing a monthly newsletter, so were considering switching to a quarterly newsletter and hiring an outside firm to assist in the writing and production of it.

One of the most significant contributions to the Highlands' client relations efforts was its increased focus on social media. More than ever, clients are sharing their views about organizations online. It is critical that Highlands be part of that conversation to participate and engage in a meaningful way. Highlands wanted to create and maintain relationships, drive revenue growth, increase customer loyalty and retention, and build advocacy.

In addition to launching and maintaining an active Facebook, Twitter and LinkedIn presence, Highlands was monitoring industry and community websites as well as relevant keywords and hashtags to see what others were saying about Highlands. This gave them an early warning system that helped them understand what was being said about the company so that they could weigh in to correct misinformation or provide insight to better control and manage their reputation. They were also active users of Pinterest, Instagram, and YouTube to share and organize visual imagery of the more significant projects they were working on and Snapchat to tell interactive stories of these projects as they unfolded. It was a surprise to Charlie the number of people following the construction progress on an office tower they were constructing.

Sales report matrix's prepared by accounting appeared to demonstrate that progress was being made on increased sales and market share, but the results were too early to be conclusive.

Client Relations @ the Department of Business

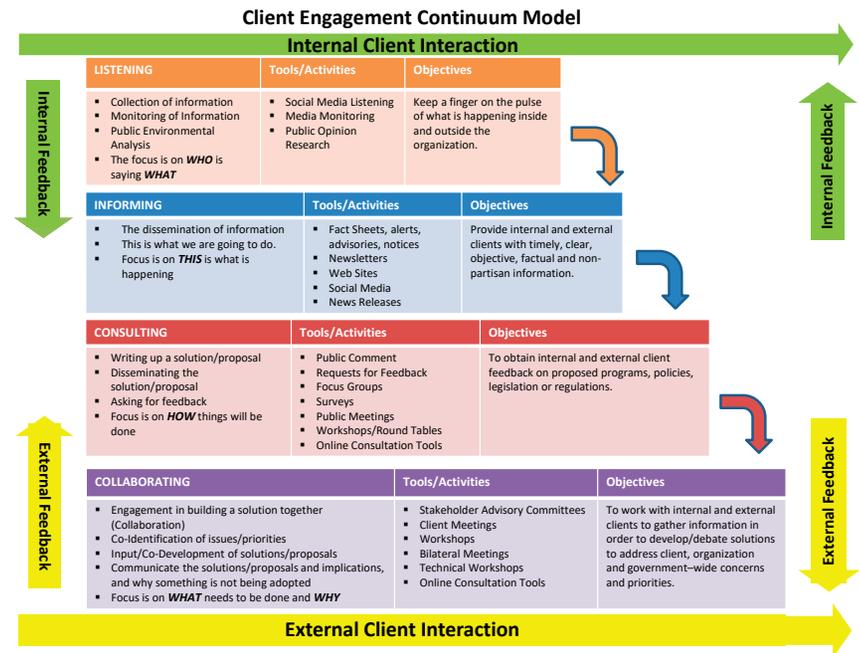
Linda had been developing an Engagement Framework for the Department of Business, which included the establishment of the Engagement Centre of Excellence to better manage relationships and engagements with key departmental stakeholder groups. This office was located within the Public Affairs Branch and was to be headed up by a senior manager who would serve as the Chief Relationship Officer (CRO) for the Department. They would be responsible for overseeing the implementation of the engagement framework, strategy and policy for the Department as well as coordinating an Engagement Community of Practice within the Department of Business. Linda had agreed to take a leave of absence from RCM Consultants and serve a one-year term to get the CRO office up and running. In this capacity Linda would be able to further develop the Relationship Centered Model from a public-sector perspective.

It was the experience of RCM Consultants Inc. that government organizations did not effectively coordinate their engagement activities with stakeholders and clients nor did they have a clear understanding of what constitutes engagement (listening, informing, consulting, or collaborating). As a result, engagement activities in public sector organizations were frequently fragmented, and took place in silos. Typically, there is a lack of an organization-wide engagement strategy, framework, tools or processes. As a result, engagement efforts, even though they were well intended, were not always coordinated or effective. They frequently overlapped other efforts and resulted in confusion and fatigue amongst engaged groups. This experience, though at times frustrating, had informed RCM's development of a robust Client Engagement Continuum model.

Client Engagement Continuum

One of the first challenges that Linda faced when she started working with the Department of Business was getting the department to define

who their clients were. At first glance, it was thought that clients were simply the businesses and individuals who made use of the programs and services offered by the Department of Business. However, it was easy to see that this definition was too narrow as it did not include the countless associations that represented various types and classifications of businesses and the service providers, such as lawyers, accountants and human resources professionals that provided support to businesses. Furthermore, this definition did not include potential new businesses.



In the end, a client was defined as an individual, company or organization that is a recipient, or potential recipient, of a product, service or program provided by the Department of Business or who could be impacted by the department's policies, regulations, programs, services and communications. This included other levels of government as well as other federal departments and agencies that had an interest or stake

in the business sector. Client relations was ultimately defined as the interactions that the department had with its clients/partners and how it engages with them to solicit feedback, provide information, consult and collaborate.

In carrying out its client relations responsibilities it was crucial that the department maintain an online database of key clients and client groups. This database served as a contact management system that maintained a record of major interactions between the Department of Business and clients/groups. This included tombstone data on the client/group as well as a record of the date, location, nature of engagement, participants and outcome of the interaction.

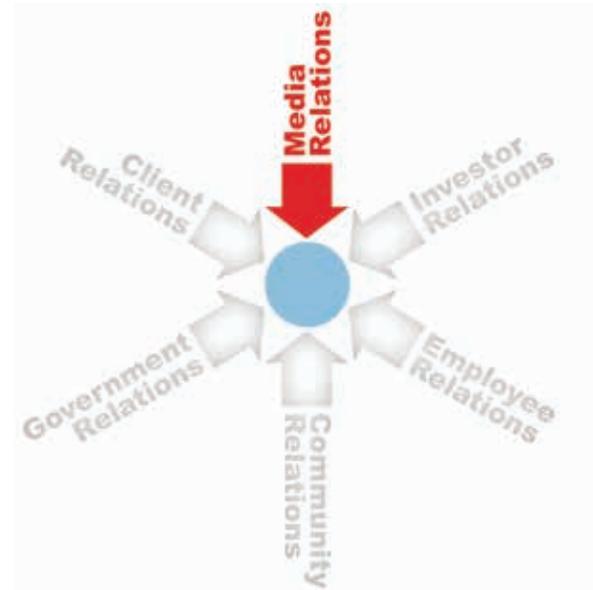
Managing client relations not only involved tracking key clients and partners, but also keeping a finger on the pulse of the broader client environment. To achieve this, the department initiated a monthly Public Environmental Analysis Report. The monthly report was comprised of a dashboard that reported on client trends based on:

- Public Opinion Research
- Media Analysis
- Social Media Monitoring
- Public Enquiry Tracking
- Stakeholder Panels and
- Key Performance Indicators (KPI's) compiled by frontline department service delivery agents.

RCM Consultants Inc. had observed over the past few years that managing client relations is becoming a greater focus of public sector organizations as they paid more attention to building and rehabilitating relationships. Governments were discovering that it was a lot easier to accomplish their mandates when their interactions with external and internal clients were more effective.

Public	Private	Client* Relations Checklist	Yes	No
X	X	Do you know who your organizations most important clients/users are?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you know what your clients/users think of your organization, staff, products, programs and services?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do your clients/users know who they must contact or how to access your programs and services?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	We know what program/product/service variables are most important to your clients/users?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you know how clients/users perceive your value proposition?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Is there a protocol in place to deal with clients/users who are dissatisfied?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you have regular communication with your existing and potential clients/users?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are your clients/users aware that you value their relationship?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are you doing enough to expand your reach to all potential clients/users?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are you doing enough to hold onto the clients you have?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do your clients trust you?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you trust your clients?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Overall, do you have an effective relationship with your clients?	<input type="checkbox"/>	<input type="checkbox"/>

* For public sector organizations using this checklist, clients should be defined as the external users of government programs or services, or the users of internal government common services such as communications, legal services or information technology.



Media Relations



CHAPTER 3

MEDIA RELATIONS

Media relations refers to the relationship that an organization develops with media representatives to gather and distribute information. It involves working directly with reporters, as well as persons responsible for the editorial (news and features), public service and sponsorship programming products of the media.

First Chair Up

Evan and Alex were the first two of the group to hit the ski hill that morning. They had jumped on a shuttle bus that picked them up at the corner and delivered them to the base of the mountain. The previous night it was agreed that Linda would be skiing with Georgina for the first part of the day.

“So, Alex, Charlie tells me that you have not strapped on the boards for a few years,” commented Evan as they got in line for the gondola to the top of the mountain. Evan was a former ski instructor and was recognized among the group as being their best skier by far.

“Yes, it has been a few. I was an avid skier in my younger days and took it up again when our kids were young, but it’s been a few years

since I have been on a hill,” said Alex. “Hopefully I don’t make too much of a fool of myself.”

“I’m sure you’ll do just fine,” replied Evan. “I’m just afraid that my business life is going to start mirroring my skiing life.” Alex gave Evan a puzzled look. “You know a long slow climb up, followed by a quick decline, full of twists and turns with a few bumps, or should I say moguls, along the way,” smiled Evan to make light of the serious situation his company was facing.

Evan was with New Technologies Limited, a mid-sized technology firm headquartered in Silicon Valley north, with satellite offices in Toronto and Europe. He had been with the company almost since day one and had risen through the ranks of sales and marketing. He was recently appointed vice president, public affairs. New Technologies had been an industry darling, growing rapidly over the first ten years. Their stock was listed on the NASDAQ and the TSE but was trading down significantly from their high of just nine months ago. As the new VP, Public Affairs, Evan was responsible for managing, amongst other things, the relationship New Technologies Limited had with the media.

New Technologies Limited had not historically worried about building relationships with the media. Given that they were industry leaders, the specialized technology media were always quick to report on their latest breakthroughs. As the business started to falter, they were experiencing negative coverage in the technology press, as well as in the business and city sections of the city dailies and local broadcast media where they had offices. This negative media coverage was affecting not only sales and the share price, but also the attraction and retention of qualified employees. There was also significant negative chatter on social media.

“You have probably seen in the media, that we are experiencing a few twists and turns ourselves at New Technologies,” volunteered Evan. Alex had observed last night over dinner that Evan appeared to be

paying very close attention to what he and Linda had been saying about the Relationship Centered Model concept. He had not been surprised when Evan had approached him at breakfast that morning asking to “pick his brain.”

“Possibly if we had been applying your Relationship Centered Model concept before, we would not be in the mess that we are now,” mused Evan. “I am particularly interested in hearing your thoughts about how we could employ your concept with respect to traditional and social media. While I am concerned about the whole company, I really don’t want media relations to be the ball that drops first,” he added.

“No problem,” replied Alex. “It would be my pleasure. I’ll help you with some advice on the way up the hill, if you promise to help me with some advice about getting down the hill.”

Media Monitoring and Analysis

“First things first. Do you have a clear understanding of what the media are saying about New Technologies? Is there a framework in place to monitor and analyze the traditional and social media coverage that you and your industry sector receive?” asked Alex.

“If you mean do we keep copies of the media stories where New Technologies is referenced and distribute them throughout the company, the answer is yes,” replied Evan.

It had been Alex’s experience that while companies and institutions were generally good at monitoring and circulating copies of media coverage, they were very poor at analyzing and interpreting what this media coverage meant. Good media monitoring and analysis was important not only for evaluating how an organization was being perceived and portrayed in the media, but also for planning media relations strategies.

“Well, that’s a good start. However, it is important to understand the state of your media environment in terms of content and trends,” stated Alex. “For example, what is the tone and volume of media coverage? Are the company’s spokespersons quoted, and are key themes and messages reflected in the coverage? What media are saying what, what variances in coverage exist across the country, continent and world, between media sources and who are the friendly and hostile journalists?” asked Alex.

“Whoa,” groaned Evan. “That’s a lot of good questions that I should probably know the answers to, but unfortunately I don’t. I guess I could ask my staff. I’m new to the position, so I have not been tracking media coverage myself,” he added.

“Ok” said Alex, “Don’t panic. The first place to start is to conduct a retrospective trend analysis of the media coverage that you have received over the past year or two. How far back do you have copies of press clippings? If you do not have much, you can also perform a key word on-line media archive search. What you then need to do is code the content of these stories and evaluate the impact of past announcements that New Technologies has made. I’ll send you copies of a couple of media evaluation tools that we have developed to prepare a quantitative analysis of media coverage as well as measure its impact.”

The tools that Alex was referring to include a media coding guide (See Appendix B) and a media score guide (See Appendix C).

The coding guide captures information on the nature and content of individual media stories. Each media clip is coded to identify:

- When and where the coverage was received (date, location, type of media, language)
- Reporter’s name

- What kind of coverage it was (story, editorial, letter to the editor)
- The tone of the coverage (positive, neutral, negative)
- Type of coverage (issue covered, who was quoted, reflection of key themes and messages).

The data is then entered into a database (e.g. Excel) and an analysis is performed that illustrates trends in coverage over time as well as variances between regions.

The media score guide enables the organization to measure the impact of media coverage received in response to an announcement, news release, or event. This guide is used to record:

- The type of media the coverage was in (daily or weekly print, magazine, trade journal, radio, television, on-line, U-Tube video, blog, tweet)
- The media coverage rating (brief mention, full story, lead/front page, editorial/commentary)
- Message rating (announcement versus key messages)
- The media coverage rating is then multiplied by the message rating to calculate the media score rating for that media event.

“Thanks. That would be great,” replied Evan. “Maybe you can explain to me how to use these evaluation tools on our next ride up the chair. In the meantime, I think it is my turn to evaluate your performance as a skier.” With some trepidation, Alex slid off the chair and started down the hill.

Today's Media Environment

"Not bad," said Evan as they got back in the chairlift line at the bottom of the hill. "It would appear that you have not lost your ability to ski. On a scale of 1 to 5, I'd give you a 3."

"Your evaluation of my skiing performance is just the point I was making on the ride up the hill the last time," said Alex. "You need to have a quantitative means of tracking your media performance so that you can see what trends in media coverage exist, and so that you can identify any media opportunities or threats that exist."

"However, tracking media coverage is only one part of managing your media relationships. You also need to take concrete steps to proactively build these relationships," said Alex.

"Today's media environment is unlike anything seen before. Because of media convergence, and the ever-evolving use of the Internet, social media and user-generated content trends, traditional media organizations have been turned upside down. Today, people get their news from Twitter, watch YouTube videos, and rarely pay to read a newspaper," said Evan. "Add to that the proliferation and claims of fake news, www should stand for Wild, Wide, West.

"You're right," replied Alex. "As media organizations continue to feel the pressure of instant online news, many are beefing up their online, mobile and app presence to supplement their traditional print and broadcast formats. As a result, reporter friends of mine are stretched farther than they ever thought possible. Reporters are not only writing stories and meeting deadlines, but also "creating content." Many write for the traditional print or broadcast version of their outlets, while at the same time Tweeting and producing online versions and their own blogs on specific topics. And with cost reductions in media groups, reporters are becoming more generalists, covering multiple beats at the same time."

Evan pointed out that as a result of being in a "post media world" in which anyone and everyone can be a broadcaster—that is, produce and distribute relevant information to potentially vast audiences through the Internet and digital communication tools—it was becoming increasingly important to maintain a comprehensive listing of not just all industry related media but also to compile a listing of local business and community media, as well bloggers and others covering the company and industry.

Alex stressed there should be an ongoing system for a representative of New Technologies to proactively touch base with key reporters to build and maintain a good rapport. A data base should be compiled that included key information on each reporter (name, media organization, office/cell numbers, email, Facebook address, and Twitter handle) as well as a record of contact dates, the nature of the contact, the results of the contact, and copies of any stories the reporter was involved in that dealt directly with New Technologies, or their industry sector in general.

Alex and Evan then launched into a conversation of some of the tips and tricks that they had both seen work effectively in the past for building relationships with the media.

Evan pointed out that New Technologies had had a lot of success with building relationships with individual reporters that are mavericks. These mavericks were reporters that had historically demonstrated a unique twist to a story and appeared to have more autonomy than most reporters to pursue new stories. Evan felt that if New Technologies could provide these reporters with a unique, inside angle, they would be more likely to explore this unbeaten path.

Show & Tell

Alex noted that conducting tours of facilities to give reporters an inside look and perspective of a company's operations could be extremely

valuable at building relationships and helping to distribute the company's messages. Of course, the tour had to be of something unique. Walking a reporter through the organization's offices would not be interesting unless there was something truly different about the office setup. Alex pointed out that he had seen organizations successfully build relationships with reporters by providing them with behind-the-scene looks at military bases, quarries, landfill sites, manufacturing facilities, training camps, and more.

Inviting media to see first-hand what a potential controversy is all about is also a very proactive way of managing a story. If the media is reporting about how noisy, smelly, or environmentally damaging a process, site or operation is, it only makes sense to invite a reporter or blogger to see first-hand what is going on, and what steps are taken to mitigate negative effects. If the reporter only looks at a situation through the eyes of someone who is being critical about something, they are only reporting one side of the story. **Telling** a reporter your side of the story is a good first step, but if you can **show** them your story, it will have a much greater impact. Alex had seen this approach turn a negative story into a positive story when the reporter saw first-hand what was really happening at a location and had all the positive points presented, rather than just hearing the negative points expressed by those individuals opposed to the operation.

Alex shared the story about the waste management company that was being criticised for emitting odours. A handful of residents around one of the company's sites were complaining to the media, politicians and anyone else that would listen that the facility stunk and was ruining their lives and decreasing their property values. Hearing only from the complaining residents, the media dutifully reported the problems the facility was causing. Once the company invited the media to tour the facility and the surrounding community to see (and smell) first-hand what was actually occurring, as well as observe other odour emitting sites in the community, the media coverage started to turn around

and noted that the reporters could not in fact detect the odours from the facility, that the facility was creating jobs and making a positive environmental contribution.

Themes & Messages

"Another good tip to follow is sticking to key themes and messages," said Evan. He pointed out that if you keep reinforcing your messages, and make sure your messages are consistent between stakeholder groups, you are more likely to be heard. You also avoid the awkward situation of being tripped up on what you have said to one group versus another. It is helpful to have an individual identified as the sole spokesperson for the organization (or multiple designated spokespersons for larger national organizations) to ensure consistency of messages and to accommodate the media talking to subject matter experts.

Being Up Front

"That reminds me of my number one rule when it comes to dealing with the media, or any other stakeholder group for that matter," said Alex. "Always tell the truth. The truth always comes out anyway, so you might as well be upfront about it. Once a reporter catches you being less than straight forward with them they will forever be skeptical of what you and your organization are saying."

Evan agreed, "You might as well acknowledge and confront a problem head on, rather than having to react to it once the situation comes to light." Evan shared with Alex a story of where New Technologies discovered that one of their plants had recently changed waste disposal contractors and was unknowingly disposing of waste material in an inappropriate fashion. Given the choice of simply fixing the problem and not saying anything about it, or coming clean, they chose to inform the appropriate officials and the media of the problem and how they were

fixing it. They invited the media into the plant to point out what had been done wrong and how they had fixed it. They even brought the media to the landfill site where the waste material had been disposed to give the media a first-hand look at how the clean-up operation was being undertaken. This tour of the plant also gave New Technologies Limited the opportunity to demonstrate how environmentally responsible the rest of the plant operations were. Rather than focusing on the negative, they had the opportunity to highlight the positives of their operations. Evan added that after the tour, one of the reporters approached a New Technologies official and said that they had heard a rumour that there was an environmental problem involving waste and that they were in the process of investigating it. The reporter stated that if New Technologies had not come forward with the confession and tour, there could have been a very damaging and one-sided exposé story.

Policies & Procedures

Alex suggested that, if media relations policies and procedures did not already exist, Evan consider establishing procedures that dealt with:

- Following up on media inquiries (who, when, how)
- Who, when and how to prepare a letter to the editor to voice New Technologies' view on a topic or issue
- Who, when and how to contact a media source when New Technologies or the industry has been misrepresented or misquoted in the media
- Tip sheets on how New Technology representatives should deal with the media when they are being interviewed
- Use of social media to reinforce media links.

Evan pointed out that, "In order to minimize the potential of negative news, we had a media policy in place, so that all employees understood

the rules of engagement with the media, including what to do when a journalist calls unexpectedly, and who to direct media inquiries to." It was agreed that meeting deadlines is a crucial part of the journalist's trade, which means a fast response from an organization is essential. Increasingly, Evan had experienced journalists contacting organizations outside normal 'working hours' via cell phones and even contacting officials at home. It pays to treat journalists as important and very demanding customers, and that way an organization is more likely to get a favourable result.

As they were approaching the top of the hill, Evan noted that Alex's insight had been very worthwhile. He promised that he would make use of the media monitoring and analysis tools as soon as he received them, and that he would review the company's existing media relations procedures to ensure that they reflected Alex's suggestions. He also promised to share some of his skiing advice with Alex during the next few runs to help him on his technique.

Media Relations @ Highlands Construction Limited

Like many small and medium-sized enterprises, Highlands Construction had not focused on building relationships with the media. Their dealings with local media were primarily through the purchase of advertising space. Buying advertising in the local papers had generally resulted in positive profile stories in the homes sections of the local papers.

As the company grew and undertook increasingly larger projects such as the River Bend development, it started to attract more media attention in the city and business sections of the papers, and not all of it was good. Charlie had wrongly assumed that buying advertising would guarantee positive media coverage.

Alex had reviewed copies of the media clippings that Highlands had collected over the past few years. Based on a simple analysis, he was able to demonstrate that the media coverage of Highlands had taken on a decidedly negative tone relative to the industry, and that the company had failed to tell its story to the local media. This was true in terms of promoting good news stories such as the successful acquisitions and the growth of the company, and more importantly, to respond to concerns raised by others about some of the developments in which Highlands was involved.

Because of this initial audit of media relations, it was agreed that the following activities would be carried out:

- Compile a list of all local media and relevant community, development and environmental bloggers
- Establish a contact management system
- Monitor industry and community related media coverage
- Prepare a media response process
- Expand the company's social media presence.

Having accurate and positive media coverage was critical, not just in terms of media relations, but the other five relationships as well. As the company grew and required additional capital funding, it was of critical importance with respect to investor relations.

The Highlands Construction Marketing Vice-President was tasked with compiling a list of all local media and establishing a contact management system. In addition, he established a protocol to deal with reporters when they contacted the company for comment on a story. This would ensure that the right person provided the right information and key messages to the media. Finally, the VP was tasked with monitoring Tweets and media alerts to respond immediately to any references made to Highlands Construction. This enabled the company to get in front of any traditional and social media coverage to provide a company response or correct misrepresentations.

Because of this ongoing media analysis and contact program, the company was garnering much more positive or at least balanced coverage. The local media were also seeking out comments from the company about stories prior to reporting on them.

