Reviewing the 'march to standards' in public relations: A comparative analysis of four seminal measurement and evaluation initiatives

Abstract

To many, development and adoption of professional standards for measurement and evaluation (M&E) is one of the most promising approaches for advancing public relations practice. In recent years, there has been a surge in efforts to develop standards for M&E in different parts of the world. Prominent examples of this include standard terminologies (e.g. the *IPR Dictionary of Public Relations Measurement and Research*), metrics *(*e.g. the *IPR Social Media Measurement Standards),* principles for best practice in the field, and evaluation frameworks. Regardless of their alleged importance, however, the acceptance and application of such M&E standards in the practice varies significantly. To better understand the process by which standards are developed and adopted, this article draws on recent concepts from management and organization studies (cf. Slager, Gond, & Moon, 2012) to analyze the trajectories of four seminal standards attempts: The *Barcelona Principles* and the *AMEC Integrated Evaluation Framework* on an international level, the *DPRG/ICV Framework* used in the German-speaking countries, and the *GCS Framework* in the United Kingdom. The article reveals, by way of an interpretive qualitative approach, the various strategies undertaken to develop common sets of terms and rules, engage relevant actors in the design, promotion, and implementation of proposed standards and to reinforcing standards symbolically.

Keywords: Public Relations Measurement and Evaluation, Standards, Standardization

1. Introduction

In communications and management, standards are ubiquitous. Widely discussed examples are the *United Nations Global Compact* (e.g. Rasche, 2009), the *Integrated Reporting Framework* (e.g. Cheng at al., 2014), the *Global Reporting Initiative*'s standards for non-financial reporting (e.g. Knebel & Seele, 2015), standardized language in corporate reporting software such as *XBRL* (e.g. Bonsón, Cortijo & Escobar, 2009), as well as the various national and international codes for ethical conduct in public relations (e.g. Huang, 2001).

In recent years, we have also seen a surge in efforts to develop standards for measurement and evaluation (M&E) in public relations, e.g., with the *Social Media Measurement Standards Conclave* in 2012, the *Barcelona Declaration of Measurement Principles* (or "Barcelona Principles") in 2010 and again in 2015, or the *Integrated Evaluation Framework* proposed by the International Association for the Measurement and Evaluation of Communication (AMEC) in 2016. Such attempts at standardization in M&E are particularly interesting because of two main reasons. First, M&E standards are widely seen as desirable, because they are thought to: resolve impasses in implementing M&E practices (Ragan/NASDAQ OMX, 2013); allow for comparability of measurement results (Michaelson & Stacks, 2011); and ultimately help to better demonstrate the value of public relations for organizations (Macnamara, 2015)—thus ultimately helping to raise the credibility of the whole industry. Second, proposed M&E standards tend to be highly debated and are, in fact, in large part not adopted in the wider practice—despite repeated efforts by engaged practitioners, membership organizations, and academics. Standard proposals are far from being widely used in practice (Macnamara, 2014a, 2015; Zerfass et al., 2009; Michaelson & Stacks, 2011; Ragan/NASDAQ OMX, 2013). Why is that? What are the specific trajectory of these standards attempts and what kinds of efforts were undertaken in their development and promotion? How do standards actually evolve from their early development to actual application and compliance?

So far, there has been some case-by-case discussion of various types of standards in public relations. These works have looked at motivations of different stakeholders in the adoption of standards (Lueg, Lueg, Andersen, & Dancianu, 2016), the relevance and chances for enforcement of standards (Huang, 2001), benefits and challenges arising from standard adoption (Angeloni, 2016), implications of standards across countries (Einwiller, Ruppel, & Schnauber, 2016), as well as problematic content of standards that may cause refinement and redesign (Knebel & Seele, 2015). While these works focus on diverse aspects, such as the history, content, quality, and implications of specific standards they do not yet contribute to a more general and theory-driven understanding of the *processes* of standard setting and following in public relations. Further, none of these works have yet focused on the vast number of standards attempts in public relations M&E.