This increased focus on media relations proved invaluable to Highlands when one of its company vehicles was involved in a fatality. Aware of the occurrence, the company immediately started monitoring the Tweets of the local reporters that they were following and the media websites to see what was being said and to view any visuals. It was noted that the reporters were not identifying Highlands in either their comments or photos and were simply referring to a construction vehicle being involved in the accident. The media strategy adopted by the company in a situation such as this was to attempt to minimize references to the company name. As a result, while the company spokesperson would respond to any direct media enquiries their messages would be limited to acknowledgement of the unfortunate accident, condolences to the

affected parties, that they were cooperating with the police and that they would conduct a thorough internal investigation themselves to ensure that all company's extensive health & safety policies and procedures had been followed. The spokesperson also drew attention to the fact that the driver of the construction vehicle was also negatively impacted both physically and mentally and outlined the employee support that the company was providing.

Because of having adopted an aggressive media outreach program to invite media to visit their construction sites and facilities in the past and making them aware of the extensive health & safety programs adopted by Highlands, reporters were more likely to see the occurrence as an unfortunate accident rather than the result of a careless or uncaring company. Reporters could see by viewing the company website and newsletters that Highlands was an industry leader with respect to safety. Being the recipient of safety awards and being active in the local construction associations Health & Safety Sub-Committee, demonstrated the company's leadership in terms of safety.

Media Relations @ the Department of Business

As is common in most federal departments and agencies, Linda had found media relations at the Department of Business to be generally well managed. Her philosophy with respect to media relations was not just talking to the media, but also talking to all stakeholders through the media. Her view was that journalists and social media representatives play an important role in the democratic process—providing the public with news and information about government and reporting on the public's views and opinions of government. In fact, she had pointed out to the Department of Business that the Ministers' mandate letter recognized that members of the Parliamentary Press Gallery, indeed all journalists in Canada and abroad, are professionals who, by asking necessary questions, contribute in an important way to the democratic process.

Linda encouraged the Department of Business to cultivate proactive relations with these media representatives to promote public awareness and understanding of departmental policies, programs, services and initiatives.

The Department of Business must operate and respond effectively in a 24-hour media environment. She noted that the communications shop must be able, on short notice, to reach and inform the media on issues of importance to decision makers and the public. Institutions engage the media using a variety of communication tools, including social media, news conferences, background or technical briefings, news releases, and audio video presentations.

The role of media relations at the Department of Business was to:

- Plan, develop and implement traditional and social media strategies
- Identify and train subject matter experts to serve as media spokespersons to communicate with the media in an official capacity on behalf of the Department of Business
- Facilitate information or interview requests from the media, and manage plans and strategies for communicating with the media;
- Ensure processes and procedures are in place to assist managers and employees in responding to media calls
- Liaise with, and answer enquiries from media, individuals and other organizations
- Develop and maintain relationships with journalists and media outlets
- Research, write and distribute press releases and tweets
- Collate and analyze media coverage
- Answer enquiries from the press or other media representatives
- Develop media contacts;
- Monitor media coverage and
- Analyze and evaluate attitudes in the national and international media.

One of the biggest challenges faced by the Department of Business was responding in a timely fashion to media enquiries and tweets. This was addressed through the establishment of a streamlined protocol for approving media responses, tweets and quotes. The Communications shops KPI's (Key Performance Indicators) for media relations included responding to 90% of media enquiries within negotiated timelines.

The other major recommendation made with respect to media relations at the Department of Business was increased environmental scanning which produced qualitative trend analysis reports. These media analysis reports had been used effectively in several departments and agencies to track media coverage and to make more strategic use of announcements. (See Appendix D for a sample report). To make production of these media analysis reports manageable, the Department had established a key list of traditional and social media sources to monitor. Doing so permitted the Department to track trends over time since the scope of the analysis was consistent. These monthly Public Environmental Analysis (PEA) reports were prepared in a dashboard format that made them easier to compile and read. The PEA reports were also broken down by region.

With offices across the country, the Department of Business had made effective use of media tours of businesses that were recipients of the departments support to highlight the economic and social benefits of the departments programs and services, particularly in aboriginal communities. It was found that there was considerable interest in many small unique businesses that received Department of Business assistance.

Public	Private	Media Relations Checklist	Yes	No
X	X	Do you monitor all the appropriate print, broadcast and social media sources?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you know what comes up on the web when you search your organization's name?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you have an up-to-date media contact list?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you have regular contact with the various media organizations?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you have a regular process to follow when you are contacted by the media?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Is everyone aware of this media contact process?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are there clearly identified spokesperson(s) for the organization?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Does your organization write a letter to the editor to voice your organization's view on a topic or issue?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you respond quickly to media enquiries to meet their deadlines?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you calmly contact the media when your organization is misrepresented, or you believe you are misquoted?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Does the media trust you?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you trust the media?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Overall, do you have an effective relationship with the media?	<input type="checkbox"/>	<input type="checkbox"/>



CHAPTER 4

Investor Relations



CHAPTER 4

INVESTOR RELATIONS

Investor relations are the activities through which an organization consciously builds relationships with current and potential investors, funding bodies, financial analysts and the media to ensure it not only has their confidence, but access to all the funds it requires at the most favourable interest rate and lowest fees.

The Meet

While Alex was skiing with Evan, Linda had paired up with Georgina Dewar. During dinner the previous evening Georgina had made it a point of approaching Linda with a request that they spend a bit of time over the weekend discussing her experience in municipal politics and exploring how the Relationship Centered Model was applicable to her. Given Linda's experience in the financial services industry, as well as a two-term municipal councillor, she felt that Linda might be able to shed some light on her approach to investor relations at the city.

They agreed they would meet at the bottom of the hill the next day at 9:00 a.m.

Georgina was in her first term as mayor of Port Osgoode, a mid-sized city just outside of Toronto. With her background in business,

Georgina wanted to see her municipality adopt a more business-like approach to running the short and long-term aspects of the city. As a former businessperson, she saw her taxpayers as the equivalent of her shareholders. She wanted to make sure that taxpayers felt that they were getting a good return on their tax dollars, and that the media had confidence in how the council was spending those tax dollars. At the same time, she was still concerned with bond rating services so that her city could access money at a favourable interest rate. One of her additional challenges was getting her council to see themselves as a board of directors, steering the direction of the city, rather than being hands-on operators, running the day-to-day business of the city.

As Linda arrived at the bottom of the hill, she spotted Georgina on her cell. Not wanting to pry, she stood off to the side. She observed that Georgina appeared to be agitated with whomever she was speaking. With a shake of her head, Georgina ended the call and replaced the phone in her vest pocket.

“My Lord,” sighed Georgina as she approached Linda. “I sometimes wonder why I ever left the business world to enter politics. Life was so much more manageable and focused back then. We had a business plan and we stuck to it.” Georgina’s mining company had built a solid reputation in the industry, and the business community in general, for generating long-term growth and steady returns for its investors. A few years back, a national business magazine recognized her as one of the top ten up-and-coming executives in the county. The article credited much of her success to her broad approach to investor relations that included not only a focus on the financial balance sheet, but also on the social balance sheet.

Simple Common Sense

“You know,” added Georgina, “I really get this Relationship Centered Model thing that you and Alex talk about. Even as a politician, I see its relevance in the municipal government sector.”

As they waited in line for the gondola, Georgina proceeded to outline the applicability of the model’s concepts to her political reality.

She noted that employee relations were probably even more relevant to the city given the fact that most of the city’s workers were unionized. “We have so many frontline city workers, it is critical that they function as ambassadors for the city in their day-to-day interactions with the public,” observed Georgina. “But do you think I can get all of them to see themselves as ambassadors? No, instead the odd one drives around the city in their truck, with the city of Port Osgoode’s name and logo prominently displayed on the vehicle, cutting off traffic or parked in no-parking zones, or worst yet, they congregate for hours in the local donut shop parking lot.”

“I take it your comments may be related to that cell phone conversation I just interrupted,” queried Linda. “Yes, and you were not interrupting. That was the Transportation Department General Manager giving me the heads up about an exposé story in this weekend’s newspaper back home that secretly followed a public works crew around for a day and recorded just how little time is spent working on the taxpayers’ dime,” moaned Georgina.

“Ouch, that’s got to hurt,” grimaced Linda.

Defending her staff, Georgina pointed out, “The sad part is, that most of our city staff are hardworking, dedicated professionals who take their jobs seriously, not just as employees, but also as taxpayers. I bet that television crew had to spend weeks tracking crews until they found one that was not that busy for a day.”

The importance of community relations was also a given for Georgina. “After all, the city is truly a community of communities, each one represented by a councillor,” she said. The city was continuously conducting public consultations in support of their official plan review, zoning decisions and budget preparation. She pointed out how city staff was constantly engaging the public, and if they were not paying attention to what the public was saying, the local councillor would be the first person to let them know.

In terms of government relations, Georgina noted the importance of working individually, and in partnership with municipal government associations to try to influence upper-tier government actions and policies. These decisions affect all municipalities in areas such as social programs, environmental regulations, and affordable housing policies. It was also important for her municipal government to lobby the upper tiers of government for infrastructure funding support.

Georgina pointed out that client relations was probably the most relevant parallel to her previous life. “After all, the taxpayers are the clients of the city’s programs and services. If they are not happy with the level of service they receive for their tax dollars, they are left with the decision of moving to another community, or more likely replacing the politicians they had elected with a new crew who would hopefully be more effective.” In fact, this is how Georgina found herself elected as mayor in the first place. The voters had not been happy with the previous administration’s client relations.

Georgina had already admitted that the phone call she had just been dealing with was related to a city hall reporter from a television station in her community. She had found that the relationship she had with municipal reporters was very different than the close working relationship she had had with the business media. She felt that this relationship was a work in progress, but that she was making progress.

“You really must have been paying attention to what we were saying last night when we were talking about what we do,” said Linda. “You have successfully illustrated the applicability of five of the six relationships.”

Georgina admitted that being a new mayor, with virtually no political experience, has been a real revelation. “When I was encouraged to enter the race for mayor by the local business community, they convinced me that politics was not really all that different from business. They told me you just had to view the taxpayers as being equivalent to shareholders from her previous life,” she moaned. “Oh, I get the relevance of investor relations. I just can’t seem to get everyone else at city hall to get it.”

“I seem to recall seeing an article in a business magazine that lauded you and your company for its investor relations program,” noted Linda. “If I recall correctly, you said something to the effect that ... one of an organization’s most important assets is its reputation. Having a good reputation is like a line of credit at the bank that an organization can draw on if it has a need.”

Georgina smiled as she fondly remembered that article. She then shared with Linda one of her other favourite investor relations quotes from billionaire investor Warren Buffett: “It takes 20 years to build a reputation and five minutes to ruin it.”

“I agree,” smiled Linda. “I have seen far too many organizations fold when they failed to protect their reputation.”

“Don’t forget fallen politicians,” added Georgina.

“Tell you what,” said Linda, as they reached the front of the line. “Why don’t you share with me why you had so much success with investor relations as we ride up the hill?”

“You’re on,” smiled Georgina. “It will be nice to reflect about the good old days for a while, instead of dealing with my constant challenges as mayor.”

Investor Relations – Worth its Weight in Gold

“I have found that there is a powerful business case for winning the hearts and minds of external stakeholders,” opined Georgina. A study conducted by some research organization found that the value of good relationships with politicians, the media, regulators and community members is worth twice as much as the value of the gold mine.

“There is actually research that quantifies what a number of us in the mining business already knew – that reducing conflict with external stakeholders in favor of winning their cooperation improves the company’s chances that the mine proposal can proceed on budget and on time, and most importantly, generates significant shareholder returns. It used to be the case that the value of a gold mine was based on three variables: the amount of gold in the ground, the cost of extraction and the world price of gold,” said Georgina. “Would you be surprised if I told you that you can have two mines, identical in term of reserves and operations that differ in their valuation by an order of magnitude of two?”

“Let me guess,” said Linda. “Because one has local support and the other doesn’t?”

“Right you are,” replied Georgina. “Never underestimate the value of the ‘social license’ to operate in today’s much more socially conscious environment. Investor relations are measurable and strategically relevant.”

Know and be Known by Your Investors

Georgina had found that it is critical to capture investor perceptions of the organization and the industry to be well informed. “You need to monitor what drives value,” she said. By this, she meant that you must be able to understand investors’ decision-making criteria to buy, hold or sell. She also acknowledged the importance of listening to a

representative sample of investors instead of just responding to the loudest, which can lead a company down the wrong path.

“Investor relations is a discussion and is as much about companies listening to the views and feedback from investors, the investment community and the financial media, as it is about companies explaining their business to the same groups,” said Georgina. “Fundamentally, the responsibility of investor relations is not only to create an awareness and understanding of your company, it is also to help gain access to capital and fair valuation of its shares.”

Linda agreed. “To target the investor community effectively, you need to know who is really going to influence the value of your company’s stock.” By this, she meant that entering a dialogue and developing relationships with the investment community helps participants become cognizant of the organization and its investment proposal. This leads to a decision as to their involvement with that organization.

“It’s all about two-way communications,” Linda stressed.

Open Communications

Through her experience as a municipal councillor, and her work with RCM Consultants, Linda had observed that a good investor relations program provides a framework for open, two-way communication.

“Good two-way communication bolsters investor confidence. Through investor relations, investors become acquainted with and trust the organization and its management,” said Linda.

Based on her experience, Linda noted that the objectives of an Investor Relations Communications Strategy should be to:

1. Determine the investor community’s understanding and perceptions of the organization.

2. Enhance the understanding of the organization's financial objectives by investors, potential investors and the financial media.
3. Set the agenda for the discussion within the financial community on the organization's financial performance through the provision of timely, appropriate and accurate information.
4. Lower the cost of accessing working capital, as a part of the organization's overall debt management strategy.

"Investor relations communications can take many forms, including meetings with investors and the financial media, news-releases, annual reports, social media and websites," noted Linda. She was aware that the commonality however, is that each communication tool utilized by the organization is designed to inform stakeholders about the institution, so that they can gain a greater understanding about the organization's business, its governance, financial performance and prospects.

Financial Media

They were now about halfway up the hill, and at a particularly high part of the lift. The ground was probably about 100 meters below them. "Oh, how I miss the financial media from my old days. This may be a good place for me to get off," joked Georgina. "In comparison to the reporters that cover city hall, they were a joy to deal with."

Georgina recognized that the financial media plays an influential role in today's financial markets. The need for organizations to communicate effectively with this audience and ultimately with all shareholders is paramount. She saw the financial media as both a target audience, and a communications tool. At city hall, reporters were frequently trying to find something to embarrass the Council. "True, coverage in the financial media will foster positive and negative stories, which in turn

will raise profile and visibility for the organization, but it was more of a professional relationship," said Georgina.

"City hall reporters and the financial media are not really all that different," said Linda. "While investor relations are focused on establishing, building and protecting reputations, financial media are fixed on questioning these reputations. That is not very different from what goes on at city hall between reporters and Council. Just as good investor relations will act as a conduit between an organization and the financial media, good media relations between the city and city hall reporters will also enhance relationships.

"While I was president of my gold mining company, relationship-building with the financial media was at the heart of our investor relations and media strategy. The ongoing, close working relationship we had with the financial media smoothed the lines of communication and generated goodwill between our company and the media and went a long way to ensuring that the organization had a generally positive voice in the media."

"You're right," agreed Linda. "All organizations should try to engage with the media in a variety of ways including one-on-one meetings throughout the year, not just at key reporting dates, or when the organization wants to get a message out. What is critical to any interaction with the media is preparation. Without proper preparation, the organization may find itself in a difficult situation, and potentially give away confidential information or create the wrong impression of the organization. Of course, the aim of any meetings with financial media is to project a positive image of the organization with the objective of securing helpful, informed and positive coverage. However, negative news will sometimes emerge, and organizations should work with their investor relations advisers to mitigate any potential damage."

"We also had in place an Issues Management process whereby we continuously monitored and assessed potential problematic issues and

their development. All employees, from the miners themselves, to the mine manager, were responsible for identifying potential problems at an early stage and advising the right people of the possible problem and media interest. This greatly reduced any potential damage to the company,” said Georgina.

“So, your dealings with the financial media were a rewarding experience,” suggested Linda.

“Yes. If organizations are well prepared and understand the journalist’s agenda, this can go a long way to alleviating negative coverage and assist an organization in enhancing and improving its public profile and reputation. Organizations need to display openness and to maintain a constructive dialogue with all stakeholders, and particularly the financial media, including during difficult times,” said Georgina.

“Well, we are at the top,” observed Linda. “Why don’t we work off some of your frustrations with an invigorating run down the hill and then talk about how we can fix your investor relations issues at city hall on the way back up.”

Investor Relations Policies and Practices

As they reached the bottom of the hill they were surprised to see that there was no one in line, so they made their way quickly back onto the lift. “That was fun. You are quite a good skier. I observed a few things as I followed you down the hill and put them in practice myself by adopting your technique,” said Georgina.

“When I was first appointed president of my old company, I learned a few things about investor relations by observing how our investor relations program was run and by asking a few simple questions. I believe they were something like:

1. Are our investor relations policies set forth clearly in writing?

2. Are our practices consistent with our investor relations policies?
3. Is it clear within the organization who can comment publicly about the organization’s direction and financial performance?
4. Is the information used in our investor relations activities up-to-date and complete?”

“Why don’t you try the same approach now with your city?” suggested Linda. “For example, does the city have any investor relations policies?”

“That’s an interesting question,” responded Georgina. “But I think a better question might be, what kind of investor relations policies should we have?”

As the two women were whisked up the hill they proceeded to have a spirited discussion about what an investor relations policy would look like for a municipality. By the time they had reached the top of the hill, they had compiled the following list of policy ideas:

- The city should have a clear understanding of how bond-rating companies establish ratings for municipalities.
- The city’s bond rating should be clearly identified, and targets established for short- and long-term ratings.
- The city should meet with bond rating agencies regularly to discuss the city’s credit rating and ensure that the agencies are aware of the city’s debt financing strategy.
- The cost of debt financing should be clearly identified and shared with taxpayers.
- The city should ensure that its financial information (budgets and financial reports) are clearly communicated to the taxpayers. The city should conduct focus groups with councillors, taxpayers and community leaders to ensure that financial information is presented in an understandable format. If not,

the city should explore alternative formats to make it more understandable and relevant. It is critical that all stakeholders understand the true costs of providing city services and where their tax dollars are being spent.

- The city's financial performance should be tracked on a quarterly basis that illustrated actual performance against budgets and those reports made public.
- The city should clearly identify who is authorized to speak to bond rating institutions, banks and other lenders, as well as the media, about financial information and performance.
- Within what timeframe should the city respond to an inquiry from a councillor, financial institution, media, or taxpayer about the state of the city's finances?
- The city's investor relations policy should be documented and approved by Council.
- Clearly articulated debt ratio ceilings should be established and tracked.

"Boy that was a productive ride up," declared Georgina as they stood at the top of the hill. "I wonder if the ride down will be as effective."

"Last one down buys the hot chocolate," declared Linda, as she launched herself over the edge and began the race down the hill.

Benchmarking

As Linda and Georgina stood exhausted at the bottom of the hill, Georgina noted, "That was an interesting exercise we went through on the last ride up, and a fun ride down. Too bad I lost. I guess the hot chocolate is on me. Why don't you grab a place by the fireplace while I grab the drinks?"

As Georgina joined Linda she noted, "As I was standing in the cashier's line, I thought of one more policy that should be added to the list."

The additional policy that Georgina suggested was to benchmark and track their performance against other municipalities. "That's a very good suggestion," responded Linda. "It is important that all the stakeholders have a context with which to judge the financial performance of the city. That context should be over time, as well as between other similar sized municipalities."

Georgina pointed out that she had done something similar at her old company by monitoring what drives value in her stock and how her company fared on those metrics in comparison to others.

"In order to educate investors about mining industry trends and key things they should know about the business environment we operated in, we compiled a list of similar mining companies and tracked their financial performance, as well as how they were perceived by the media and community in which they operated. By selecting and analyzing a peer group, we had a much better understanding of how our industry was viewed, and more importantly, how we stacked up against them."

As they discussed this additional policy, they realized that benchmarking against other municipalities would also enable them to identify instances where potential issues or financial crises were emerging across municipalities or within Georgina's own municipality.

Georgina admitted that during her election campaign she had been critical of the previous mayor and council for increasing the amount of debt that the city was incurring. Now that she was an elected official, she realized that in comparison to other municipalities, her city was making less use of debt financing. In addition, it sometimes makes more sense to debt finance a capital project than put off making the necessary infrastructure repairs, which would cost considerably more in the future to fix as the infrastructure deteriorated further and costs rose.

The use of debt financing was particularly beneficial during periods of low interest rates.

The concept of comparing rates of taxation to other municipalities and other jurisdictions had also been insightful for Georgina.

“When my taxpayers complain that they are paying much higher taxes than some similar-sized city across the country, it was important to make sure that the basket of programs and services supported by that tax rate are similar,” said Georgina.

By the time they finished their hot chocolate, Linda and Georgina had agreed that benchmarking was an important tool to use in investor relations, both from an analysis perspective, but also for communications purposes.

Investor Relations @ Highlands Construction Limited

Investor relations had not been much of a focus of the work that Alex had performed at Highlands Construction since Highlands was a privately held company with very few outside investors, who only owned a small number of shares. It was agreed that there were a few Investor Relations activities that Highlands could focus on. These included:

- Compiling a list of all existing investors.
- Maintaining an up to date list of all lenders and creditors.
- Monitoring the company financial rating.
- Monitoring industry related media coverage.

Highlands had historically reinvested its profits into the company which enabled it to finance its growth internally for the first 20 years. Because of its more aggressive growth and acquisitions during the more recent past, the company had to spend time courting the banks and potential investors. Not only was this time consuming, but the uncertainty of ready financing created some instability and resulted in paying higher than expected interest rates and fees. What further complicated the raising of funds through outside investors was the pushback that Charlie received from existing investors when he failed to keep them informed of the early negative reaction he was getting from the community around the River Bend proposal. The lesson he learned in this instance was to ensure his investors were never caught off guard when it came to negative press. He was committed to ensuring that his investors heard it first from him, both good news and bad news, rather than in the media, some politician, employee, client or community member.

In the past, the company’s investor relations efforts were focused on his long-time bank and a small number of private investors that he knew because of them being clients, or through business associations that he was involved in. Charlie had confessed to Alex when they first

discussed investor relations that he had not even considered the business media as a group of concern when it came to investor relations.

It was, however, anticipated that over the next few years, as the company continued to grow and expand into other sectors, investor relations would become an increasingly important relationship.

As a result, the VP-Finance had compiled a list of all existing investors and partners. In addition, he had reviewed the company's list of lenders, suppliers and creditors to ensure that it was up to date. Working with the VP-Marketing, he was also paying much more attention to media coverage and actively seeking opportunities to go out and meet with business reporters.

It was interesting to note that as their other relationships had improved, outside investors and new partners had showed more interest in Highlands Construction and were bringing investment proposals and projects to them for consideration. In addition, there were some early indications that as the other relationships improved, there were improvements in sales and market share numbers.

As the company moved forward, they would be closely following industry media coverage, benchmarking their financial performance relative to other companies in their industry sector, and monitoring company indicators such as sales, market share and profit margins so that this information could be used in their investor relations efforts.

Investor Relations @ the Department of Business

Linda had found that many public servants had difficulty with the concept of investor relations being relevant in the public sector. However, once they consider investors as being the taxpayers who provide the funding, as well as the Senior Management Committees, Central Agencies, Cabinet Committees and legislators that allocated the limited financial and personnel resources across organizations and programs, investor relations started to make much more sense. Linda frequently asked her public-sector clients, "what government organization would not want to have access to more resources to help them carry out their mandate?"

How government and central agencies, as well as departments allocate their limited financial and personnel resources is critical to the success of all organizations and programs, especially service providers such as Communication, Information Technology, Legal and Human Resources Branches.

Within the federal government, it is expected that Cabinet committees and individual ministers will: track and report on the progress of commitments; assess the effectiveness of work; and align resources with priorities, to achieve the outcomes expected by the government and the results Canadians deserve.

As Guylaine Pégeot, head of communications at an Ontario Provincial Ministry had noted during her conversation with Linda, "If I can't convince senior management that my staff is best positioned to assist them in their mandate, they are not going to give me the resources I need to do my job."

As part of her work with the Department of Business Linda initially benchmarked the resources devoted to communications in the department as well as resource levels at similar sized departments. This included a breakdown of the level of resources devoted to various types of communications outputs and services, as well as an analysis of the actual gross voted operating expenditures on communications

as a percent of Department of Business in comparison to other federal departments.

She also conducted a review to ensure that the Communications Branch was compliant with government and departmental policies and procedures and that the staff tracked their performance so that they were able to demonstrate their efficiency and effectiveness.

For many government programs, such as infrastructure investment, housing and environmental protection, all three levels of government must work cooperatively to identify and finance projects. Understanding the respective financial positions and priorities of each level of government is critical in understanding what can be accomplished. These cooperative investments also frequently include working with first nations and national associations.

An important part of the job of the Communications Branch at the Department of Business was to explain to taxpayers, the business community and the media the benefits of the federal government investing in projects across the country. This included highlighting the return on investment in terms of job creation and generation of taxation. One of the reasons that the Department of Business had hired RCM Consultants and Linda was to assist the department to rebuild relationships and explain the financial benefits of investing in Canadian businesses after the Auditor General had conducted an audit that was critical of how the department prioritized its investments.

The Communications Branch was also responsible for the drafting of Communications Strategies in support of Treasury Board and Cabinet Committee submissions. The Department had found that by illustrating how these proposals supported government-wide priorities identified in the Speech from the Throne and Budget speeches were effective ways of helping to ensure financial support.

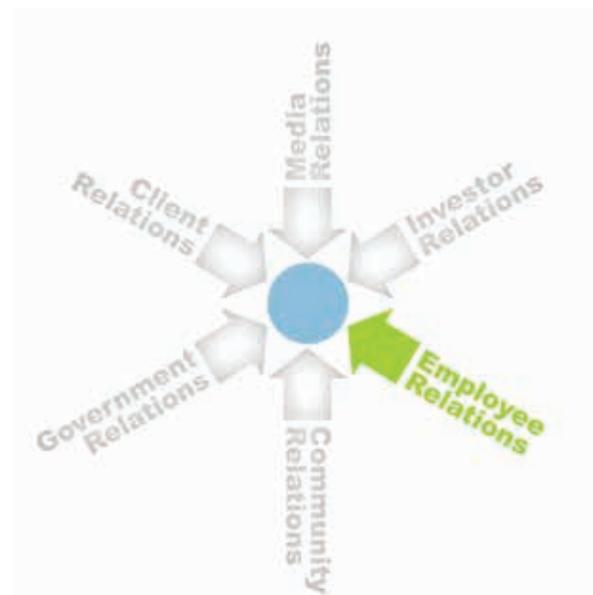
The Communications Branch also played a role in supporting budget consultations with taxpayers, the business community and the

financial sector to identify budget priorities and to help explain the governments proposals. Linda had discovered that taxpayers' and financial community's perceptions of the department were not what they thought they were. This finding led the department to revamp its Public Environmental Analysis and Issues Management functions to ensure that they could more quickly identify emerging issues that impacted the overall and financial reputation of the organization and track their impact.

CHAPTER 5

Public Private		Investor* Relations Checklist	Yes	No
	X	Have you reviewed your investor relations needs lately?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you know what the investor community's perceptions are of your organization?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you have clearly defined investor relations objectives?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are your investor relations policies set forth clearly in writing?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are your practices consistent with your investor relations policies?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Is it clear who within the organization can comment publicly about the organization's direction and financial performance?	<input type="checkbox"/>	<input type="checkbox"/>
	X	Is the information used in investor relations activities up-to-date and complete?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you know how your financial performance stacks up against similar organizations?	<input type="checkbox"/>	<input type="checkbox"/>
	X	Do you proactively go out and meet with the financial/business media?	<input type="checkbox"/>	<input type="checkbox"/>
	X	Is the organization in a high growth or volatile sector/industry?	<input type="checkbox"/>	<input type="checkbox"/>
	X	Have there been any occurrences of shareholder litigation in the past, or are there any potential situations on the horizon?	<input type="checkbox"/>	<input type="checkbox"/>
	X	Are you accessing funds at the most favorable rate?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do your investors trust you?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you trust your investors?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Overall, do you have an effective relationship with your investors?	<input type="checkbox"/>	<input type="checkbox"/>

* For public sector organizations using this checklist, investors should be defined as the Senior Management Committees, Central Agencies, Cabinet Committees and parliamentarians that allocate the limited financial and personnel resources across organizations and programs.



Employee Relations



CHAPTER 5

EMPLOYEE RELATIONS

Employee relations involve practices that impact the management and regulation of relationships between the organization, individual staff members, and groups of individuals within the organization.

Sharing Secrets

During lunch, Linda ran into Mary Black at Le Shack, a long-time favourite restaurant located at the base of the hill. They agreed that after lunch they would pair up for a few runs. Mary worked with RNH Incorporated, a mid-size developer and builder of luxury homes, where she was the director of personnel. Over the past few years, like Highlands, the company had been experiencing difficulties in attracting and retaining qualified employees. The housing market had been exploding and there was fierce competition for qualified planners, engineers, supervisors and trades people. Even though RNH was paying slightly above-average compensation, the company still had numerous positions that were unfilled.

To make matters worse, Mary had observed that the two divisions of RNH (property development and construction) were not working closely

together. This situation was starting to have negative consequences on meeting closing dates.

As they sat down, Mary noted, “Ok Linda. I just must pick your brain. As I am in the same industry as Highlands, I have seen what the Relationship Centered Model has been able to do for Charles when it comes to attracting and retaining qualified employees and it is truly amazing. Just exactly how have you been able to assist Highlands?”

“Well Mary, at RCM Consultants we have a strict policy of not releasing the identity of our clients to anyone. I would never share with one company what we have been doing for another, but Charlie said that you might be interested in talking to us, and in fact encouraged us to be upfront and honest with you. What I would propose to do, if you are interested, is to talk about the methodology we employ and leave out the actual details from Highlands.”

“That seems fair to me,” replied Mary.

Understanding Managers

“Have you ever read Stephen Covey?” asked Linda.

“Yes,” replied Mary. “Wasn’t he the seven habits guy?”

“That’s right, and habit number 5, of his *Seven Habits of Highly Effective People*, “Seek first to understand, then to be understood,” notes that it is important to understand the people that work with you and the environment these people work in. One of the most effective ways to enhance this understanding is through in-depth interviews, employee focus groups and surveys,” said Linda. “This research often leads to teambuilding sessions. Another device is to make use of personality assessment tools such as Myers-Briggs,” she added.

“Ok” said Mary, “When and how would I use these tools?”

“Typically, when we first get involved with a new client we start at the top,” said Linda.

RCM Consultants does this because change should start from the top so the leader, or management team, must be willing to listen and act.

You must have a good understanding of where the organization’s leaders are coming from. Linda pointed out that “the usual first step of the process is to conduct in-depth, one on one, confidential interviews with the management team. The purpose of these interviews is to become acquainted with the team, their backgrounds and their priorities. In addition, a SWOT (Strength, Weakness, Opportunities, Threat) analysis is conducted. Personnel issues are often a focus of this analysis, but the other relationships are also examined.”

“Why just interview members of the management team?” queried Mary. “Isn’t it important to talk to all employees?”

“This initial analysis gives RCM Consultants a preliminary overview of the organization from the perspective of the management team” replied Linda. “However, you are correct about the importance of talking to all levels of staff. This is usually done a bit later in the process, but sometimes a series of background interviews or what we call soft soundings, with staff is conducted at the outset if employee relations have been identified as a key area of concern.”

Team Building

Continuing, Linda noted that, “If the initial research reveals inconsistencies in an understanding of the direction, priorities and processes of the organization, it is generally recommended that a team building session be undertaken.”

“Sure, team building,” mused Mary. “Heading off on some retreat to undertake scavenger hunts, build forts, fight paint ball battles and sit in a circle and sing Kumbaya. You all head back to the office the next

day feeling “like one” with your colleague in the office next door, only to fall back into your usual dysfunctional patterns of behavior the next week, if not next day.”

“Actually,” piped up Linda, “that was not the type of team building I was talking about.” Linda went on to explain to Mary that she was referring more to a strategic type of team building that focused on building a Logic Model, or road map to get the organization from where it is now, to a well-defined and shared view of where it wants to be. (See Page 6 for a sample of a completed Logic Model for all six of Highlands six relationships).

“Just as in other relationships, teambuilding is the process by which people are encouraged to learn about themselves, and each other, and how working together gets them to where they want to be.”

“This sounds more like marriage counselling than team building,” laughed Mary.

A Road Map

“So how do you use this strategic road map you mentioned to build an effective organization?” asked Mary. “You really are paying attention,” replied Linda. “It’s as basic as asking four simple questions,” Linda added. The four questions that Linda was referring to were:

1. Where are we now?
2. Where do we want to be?
3. How are we going to get there?
4. How are we going to know if we are getting there?

“That sounds remarkably like a strategic planning exercise,” pointed out Mary. “Right you are,” said Linda, “but when it comes to team building, the focus is on the following areas:

- Communicating
- Making Decisions
- Managing Change
- Managing Conflict.”

Personality Assessments

(Where are we now?)

“One of the most important ways of answering ‘where we are now?’ is to understand who we are,” suggested Linda. “One of the tools employed in the RCM approach to employee relations and team building is the use of Myers-Briggs.”

Linda explained that Myers-Briggs assessments help team members understand their own personality types as well as those of their counterparts so that they can deal more effectively with one another. “Before you start any journey, you need to be aware of where you are starting from,” said Linda. “Myers-Briggs is a great tool to help organizations understand the team that it currently has, and to achieve the goals of building effective teams,” she added.

ISTJ	ISFJ	INFJ	INTJ
ISTP	ISFP	INFP	INTP
ESTP	ESFP	ENFP	ENTP
ESTJ	ESFJ	ENFJ	ENTJ

As a Myers-Briggs certified practitioner, Linda was well qualified to explain how the Myer-Briggs Type Indicator (MBTI) identifies 16 personality types and shows the process by which a person perceives and evaluates information, considering four dimensions of personality: Extroversion vs. Introversion, Intuition vs. Sensing, Thinking vs. Feeling and Judging vs. Perceiving. (An overview of the combinations for the 16

types can be found in Appendix E). Linda explained that, “knowledge of individual differences will help teams identify the particular talents and gifts that each member brings to his or her task and this knowledge can help reduce conflict by reframing potential sources of misunderstanding as the individual differences that exist in all relationships.”

“So, understanding one’s own personality type and the types of other team members is an essential factor in understanding where the team is, as well as to help make the team more successful,” stated Mary.

“That’s right,” replied Linda, “the MBTI functions as a tool that helps people in organizations to understand themselves and their behaviors. It enables them to appreciate others and to make constructive use of individual differences. They can then see that approaching problems in different ways can be healthy and productive for an organization.”

Linda went on to explain how RCM Consultants also used the Myer-Briggs Type Indicator to assist organizations:

- Communicate more effectively with peers, supervisors and employees
- Resolve organizational issues
- Improve teamwork
- Understand and adapt to differences in management style
- Resolve conflicts
- Understand contributions to the organization.

Healthy Organizations

(Where do we want to be?)

“Once you understand the organization you are working with, the next step is to define where that organization wants to be,” said Linda. “One of the methodologies we frequently adopt is an approach developed

by The Table Group.” The Table Group is a firm dedicated to helping organizations, and the people who work within them, become healthier and more effective. Patrick Lencioni of the Table Group has identified four disciplines that an organization should embrace and put into practice if it wants to become healthy.

“Ok,” said Linda, “I am going to ask for your indulgence as I launch into a bit of a lecture.” She went on to explain that for an organization to be healthy, it must define where it wants to be in terms of the following four disciplines:

1. Building and maintaining a cohesive team
2. Creating organizational clarity
3. Over communicating organizational clarity
4. Reinforcing organizational clarity through human systems

“Building a cohesive team that trusts one another in constructive conflict, commits to group decisions and holds one another accountable is a critical priority for a team.” Cohesive teams build trust, eliminate politics, and increase efficiency by:

- Knowing one another’s unique strengths and weaknesses
- Openly engaging in constructive ideological conflict
- Holding one another accountable for behaviors and actions
- Committing to group decisions

“Another priority for the team is to create clarity by clearly defining where it wants to be.” To create organizational clarity, the team must answer a series of questions regarding values, strategies and goals, as well as roles and responsibilities. Teams must align themselves around a few key questions that define their business and where they want to be. These include:

- **Core Purpose:** *To what greater purpose are we called?* Core purpose is the set of fundamental reasons for an organization's existence beyond just making money. It is meant to guide and inspire, not to differentiate. One of the best ways to define a team is in terms of its objectives, targets and measures. However, first it is necessary to clearly define its mission. This is not a jargon phrase designed to sound good and mean nothing, but a simple statement of why the team exists.
- **Values:** *What traits are inherent and important in our organization?* These are the few qualities that are uniquely inherent to the organization and must be maintained at all costs. Values represent the core priorities in the organization's culture; including what drives management and staff priorities and how they truly act in the organization. They reflect what is true within an organization. Value statements are internal messages that are shared among the management and staff of an organization. Value statements:
 - are not intended for use with external stakeholders
 - are designed for internal use with team members
 - help the staff stay on strategy and stay on message
- **Business Definition:** *What specifically does the organization do?* A business definition is intended to provide a simple statement of the business that a company engages in or the product/service it provides to a given set of customers/clients. It describes what an organization does to realize its core purpose. In short, it is simply a statement of the business you are in.
- **Thematic Goals:** *What is the organization trying to accomplish?* The single, temporary and qualitative rally cry shared by

all members of the team. What is it that the organization must focus on during the next year to achieve its Core Purpose.

“To get everyone in the organization to row in the same direction it must align its employees by repetitively and comprehensively communicating all aspects of organizational clarity.” Healthy organizations align their employees around organizational clarity by communicating key messages through:

- **Repetition:** Repeat the same message again and again.
- **Simplicity:** More complicated the message, the more potential for confusion and inconsistency.
- **Multiple mediums:** People react to information in many ways, use a variety of mediums.
- **Cascading messages:** Leaders communicate key messages to those they supervise; the cycle repeats itself until the message is heard by all.

“Finally, organizations sustain their health by establishing simple structures around the way they make decisions, evaluate job candidates, manage performance and reward employees.” Organizations sustain their health by ensuring consistency in:

- Hiring
- Managing performance
- Meeting structure
- Rewards and recognition
- Employee dismissal

“Boy that was a bit of a lecture,” chuckled Mary. “However, you are obviously passionate about what you do, and that is a good thing. I have always found it worthwhile to take advice from people who are knowledgeable and committed to what they do. Just let me summarize

what I have just heard you say from an RNH Incorporated perspective so that I am sure that I got it right.

“First, it is important to make sure that every member of the RNH management team understands and is comfortable with each other, so we can engage in debate, reach decisions and commit ourselves to those decisions.

“Secondly, ensure that the RNH team is all on the same page in terms of where we are headed by defining why we exist, the values of our organization, what the organization does, and what we are focused on in the short term to ensure we get where we are headed.

“Thirdly, ensure ongoing and consistent communications so everyone throughout the organization knows, from the person that pushes the broom to prepare a housing unit for occupation, to the sales staff and the president’s office, where we are headed.

“Finally, make sure that everything we do to recruit and retain employees at RNH Incorporated is done in a consistent fashion.”

“That’s a great summation,” agreed Linda. “However, before we continue with this conversation I think I need another coffee.”

Ongoing Team Meetings

(How are we going to get there?)

After flagging down the server, Linda started off by explaining, that “once the organization has defined where it wants to be, the next step is to identify how it is going to get there. Of course, having a one-off team building session is not the answer to all your prayers,” pointed out Linda. “It is important to have ongoing follow-up sessions.” She proceeded to explain to Mary the rationale behind daily, weekly, monthly and quarterly or biannual team meetings.

Daily Management Meetings last 5-10 minutes long and the focus is on what is happening right now. Participants discuss their duties and priorities for the day and ensure nothing falls through the cracks. They are also referred to as “Morning Prayers” or the “Coffee Club.”

Weekly Management Meetings are conducted on an ongoing basis, focus on tactical issues of immediate concerns, and should last about 1.5 to 2 hours. During the weekly management meeting, there are three overriding goals:

- Resolution of issues and reinforcement of clarity;
- Obstacles that need to be identified and removed; and
- Input from everyone.

A potential structure for a weekly management meeting has the following elements:

Round Table: A round table that focuses on 2-3 priorities of each participant. This should last less than a minute per participant.

Progress Review: This is a short review of what progress is being made on outstanding issues identified in previous weekly management meetings. This should last about five minutes.

Meeting Agenda: The meeting agenda is now identified by the team leader (meeting facilitator/chair) based on the issues identified during the round table and progress review. This is the meat of the meeting and should last from 60 to 90 minutes.

Meeting Review: This is a short recap of decisions made during the meeting and a reconfirmation as to who has what responsibilities and timeframes to

carry out agreed upon actions. This also provides an opportunity to ensure that there is buy-in with the decisions made during the meeting, and how decisions are to be communicated. This should last about five minutes.

To aid in the identification of issues and the agreed-on solutions/decisions, Management Action Plans (MAPs) are prepared weekly, reviewed, and progress recorded until they are closed. The MAP should identify the issue, the specific action(s) to be taken, who is responsible for organizing and overseeing the action, the target date and the date it was taken. (A sample of a blank Management Action Plan can be found in Appendix F). The Management Action Plans can be used to record decisions stemming from other meetings as well.

Both daily and weekly management meetings can be held face-to-face or using dial-in or video conferencing technologies to make them less time consuming and more convenient to attend.

Monthly Strategic Meetings can be scheduled more or less frequently as required. Issues to be discussed are often brought to light during the weekly management meetings. Usually one or two topics are discussed with about two hours allocated per topic. Ad hoc strategic meetings allow organizations to rally around and react to issues with urgency. Scheduled strategic meetings are also required to ensure that strategic issues are not being forgotten.

Quarterly/Biannual Team Meetings should be held every three to six months to review strategy, sector trends, competitive landscape, key personnel, and team development.

Divisional Team Meetings can be held just like daily, weekly and monthly management team meetings. Meeting with subsets of the organization provide a great opportunity for divisional managers to work with their own staff to develop Management Action Plans to address specific issues within their part of the organization.

Best Practices

(How else are we going to get there?)

“Seems to me that you are suggesting that the best way to make an organization effective is to spend all your time in meetings,” said Mary, somewhat sceptically.

“Meetings are important in that they create clarity, define direction and establish priorities,” replied Linda. “But there are a lot of other things that an organization should be doing to ensure that its employee relations are functioning smoothly.”

“It is important to remember,” noted Linda, “that when employees are happy, they are your very best ambassadors. Front-line employees are the ones who interact with the organization’s clients, and potential clients, every day and are ultimately the ones who communicate the values and culture of the organization to the broader public. When employees are not passionate about their work, their bosses or their organization, their attitudes can influence the client’s experience.” Linda was a strong believer that good relationships between the employer and employee do not just simply happen. They are the result of a strategy and activities designed to improve communication between employees and management. Employee relations managers create ways to boost employees’ attitudes.

“So, what are some of your suggestions that I should adopt to make my ambassadors happy?” asked Mary. “As the Director of Personnel at RNH I would like to think that we are adopting a few best practices.”

What followed was a spirited, fast-flowing conversation where both Linda and Mary outlined some of their favorite employee relations practices. Included in their list were:

Compensation - Many executives once believed that you could not keep prices low if an organization pays high wages and benefits. However, experience is proving that this is not always the case.

Increasingly, senior managers understand the impact and importance that good employees can have on an organization. Perks such as higher wages, good benefits, as well as profit sharing, attracts a large pool of high-quality candidates who are committed to their jobs. Successful organizations reward employees with bonuses and other incentives.

Putting Employees First – Successful executives focus on putting their employees first, which leads to lower employee turnover rates. When employees feel important and that there is value in the work that they do, it makes it harder to leave their current position and seek out new work. Operate in a culture of ‘openness’ where decisions, which affect employees, are fully and openly discussed - no one member of staff should seek to exclude the views of others.

Communication - Maintaining an open line of communication up and down throughout the organization that encourages dissension and criticism is an essential step in improving the employer-employee relationship. Communicate early, often, aggressively and as consistently as is practical on all matters affecting the organization. Never let the rumour mill be a substitute for communications and never assume employees understand company policy, procedures, culture or benefits.

Training – Developing and implementing an employee-training program demonstrates to employees that the organization is serious about investing in its employees and arming them with the skills required to maximize their performance. The organization must be committed to providing a supportive working environment to enable each member of staff to fulfill the requirements of their job, to encourage professional development and to reach their full potential.

Support - Support each other in the conduct of work whenever possible. Respect the work of others and the contributions they have made to the organization. Endeavour to recognize when colleagues and staff are in difficulty (personal or professional) and support these members of the organization as much as possible.

Management by Walking Around (MBWA) - Management visibility is essential. Upper management’s visibility and accessibility is also a needed ingredient. Employees welcome the attention and sense that it is all part of management’s commitment to the company’s culture. With increased exposure to employees comes increased feedback on the organization’s effectiveness. Encourage this feedback and respond sympathetically and openly to criticisms and complaints.

Access to Human Resources Personnel - All too often, in smaller organizations, there is no human resource department, or no one manager is tasked with overseeing human resources. This prevents employees from making a quick stop to ask human resources staff about benefits, taxes, payroll and workplace issues. Best practices for employee relations include making human resources more accessible to employees.

Work-Life Balance - Effectively managing the juggling act between paid work and other activities is important to everyone - including spending time with family, taking part in sport and recreation, volunteering or undertaking further study. It is a challenge faced by both managers and employees. Just as it is critical for managers to lead by example when it comes to working hard, managers must also recognize and demonstrate the need for work-life balance.

Health & Safety - Strive for a safe and health-enhancing workplace, which includes codes of workplace conduct, harassment policies, efforts to promote a high-quality workplace, health and safety procedures, physical activity and occupational stress reduction measures. This Health & Safety focus should be extended to how the organization interacts with its public.

Employee Feedback

(How are we going to know if we are getting there?)