To better understand standardization in public relations M&E we propose to follow recent work on standards grounded in the management and organization studies literature (Brunsson, Rasche, & Seidl, 2012, p. 616), which broadly defines standards as "formulated rule[s] for common and voluntary use, decided by one or several people or organizations". Instead of seeing standards as something static, this literature focuses on the *process* of standardization made up of continuous interactions of a diverse set of actors and institutions, leading both to wanted and unwanted consequences. Furthermore, it does not narrow down on formal 'de jure' standards that allow for clear implications (e.g., in terms of sanctions) but also allows to focus on 'softer' best practice principles as efforts in standardization. Specifically, in this article we trace standardization processes in public relations M&E inquiring into four seminal standards attempts of recent years. The aim is to trace central dynamics of standard setting and following by looking at central steps undertaken in designing the standard terminology, engaging audiences, experts, and adopters, as well as supporting and enforcing standards attempts though symbolic efforts such as labels, certification, or public knowledge resources.

The contribution of this article is threefold: First, by analyzing standardization in M&E, we contribute to a better understanding of one of the most important practical domains in the field, a domain that has long been said to be the "Holy Grail" in public relations (Buhmann et al., 2019; Macnamara, 2018; Noble, 1999). Second, we contribute to understanding standardization in the field of public relations more generally by introducing an organization studies perspective that can inform other important standards in the field, e.g. regarding public relations ethics or corporate reporting (Angeloni, 2016; Einwiller et al., 2016; Huang, 2001; Knebel & Seele, 2015). Third, our work contributes to the broader standardization literature (Haack, Schoeneborn, & Wickert, 2012; Seidl, 2007; Slager et al., 2012), by applying recent concepts developed therein to study dynamics of standardization in communications as a management function.

2. The Blind Spot: Understanding the M&E Standardization Process

The Need for Measurement and Evaluation Standards

Measurement and evaluation (M&E) has long been a major issue in the wider public relations literature (for the state of the debate see AUTHOR 1, 2019). Especially since the 1980s it arguably constitutes, in itself, an important subfield for both research and practice (Watson, 2012). In recent years, we have seen a surge in the efforts to develop national and international standards for M&E in public relations (cf. AUTHOR 1 et al. 2018a, Macnamara, 2014a; Ragas & Laskin, 2014)—such as the formation of the *Coalition for Public Relations Research Standards* and the *Social Media Measurement Standards Conclave* (both in 2012) the *Barcelona Declaration of Measurement Principles* (in 2010 and, in revised form, in 2015), and the *Integrated Evaluation Framework* put forward by the International Association for the Measurement and Evaluation of Communication (AMEC) in 2016.

Both academics and practitioners widely agree that such efforts are imperative for three main reasons. First, on the micro level, standards are deemed necessary to increase *comparability* of measurement results as multiple evaluations using different frameworks, measures, and methods do not demonstrate change or value. Only standardized and commensurable concepts, metrics, and methods will allow meaningful comparisons of results across programs and organizations (Michaelson & Stacks, 2011). Second, on the meso level standards are needed to increase the *applicability* of research-based M&E in organizations. Practitioners repeatedly ask for M&E standards as a way to resolve local impasses in implementing rigorous M&E in their work environment (Macnamara, 2014a). Next to often over-simplified methodology and a lack of budget, knowledge, and management support, the lack of standards is often seen as a central obstacle to delivering insights for formulating communication strategy and deriving and implement a strategic communications plan (Macnamara, 2015). Finally, on the macro level standards are desirable to increase the *credibility* of public relations as a professional discipline (Buhmann et al., 2018b). Established methods support continuous improvement of any field, and they signal to others that PR is a mature profession. Despite 40 years of research as well as industry discussion (Volk, 2016), practitioners are still concerned that the public relations industry lacks abilities to convincingly demonstrate the value of public relations (Macnamara, 2014b), and M&E standards are seen as central for underlining why public relations is important as a professional field (Zerfass et al., 2017).

However, regardless of numerous standards initiatives, most do not gain significant adoption in the practice. Public relations professionals are still widely criticized for not conducting sophisticated M&E (Zerfass et al. 2017), “cracks and gaps” in the standards proposed by the industry are “starkly evident” (Macnamara, 2014a, p. 21), and practitioner surveys show that the majority of practitioners agrees that standards for M&E are necessary (cf. Michaelson & Stacks, 2011) and that that the lack of standards is the single biggest problem within public relations M&E (Ragan/NASDAQ OMX, 2013). While both practitioners and academics are pushing towards standards and, at the same time, lamenting that proposed standards are not adopted, the literature still lacks analyses that look at the standardization processes itself with an intention to better understand the factors that drive or hamper standards attempts.