“So, it is good that we agree on a number of the tactics that an organization can use to get to where it wants to be,” said Mary. “To assist us at RNH Incorporated to know if we are in fact getting to where we want to be, we track the success of hiring practices, employee turnover and the number of vacancies. We also benchmark ourselves against industry HR statistics so not only do we track trends, but we can also see how we stack up against others in our field, to help us determine if we are getting there.”

“Another employee relations tool that RCM has a lot of success with is employee surveys,” volunteered Linda. Linda recommended that confidential employee surveys be conducted on an annual basis that tracked issues such as:

- Mission and Vision
- Feedback
- Teamwork
- Quality and Customer Focus
- Communication
- Opportunities for Growth
- Work/Life Balance; Stress and Work Pace
- Fairness
- Health & Safety
- Respect for Management
- Respect for Employees
- Personal Expression/Diversity

“It is important that employees are convinced of the confidentiality of these surveys,” added Linda, “so it often makes sense that they are administered by an outside third party.” Linda went on to explain several other tips about administering employee surveys such as:

- Breaking down the analysis between divisions and geographic areas so that threats and weaknesses as well as strengths and opportunities can be identified.
- Sharing the results (the good the bad and the ugly) with the employees so that they were aware that management had heard what they had to say.
- Holding de-briefing sessions with staff to drill down on findings, identifying and exploring solutions to problems area as well as building on strengths.
- Conducting surveys on an ongoing basis so that trends are tracked over time.

“It is also a good idea to conduct ongoing management surveys to solicit manager’s feedback on how the organization is performing relative to its commitments,” suggested Linda.

“You know what,” said Mary “This has been a great conversation. I hate to admit it, but I’m actually excited about getting back to the office and talking to the president and the rest of the RNH management team about adopting some of these employee relations ideas.”

“Just remember,” cautioned Linda, “It is important to adopt the entire Relationship Centered Model concept, not just select one or two components. After all, an organization is only as strong as its weakest relationship.”

“You’re right,” replied Mary. “Why don’t we hit the hill and chat about the other five relationships as well.

Employee Relations @ Highlands Construction Limited

Highlands Construction had invested a considerable amount of effort in making sure that they took positive steps to address the recruiting and retention problems that it, as well as other firms in their sector, were experiencing.

Following a series of confidential background interviews with the Highlands Construction management team, one of the first actions was to undertake a company-wide confidential employee survey. The survey focused on what employees thought about working for the company in general, their opportunities for growth, communications, quality, customer service and safety. The survey results proved to be a real revelation for Charlie.

A copy of the survey is contained in Appendix H. This survey, administered on an annual basis, tracks employee satisfaction and measures the attainment of employee relations strategies.

In response to several issues raised by the employee survey, Charlie wanted to ensure that his management team received the training and insight to be better managers. Linda had all the management team complete Myers-Briggs Step II assessments to help them understand their individual personality types, as well as to understand the types of the other members of the management team. This greater insight along with some team building helped them deal more effectively as a management group.

A two-day, off-site retreat was then conducted with the management team that focused on Team Building and the development of a Relationship Logic Model (Road Map) for Highlands Construction for the next year (See Page 6). The employee activities identified in the Road Map included:

- Compiling a list of all employee contact information
- Repeating the employee survey on an annual basis

- Monitoring industry related employee developments
- Producing a monthly newsletter
- Setting up a Highlands Construction Intranet

Because of implementing these activities, it was expected that employee satisfaction would increase, which in turn would contribute to lower staff turnover and more effective employees.

At the outset of the retreat there was a presentation of each member's MBTI Type. One of the tools produced during the retreat for each team member was an Individual One-Page MBTI Summary that highlighted the personal strengths and weaknesses of an individual, within a specific type team. (See Appendix G)

Each summary:

- Positions the team member type (e.g. ESTP) relative to the team type (e.g. ESTJ)
- Identifies contributions of the individual type to the team
- Identifies potential weaknesses of the individual type to the team
- Defines out-of-preference and mid-zone facets of the individual team member
- Identifies strengths and weaknesses of the individual
- Summarizes as a team, what the team needs to do to help the individual team member improve.

After the retreat, each team member was provided with a laminated copy of his or her own MBTI Summary. Management Team members were requested to post a copy in a prominent spot in their office and carry it with them constantly. They were also encouraged to share their one-page summary with their colleagues, particularly when they are having some difficulty working with one another.

While developing their corporate Road Map, the management team defined their business and where they want to be in terms of:

- **Core Purpose:** To what greater purpose are we called? *The mission of the Highlands Construction management team is to provide direction and leadership to all employees to achieve financial success (profits, market share) and a healthy and rewarding work environment (recruitment, retention).*
- **Values:** What traits are inherent and important in our organization? *At Highlands Construction we treat our staff the way we wish to be treated ourselves where people come first, everyone enjoys rewarding, fair, high quality experiences in a safe and environmentally sustainable work environment.*
- **Business Definition:** What specifically does the organization do? *At Highlands Construction, we build high quality residential and commercial properties and developments that provide value to our customers in a timely and environmentally sustainable manner.*
- **Thematic Goals:** What is the organization trying to accomplish? *Increase market share and profitability by attracting and retaining a team of highly motivated and effective managers and staff.*

Highlands Construction now has instituted a series of daily, weekly, monthly and quarterly management team meetings. Added to the management team was a Human Resources Manager, who in consultation with representatives from all levels throughout the organization developed a Human Resources Strategy.

One of the major issues that emerged from the staff survey related to a lack of communications, both the dissemination of information as well as the listening side of communications. The newsletter was one of the early initiatives launched by the company. In addition, using

the list of employee contact information, email blasts to communicate important news and developments directly to all employees through both their company, as well as personal, addresses.

Employee Relations @ the Department of Business

Within public institutions, where there typically exists a branch responsible for human resources, program managers frequently are of the impression that Employee Relations is not a relationship that they must concern themselves with. While Department of Business program managers are not responsible for government or departmental wide employment policies and pay scales, they are still responsible for the day-to-day functioning of their programs, which are significantly impacted by the actions and interactions of their management and staff.

As was noted in the Client Relations Chapter, Linda Berkley was working with the Department of Business to establish the Engagement Centre of Excellence to better manage relationships and engagements with key departmental stakeholder groups. Linda had agreed to take a leave of absence from RCM Consultants and serve a one-year term Chief Relationship Officer (CRO) for the Department to get the Engagement Centre up and running.

Linda had conducted a Team Building retreat with the managers and staff that were going to form the Engagement Centre of Excellence within the Public Affairs Branch. This group was comprised of the individual that were previously involved in listening activities such as public opinion research, media monitoring and analysis, public enquiries tracking and other public environmental analysis activities such as monitoring social media. The group also included team members that were previously involved in conducting and coordinating public consultations. Linda quickly recognized the importance of breaking down silos since the new group was not used to working together.

The output of this retreat was a Department of Business Engagement Logic Model that is presented at the end of this chapter. This Road Map served as the framework for the departments Engagement Strategy.

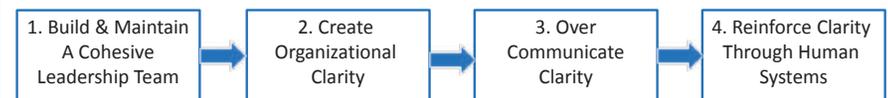
In developing this strategy, Linda had all team members complete a Myers-Briggs assessment and produced a Team Report that identified

each member's individual Myer-Briggs Type Indicator (MBTI) versus the overall Engagement Team. The power of teambuilding with the MBTI tool is that it can help the team members understand their differences and work to convert them into strengths. Based on the review of the team strengths and challenges, the team members can decide on specific steps to move themselves toward greater productivity and better relations with one another.

Interestingly, the Team Report revealed a high level of similarity between the Engagement Team members. High similarity has been shown to be associated with the following:

1. Finishing tasks more quickly
2. Failing to make good use of the resources on the team; perhaps not identifying or using the talents of the right person for the task
3. Producing more traditional, less original solutions to problems
4. Producing more limited or constrained solutions than do highly dissimilar teams, as judged by external criteria
5. Pressure within the team to solve problems by consensus, which may inhibit the expression of unique individual solutions.

Because of this finding, Linda recognized the importance of recruiting new team members that did not share the same profile, as well as taking this team profile into consideration when making decisions. To reinforce this, during the retreat, Linda reviewed the Four Disciplines of a Healthy Organization:



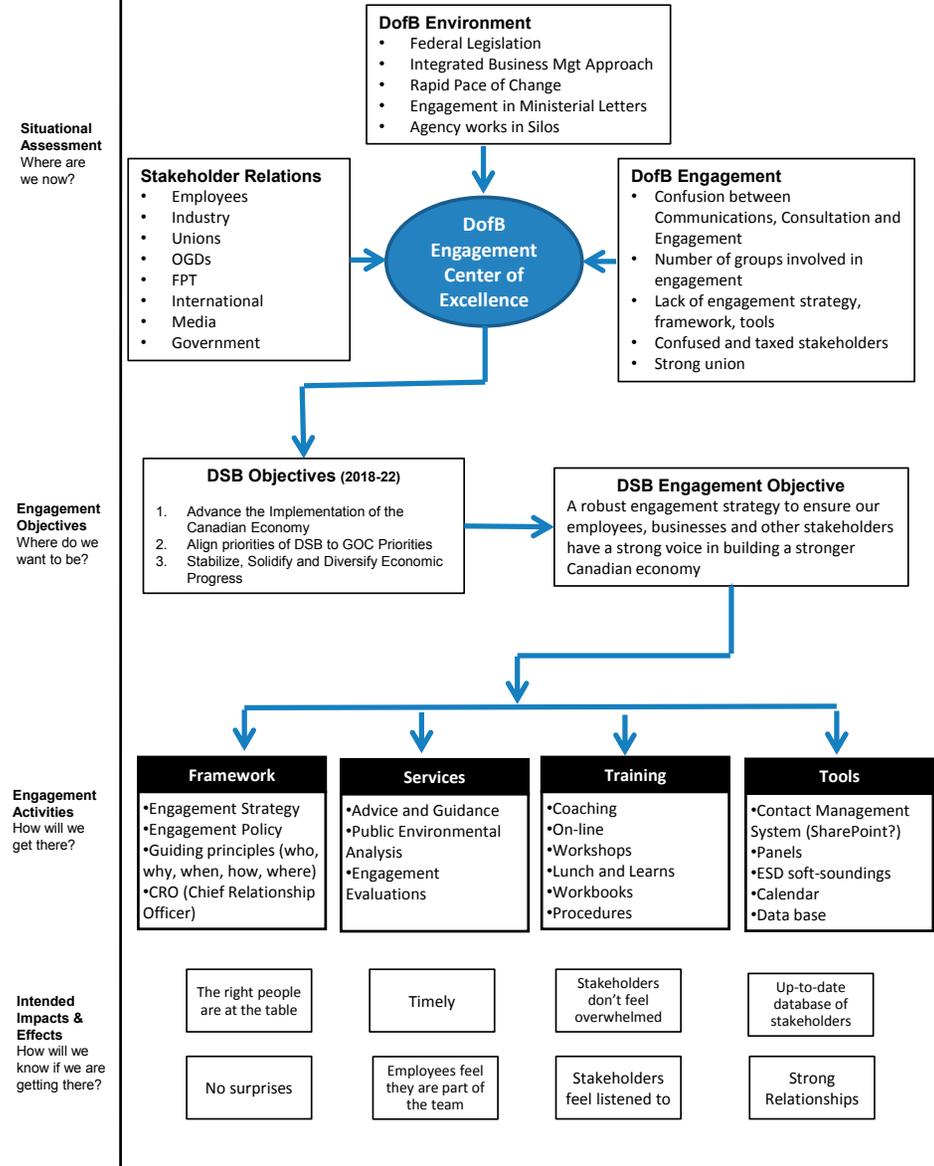
1. A cohesive team trusts one another in constructive conflict, commits to group decisions and holds one another accountable.
2. Organizations create clarity by definitively answering a series of questions regarding values, strategies, goals as well as roles and responsibilities.
3. Healthy organizations align their employees by repetitively and comprehensively communicating all aspects of organizational clarity.
4. Organizations sustain their health by establishing simple structures around the way they make decisions, evaluate job candidates, manage performance and reward employees.

To assist in creating organizational clarity the Engagement Team defined where they wanted to be as follows:

- **Core Purpose:** To ensure Department of Business employees, businesses and other stakeholders have a strong voice in building a stronger Canadian economy.
- **Values:** Provide objective, coordinated, complete, timely, accurate information regarding DofB stakeholders to Departmental management.
- **Business Definition:** Provide a coordinated, economical and effective means of engaging with DofB stakeholders to enhance relationships.
- **Thematic Goal:** Develop an engagement strategy. Build DofB management's awareness of the importance of stakeholder engagement.

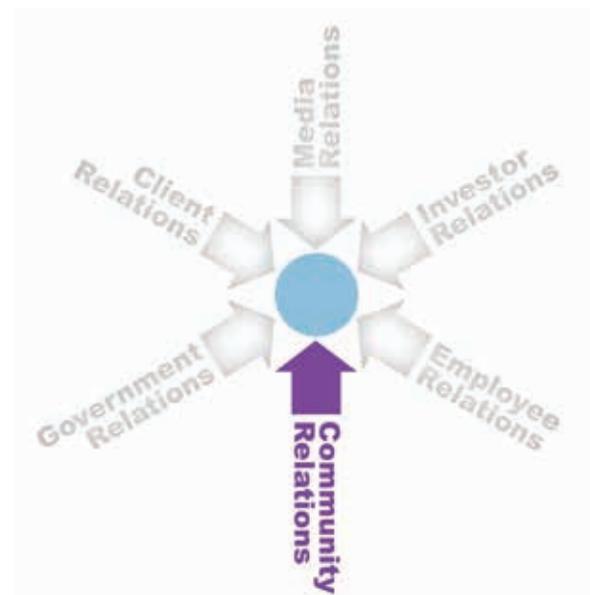
This process went so well, that the Director General of the Public Affairs Branch asked Alex to undertake a Branch-wide team building process.

Department of Business Engagement Logic Model



CHAPTER 6

Public	Private	Employee Relations Checklist	Yes	No
X	X	Have you had any difficulties attracting and retaining the right staff?	<input type="checkbox"/>	<input type="checkbox"/>
	X	Does your compensation and benefits program help your organization improve productivity, increase morale and reduce absenteeism?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are your employee policies and procedures up-to-date and in compliance with regulations?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do your employee relations efforts help employees reach their full potential to benefit the organization?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are upper managers visible and accessible to all employees?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are managers and employees clear about the direction of the organization?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are communications at all levels of the organization open, honest and direct?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are there training programs in place to arm employees with the skills required to maximize their effectiveness?	<input type="checkbox"/>	<input type="checkbox"/>
	X	Is there a comprehensive health & safety program in place?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	The workplace is harassment free.	<input type="checkbox"/>	<input type="checkbox"/>
	X	Is there an individual who is clearly responsible for human resources?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do your employees trust you?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you trust your employees?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Overall, do you have an effective relationship with your employees?	<input type="checkbox"/>	<input type="checkbox"/>



Community Relations



CHAPTER 6

COMMUNITY RELATIONS

Community relations involves establishing a two-way rapport with the community, raising and maintaining the organization's public profile and ensuring broad public input into the decision-making processes, to build buy-in and support for decisions made.

Taking a Break

By mid-afternoon, Alex and Linda were finding the old ski legs screaming for a rest. Rather than risk a serious fall, they decided to take a break and step into the ski lodge at the top of the hill for a hot chocolate. As they sat down around a huge roaring fireplace that was a focal point of the ski chalet, they spotted Taki and Isabelle, who they had not seen all day. As two of the less experienced skiers, Taki and Isabelle had agreed to partner up and had spent most of the day avoiding the expert hills, choosing instead to stay on the intermediate slopes.

"So, Taki, how have you found your ski day going?" asked Linda.

"About as difficult as raising money for my home support program," replied Taki.

Taki Pham, as a newly-elected board member, had been appointed to lead a fundraising campaign to increase both corporate and individual

donations for the local Home Support Program. Because of expanded activities, a growing demand for services, and a stagnation of funding from all levels of government, the Home Support Program was finding it difficult to finance all the organization's programs.

The Home Support Board did not wish to raise or introduce new user fees and was thus dependent on finding new revenue sources. Taki had discovered that while Home Support offers great programs, the level of awareness of the organization, its mandate, and funding sources was very low. As a result, his task was proving to be more difficult than anticipated and fundraising results to date had been disappointing.

"What I thought was going to be a relatively smooth run has turned out to be full of twists and turns. I even think I have managed to ski into a bump of snow or two," he added. "On the hill?" asked Linda. "No," replied Taki, "On my fundraising drive!"

"Tell you what," suggested Alex, "why don't you and Linda talk about community relations while Isabelle and I move over to the other side of this magnificent fire place and talk about government relations."

Building Community Relations

"Actually Taki, those bumps of snow are referred to as moguls," replied Linda. "But those moguls, or bumps along the road apply to not-for-profit organizations, just as they apply to private- and public-sector organizations. It is critical that non-profits maintain their reputations in the communities in which they operate so that they can be successful."

Community Profile

"Unless your community relations objective is to remain unknown, which I don't recommend," added Linda, "the first order of business is

to raise and control your own community profile." This was important, explained Linda, for two reasons:

1. If you do not control your own reputation, you are leaving it up to someone else to do that for you or let people in the community do that for themselves. In both cases you run the risk of someone misinterpreting your organization, or worse still, painting a negative picture of your organization. This will just make it more difficult for you to achieve your community relations' objectives in the future.
2. Increasing the community's awareness of your organization helps you address point number one, but also raises your profile in the community so that when you have something to say, people will listen.

"I would hazard a guess that the profile of your Home Support Program is not very high," quizzed Linda.

"You are absolutely right," replied Taki. "In fact, not only do most people and businesses not know who we are, many that do know who we are think we are part of the municipal government, since we are in a municipal building."

This situation was proving difficult for Taki since people were either nervous about giving money to an organization they were not familiar with, or they did not feel it was necessary to donate more money to an organization they were already financing through their taxes.

"Well," said Linda, "I think the first order of business for you is to concentrate on raising your profile in the local community."

"I'm not sure we have time to do that," replied Taki. "We have to raise some money."

"How's that working for you so far?" asked Linda with a mischievous grin.

"Not so great," replied Taki with a strained look.

What Linda went on to recommend to Taki was that the Home Support Program develops a communications strategy to raise awareness of their organization in the community.

Raising Awareness

Linda suggested that Taki first compile a list of community leaders (business leaders, politicians, community activists, sport, arts and community association presidents) as well as service clubs (church, civic, seniors groups).

This could be done with the assistance of a small communications committee comprised of Home Support board members as well as interested members of the community. The next task for this committee would be to draft a letter introducing Home Support to a community leader or service club and request an opportunity to come speak to or make a presentation to their group. Each letter would be signed by the board's chair, and/or by a board member that had a connection with the group.

At the same time, the communications committee could be working on a simple brochure and PowerPoint presentation that gave a history of Home Support, the programs it offered, an overview of their budget and funding sources, as well as testimonials from clients.

In support of this awareness campaign, Linda suggested that Taki meet with the city and community media to offer them an opportunity to learn more about the Home Support Program by spending the afternoon with a Home Support volunteer or staff member to see the important work that the organization does and to meet some of its appreciative clients.

Other awareness raising ideas that Linda discussed with Taki included:

- Websites
- Social media

- Participation in tradeshow
- Newsletters

“One of the most important tricks that I have learned about community relations is to make sure that whatever methods you develop for disseminating information, make sure you build in a process to gather feedback as well,” said Linda. “Communications involves the two-way flow of information. Once you stop listening to what your community has to say, you lose the ability to respond to their information needs. Social media is great for this.”

The Ask

Once the campaign had raised awareness, Linda pointed out, that it was now time to execute Phase II of the fundraising campaign – raising the funds. “What’s the point of meeting with potential donors if you never get around to asking for the donation?” she asked Taki.

Linda explained, that armed with a PowerPoint, Taki would accompany the chair or board member to a meeting or presentation. The purpose of his attendance would be to assist in the presentations, as well as ensure that ‘The Ask’ was made. As an incentive for making a more sizable donation, groups or individuals could be recognized as platinum, gold, silver or bronze sponsors. Their names or logos could be printed on Home Support brochures and letterhead. Recognition plaques or certificates could also be presented to larger donors.

“I have had a lot of success with this approach myself in the past with groups that I have been part of,” volunteered Linda. Going to community groups such as a Lion’s or Kiwanis club had given her the opportunity to pitch not only to the service club, but also the individual members who are often business owners themselves.

Other suggestions Linda made to Taki included:

- Holding a gala dinner
- Developing a direct mail/email campaign to go to clients and their families
- Social media, including “like” campaigns and crowd sourcing
- Setting up a giant thermometer outside the Home Support office to track progress towards the success of the fund-raising campaign.

“You know what Linda, these are really great ideas. I recognize now that to some extent I have been banging my head against the wall by trying to convince someone to give me money before they were truly aware of who I represent. It is probably a good thing that I put my fundraising efforts on hold for now and focus on building our community awareness. After all, it would be more difficult for someone to say yes to my request when they have already said no because they had misconceptions about who we are.”

“You may want to put your fundraising efforts on hold Taki, but never put your community relations efforts on hold. Ideally, community relations should be ongoing. The longer the process lasts, the greater the opportunity to form a constructive relationship with your community and the more your ongoing fundraising efforts will be successful.”

“Tell you what,” concluded Linda, “Let’s go collect Alex and Isabelle and go work on our skiing program instead of our community relations program.” With that, the four headed back out onto the slopes to enjoy the balance of a great afternoon of enhancing their skiing and new friendships.

Community Relations @ Highlands Construction Limited

Community opposition to the River Bend development proposal was one of the main reasons that RCM Consultants became involved with Highlands Construction. Charlie had asked Alex to investigate ways to improve the situation so that the company could receive the necessary zoning approval.

Charlie had originally met with his local city councillor to explain his plans to develop a high-end estate-lot subdivision on approximately 250 acres of marginal and agricultural zoned land near the Black River that ran through the councillor’s ward. In addition, the development would house a small commercial centre and recreational facility. This property was not too far from where Charles had lived for the past 20 years. The councillor expressed support for the project, indicating that the community could benefit from the extra tax revenue as well as the jobs created during the construction.

Word of the development spread quickly among local residents. The environmental impact in terms of loss of farmland and a wood lot raised the concern of a local conservation group member, who discussed their opposition with a newspaper reporter. Charlie had failed to return a call to the journalist who had left a message for him looking for comment.

The reporter wrote a story that appeared in the weekend edition, which was full of distortions and factual errors since it only reported the views of the opponents. It was through this article that the local residents first learned about the proposed project.

Residents, alarmed about the project’s reported negative impact on their community, flooded the councillor’s office with calls and emails, and turned out in force at the next city council meeting to voice their concerns. Property owners near the proposed River Bend development announced that they were organizing an opposition group. Faced with vocal project opponents, the councillor decided to reconsider his initial support and publicly voiced strong concerns about the project.

Alex explained that a highly-effective tool in promoting needed support for development projects such as River Bend is a comprehensive community relations program. Such a community relations plan should be tied closely with the media relations and government relations programs.

The community relations program that Alex had proposed was divided into five steps as follows:

Research

During the first step Alex examined what Highlands Construction was currently doing in terms of community relations.

What Alex found was that Highlands Construction and Charlie had been relatively active in responding to the community's cries for help in terms of fundraising requests. However, while these donations were substantial and regular, Charlie and Highlands Construction had done very little to raise awareness of their contributions and in fact appeared to shy away from bringing attention to themselves and their good deeds.

Outside of their response to requests for financial or in-kind support, Highlands had very little in the way of a Community Relations program. They shied away from conducting open houses or public meetings with residents and community groups to help explain their plans and activities, and the extensive steps they were taking to help protect the environment. Instead, they relied on the city meetings organized as part of zoning and official plan amendments. Charlie's original view of hosting public meetings or consultations was that of inviting your enemies into your house to complain about you. "Why invite more trouble when you are already required by the city to conduct certain public meetings for approval purposes?"

As part of his background research, Alex cataloged all the contributions Highlands had made to the community. He also identified all the service clubs and local groups that Charlie and his staff were involved

in. Finally, he compiled a list of all the community groups that operated in the area as well as visible opinion leaders. Attention was paid to the community groups around the River Bend development. This research was then combined with the list of local politicians (government relations) and local media and key reporters (media relations).

Another area of focus for Alex was the identification of community leaders. Alex knew that they are not always the mayor or the city council. Very often there is a local activist, organization or individual that may oppose development. It is important to know who it is in the community that residents most respect. It is these community leaders that Highlands and River Bend needed to have on side.

One effective research tool that Alex had employed in the past was public opinion research. POR enables an organization to determine the true level of support or opposition to a project from a representative sample of people, rather than just listening to the vocal opponents. In addition, POR can help identify the key priorities of the community and key messages to which the public will relate and respond.

Plan

The next step in the process was to formulate a community relations plan in consultation with the consulting engineering firm that worked with Highlands. A community relations plan crafted early in project development can help shape public opinion in support of a project.

Alex explained the best defense against NIMBYism (Not in My Back Yard) is a good offense. Attack the opposition proactively. Establish a "good neighbor" policy early on and repeat it often. It is important to effectively communicate each of the project's benefits to the public. Encourage the belief among residents that this is an opportunity that the community cannot afford to pass up.

Alex knew that nearly all projects have a good story to tell - increased tax revenue, jobs, and environmental improvements. He explained

to Charlie that each of these benefits will help win local support if the right messages are properly crafted and communicated to the appropriate audiences. As Charlie had already seen, the failure to provide carefully prepared project information early on leads to speculation, rumors and the spread of misinformation. In the case of the River Bend project, a couple of vocal residents opposing the development quickly grew into an angry mob. Charlie had seen first-hand how waiting to become active until after strong opposition surfaces is a costly and often fatal mistake.

Alex explained that a community relations plan for River Bend had to be developed that included the following:

- Objectives – What specifically did Charlie want to see happen and by when?
- Public Environmental Analysis – What are the obstacles and opportunities identified during the research step that must be overcome or taken advantage of to achieve Charlie's objectives?
- Target Audiences - Who are the key individuals and groups that need to be reached?
- Messages – What are the key messages that Highlands Construction needed to communicate to reinforce their position and counteract opposition?
- Activities – What activities need to be undertaken to win this battle and gain community, media and political support for the River Bend project?
- Timing – When do these activities have to be started and completed?

- Budget – How much was Highlands Construction prepared to spend (dollars and staff time) to protect their multi-million-dollar investment in this project?
- Roles and Responsibilities – Who is going to be responsible for doing what to execute this community relations plan?
- Evaluation – How will you gauge success?

Develop

Once the community relations plan was approved, Alex worked with Highlands Construction personnel, their consulting engineers and marketing firm to develop the materials identified in the plan and pre-test elements of it as they were created to ensure their maximum effectiveness. The communications materials looked professional but were not overly slick. Emphasis was placed on making sure that all the material explained the need and benefits of the development.

One of the key tools developed for both public officials and citizens was a project information packet. This kit, printed on recycled paper, included a question and answer section, artist's rendering of what the River Bend project would look like once completely developed, background information on Highlands Construction and other information about the project.

Deliver

It was now time for Charlie and Highlands Construction to get out there and show the local politicians, officials, residents and activists how the River Bend project would benefit them and their constituencies. This was not a one-time event, but an ongoing effort to stay in touch and keep everyone updated as to the steps along the way. This involved Highlands Construction managers and employees, particularly those that lived in and around the River Bend community.

Charlie was seeing first hand that the best way to develop political allies is to demonstrate that grassroots residents support your proposed

development. Alex knew that every project brings with it a natural constituency of supporters, including labor unions concerned about jobs, senior citizens on fixed incomes worried about rising tax rates and others. The challenge was to find them. These local, third-party citizen supporters were the best friends Charlie could ever have. The success of his community relations program depended largely on finding, cultivating and mobilizing them.

As is the case with any development application, it is inevitable that local people will have a strong emotional attachment to their homes and their community. After all, they have spent considerable time and money making their homes and neighbourhoods as pleasant as possible. There is pride in ownership and belonging to a nice community. This is not to say that everyone will oppose development, but it is their neighbourhood and they want to have a share in the vision for its future. Existing residents will want to feel that their views matter and if they gain a sense of ownership in the changes, their response can shift from being negative or indifferent, to supportive and enthusiastic. Buy-in is ultimately what Highlands Construction is looking for.

Charlie had originally questioned the time and effort required in identifying and meeting with the various formal and informal community groups, but early results were changing his mind. By meeting with the community leaders, listening to their concerns and explaining in detail the process and studies they would be undertaking to prepare their subdivision, many concerns had disappeared.

A centerpiece of the community relations strategy was the formation of the River Bend Advisory Committee (RBAC). The purpose of the RBAC was to serve as a forum for dissemination of information, consultation, review and exchange of information regarding the design, development and construction of the development. This included planning studies and ongoing environmental monitoring, complaint resolution and review of new approvals or amendments to existing agreements related to the construction of River Bend.

The objectives of the River Bend Advisory Committee are;

- To act as a resource to Highlands on planning, implementation and evaluation of project operations.
- To serve as a formal mechanism to exchange ideas and concerns related to the planning, development and construction of the project, as identified by Highlands, the City, committee members and the surrounding residents.
- To serve as an ongoing communications vehicle to the River Bend community on the work and plans of the project.

One of the unique aspects of the River Bend community relations program was that responsibility for community relations was not just left to senior managers. Staff living in and around the River Bend area was encouraged to join specific local groups and support local charities. In addition to monetary donations, employees could arrange for gifts in kind, such as making company facilities and equipment available to the community. Targeted sponsorship by Highlands as a community relations tool and created opportunities for name exposure, image association, generating goodwill, and providing an opportunity for hospitality with the key audiences.

Similarly, the community was invited to participate in the functions of Highlands Construction. Local officials and community leaders were invited to open house days and tours. The 25th Anniversary of Highlands Construction took place in the past year and the community was given an opportunity to come and celebrate with Charlie and his staff.

Members of the local news media had a major impact on how the River Bend project was viewed by local residents, opinion leaders and politicians. Because of his new focus on media relations, Charlie was now making every effort to establish and maintain a professional working relationship with the local reporters. Alex explained how the power of the press and social media to influence public opinion is far-reaching.

The goal is to achieve fair and accurate coverage of the proposed development. Alex arranged for training of a project spokesperson, who was one of the Highlands vice-presidents, to communicate effectively with the media, local officials and the public. The media trainer stressed that it is not only what you say, but also how you say it, that will leave a lasting impression on the public.

All this community relations work was undertaken to prepare for the public hearings planned for the spring. The proper planning and management of community relations would help Highlands Construction win public support for the zoning application and various permitting efforts.

Charlie was aware of the importance of ensuring his supporters were there for the public hearings and securing commitments from them to speak in support of the River Bend project. This visible display of support for the development would help level the playing field and make permitting authorities more comfortable in supporting the project.

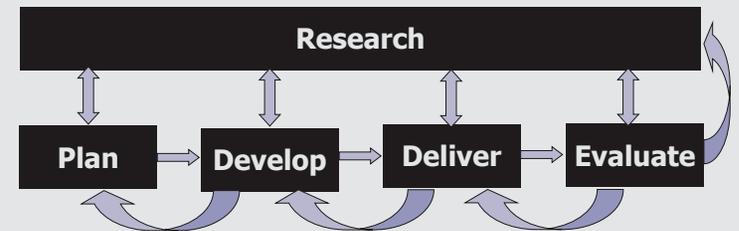
Highlands would also be working with the media at public hearings to provide them with the information they needed to write their stories. Most residents' only impression of the hearing will be what they read in the newspaper, view on TV or see on the web the next day.

Evaluate

Of course, the true measure of success for the River Bend development community relations program would be the successful approval and completion of the project. However, as Alex knew, it was important not to wait to the end to evaluate, but to evaluate throughout the program.

In the case of River Bend, it was important to ensure that Charlie had a good understanding of the public environment in which he was operating, and not just assume that everything would fall into place. As the program was planned, Highlands would have to assess if their plan was the most effective one to respond to challenges and take advantage of opportunities that were presented to them.

During development, Highlands would have to pre-test the communications tools, tactics and messages to ensure they were going to be effective and meet the needs of the target audiences. Alex pointed out that it was during delivery that many community relations programs fell off the rails because the organization failed to monitor how the program was rolling out and missed opportunities to modify the program to maximize its effectiveness. In fact, Alex convinced Charlie that if he evaluated his community relations program throughout the research, planning, development and delivery steps of the process, chances were much greater that the final evaluation would show that the program was ultimately effective.



Based on Highlands experience with the five-step Community Relations Program developed and executed for the River Bend development, they adopted a series of activities into their Relationship Logic Model. These activities included:

- Compile a list of all local and city-wide community groups that were in the areas where they were developing or planned to have future development projects.
- Establish a contact management system to stay in touch with these groups.
- Monitor community meetings, events and social media (e.g. web sites, Facebook pages).

- Make targeted community contributions that were responsive to community needs and reflected the priorities and intended image of Highlands.
- Provide copies of company newsletters and other communications material to community groups.

Because of adopting a pro-active community relations program, it was expected that Highlands would experience increased community support for existing and future projects.

Community Relations @ Department of Business

The federal government places considerable importance on building relationships and engaging with citizens. Ministers are held accountable for constructive dialogue with Canadians, civil society, and stakeholders, including business, organized labour, the broader public sector, and the not-for-profit and charitable sectors.

Linda had found that there was considerable confusion within the public sector as to the difference between Client and Community Relations. She had found that within public sector organizations, clients are defined as an individual, company or organization that is a recipient of a government product, service or program. Community on the other hand is defined much more broadly in that it refers to organizations and individuals that are directly or indirectly impacted by the decisions and actions of the institution in terms of betterment or detriment due to their physical proximity, economic, social, health or emotional impact.

For the Department of Business, different industries, professions, organizations, business units within a single organization, and even people within those business units, will have a different understanding of what constitutes a community. Now complicating this even more is taking into consideration the views of Canadians, other levels of government (locally, provincially and internationally) and special interest groups and how they are impacted by the decisions, work practices, culture, governance, transparency, etc. of the Department of Business.

As in the case of all relationships, perception is key. At the outset of her assignment, Linda was interested in assessing: How do the collective and individual communities perceive the Department of Business? Is the Department of Business seen as a good investment and contributing to national, regional and local prosperity as well as global competitiveness? What is the profile of the Department of Business within the federal government? How do the programs, services and

decisions of the Department of Business support the government's Speech from the Throne and Budget Speeches?

She started out by examining if there were differing perceptions across the country, sector, size of business and demographics. What was not a great surprise was that there were wide variances in perceptions. She determined that these perceptions were greatly impacted by the strengths and weaknesses of the individual managers across the country and between program areas. Furthermore, the perceptions were impacted by the needs and priorities of the various communities.

She launched a program that focused first on raising awareness of the Department, to be followed by building understanding and then support. Emphasis was placed on demonstrating how the Department of Business was helping Canadian businesses survive trade wars and global protectionism and positioning Canadian companies to perform better in an evolving global economy.

This strategy consisted of a national advertising campaign and targeted sponsorship of programs such as the *Dragons' Den* and national and regional business conferences and tradeshow. The Department of Business revamped its newsletter and website and launched a more aggressive and targeted social media campaign to promote business opportunities and successes. They also expanded their open houses and speakers program at the regional level to better target business groups.

To track progress with its community relations strategy, Linda proposed an annual public opinion research survey that tracked the rate of Department of Business awareness, understanding and support amongst Canadians and businesses. The impact of Department of Business events and announcements was tracked through a monthly media analysis report (See Appendix D).

Public	Private	Community* Relations Checklist	Yes	No
X	X	Does your organization have a high profile in the communities it operates in?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Is your reputation in the community positive?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Is your organization active in the community?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Does your organization have a plan identifying community relations goals and objectives, tools and tactics?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Does your organization have an up-to-date list of community groups, opinion leaders, and other external stakeholders?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Is there a protocol in place to deal with members of the community that express a concern?	<input type="checkbox"/>	<input type="checkbox"/>
	X	Do you have an annual budget and criteria for community donations?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Have you made adequate budgetary provisions to support your community relations program?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Has your organization stressed the importance of community relations throughout the organization?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Is there a planned way of distributing information to external stakeholders in a timely fashion?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Is there a plan to collect feedback from the public?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Does your community trust you?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you trust your community?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Overall, do you have an effective relationship with the community?	<input type="checkbox"/>	<input type="checkbox"/>

* For Public sector organizations using this checklist, community groups should be referred to as external stakeholders



Government Relations



CHAPTER 7

GOVERNMENT RELATIONS

Government relations involve the systematic effort to influence the actions and policies of government to help achieve objectives or protect interests, in a way that reflects well on the organization and the decision-makers involved.

Meanwhile on the Other Side of the Chalet

“My, Linda and Taki appear to have gotten off to an animated start. Taki really seems to be getting excited about this Relationship Centered Model concept of yours,” said Isabelle. “I actually get the concept, and I think it is a great one. I don’t want to appear to be disrespectful, but it really is common sense. However, just to ensure that I really do get it, would you mind providing me with a critique of my understanding of the RCM and how I think I am already implementing it at the Construction Association?”

“That sounds fair,” replied Alex. “It would actually be refreshing to see how the model works from another person’s perspective. As for being disrespectful, that’s not a problem. You are right. This is common sense. It is just amazing how many people seem to be so caught up with one or two of the relationships that they drop the ball on one or two more

and end up having - please excuse the mixed metaphor - the whole deck of cards come tumbling down.”

Some History

“Why don’t you start off by telling me what you have been up to at the National Capital Construction Association,” suggested Alex.

“Well,” replied Isabelle, “Our association represents 150 members who are involved in road, water and sewer infrastructure as well as residential and commercial construction from both sides of the Ottawa River. I joined the association about five years ago, when they frankly operated a bit like an old boy’s club. Their major focus was on running a couple of golf tournaments a year, as well as an AGM dinner meeting and a Christmas party. All of their events were well attended and deemed to be successful.”

Since she started, Isabelle had been successful at redefining the association as a more proactive advocacy group, and less of a social club. One area where she was facing challenges was with respect to government approvals and funding. Isabelle was finding her members becoming increasingly frustrated with government bureaucracy and red tape around commercial and residential development. At the same time, due to tight fiscal environments, public sector infrastructure was deteriorating. Isabelle faced the challenge of encouraging all three levels of government to invest more in infrastructure renewal, while at the same time getting government to work more closely and cooperatively with developers and construction companies to get projects approved and completed.

“Ok,” said Alex. “It sounds like your greatest challenge is government relations. Why don’t you run me through the other five relationships first, and we’ll finish up with Government Relations last?”

The First Five Relationships

“The main reason that I was hired was to assist the Construction Association in expanding its membership. So, I guess we should start with client relations,” said Isabelle.

“Client relations or investor relations?” asked Alex. “You may consider your members to be your clients, but in reality, they are members of the association. I had originally considered adding a seventh relationship, that being member relations, but I concluded that members are really shareholders in the organization. Enhancing relationships with shareholders is actually an investor relations activity.”

“Ok. I see where you are going,” said Isabelle. “So, when I conducted a membership survey, was I conducting an investor or a client survey?”

Alex responded by noting that conducting a membership survey at the outset was a great initiative. Such a survey would enable Isabelle to find out what the membership most valued about the association, determine which communications channels worked most effectively and define what the members’ priorities were. Part of the challenge that the association faced when it hired Isabelle was that it focused too much on existing members and failed to identify and develop new members.

To reach these non-member construction firms, it would have been necessary to go out and talk to them to see what their perceptions were of the construction association and what needs they expected to be filled by joining. Isabelle noted that she had done this when she went out and met with construction firms who were not members.

She started out each meeting by asking the company what they knew about the construction association, why they were not members, and what their priorities would be for activities, programs and services.

“So, would that make these firms potential clients or potential investors?” asked Alex again.

“Does it really matter?” replied Isabelle. “The main point is that I went out and enhanced the organization’s relationships with our members and potential members. The results of this membership survey and meetings with non-members were then used to develop a strategic plan with the board of directors. It enabled us to define where we were, where we wanted to be, and how we are going to get there.”

“Employee relations is not really an issue with the Construction Association since it only consists of one part-time support staff member and me,” said Isabelle.

“I’ll agree,” responded Alex, “but don’t totally lose track of it. Hopefully your association will grow in the future and have more staff.”

“Media is an important stakeholder,” said Isabelle. “I spend a lot of time working with the media to make sure that our association’s voice is heard when it comes to commenting on infrastructure investment, approval processes, development projects, budgets and by-laws. I now have a very close working relationship with most of the media that cover city hall as well as the business media.”

“That’s important,” agreed Alex. “Do you wait for them to come to you, or are you always chasing them,” he asked.

“When I first started out it was me chasing them with a comment or a clarification. Now, the media reaches out to me for a comment on stories that affect our industry. By monitoring the media coverage we get, I can almost anticipate how each media source is going to react to a story and it permits me to tailor a message specifically for them.” Alex concluded that Isabelle had a good handle on media relations.

“I think I missed one of the relationships,” said Isabelle. “We wanted to save government relations for the end, and we have talked about media, employee, investor, and client relations. What is the missing relationship?” Before Alex could respond, Isabelle announced it was community relations.

As part of the construction association’s strategic plan, directors wanted to put pressure on the municipal government to increase capital funding for deteriorating infrastructure, such as community centers, roads, water and sewer lines. The association planned to build support within the taxpayer base for more tax dollars to be dedicated to these needs. “We did a literature search and found that this funding problem was not just an issue in our city but was a growing issue across the country. The research showed us that taxpayers were starting to realize that municipalities had been underfunding infrastructure to keep taxes down, and that these same taxpayers were now willing to pay more taxes to make the necessary repairs.” To see if local taxpayers felt the same way, the association commissioned a public opinion poll which showed that taxpayers were much more concerned about infrastructure than other recreational and social programs and they wanted to see their government fix the problem.

“It was very rewarding,” recalled Isabelle, “to see other community groups and lobbyists agree with our position at a council meeting.”

“Every time there was a water pipe rupture or a story about a community hall falling into disrepair, we were there reminding reporters of the necessity of fixing our deteriorating infrastructure,” said Isabelle. “It really gave us an opportunity to make the community at large an ally. We reminded residents, community groups, council and the media that there was no point in having a social or sports program if there were no roads to drive and walk on to get there, and once you got there the facility was closed because the roof was leaking, and the water had been turned off.”

“Boy, it seems like you have this community relations thing under control. It also sounds that you have a good foundation for a government relations program as well,” noted Alex.

Government Relations

“As I said earlier, my members are becoming increasingly frustrated with government bureaucracy and red tape around commercial and residential development, as well as with the lack of funding for infrastructure renewal. As an association, we have been working hard to convince the mayor and council that things must change for the good of the city,” said Isabelle.

“So how have you pursued your government relations efforts?” asked Alex. Isabelle went on to explain that they had attended all the mayoral debates during the last municipal election, asking each candidate what their priorities were in terms of fixing infrastructure and red tape. They regularly attended events where the mayor was speaking, as well as attending relevant committee and council meetings. Representatives of the association were at all budget consultation meetings to enquire about funding for infrastructure and staffing to eliminate the backlog in approvals. “We invited the mayor and council to our Annual General Meeting, as well as requested one-on-one meetings with the mayor, councillors and senior staff.”

“I have already told you about our media and community relations activities that are supporting our government relations efforts, but we still can’t seem to crack through this barrier that city council has put up,” said Isabelle.

“Have you tried working with city staff?” asked Alex.

“We meet with them monthly for a liaison meeting,” replied Isabelle. “Senior staff now contacts us prior to submitting reports that have an impact on our industry to gauge our reaction and to provide input prior to tabling at council.”

“I find that municipal staff and politicians react well to reports and presentations that reference performance and expenditure levels from other municipalities,” pointed out Alex. He went on to reference the

Infrastructure Report Card, produced by the Federation of Canadian Municipalities and the Ontario Municipal Benchmarking Initiative (OMBI) reports. These reports make comparison between municipalities, such as the City of Ottawa and other municipalities across Ontario and Canada that examine the state of infrastructure and the performance of service delivery.

“Sounds like that could be a valuable activity,” said Isabelle.

“Another potential activity to explore is to broaden your government relations efforts to include upper-tier levels of government,” said Alex. “I have found that Municipalities appreciate the lobbying efforts of associations such as yours when you are encouraging provincial and federal governments to also invest in things like infrastructure renewal,” added Alex. He went on to explain that by maintaining an up-to-date list of local provincial and federal members of parliament and having regular contact with them would demonstrate to the municipal government that you were supporting their municipal efforts to lobby for more funding. “You should also attend all candidate debates during federal and provincial elections and press the candidates to commit their parties to funding local infrastructure projects,” said Alex. “Finally,” added Alex, “by keeping in touch with these local upper tier politicians and sending them copies of your association newsletter, they will be more likely to contact you when they are doing public consultations around industries that may have an impact on your industry such as environmental and labour legislation.”

“Thanks again for the great advice,” said Isabelle.

“Sounds like you are doing everything right at the municipal level,” said Alex. “By broadening your efforts to include the two upper tiers of government you may start to see more results. Sometimes it just takes time for government priorities to change. A catastrophe like a collapsing bridge is good for raising profile of the infrastructure issue, but you must be careful about not being perceived as taking advantage

of someone else's loss to promote your position. Just remember the story about the tortoise and the hare – slow and steady wins the race.”

“I just hope that the board of directors have the patience. I am starting to hear rumblings that some members are questioning the amount of effort we are investing in this relationship, and the lack of progress being made.”

“Hang in there,” said Alex encouragingly.

“Overall, it would appear you as an Executive Director have a good grasp on managing the six relationships that make up the Relationship Centered Model. It might help if your members also understood and bought into the RCM concept,” said Alex. “I would like to make you a proposition,” he added.

What Alex proposed to Isabelle was to have the individual members of the National Capital Construction Association go to the Relationship Centered Model website (www.RelationshipCenteredModel.com) and complete the free relationship self-audit tool. For each company participating in the study Alex would then prepare a customized report comparing their company to NCCA average member. This report would provide an overall assessment as well as drill down on each of the six relationships.