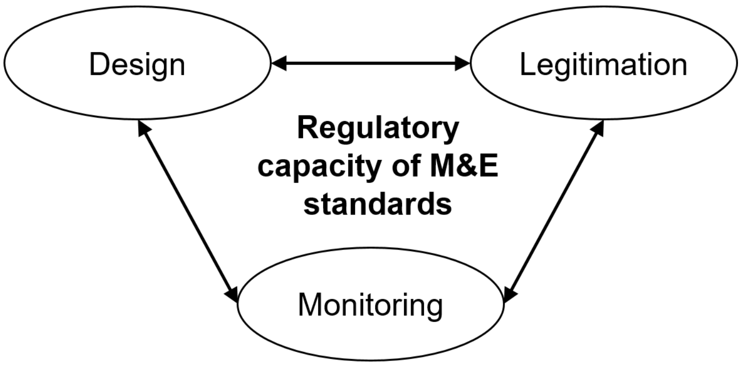
Development and Adoption of Standards

A standard can be broadly defined as “a formulated rule for common and voluntary use, decided by one or several people or organizations.” (Brunsson et al., 2012, p. 616). As such, the term includes not only standards developed and coordinated by official standards organizations (such as the ISO) but also, more generally, ‘business principles’ formulated and propagated by other types of networks and organizations. Standards are commonly categorized on the basis of three core distinctions: a) technical vs. non-technical standards; b) process vs. outcome standards; and c) de jure vs. de facto standards (ibid). Based on this conceptual understanding we define standards in public relations M&E as formulated nontechnical process rules for common and voluntary use, decided by one or several people or organizations.

Standards are commonly seen as static, as the internal dynamics of the *prosess* of standard setting are often taken for granted (Seidl, 2007). This proces involves ongoing activities of various actors and institutions, leading to both wanted and unwanted effects (Slager, Gond, & Moon, 2012). What is and isn’t regulated by a standard is not merely determined by the initial developers of a standard and the supporting institutions, but is, in large part, influenced by interactions of various actors that follow long after the standard has first been introduced (Seidl, 2007). In short: most standardization “starts rather than ends with adoption” (Haack et al., 2012)—even more so as standards may need significant reworking in order to incorporate new emerging practices and expectations (Tamm Hallstoem, 2002).

But how do standards emerge and become adopted in practice? A broad review of definitions (Slager et al., 2012) identifies three mutually reinforcing elements that constitute standardization processes and continuously contribute to building the regulatory capacity of a standard (cf. Figure 1): First, *design* involves setting up membership rules by identification of the common practices of potential members. Second, *legitimation* involves the creation of knowledge and enabling collaboration with experts. Finally, *monitoring* involves the control of organizational behavior based on arrangements to measure and assess (degrees of) compliance with a proposed standard.

FIGURE 1: Core Elements of the Standardization Processes in M&E (based on Slager et al. 2012).



Further, according to Slager et al. (2012), design, legitimation, and monitoring are supported by various types of "standardization work". First, *commensurating and defining* refers to the establishment of a common and comprehensive terminology based on a broader range of concepts and approaches. This simplifies a heterogeneous set of information and makes concepts and measures relatable. Further, this relates to the establishment of a commensurable and more homogenous terminology within a basic system of rules (ibid.).

Second, *mimicking and analogical work* means that, within this process of commensurating and defining, existing and already legitimized indices are taken up (and potentially later replicated). When pre-existing templates are used it makes the new standards more understandable, but conformity with other existing templates is often also highlighted to facilitate a greater acceptance of the standard. Both commensurating and mimicking/analogical are referred to as standardization work of "calculative framing" (ibid.). For a recent review or efforts in calculative framing apparent in the ongoing struggle over labels and meanings of different M&E stages (such as output, outtake, outcome, impact etc.) (Macnamara & Likely, 2017).

Third, *convening* refers to the fostering of collaborations, aiming to find solutions for a particular problem. This is often a creation of loose alliances with external third-party experts (often included already in the first design of the rules but remains important as a continuous work building and maintaining the legitimacy of a standard). Convening involves, e.g., fostering collaboration between potential beneficiaries and external parties that are needed to establish a standard (Slager et al., 2012).