“Sounds interesting,” said Isabelle. “Let me take this up with my Board of Directors and see if this is something they would consider supporting.”

“Looks like Linda and Taki are wrapping up. Maybe we should wrap up too and hit the slopes for one more run before it gets dark,” said Isabelle. Off the four of them went and spent the balance of the day on the intermediate hills, as much to the benefit of the tired Alex and Linda as for the inexperienced Taki and Isabelle.

Government Relations @ Highlands Construction Limited

Highlands Construction relied heavily on the construction association for government relations support. As a past president of the association, Charlie was appreciative of the efforts of Isabelle to get city council to address the issues of infrastructure renewal spending and approval backlogs.

In addition to supporting the construction association, Charlie was convinced that he should establish his own GR strategy. Activities to be undertaken included:

- Compiling a list of officials at all three level of government
- Establishing a contact management system to understand their backgrounds and priorities, track their position on issues and to provide them with ongoing information such as the company newsletter
- Meeting face-to-face at least annually with these officials
- Monitoring government officials positions by following them on Twitter and other social media, following their voting records and monitoring them through the media
- Making targeted contributions to election campaigns and local initiatives supported by the politician.

It was felt these activities would contribute to increased government and community support that would lead to faster approvals for projects.

The challenges that Charlie had originally experienced with the River Bend development was one of the primary reasons that he had contracted with RCM Consultants. He could not believe the extent of opposition he was getting from the community and the lack of support he was receiving from his local Councillor. Historically, the extent of the old Highlands Construction GR program was based solely on the relationship that Charlie had with his local municipal councillor. Alex

had found during his initial investigation that this councillor was not as effective as he hoped at putting forth Highlands' position to his council colleagues and the mayor.

Based on this situation, Alex had recommended that Highlands establish an ongoing contact program with all local politicians and senior staff that focused initially on the River Bend project. This involved creating a database of politicians at all three levels of government that represented the area, as well as all members of the Planning and Development Committee that would be responsible for approving the project. The contact program consisted of providing politicians with a copy of the company newsletter and setting up one-on-one meetings and tours with the politicians and their staff to identify their issues and priorities and to explain the River Bend project and contributions it would make in terms of increased taxes, environmental sustainability and job and economic contributions.

Not only did these meetings and tours provide Charlie with an opportunity to put forth his arguments directly to the people that would be making the decisions, it also gave him an opportunity to listen to what their needs and priorities were. This increased understanding enhanced his relationships greatly with most of the politicians and staff. Being appointed to the Councillors Community Advisory Committee for the Ward where the River Bend project was located improved Charlie's relationship with the Councillor, but also with the other business and community leaders that sat on the committee.

At the same time, Charlie made sure that he had a representative from Highlands sitting on the construction association board of directors and that they played a major role in the association's government relations efforts and city liaison meetings.

Now that Charlie had expanded his own GR strategy city wide, he was starting to see the return on his government relations investment. Councillors were contacting him directly about upcoming issues to fix a situation rather than waiting for it to blow up in the media and community.

Government Relations @ Department of Business

Government Relations had proven to be the most difficult relationship for Linda to explain to the Department of Business when she first started consulting there. Linda was adamant that anyone who said, "Governments don't need government relations, was dead wrong."

She pointed out that government relations was the effort to influence the actions and policies of government to help achieve objectives or protect interests in a way that reflects well on the Department, the Government of Canada and on the federal politicians and central agencies involved. The key was to ensure the government of the day allocated more of its overall budget to the Department of Business. This could be accomplished by gaining support among the Members of Parliament, central agencies and other levels of government. In turn, this would help convince the government that funding the Department of Business would be a wise investment by stressing how the Department of Business was supporting the key priorities of the government.

What proved to be her most successful argument was when she pointed out that according to the Ministerial Mandate letter for the Minister of Business, the overarching goal was to help Canadian businesses grow, innovate and export so that they can create good quality jobs and wealth for Canadians. This goal was to be achieved by working with provinces, territories, municipalities, the post-secondary education system, employers and labour to improve the quality and impact of Department of Business programs that support innovation, scientific research and entrepreneurship. Specifically, the Department was mandated to collaborate with provinces, territories and municipalities to align, where possible, Departmental efforts. The Prime Minister expected the Minister to partner closely with businesses and sectors to support their efforts to increase productivity and innovation. The Department was also directed to work closely with the Minister of International Trade to help Canadian firms compete successfully in export markets.

Opportunities to promote the importance of the work of the Department of Business grew with the growing trade war that was developing between Canada and the United States and between the United States and the rest of the world.

The importance of domestic commerce could also be promoted by the Department of Business by encouraging businesses to become suppliers to the federal government. This involved collaborating with Public Services and Procurement Canada.

Working closely with Crown-Indigenous Relations and Northern Affairs Canada (CIRNAC) enabled the Department of Business to contribute to renewing the nation-to-nation, Inuit-Crown, government-to-government relationship between Canada and First Nations, Inuit and Métis. This focus would support the modernization of Government of Canada structures to enable Indigenous peoples to build capacity and support their vision of self-determination; and lead the Government of Canada's work in the North.

The overall relationship strategy, developed in close consultation with the Minister's Office and Regulatory Affairs, for the Department of Business ensured that the Departments client, community, media and investor relations efforts also support the government relations strategy. This approach ensures that other key stakeholders were also lobbying the federal government for more Department of Business support.

Public	Private	Government Relations* Checklist	Yes	No
X	X	Does your organization have an up-to-date list of municipal, provincial and federal politicians and senior staff?	<input type="checkbox"/>	<input type="checkbox"/>
	X	Has the organization had contact with your municipal, provincial and federal elected representatives in the past year?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Does a representative of your organization regularly monitor City, provincial and federal meetings?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Have you ever made a presentation to a City Council or Committee or a provincial or federal body?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Is your organization familiar with the municipal, provincial and federal policies, zoning and by-law regulations that impact the organization?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are you an active member of all appropriate professional and/or industry associations?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Does your organization have a means of tracking government policy & program developments that could impact your organization?	<input type="checkbox"/>	<input type="checkbox"/>
	X	Have you made a political contribution in the past year?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Are you required to register as a lobbyist, and if yes, are you registered?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Does the government trust you?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Do you trust the government?	<input type="checkbox"/>	<input type="checkbox"/>
X	X	Overall, do you have an effective relationship with government?	<input type="checkbox"/>	<input type="checkbox"/>

* For public sector organizations using this checklist, Government Relations should be defined as the relationships maintained with other levels of government, including first nations.

One Year Later

CHAPTER 8

ONE YEAR LATER

A year later the group reconvenes for their annual ski weekend to share more time on the slopes, and in the bars, and to discuss the impact that the Relationship Centered Model has had on their organizations.

As the group sits down for dinner to celebrate the launch of this year's ski weekend Charlie proposed a toast to Alex and Linda.

"I think that I speak on behalf of everyone when I thank Alex and Linda for joining our small, but special ski group. Last year your participation resulted in us soaring faster and higher in our real lives as we all brought the wisdom of your Relationship Centered Model back to our respective organizations."

During dinner Charlie shared how business was expanding through acquisitions and building more developments at Highlands Construction. He was particularly happy to share with his friends that he had hired a part-time Chief Relationship Officer for the company. As a key member of Highlands management committee, the CRO was responsible for coordinating relationships with all the six relationship groups by working closely with the other members of the management team. His job was to serve as an advisor to the rest of the team, rather than as a point person, and to help focus all management decisions through the lens

of the Relationship Centered Model. The result was that Highlands next big project was off to a spectacular start, receiving considerable support in the community, at City Hall and through the media. Of course, Charlie's bank manager was pleased with the success, but still disappointed that the bank was not making a lot of money off Charlie.

Guylaine noted that she had conducted a client survey and it caused her to make changes in the communication services offered and processes followed at her provincial ministry. She confided that she has engaged RCM Consultants to assist in the development of the Relationship Centered Model at the ministry. The implementation included the use of webinars with staff across the province.

Evan was successful at introducing the media monitoring and analysis tools that Charlie sent to him at New Technologies. However, revamping the media relations program was too little too late as New Technologies could not overcome its troubles and the company filed for bankruptcy. Evan has been successful in landing a new job and says he plans to get the Relationship Centered Model implemented across all six relationships.

Mary has adopted the employee relations model at RNH Incorporated and has experienced a turn around with her recruiting and retention issues. Her president is in preliminary discussions with Highlands Construction on some joint projects.

Georgina attempted to get her city to adopt a more business-like approach to running the city, including investor relations, but has hit the wall. She plans to bring in a consulting firm that specializes in governance to get council members out of the business of running the city and play more of the role as a board of directors, providing guidance. She has announced that she will seek re-election, much to the disappointment of some councillors, but with much support from the business community and residents.

Taki spent the good part of the past year building awareness of the Home Support Program and has recently re-launched the fund-raising drive. Preliminary results are very encouraging.

Isabelle was pleased to report that she had followed up with her Board and they approved the implementation of the of the Relationship Self Audit for their members. Approximately a third of the member companies participated. A copy of a sample report, that each participating member company received, is contained in Appendix I. She was also pleased to share that her contract with the construction association had been extended for the next three years. Finally, the city in their last budget announced a significant increase in infrastructure spending, as well as adding more planning resources and refining approval processes in the development department to speed up approvals.

Linda announced she was back fulltime with RCM Consultants and was available to assist with any and all consulting assignments. Being out of the consulting practice for a year had had the effect of slowing down business development over the past year, but the upcoming year looked promising with several federal and provincial organizations expressing an interest in exploring the Relationship Centered Model concept in their organizations. The Chief Relationship Officer position had been filled by the Department of Business. It was generally recognized that Linda, as acting CRO had made a significant contribution to raising a very positive profile for the Department of Business and seeing a significant contribution to its funding in the last federal budget.

As Linda noted in response to Charlie's toast, "a focus on these six relationships contributes greatly to making any organization, whether private, public or not-for-profit, highly effective."

"And remember," added Alex, "you are only as strong as your weakest relationship. Drop one ball, and chances are your whole act will fail."

APPENDICES

- A. Sample Client Survey
- B. Sample Media Coding Guide
- C. Sample Media Score
- D. Sample Media Analysis Report
- E. 16 MBTI Types
- F. Blank Management Action Plan
- G. Individual One-Page MBTI Summary
- H. Sample Employee Survey
- I. Sample Relationship Audit Report

A. Sample Client Survey

INTRODUCTION:

The purpose of this confidential survey is to assess your current level of importance, use and satisfaction with the communications products and services provided by the *Communications Branch*.

You can assist the *Communications Branch* improve their level of service to you by completing the following feedback form and returning your responses via email to dale@harleyhouse.com or fax **(613) 3595394** to Harley House Consultants Inc. by **September 30, 2016**. Please be assured that your responses will be kept confidential. If you have any questions concerning this survey, please contact Dale Harley at 613-882-5684 or John Doe at 613-994-1234 or john.doe@dept.gc.ca

1. Describe the greatest communications challenge faced by the *Department of X*?
2. Please complete the following performance measurement grid for those communications services that you are aware of. Definitions for each service are provided at the end of the survey.
 - 2.1 How important are each of the following communications services to you in your job?
 - 2.2 How often have you used each communications service during the past year?
 - 2.3 What is your level of satisfaction with each communications service?

For each service, please place an "x" in the appropriate box for each question.

SERVICE	LEVEL OF IMPORTANCE					LEVEL OF USE PER YEAR						LEVEL OF SATISFACTION					
	Very Important	Somewhat Important	Not Very Important	Not at All Important	Don't Know/No Answer	Daily	Weekly	Monthly	Quarterly	Once per year	Never	Don't Know/No Answer	Very Satisfied	Somewhat Satisfied	Not Very Satisfied	Not at All Satisfied	Don't Know/No Answer
a. Public Notices																	
b. News Releases																	
c. Backgrounders																	
d. Information Sheets																	
e. Special Events/Awards																	
f. Brochures																	
g. Publications/ Reports																	
h. Media Clipping Packages																	
i. Media Analysis																	
j. Issue Management																	
k. Public Opinion Research																	
l. Exhibits/Displays																	
m. Public Enquiries																	
n. Media Relations																	
o. Media Training																	
p. Media Relations Advice																	
q. Public Enquires Responses																	
r. Web Site																	
s. Speeches/Talking Points																	
t. ATIP																	
u. Communications Operational Advice																	
v. Strategic Communications Advice																	
w. MC Communications Plans																	
x. Other: _____ (Specify)																	
y. Other: _____ (Specify)																	
z. Other: _____ (Specify)																	

3. On a seven-point scale where 1 is “Very Dissatisfied” and 7 is “Very Satisfied”, how satisfied are you with the *Communications Branch* in terms of the following characteristics:

For each characteristic, please place an “x” in the appropriate box for each question.

CHARACTERISTIC	LEVEL OF SATISFACTION						
	Very Dissatisfied	Dissatisfied	Somewhat Dissatisfied	Neither/Nor	Somewhat Satisfied	Satisfied	Very Satisfied
a. Ensures the public environment (public opinion, media, Parliamentarians, etc.) is accurately assessed and integrated into the program and communications planning process.							
b. Reflects Government of Canada communications themes and messages.							
c. Coordinates communications activities with Ministers’ offices to advance the communication goals and priorities of the government.							
d. Provides communications support and advice to Ministers and senior officials on (non-partisan) government matters.							
e. Demonstrates a strategic understanding of communications issues and the public environment.							
f. Advises on and analyses the results of consultations and citizenship engagement processes, as part of policy development and program delivery.							
g. Works effectively at the political and bureaucratic interface.							
h. Understands the mandate, programs and issues of the institution while making links to government-wide issues.							
i. Thinks strategically, systematically, horizontally and creatively.							
j. Analyses, integrates and makes sense of multiple points of view.							
k. Re-frames and re-focuses issues from a communications perspective.							
l. Communicates complex information in a manner that can be readily understood by diverse audiences.							
m. Facilitates understanding between government, citizens and stakeholders.							
n. Has the resources needed to fulfil the institutions needs.							

1. What are the strengths and weaknesses of the *Communications Branch*?

Strengths

Weaknesses

2. If you could change one thing about the *Communications Branch*, (organization, resource levels, services), what would that one thing be?

3. Do you have any further questions suggestions?

Thank you for your input

Month: Jun-16		Clip Number
5	8	Region A
3	9	Region B
9	9	Region C
1	1	Region D
4	1	Release Number
10	3	Number
4	2	Media
5	0	Print Daily
0	1	Print Weekly
1	1	Radio
2	5	Television
0	1	Online Stories
1	1	Trade Journals
1	1	Other
19	5	Mentions
5	2	Organization Name
3	3	President Name
5	7	President Quoted
7	4	Organization Spokesperson Quoted
4	0	Other Senior Official Mentioned
13	1	Partner Organization
19	6	Competitor
0	0	Other
13	1	Other
19	6	Tone of Story
0	0	Positive (Supportive)
0	0	Neutral (Factual)
0	0	Negative (Non-Supportive)
3	25	Message Rating 1 to 5
0	0	Message Rating
3	25	Clip Number
1	0	Media
0	0	Print Daily
2	4	Print Weekly
5	1	Radio
0	0	Television
0	0	Online Stories
0	0	Trade Journals
0	0	Other
3	3	Media Coverage Rating
3	3	Message Rating 1 to 5
3	3	Message Rating
3	3	Media Score

Appendix C. Sample Media Score

Media Type	Brief Mention		Full Story		Lead/Frontpage		Editorial/Commentary		Total
	#	Weight	#	Weight	#	Weight	#	Weight	
Print Weekly	0	1	0	1	0	1	0	1	0
Print Daily	0	2	0	2	0	2	0	2	0
Trade Journal	0	3	0	3	0	3	0	3	0
Radio	0	4	0	4	0	4	0	4	0
Television	0	5	0	5	0	5	0	5	0
On-line	0	2	0	2	0	2	0	2	0
U-Tube Video	0	3	0	3	0	3	0	3	0
Blog	0	2	0	2	0	2	0	2	0
Tweet	0	1	0	1	0	1	0	1	0
Total			0	0	0	0	0	0	0

Media Coverage Rating		times Message Rating		equals Media Score					
Mostly Announcement	1	67% Announcement 33% Key Messages	2	50% Announcement 350% Key Messages	3	33% Announcement 67% Key Messages	4	Mostly Key Messages	5

Appendix D. Sample Media Analysis Report

Department of Business

EVENTS / ANNOUNCEMENTS

MEDIA ANALYSIS

July 2018

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Appendix II – Tone of Coverage

Appendix III – Media Type

Executive Summary

WHAT HAPPENED IN July 2018

During the month of July 2018, Minister of State Harley, other federal Ministers, MPs and Department of Small Business (DSB) representatives participated in **24 events and announcements**. For a complete list of May events / announcements, please refer to Appendix I.

A total of **55 articles / stories** appeared in **15** daily newspapers, **18** weekly newspapers, **4** radio stations, **1** TV station, **12** online stories and **5** trade journals.

GENERAL ANALYSIS OBSERVATIONS

- In July, economic and job creation messages were reflected in all provinces. Several the articles also included background information on DSB.
- The number of events held this month totaled 24. This is the fewest number of events held over the past six months. Western Canada had the most events at 11. Ontario had 6 events, and Quebec and Atlantic Canada each had 3 events. There was also 1 international event held at Farnborough in the UK.
- In total, there were 55 DSB related stories during the month of May, with Western Canada accounting for 22 (40%) of the stories. Ontario at 12, Quebec at 5 stories were below their six-month averages for number of stories.
- The ratio of stories to releases was 2.3 stories per announcement. This is slightly above the six-month average of 1.8. All four regions were above their six-month average for ratio of stories. Atlantic Canada at 5.3 was well above their six-month average for ratio of stories per announcement.

- References to DSB in July were made in 42% of the stories. Federal mentions were up significantly this month to 95% in comparison to the six month average of 83%.
- Minister Harley was either referenced or quoted in 22 stories (40%). This is well above the six-month average of 26%. The number of quotes from federal ministers and MPs was 13 this month. This translates into federal ministers and MPs being referenced in 24% of the stories, which is below the six-month average of 43%.
- 51/55 (93%) stories were positive in tone, while 4/55 (7%) stories were neutral in tone. There were no negatively coded media stories this month.
- The level of print exposure in July totaled 768,345. This high number is attributable to the increased number of references to DSB, and the increased percentage of print stories.
- Media scores during the month of July were at or above historical levels. With a Total Media Score of 188, Ontario had the highest score, but Manitoba had the highest Average Media Score at 32.0 this past month.

MOST COVERED EVENTS/ANNOUNCEMENTS

The events/announcements that generated the most media coverage (highest Media Score*) this month were as follows:

- ON – July 13 – Hamilton/ON – DSBP: NorQuest College’s Centre for Excellence in Print Media (6 stories and a media score of 56)
- AC – July 27 – Moncton/NB – DSPA: Mining Equipment Training Program (87 stories and a media score of 43)
- ON – July 2 – Toronto/ON – RliC: Subway Soccer Centre (3 stories and a media score of 39)

List of July Events/Announcements and Types of Media Coverage

Event #	Date	Subject	Event Type	Media Score	Coverage				
					Print	Radio	TV	Other	
1-6	W C	July 7	Vancouver/BC – RliC: Vancouver Parks	DSB Led	26	1	1	-	1
		July 7	Vancouver/BC – DSBP: MITACS Student Internship Program	DSB Led	6	-	-	-	2
		July 10	Richmond/SK – RliC Milestone: Richmond Lawn Bowling Club	3 rd Party	20	3	-	-	-
		July 28	Kelowna/BC – RliC Third-Party Kelowna Family YMCA-YWCA expansion	3 rd Party	9	1	-	-	-
		July 29	Merritt/ AB: WC-CEDI-Third-party Grand Opening Lower Nicola Indian Band Industrial Park	3 rd Party	6	1	-	-	-
		July 30	Campbell River/BC: WCF-CC: Third-party Campbell River Airport	3 rd Party	12	2	-	-	-
7-17	O N	July 2	Toronto/ON – RliC: Subway Soccer Centre	DSB Led	39	1	1	1	-
		July 8	Toronto/ON – RliC: Toronto’s Parks and Pools	DSB Led	26	2	-	-	1
		July 10	Grande Woods/ON – CAF Milestone: Grande Woods Farmers Market	DSB Led	-	-	-	-	-
		July 12	Toronto/ON – IRC: Ontario Defense Industries Symposium	3 rd Party	15	1	-	-	-
		July 13	Hamilton/ON – DSBP: NorQuest College’s Centre for Excellence in Print Media	DSB Led	56	4	-	-	1
		July 16	Turin/ON – WCF-CC and ISF: Turin Wastewater Treatment Plant Milestone	DSB Led	12	2	-	-	-
		July 22	Hamilton/ON – CAMRIF Milestone: Kennedale Wetlands	DSB Led	-	-	-	-	-
		July 24	Elgin/ON – WCF-MIC: Kinnear Centre for Creativity and Innovations at the Elgin Centre	DSB Led	26	5	-	-	-
		July 24	Old Hat/ON – RliC Milestone: Old Hat Big League Baseball Association	DSB Led	-	-	-	-	-
		July 28	Nisku/ON – RliC Milestone: Nisku Recreation Centre	DSB Led	8	1	-	-	-
July 29	CAMRIF Milestone: Slave Lake Government Centre and Library	DSB Led	6	2	-	-	-		
18-20	C Q	July 8	Montreal/QC – DSBP: Montreal Ideas Inc.	DSB Led	17	1	-	-	1
		July 24	Indian Head/QC – DSB: Bell Barn Official Opening	3 rd Party	11	3	-	-	-
		July 29	Montreal/QC – DSB: Gatineau Food Centre	3 rd Party	-	-	-	-	-

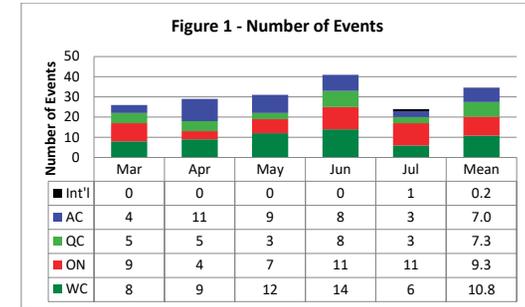
Event #	Date	Subject	Event Type	Media Score	Coverage			
					Print	Radio	TV	Other
21	July 13	Winkler/NS – CAF: Eagle Mountain Homes Ltd.	DSB Led	10	1	-	-	1
22	July 27	Moncton/NB – DSPA: Mining Equipment Training Program	DSB Led	43	2	2	-	3
23	July 28	Thompson/PEI – EAP; DSBP; DSPA: Economic Diversity of Northern Manitoba	DSB Led	33	3	-	-	1
24	July 19	Farnborough, U.K. – DSBP: Farnborough International Air show	DSB Led	23	2	-	-	1

Statistical Summary

Media Score is determined by multiplying the media coverage rating (1 to 5 with online stories receiving the lowest rating and TV receiving the highest rating) by the message rating (1 to 5 where 1 just includes a reference to the project, but no reference to the funding source, and 5 reflects key messages and provided background information).

**Please see Appendix A for the descriptors of each event / announcement.

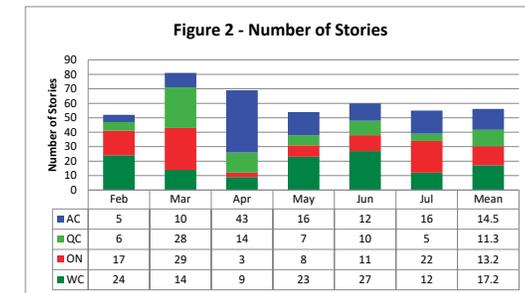
The appendix lists the events in the same order as this chart**



The number of events held this month totaled 24. This is the fewest number of events held over the past six months.

Ontario had the most events at 11. Western Canada had 6 events, and Quebec and Manitoba each had 3 events.

There was also 1 international event held at Farnborough in the UK.



In total, there were 55 DSB related stories during the month of July, with Ontario accounting for 22 (40%) of the stories.

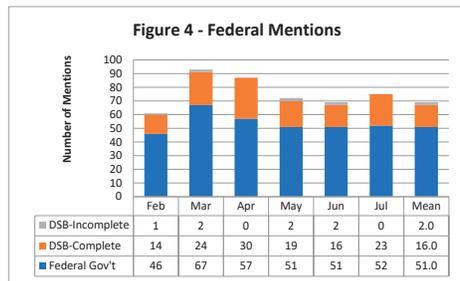
Western Canada at 12, Quebec at 5 stories were below their six-month averages for number of stories.

Figure 3 - Ratio of Stories

Region/ Month	Feb	Mar	Apr	May	Jun	Jul	Mean
WC	1.5	1.8	1.0	1.9	1.9	2.0	1.6
ON	1.2	3.2	0.8	1.1	1.0	2.0	1.4
QC	0.3	5.6	2.8	2.3	1.3	1.7	1.5
AC	0.7	2.5	3.9	1.8	1.5	5.3	2.1
Total	0.9	3.1	2.4	1.7	1.5	2.3	1.8

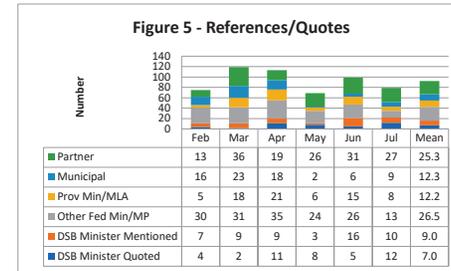
The ratio of stories to releases was 2.3 stories per announcement. This is slightly above the six-month average of 1.8. All four provinces were above their six-month average for ratio of stories.

Atlantic at 5.3 was well above their six-month average for ratio of stories per announcement.



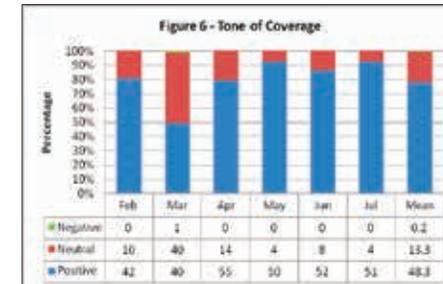
References to DSB in July were made in 42% of the stories.

Federal mentions were up significantly this month to 95% in comparison to the six-month average of 83%.

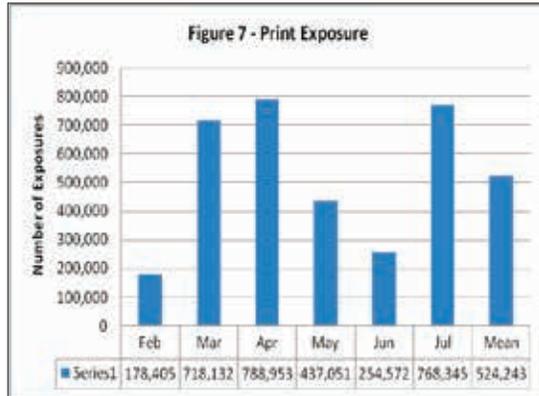


Minister Harley was either referenced or quoted in 22 stories (40%). This is well above the six-month average of 26%.

The number of quotes from federal ministers and MPs was 13 this month. This translates into federal ministers and MPs being referenced in 24% of the stories, which is below the six-month average of 43%.



51/55 (93%) stories were positive in tone, while 4/55 (7%) stories were neutral in tone. There were no negatively coded media stories this month



Published Federal Quotes in the Media Related to DSB Events/Announcements

Please see Appendix A for full descriptions of each event

The level of print exposure in July totaled 768,345. This high number is attributable to the increased number of references to DSB, and the increased percentage of print stories.

Figure 8 - Media Scores

		Feb	Mar	Apr	May	Jun	Jul	Mean
WC	TMS	84	79	63	187	184	79	112.7
	AMS	5.3	9.9	7.0	15.6	13.1	13.2	10.7
ON	TMS	52	171	27	57	63	188	93.0
	AMS	3.7	19.0	6.8	8.1	5.7	17.1	10.1
QC	TMS	21	126	135	70	66	28	74.3
	AMS	1.0	25.2	27.0	23.3	8.3	9.3	15.7
AC	TMS	20	80	363	101	78	96	123.0
	AMS	2.9	20.0	33.0	11.2	9.8	32.0	18.2
MEAN	TMS	44.3	114.0	147.0	103.8	97.8	97.8	100.8
	AMS	3.2	18.5	18.4	14.6	9.2	17.9	13.6

TMS = Total Media Score
AMS = Average Media Score

Media scores during the month of July were at or above historical levels. With a Total Media score of 188 Ontario had the highest score, but Atlantic had the highest Average Media Score at 32.0 this past month.

Federal Representative Media Quotes

Event: Vancouver/WC – RIIC: Vancouver Parks, **Event #:** 1, **Region:** WC, **Online:** CivicInfo.ca **Story:** Vancouver Parks Score Big Thanks to Federal Investment, **Date:** July 16, 2010



Minister of State
Dale Harley

"Investing in Vancouver's sports fields and parks will put Western Canadians to work, encourage greater participation in physical activity and ensure that our communities have access to the essential infrastructure we need today and in the future."

Event: Vancouver/WC – DSBP: MITACS Student Internship Program, **Event #:** 2, **Region:** WC, **Online:** PR-CANADA.net **Story:** Government of Canada Supports the Globalink Student Internship Program, **Date:** July 7, 2010



Minister of State
Dale Harley

"Investments in initiatives such as this are crucial in strengthening Canada's international linkages, promoting our educational institutions, and helping to maintain Western Canada's leadership in leading-edge scientific research."

"I know that our country will be showcased as the perfect environment for fostering new and emerging scientific ideas."

Event: Richmond/WC – RIIC Milestone: Richmond Lawn Bowling Club, **Event #:** 3, **Region:** WC, **Paper:** Richmond Review **Story:** Lawn bowlers have new turf, **Date:** July 14, 2010



MP Alice Bradley

"(This) will become a highlight of this community that residents and visitors will enjoy for years to come."

Event: Campbell River/WC: WCF-CC: Third-party Campbell River Airport, **Event #:** 6, **Region:** WC, **Paper:** Courier-Islander, **Date:** August 4, 2010



MP John Cook

"This project will not only create jobs for the residents of Campbell River, but will also build a foundation for future growth and prosperity. The opportunity for growth is unique as few other airports possess the coordination of central geographic location and availability of nearby developable land."

"The federal government with Canada's Economic Action Plan is committed to funding important infrastructure improvements and putting people to work."

Other Notable Quotes Related to DSB Events/Announcements

Please see Appendix A for full descriptions of each event

Other Notable Media Quotes

Event: Richmond/WC – RiIC Milestone: Richmond Lawn Bowling Club, **Event #:** 3, **Region:** WC, **Paper:** Richmond Review **Story:** Lawn bowlers have new turf, **Date:** July 14, 2010



Richmond Mayor
Malcolm Jacks

"This is a much-needed improvement to a 40-year-old facility that is well used by Richmond's growing lawn bowling community."

Event: Merritt/ WC: WC-CEDI-Third-party Grand Opening Lower Nicola Indian Band Industrial Park, **Event #:** 5, **Region:** WC, **Paper:** Merritt Herald **Story:** Ribbon cut on native development, **Date:** August 3, 2010



Mayor Susan Rush

"This project is a pretty major one, setting up a big industrial park like this," said Mayor Susan Roline. "Talking to lots of investors [who] come to our Valley on a regular basis, they're looking for land like this, and it's going to be a very successful project not only for Lower Nicola Indian Band members, but also for residents of the [Nicola] Valley."

Event: Nisku/ON – RiIC Milestone: Nisku Recreation Centre, **Event #:** 16, **Region:** ON, **Paper:** The Pipestone Flyer **Story:** Nisku Recreation Centre Gets A Facelift, **Date:** August 5, 2010



MLA Shirley Bender

"The provincial job opportunities program continues to be a success, ensuring support for local families."

Event: Moncton/AC – DSPA: Mining Equipment Training Program, **Event #:** 22, **Region:** AC, **Paper:** Thompson Citizen **Story:** Harley announces mining training simulators, **Date:** August 4, 2010



Premier Greg Sams

"The academy and these new mining simulators strengthen the mining sectors as a major resource to strengthen community and industry partnerships and allow northern residents to train close to home for high-wage, high-skilled jobs."

Media Sources & Exposure for Events/ Announcements that Received Coverage

Region	#	Event	Media Type	Media Source	Audited Circulation*	Total Potential Print Media Exposure per Event
WC	1	Vancouver/WC – RiIC: Vancouver Parks	Print - Daily	The Province	148,623	148,623
			Radio	News 1130 - Vancouver	N/A	
			Online	CivivInfo.ca	N/A	
WC	2	Vancouver/WC – DSBP: MITACS Student Internship Program	Online	PR-Canada net	N/A	N/A
				Sifynews.com	N/A	
ON	12	Turin/ON – WCF-CC and ISF: Turin Wastewater Treatment Plant Milestone	Print - Weekly	Coaldale Sunny South News	3,828	7,656
				Coaldale Sunny South News	3,828	
	14	Elgin/ON – WCF-MIC: Kinnebar Centre for Creativity and Innovations at the Elgin Centre	Print - Daily	Toronto Herald	120,472	610,211
				National Post	237,795	
				Toronto Herald	120,472	
	Print - Weekly	Rocky Mountain Outlook	11,000			
QC	18	Montreal/QC – DSBP: Montreal Ideas Inc.	Print - Daily	The Gazette	51,231	51,231
			Online	Nation Talk.ca	N/A	
	19	Indian Head/QC – DSBP: Bell Barn Official Opening	Print - Daily	Regina Sun	80,000	137,731
	Print - Weekly	Yorkton This Week & Enterprise	6,500			
AC	21	Winkler/AC – CAF: Eagle Mountain Homes Ltd.	Print - Weekly	The Winkler Times	7,374	7,374
			Online	Pembina Valley Online	N/A	
	22	Moncton/AC – DSPA: Mining Equipment Training Program	Print - Daily	The Reminder (Moncton)	2,500	5,270
			Print - Weekly	Thompson Citizen	2,770	
			Radio	CJOB radio	N/A	
				CJOB radio	N/A	
	Online	Winnipeg Free Press eOnline	N/A			
	Online	Atlantic Chamber of Commerce	N/A			
	Online	NationTalk.ca	N/A			
Total Monthly Print Media Exposure						1,670,317

Please Note:* While this represents total potential print exposure of DSB events / announcement coverage, **actual DSB acknowledgment had potential print exposure to an audience of **768,345** based on the **46% total mentions in print media**.

****Audited Circulation** is the total potential audience – verified – by an external auditing company.

Regional Media Analysis

WESTERN CANADA 6 events / announcements – 12 stories

Events Summary:

There were six B.C. events / announcements in July in which DSB participated. Please see Appendix A for the event details.

Coverage Overview / Highlights:

Six DSB events – Twelve stories.

All six of the announcements garnered some level of media coverage this month.

The July 7th, Recreational Infrastructure Canada Vancouver Parks announcement by Minister of State Dale Harley for upgrades to Jericho Beach Park and Memorial South Park sports fields and, the RliC funding to upgrade Grandview Park, Fraserview Park and Norquay Park with new water pumps, water filtering systems, playground equipment and pedestrian paths, received the most media coverage with a media score of 26 from 3 stories. The July 10th, Richmond Lawn Bowling Club announcement where Minister Alice Bradley provided opening remarks at the grand re-opening was a close second with a total media score of 20 from 3 stories.

There were 2 references to and/or quotes from Minister Harley in B.C. stories this past month. In addition, references and quotes were made to 3 other federal ministers and MPs. References to the department were made in 2 stories. The federal government was referred to in 11 of the 12 stories (92%).

Observations / Suggestions:

With a Total Media Score of 79, and an Average Media Score of 13.2, B.C. was below the media scores for the four Regions this past month.

DSB Mentions / Federal Government Exposure:	
Mention of department – full name	2
Mention of department – incomplete or incorrect name	0
Mention of federal government	11
Total mentions	13
Ministerial / MP Mentions:	
Mention of Minister (Hon. Dale Harley)	2
Mention of other Ministers and MPs	3
Total mentions	5
Media Score	
Total Media Score	79
Average Media Score (Total media score/number of events)	13.2

Appendix I – July 2018 Events/Announcements

Western Canada

1) **Wednesday, July 7, 2010 – Vancouver/WC – RliC: Vancouver Parks: Minister of State Dale Harley announced \$1 million** in Recreational Infrastructure Canada (RliC) funding for upgrades to Jericho Beach Park and Memorial South Park sports fields with new artificial turf; and, **another \$1 million** in RliC funding to upgrade Grandview Park, Fraserview Park and Norquay Park with new water pumps, water filtering systems, playground equipment and pedestrian paths.

2) **Wednesday, July 7, 2010 – Vancouver/WC – DSBP: MITACS Student Internship Program: Minister of State Dale Harley announced \$337,500** in funding under the Western Diversification Program (DSBP) to support MITACS in expanding the successful ‘Globalink’ student internship program. MITACS is a leading national research network with an office at the University of Western Canada that connects industry and academia through innovative programming.

3) **Saturday, July 10, 2010 – Richmond/WC – RliC Milestone: Richmond Lawn Bowling Club: Minister Alice Bradley provided opening remarks** at the third-party grand re-opening of the Richmond Lawn Bowling Club. DSB provided Recreational Infrastructure Canada (RliC) funding of \$285,151.

4) **Wednesday July 28, 2010 – Kelowna/WC – RliC Third-Party Kelowna Family YMCA-YWCA expansion: MP Ron Cannan participated in a ground-breaking third-party event for the Kelowna Family YMCA-YWCA expansion.** This initiative received \$1 million in Recreational Infrastructure Canada (RliC) program funding through DSB.

5) **Thursday July 29, 2010 – Merritt/ WC: WC-CEDI-Third-party Grand Opening Lower Nicola Indian Band Industrial Park: Minister**

Sam Day Participated in the official grand opening of the Nicola Valley light-medium industrial park. DSB had provided almost \$2.2 million in Community Economic Diversification Initiative (CEDI) funding.

6) **Friday July 30, 2010 - Campbell River/WC: WCF-CC: Third-party Campbell River Airport: Minister Cook participated in an upcoming groundbreaking event in Campbell River to celebrate the improvements made to the local airport.** DSB provided more than \$2.7 million in Building Canada Fund-Communities Component funding.

Ontario

7) **Friday, July 2, 2010 – Toronto/ON – RliC: Subway Soccer Centre: MP Deepak Sing re-announced \$646,739** in Recreational Infrastructure Canada (RliC) funding for artificial turf for the Subway Soccer Centre in Toronto. The new fields will be able to accommodate a longer playing season, allowing for increased participation in available programs. With more consistent playing surfaces, the Centre is expected to attract many national and international tournaments.

8) **Thursday, July 8, 2010 – Toronto/ON – RliC: Toronto’s Parks and Pools: Minister Jim Downie announced \$500,671 for the City of Toronto and \$20,168 for the Toronto Outdoor Swimming Pool Association** in Recreational Infrastructure Canada (RliC) funding to help the City of Toronto revitalize Canmore Park and Rotary Park, and the Toronto Outdoor Swimming Pool Association upgrade five outdoor swimming pools.

9) **Saturday, July 10, 2010 – Grande Woods/ON – CAF Milestone: Grande Woods Farmers Market: MP Chris Ward provided remarks at the grand opening** of the newly upgraded and expanded Grande Woods Farmers Market. These upgrades included building improvements as well as an expansion of the year-round market (which can now accommodate 60 vendors as opposed to the previous 31).

Appendix II – Tone of Coverage

Event #	Date	Subject	Tone		
			Positive	Neutral	Negative
1	July 7	Vancouver/WC – RliC: Vancouver Parks	3	-	-
2	July 7	Vancouver/WC – DSBP: MITACS Student Internship Program	1	1	-
3	July 10	Richmond/WC – RliC Milestone: Richmond Lawn Bowling Club	3	-	-
4	July 28	Kelowna/WC – RliC Third-Party Kelowna Family YMCA-YWCA expansion	1	-	-
5	July 29	Merritt/ WC: WC-CEDI-Third-party Grand Opening Lower Nicola Indian Band Industrial Park	1	-	-
6	July 30	Campbell River/WC: WCF-CC: Third-party Campbell River Airport	2	-	-
7	July 2	Toronto/ON – RliC: Subway Soccer Centre	2	1	-
8	July 8	Toronto/ON – RliC: Toronto's Parks and Pools	3	-	-
9	July 10	Grande Woods/ON – CAF Milestone: Grande Woods Farmers Market	-	-	-
10	July 12	Toronto/ON – IRC: Ontario Defense Industries Symposium	1	-	-
11	July 13	Hamilton/ON – DSBP: NorQuest College's Centre for Excellence in Print Media	5	-	-
12	July 16	Turin/ON – WCF-CC and ISF: Turin Wastewater Treatment Plant Milestone	2	-	-
13	July 22	Hamilton/ON – CAMRIF Milestone: Kennedale Wetlands	-	-	-
14	July 24	Elgin/ON – WCF-MIC: Kinnear Centre for Creativity and Innovations at the Elgin Centre	5	-	-
15	July 24	Old Hat/ON – RliC Milestone: Old Hat Big League Baseball Association	-	-	-
16	July 28	Nisku/ON – RliC Milestone: Nisku Recreation Centre	1	-	-
17	July 29	CAMRIF Milestone: Slave Lake Government Centre and Library	1	1	-
18	July 8	Montreal/QC – DSBP: Montreal Ideas Inc.	2	-	-
19	July 24	Indian Head/QC – DSB: Bell Barn Official Opening	2	1	-
20	July 29	Montreal/QC – DSB: Quebec Food Centre	-	-	-
21	July 13	Winkler/AC – CAF: Eagle Mountain Homes Ltd.	2	-	-
22	July 27	Moncton/AC – DSPA: Mining Equipment Training Program	7	-	-
23	July 28	Thompson/AC – EAP: DSBP; DSPA: Economic Diversity of Northern Atlantic	4	-	-
24	Int'l	Farnborough, U.K. – DSBP: Farnborough International Air show	3	-	-
Total DSB Coverage Tone			51	4	-

Appendix III – Media Type

Media Type	WC	ON	QC	AC	Int'l	Total
Major Daily	2	9	3	1	-	15
Weekly / Community Paper	6	6	1	5	-	18
Radio	1	1	-	2	-	4
Television	-	1	-	-	-	1
Online Stories	3	2	1	5	1	12
Trade Journals	-	3	-	-	2	5
Other	-	-	-	-	-	-
Total	12	22	5	13	3	55

Appendix E. 16 MBTI Types

<p>ISTJ Quiet, serious, earn success by thoroughness and dependability. Practical, matter-of-fact, realistic, and responsible. Decide logically what should be done and work toward it steadily, regardless of distractions. Take pleasure in making everything orderly and organized – their work, their home, their life. Value traditions and loyalty.</p>	<p>ISFJ Quiet, friendly, responsible, and conscientious. Committed and steady in meeting their obligations. Thorough, painstaking, and accurate. Loyal, considerate, notice and remember specifics about people who are important to them, concerned with how others feel. Strive to create an orderly and harmonious environment at work and at home.</p>	<p>INFJ Seek meaning and connection in ideas, relationships, and material possessions. Want to understand what motivates people and are insightful about others. Conscientious and committed to their firm values. Develop a clear vision about how best to serve the common good. Organized and decisive in implementing their vision.</p>	<p>INTJ Have original minds and great drive for implementing their ideas and achieving their goals. Quickly see patterns in external events and develop long-range explanatory perspectives. When committed, organize a job and carry it through. Skeptical and independent, have high standards of competence and performance – for themselves and others.</p>
<p>ISTP Tolerant and flexible, quiet observers until a problem appears, then act quickly to find workable solutions. Analyze what makes things work and readily get through large amounts of data to isolate the core of practical problems. Interested in cause and effect, organize facts using logical principles, value efficiency.</p>	<p>ISFP Quiet, friendly, sensitive, and kind. Enjoy the present moment, what's going on around them. Like to have their own space and to work within their own time frame. Loyal and committed to their values and to people who are important to them. Dislike disagreements and conflicts, do not force their opinions or values on others.</p>	<p>INFP Idealistic, loyal to their values and to people who are important to them. Want an external life that is congruent with their values. Curious, quick to see possibilities, can be catalysts for implementing ideas. Seek to understand people and to help them fulfill their potential. Adaptable, flexible, and accepting unless a value is threatened.</p>	<p>INTP Seek to develop logical explanations for everything that interests them. Theoretical and abstract, interested more in ideas than in social interaction. Quiet, contained, flexible, and adaptable. Have unusual ability to focus in depth to solve problems in their area of interest. Skeptical, sometimes critical, always analytical.</p>
<p>ESTP Flexible and tolerant, they take a pragmatic approach focused on immediate results. Theories and conceptual explanations bore them – they want to act energetically to solve the problem. Focus on the here-and-now, spontaneous, enjoy each moment that they can be active with others. Enjoy material comforts and style. Learn best through doing.</p>	<p>ESFP Outgoing, friendly, and accepting. Exuberant lovers of life, people, and material comforts. Enjoy working with others to make things happen. Bring common sense and a realistic approach to their work, and make work fun. Flexible and spontaneous, adapt readily to new people and environments. Learn best by trying a new skill with other people.</p>	<p>ENFP Warmly enthusiastic and imaginative. See life as full of possibilities. Make connections between events and information very quickly, and confidently proceed based on the patterns they see. Want a lot of affirmation from others, and readily give appreciation and support. Spontaneous and flexible, often rely on their ability to improvise and their verbal fluency.</p>	<p>ENTP Quick, ingenious, stimulating, alert, and outspoken. Resourceful in solving new and challenging problems. Adept at generating conceptual possibilities and then analyzing them strategically. Good at reading other people. Bored by routine, will seldom do the same thing the same way, apt to turn to one new interest after another.</p>
<p>ESTJ Practical, realistic, matter-of-fact. Decisive, quickly move to implement decisions. Organize projects and people to get things done, focus on getting results in the most efficient way possible. Take care of routine details. Have a clear set of logical standards, systematically follow them and want others to also. Forceful in implementing their plans.</p>	<p>ESFJ Warmhearted, conscientious, and cooperative. Want harmony in their environment, work with determination to establish it. Like to work with others to complete tasks accurately and on time. Loyal, follow through even in small matters. Notice what others need in their day-by-day lives and try to provide it. Want to be appreciated for who they are and for what they contribute.</p>	<p>ENFJ Warm, empathetic, responsive, and responsible. Highly attuned to the emotions, needs, and motivations of others. Find potential in everyone, want to help others fulfill their potential. May act as catalysts for individual and group growth. Loyal, responsive to praise and criticism. Sociable, facilitate others in a group, and provide inspiring leadership.</p>	<p>ENTJ Frank, decisive, assume leadership readily. Quickly see illogical and inefficient procedures and policies, develop and implement comprehensive systems to solve organizational problems. Enjoy long-term planning and goal setting. Usually well informed, well read, enjoy expanding their knowledge and passing it on to others. Forceful in presenting their ideas.</p>

Excerpted from Introduction to Type® by Isabel Briggs Myers

Appendix F. Blank Management Action Plan

Management Action Plans			
Issue:	Management Team Minutes	Meeting Date	YY-MM-DD
Facilitator:		Note Taker:	
Attendance			
In attendance were:			
Decisions of Previous Meeting (YY-MM-DD)	Responsibility	Target Date	Communicate
Outstanding Actions	Responsibility	Target Date	Communicate
Decisions of Previous Meeting (YY-MM-DD)	Responsibility	Target Date	Communicate

Appendix G. Individual One-Page MBTI Summary

Personal Strengths and Weaknesses Team Type: ESTJ Individual Type: ESTP		ESTJ	ESTP	ISTP	ISTJ
		ESFJ	ESFP	ISFP	ISFJ
		ENFJ	ENFP	INFP	INFJ
		ENTJ	ENTP	INTP	INTJ
Contributions of ESTPs to the Team		Potential Weaknesses of ESTPs on a Team			
Analyze problems logically, troubleshoot to take care of problems immediately, manage crises well, do what needs to be done right away, act quickly, keep things running smoothly by attending to important details.		May focus only on the short term and putting out fires, may lack a plan for how goals are to be accomplished, may take action too quickly and leave others behind, may fail to consider how decisions might affect important stakeholders, may not prepare agendas for meetings, preferring to wing it instead			
Out of Preference Facets		Mid Zone Facets			
<ul style="list-style-type: none"> Feeling – accommodating Introversion – contained Judging - systematic 		<ul style="list-style-type: none"> Sensing – concrete Thinking – critical Perceiving – casual Judging/Perceiving - scheduled/spontaneous Judging – early starting, methodical 			
Identified Strengths		Identified Weaknesses			
<ul style="list-style-type: none"> Hard working Speaks up Knowledgeable 		<ul style="list-style-type: none"> Organizing paperwork Patience is short and becomes discouraged Mad can't take on more work Taking criticism that is out of his control 			
As a Team, what do we need to do to help Joe improve?					
<ul style="list-style-type: none"> Help him delegate and teach others Could delegate more and then he could take on other things Encourage to give up control 					

Appendix H. Sample Employee Survey

INTRODUCTION

Highlands Construction Limited is continuing to experience strong growth and with growth comes new opportunities for all employees. In order to ensure we are continuing to foster a good working environment, one where people can learn and advance in their individual areas, we ask all employees to complete the following confidential survey. The purpose of this survey is to monitor if we are achieving our goals and our commitments to you as an employer. Our strength is in your abilities to excel at your strengths, and we need to provide you with the required support to have that happen. We hope to build experience and expertise in each of you, so you can achieve your goals within the organization.