Fourth, *educating* refers to the creation of knowledge for possible standard adopters on how to comply with the criteria of the standard. Possible adopters need to be identified and informed. Both convening and education are referred to as standardization work of “engaging” (ibid.).

Fifth, *symbolic work* refers to the production and the use of artefacts, aimed at enhancing the symbolic value of being a member of the group of standard adopters. Artefacts can be, for instance, certificates or the right to use certain logos. These artefacts build reputational value for those that belong to the group of standard adopters. They are used by companies ‘impress’ external stakeholders and clearly signal to them, that their practices measure up to high industry standards. And they are of value internally when managers use them to attract colleagues’ attention or the attention of senior management (ibid.).

Finally, *normative shifts* refer to changing the association between the standard and relevant actors in the field, i.e., adopters can move in and out of the standard. When an officially complying company gets challenged by an observer who thinks that its inclusion in the standard is not justified by its practices, it may be dropped. On the other hand, standard developers can alter the standard to keep companies “on board”. Thus, shifting normative associations implicitly recognizes a) companies that stay in the index and b) the standard itself as a valid metric to identify deviant companies. Both symbolic work and normative shifts are referred to as standardization work of “valorizing” (ibid.).

So far, in public relations M&E, the common lamenting that proposed standards are not adopted has not led to a discussion of the *standardization work* itself. Based on the framework outlined above, we aim to discuss the trajectories of seminal standards attempts in M&E based on the interrelated types of standardization work. In other words, we will discuss how far specific types of standardization work supporting design, legitimation, and monitoring of M&E standards can be identified.

3. Approach and Methodology

Approach

This analysis of standardization processes uses an interpretive qualitative approach based on expert review. All authors are members of the AMEC Academic Advisory Group and two actively participated in the AMEC initiatives reviewed here (providing independent review and advice through working groups and task forces). Buhmann and Macnamara were also members of the Institute for Public Relations (IPR) Task Force on Standardization of Communication Planning and Evaluation Models that reviewed these and other M&E frameworks and models between April 2015 and early 2018. Macnamara served as adviser to the UK GCS on evaluation in 2015 and from June to December 2016 participated as a member of the GCS Evaluation Council. Zerfass co-chaired the task force that developed the DPRG/ICV Framework and was intensively involved in promoting it both nationally and internationally.

Thus, the researchers had both close first-hand observation of and active participation in the respective groups and the standards initiatives discussed, which facilitated detailed understanding of these groups and processes "from the viewpoint of an *insider* in the culture" (Neuman, 2006, p. 381) [emphasis added]. Furthermore, this review is based on examination of practices in their "natural setting over a prolonged period of time … collecting, primarily, observational and interview data" (Creswell, 2009, p. 13). In all four cases, the researchers have *lived in* the respective professional community for much more than the often cited "two years ideally" that is applied to ethnographic research (Tedlock, 2008, p. 151) [emphasis added].

In this sense, this analysis is informed by ethnographic approaches as well as critical analysis of frameworks, models, principles, guidelines, and other related materials. In addition to gaining an 'insider' perspective, close examination over an extended period of time and active participation in the studied activities afforded what Geertz (1973) referred to as "thick description", aided by numerous informal discussions with those involved in the studied activities, analysis of documents, and formal interviews.

The authors' vantage point as both participants in the activities described and as independent expert advisers reviewing draft standards affords both *emic* and *etic* perspectives in observations and reflections—what some researchers in organizational research refer to as "inquiry from the inside" and "inquiry from the outside" (Brannick & Coghlan, 2007, p. 60). While some studies focus either on one or the other approach, cultural expressions "can and should be studied from both internal and external perspectives" (Jensen, 2012, p. 267), relating "the two aspects of understanding and interpretation" (Pike, 1967, as cited in Jensen, 2012, p. 267).