Please take the time and fill out the survey.

Thank you

Charles Matherson

Charles Matherson
President

Our Mission: *The mission of the Highlands Construction management team is to provide direction and leadership to all employees in order to achieve financial success (profits, market share) and a healthy and rewarding work environment (recruitment, retention).*

Our Values: *At Highlands Construction we treat our staff the way we wish to be treated ourselves where people come first, everyone enjoys rewarding, fair, high quality experiences in a safe and environmentally sustainable work environment.*

Business Definition: *At Highlands Construction we build high quality residential and commercial properties and developments that provide value to our customers in a timely and environmentally sustainable manner.*

Thematic Goals: *Increase market share and profitability by attracting and retaining a team of highly motivated and effective managers and staff.*

INSTRUCTIONS

Please answer each question by checking the box that best reflects your level of agreement or disagreement with each statement. A guide is at the top of each question area. The first five choices range from "Strongly Disagree" to "Strongly Agree". The last choice is "Don't Know".

Complete the survey and return it in the self-addressed, postage paid envelope provided by July 31st. Your answers will be combined with all other employees. Responses will not be used to see how any one person answered. All surveys are confidential and going to a third party, independent consultant. No one from Highlands Construction will see any of the completed surveys. If you have any questions, please contact Alex Berkley of RCM Consultants at 613-882-5684.

1. What do you think about Highlands Construction Limited?

Statement:	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Don't Know
a. Highlands Construction's cares about its customers and clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Highlands Construction's cares about it's employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Highlands Construction's cares about the community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Highlands Construction's cares about the environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Highlands Construction's is a great place to work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. How do we communicate at Highlands Construction Limited?

Statement:	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Don't Know
a. Information is provided to me in a timely fashion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Communications are open, honest and direct	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. I have the information I need to do my job well	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. My supervisor provides effective performance evaluations and feedback	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Management listens to me when I have something to say	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Communications have improved over the past year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. How do you feel about your job?

Statement:	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Don't Know
a. Highlands Construction's offers fair/reasonable pay for the work I do	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Highlands Construction's provides a sufficient benefits package	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Highlands Construction's lets me make good use of my skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. I find my job interesting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Working for Highlands Construction's provides me with opportunities for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. I would recommend Highlands Construction as a good place to work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. I feel better about working here this year than last year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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4. How do you feel about helping the company?

Statement:	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Don't Know
a. I am willing to spend a lot of time and effort to help Highlands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. If a customer had a problem, I would do everything I could do to solve it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Working here makes me want to do the best work I can	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. I am prepared to take responsibility for the work I do	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Employees are rewarded for developing ideas that save the company time & money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Is Highlands Construction Limited focused on quality?

Statement:	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Don't Know
a. We are trying to make Highlands Construction's number one in quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. The managers show by their own actions what it means to do quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. We get the time and tools we need to improve quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Management acts on my ideas for quality improvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Highlands Construction's cares about quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. I have noticed an increased emphasis on quality over the past year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Is Highlands Construction Limited focused on safety?

Statement:	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Don't Know
a. I am aware of the Highlands Construction health & safety program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. The Highlands Construction health & safety program is effective at making our workplace safer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Highlands Construction's is a safe place to work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Safety issues, when they are identified, are corrected in a timely manner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. I think about safety when I am doing my job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. I have noticed an increased emphasis on safety over the past year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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7. How do we work together at HIGHLANDS Construction Limited?

Statement:	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Don't Know
a. There is good cooperation between the managers and employees in this company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Nearly all managers have a lot of respect for the employees of this company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Employees have a clear understanding of the direction of the company.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Highlands Construction's recognizes employees who do a good job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. We are working together better this year than last year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you could make one change to Highlands Construction Limited, what would that one change be?

Which part of the company are you from? Please select only one.

- Office and Admin
- Sale and Marketing
- Residential Construction
- Commercial Construction
- Property Development

Are you an hourly or salaried employee?

- Hourly
- Salaried

Please return the survey by July 31st in the envelope provided to:

RCM Consultants Limited
322 Dargavel Road
Elgin, ON K0G 1E0

Thank you for your feedback

Appendix I. Sample Relationship Audit Report

Relationship Self-Audit (Fall 2017)

National Capital
Construction Association

Sample
Company

The Relationship Self-Audit Tool examines the six key relationships (Client, Media, Investor, Employee, Community, and Government) that every organization, should focus on. The Self-Audit Tool is just one part of the Relationship Centered Model.



The Relationship Centered Model (RCM) has been adopted by winning organizations to examine all of their various key stakeholder groups to ensure the long-term success and effectiveness of the organization.

The Relationship Centered Model empowers organizations by focusing them on the variables that they can control and maximizing the organizations success, instead of dis-empowering the organization and blaming the variables that can't be control for negatively impacting an organization.

Key Relationship	NCCA	Sample Company	Delta
Client Relations	4.27	3.92	-0.36
Media Relations	3.03	2.42	-0.62
Investor Relations	3.60	3.00	-0.60
Employee Relations	4.37	3.23	-1.14
Community Relations	3.59	3.50	-0.09
Government Relations	3.30	4.14	0.84
Overall Relationship Score	3.69	3.37	-0.32
	0.00 to 2.75	2.76 to 3.75	3.76 to 5.00

The self-audit was conducted using the [FREE Relationship Self-Audit Tool](#) developed by Harley House Consultants Inc. and was completed by one **Sample Company** manager.

Overall, **Sample Company** scored below average in comparison to the other NCCA contractors participating in the study. While **Sample Company** scored particularly well with respect to Government Relations, there was some concern with respect to Community, Employee and Investor Relations. The area of greatest concern was with respect to Media Relations.

On the following pages we explore each of the six relationships in more detail.

Client Relations



Client relations and development should be every organization's first order of business. Many organizations fail to maintain proper visibility with their clients, while some organizations tend to focus too much on existing clients, and fail to identify and develop new clients, which severely hampers growth.

Client Relations	NCCA	Sample Company	Delta
a) We know who our most important clients are.	4.62	5.00	0.38
b) We know what our clients think of our organization, staff, products and services.	4.23	4.00	-0.23
c) Our clients know who they have to contact to access our services.	4.50	5.00	0.50
d) We know what product/service variables are most important to our clients.	4.42	4.00	-0.42
e) We know how our clients perceive our value proposition.	3.96	4.00	0.04
f) There is a protocol in place to deal with dissatisfied clients.	3.81	4.00	0.19
g) We have regular communication with our clients.	4.35	3.00	-1.35
h) We let our best clients know that we value their relationship.	4.38	4.00	-0.38
i) We are doing enough to expand our client base.	3.76	4.00	0.24
j) We are doing enough to hold onto the clients we have.	4.08	2.00	-2.08
k) Our clients trust us.	4.65	4.00	-0.65
l) We trust our clients.	4.54	4.00	-0.54
Mean Score	4.27	3.92	-0.36

1=Strongly Disagree, 5=Strongly Agree

0.00 to 2.75 2.76 to 3.75 3.76 to 5.00

Comments:

Overall, **Sample Company** scored 0.36 points below the NCCA average with respect to Client Relations.

Sample Company was particularly strong in comparison to the NCCA average with respect to the statements:

- c) Our clients know who they have to contact to access our services. (0.50)
- a) We know who our most important clients are. (0.38)

Sample Company scored below the NCCA average with respect to:

- j) We are doing enough to hold onto the clients we have. (-2.08)
- g) We have regular communication with our clients. (-1.35)
- k) Our clients trust us. (-0.65)
- l) We trust our clients. (-0.54)

Media Relations



Media relations refers to the relationship that an organization develops with media representatives to gather and distribute information. It involves working directly with reporters, as well as persons responsible for the editorial (news and features), public service and sponsorship programming products of the media.

Media Relations	NCCA	Sample Company	Delta
a) We monitor all the appropriate print, broadcast and social media sources.	3.35	3.00	-0.35
b) We know what comes up on the web when our organization's name is Googled.	3.63	2.00	-1.63
c) We have an up-to-date media contact list.	2.68	2.00	-0.68
d) We have regular contact with the various media organizations.	2.63	1.00	-1.63
e) We have a regular process to follow when we are contacted by the media.	3.08	3.00	-0.08
f) Everyone is aware of this media contact process.	2.88	2.00	-0.88
g) There are clearly identified spokesperson(s) for the organization.	3.69	3.00	-0.69
h) During the past year we have written letters to the editor to voice our organization's view on a topic or issue.	2.12	1.00	-1.12
i) We respond quickly to media enquiries so as to meet their deadlines.	2.96	3.00	0.04
j) We calmly contact the media when our organization is misrepresented or we believe we are misquoted.	3.08	3.00	-0.08
k) The media trusts us.	3.14	3.00	-0.14
l) We trust the media.	3.00	3.00	0.00
Mean Score	3.03	2.42	-0.62

1=Strongly Disagree, 5=Strongly Agree

0.00 to 2.75 2.76 to 3.75 3.76 to 5.00

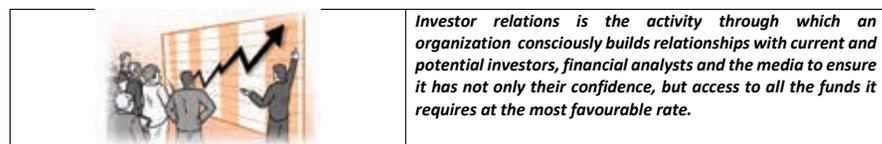
Comments:

Overall, **Sample Company** scored lowest on the Media Relations questions in comparison to the other five relationships, and 0.62 points below the NCCA average. Media Relations also scored lowest across the NCCA companies.

Of particular concern was with respect to:

- d) We have regular contact with the various media organizations. (-1.42)
- b) We know what comes up on the web when our organization's name is Googled. (-1.35)
- h) During the past year we have written letters to the editor to voice our organization's view on a topic or issue. (-1.04)
- f) Everyone is aware of this media contact process. (-0.88)
- g) There are clearly identified spokesperson(s) for the organization. (-0.69)
- c) We have an up-to-date media contact list. (-0.58)

Investor Relations



Investor Relations	NCCA	Sample Company	Delta
a) We regularly review our investor relations needs.	3.65	3.00	-0.65
b) We know what the investor community's perceptions are of our organization.	3.80	3.00	-0.80
c) We have clearly defined investor relations objectives.	3.43	3.00	-0.43
d) Our investor relations policies are set forth clearly in writing.	3.09	1.00	-2.09
e) Our practices are consistent with our investor relations policies.	3.50	0.00	N/A
f) It is clear who within the organization can comment publicly about the organizations direction and financial performance.	3.96	4.00	0.04
g) The information used in investor relations activities is up-to-date and complete.	3.76	0.00	N/A
h) We proactively go out and meet with the financial/business media.	2.86	1.00	-1.86
i) The organization is in a high growth or volatile industry.	2.95	4.00	1.05
j) There have been no occurrences of shareholder litigation in the past, or there are no potential situations on the horizon.	4.21	5.00	0.79
k) We are accessing funds at the most favorable rate.	3.58	4.00	0.42
l) Our investors trust us.	4.14	4.00	-0.14
m) We trust our investors.	4.22	4.00	-0.22
Mean Score	3.60	3.00	-0.60

1=Strongly Disagree, 5=Strongly Agree

0.00 to 2.75 2.76 to 3.75 3.76 to 5.00

Comments:

Overall, the scores given with respect to Investor Relations were the second lowest amongst the six relationships. **Sample Company** also scored below average with respect to Investor Relations in comparison to the NCCA average (-0.60)

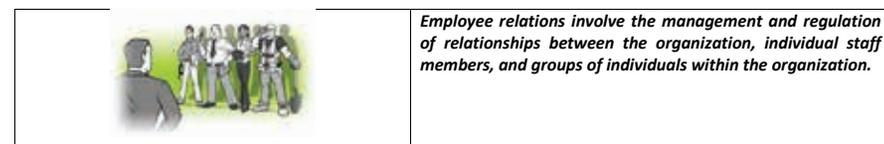
Of particular concern were:

- d) Our investor relations policies are set forth clearly in writing. (-2.09)
- h) We proactively go out and meet with the financial/business media. (-1.86)

The statement that received significantly above average ratings was:

- i) The organization is in a high growth or volatile industry. (1.05)

Employee Relations



Employee Relations	NCCA	Sample Company	Delta
a) We have no difficulties attracting and retaining the right staff.	3.54	3.00	-0.54
b) Our compensation and benefits program helps our business improve productivity, increase morale and reduce absenteeism.	3.88	3.00	-0.88
c) Our employee policies and procedures are up-to-date and in compliance with regulations.	4.35	4.00	-0.35
d) Our employee relations efforts help employees reach their full potential to benefit the organization.	4.23	2.00	-2.23
e) There is trust and respect between management and employees.	4.50	3.00	-1.50
f) Upper managers are visible and accessible to all employees.	4.58	3.00	-1.58
g) Managers and employees are clear about the direction of the organization.	4.38	3.00	-1.38
h) Communications at all levels of the organization are open, honest and direct.	4.62	3.00	-1.62
i) There are training programs in place to arm employees with the skills required to maximize their effectiveness.	4.35	4.00	-0.35
j) There is a comprehensive health & safety program in place.	4.73	4.00	-0.73
k) There is an individual responsible for human resources.	4.38	3.00	-1.38
l) Our employees trust us.	4.62	3.00	-1.62
m) We trust our employees.	4.58	4.00	-0.58
Mean Score	4.37	3.23	-1.14

1=Strongly Disagree, 5=Strongly Agree

0.00 to 2.75 2.76 to 3.75 3.76 to 5.00

Comments:

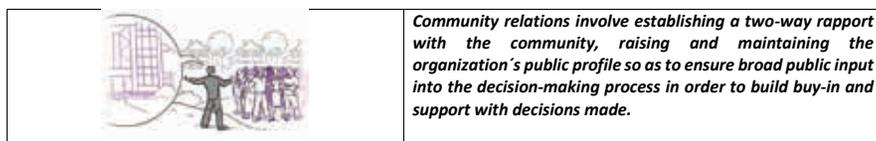
Overall, the ratings given with respect to Employee Relations were significantly below the NCCA average score (-1.14).

Of particular concern was the statement "Our employee relations efforts help employees reach their full potential to benefit the organization." which was significantly below the NCCA average (-2.23).

Sample Company scored below the average in terms of Employee Relations with respect to:

- h) Communications at all levels of the organization are open, honest and direct. (-1.62)
- l) Our employees trust us. (-1.62)
- f) Upper managers are visible and accessible to all employees. (-1.58)
- e) There is trust and respect between management and employees. (-1.50)
- g) Managers and employees are clear about the direction of the organization. (-1.38)
- k) There is an individual responsible for human resources. (-1.38)

Community Relations



Community Relations	NCCA	Sample Company	Delta
a) Our organization has a high profile in the communities it operates in.	4.00	5.00	1.00
b) Our reputation is positive.	4.46	4.00	-0.46
c) Our organization is active in the community.	4.12	5.00	0.88
d) Our organization has a plan identifying community relations goals and objectives, tools and tactics.	3.54	4.00	0.46
e) Our organization has an up-to-date list of community groups, opinion leaders, government officials and the media.	3.27	4.00	0.73
f) There is a protocol in place to deal with members of the public that express a concern.	3.42	3.00	-0.42
g) We have a plan for dealing effectively with the news media.	2.85	3.00	0.15
h) We have an annual budget and criteria for community donations.	3.62	2.00	-1.62
i) We have made adequate budgetary provisions to support our community relations program.	3.54	3.00	-0.54
j) Our organization stresses the importance of community relations throughout the organization.	3.54	4.00	0.46
k) There is a planned way of distributing information to the external community in a timely fashion.	3.12	3.00	-0.12
l) There is a plan to collect feedback from the public.	2.62	2.00	-0.62
m) The community trusts us.	4.12	3.00	-1.12
n) We trust our community.	4.24	4.00	-0.24
Mean Score	3.59	3.50	-0.09

1=Strongly Disagree, 5=Strongly Agree

0.00 to 2.75 2.76 to 3.75 3.76 to 5.00

Comments:

Overall, the Community Relations ratings given by **Sample Company** were on par with the NCCA average.

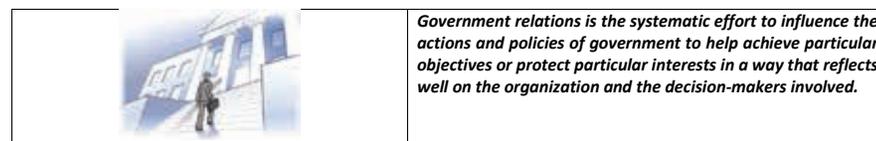
The areas of concern expressed with respect to Community Relations included:

- h) We have an annual budget and criteria for community donations. (-1.62)
- m) The community trusts us. (-1.12)
- l) There is a plan to collect feedback from the public. (-0.62)
- i) We have made adequate budgetary provisions to support our community relations program. (-0.54)

The company did score significantly above average ratings with respect to:

- a) Our organization has a high profile in the communities it operates in. (1.00)
- c) Our organization is active in the community. (0.88)

Government Relations



Government Relations	NCCA	Sample Company	Delta
a) Our organization has an up-to-date list of municipal, provincial and federal politicians and senior staff.	3.56	0.00	N/A
b) Our organization has had contact with our municipal, provincial and federal elected representatives in the past year.	3.44	0.00	N/A
c) A representative of our organization regularly monitors City Council and Committee meetings.	2.73	3.00	0.27
d) We have made presentations to a City Council or Committee or a provincial or federal body.	2.60	0.00	N/A
e) Our organization is familiar with the municipal policies, zoning and by-law regulations that impact the organization.	3.58	4.00	0.42
f) We are an active member of all appropriate professional and/or industry associations.	4.04	5.00	0.96
g) Our organization has a means of tracking government policy & program developments that could impact our organization.	3.42	3.00	-0.42
h) We have made political contributions in the past year.	3.35	5.00	1.65
i) When required to register as a lobbyist we do so.	2.71	0.00	N/A
j) The government trusts us.	3.48	5.00	1.52
k) We trust the government.	3.28	4.00	0.72
Mean Score	3.30	4.14	0.84

1=Strongly Disagree, 5=Strongly Agree

0.00 to 2.75 2.76 to 3.75 3.76 to 5.00

Comments:

Overall, **Sample Company** scored 0.84 points above the NCCA average with respect to Government Relations. It should be noted that 4 out of 11 statements were not rated.

Sample Company was particularly strong in comparison to the NCCA average with respect to the statements:

- h) We have made political contributions in the past year. (1.65)
- f) We are an active member of all appropriate professional and/or industry associations. (0.96)

Sample Company expressed some concern with respect to:

- c) A representative of our organization regularly monitors City Council and Committee meetings.
- g) Our organization has a means of tracking government policy & program developments that could impact our organization.

ABOUT THE AUTHOR



Dale Harley is the President of Harley House Consultants Inc. and has over thirty-five years' experience in marketing and communications management. Prior to forming Harley House Consultants Inc. in 1999, he was Vice-President, Government Communications for Canada's largest Communications and Public Relations firm. Dale also founded and served as Managing Partner of D.R. Harley Consultants Limited (with offices in Ottawa, Toronto and Montreal) which, for fourteen years, was highly regarded for its expertise and service in the areas of marketing and communications, strategic planning, public opinion research and evaluation.

Mr. Harley helps his clients build and rehabilitate key stakeholder relationships. His private sector clients include leading firms in the heavy construction industry, home builders, developers and environmental services companies. His public-sector clients take in virtually every federal government department and agency, numerous provincial government ministries and regional/municipal governments. In addition, he has assisted national, provincial and local not-for-profit organizations with their marketing, communications and fundraising needs.

Mr. Harley holds a B.A. in economics-law from Carleton University and is a Certified Management Consultant. He also served two terms as an elected Municipal Councillor with Osgoode Township.

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