The validity and reliability of our observations reported here have been addressed in several ways. First, by acknowledging the researchers' role in the research and the situated nature of the research, reflexivity is applied in both senses in which it is understood in the social sciences (Finlay & Gough, 2003). First, the researchers strived to be aware of their relationship to the field of study and how power relations might influence the observations and analysis. This was addressed through applying self-critique and reflecting 'with the benefit of time', which allowed for some critical distance. Second, the research addressed reflexivity in the sense that research, as any cultural practice, involves self-references and commentary. As such, examination can "bend back on" and affect the entity undertaking the investigation—that is, the researchers can become socialized into the practices and culture under investigation (Finlay & Gough, 2003, p. ix). This was addressed by drawing on other scholarly research and historical literature and documents when available to compare, verify and contextualize observations. Finally, the researchers' observations were linked to concrete activities and other evidence as far as possible, such as recorded events and published policies, papers, minutes of meetings, emails, and feedback from other actors involved in the processes, rather than relying solely on personal subjective interpretation.

Cases

To inquire into the factors that drive standardization processes in M&E we focus on four standards attempts: The Barcelona Principles (BPs); the AMEC Integrated Evaluation Framework (IEF); the framework developed by the DPRG German Public Relations Society and the ICV International Association of Controllers (DPRG/ICV Framework); and the Government Communication Service evaluation framework in the United Kingdom (GCS Framework). All four were selected because they represent some of the most seminal attempts at standards in the field undertaken during the past two decades. Further, the BPs and IEF were an obvious choice as they represent the major international initiatives of recent years originating in the single biggest international industry body specializing in M&E. The other two cases were selected as they, in contrast, represent national-level initiatives. The DPRG/ICV Framework developed as a 'grassroots' initiative, emerging from activities in a large group of practitioners in Germany. Next to the national focus, this differs to the AMEC initiatives as the professional associations officially approved the developments, but did not support them financially or used them to create services for membership. Finally, the GCS Framework is one of the largest government initiatives (no comparable standardization attempts exist e.g. in Germany, France, Italy, or Spain) initiated 'top down' to standardize evaluation practices of about 4,000 professional communicators across more than 200 government departments. This last case is also unique to the other three in that it did not serve any purpose towards promoting an association or industry, but serves primarily one institution's internal purpose.

4. Tracing Standardization Processes in Public Relations M&E

Aiming for Seven Global Best-Practice Principles for M&E

The Barcelona Principles (see Table 1) have a long prehistory emerging from discussions at numerous academic and industry conferences (convening) focused specifically on public relations M&E. These have been held regularly over the past 15 years, e.g., with an annual Summit on Measurement in the United States which commenced in 2003. Originally hosted by an independent measurement consultant and 'M&E protagonist', this has been sponsored and hosted more recently by the IPR. These and other summits, along with various conclaves and task forces, have been key initiatives in what has been referred to as the "march to standards" (Marklein & Paine, 2012).

In 2008, the IPR and AMEC agreed to partner in hosting the first European Summit on Measurement (ESM), held in Berlin in 2009 and supported by the German Public Relations

Association (DPRG) (Grupp, 2008). Internationalization of standards initiatives and the so-called march to standards gathered momentum in 2010 when more than 200 delegates from 33 countries convened at the second ESM in Barcelona agreed on seven principles to guide evaluation of public relations. Subsequently referred to as the Barcelona Principles, these emerged from an open forum discussion at the summit initiated and led by the Managing Director for Global Research of a major international PR agency.

Five organizations joined in the symbolic work of signing the 'declaration' of the original Barcelona Principles—the Global Alliance for Public Relations and Communication Management; the IPR Measurement Commission; AMEC; the Public Relations Society of America (PRSA); and the International Communication Consultants Organization (ICCO). Subsequently, several hundred PR and communication management organizations worldwide pledged to support the principles.

While they received considerable publicity in industry journals and websites after they were launched, the seven principles did not result from an extended effort of commensurating and defining a specific set of rules. They were not significantly framed within standards literature and they process did not systematically focus on establishing common terminology. Rather, the BPs emerged as broad statements that everybody involved could agree to. Some, such as "social media can and should be measured" (principle 6) could be considered a statement of the obvious, given the widespread use and rapid growth of social media by 2010. Further, relevant experts such as social scientists/academics were not engaged in their development. Finally, while publicized as a "declaration" and subsequently "pledged for", they were not valorized by further initiatives such as certification or mechanisms to ensure adoption.

TABLE 1. The original 2010 Barcelona Principles and the 2015 revision (AMEC, 2015)

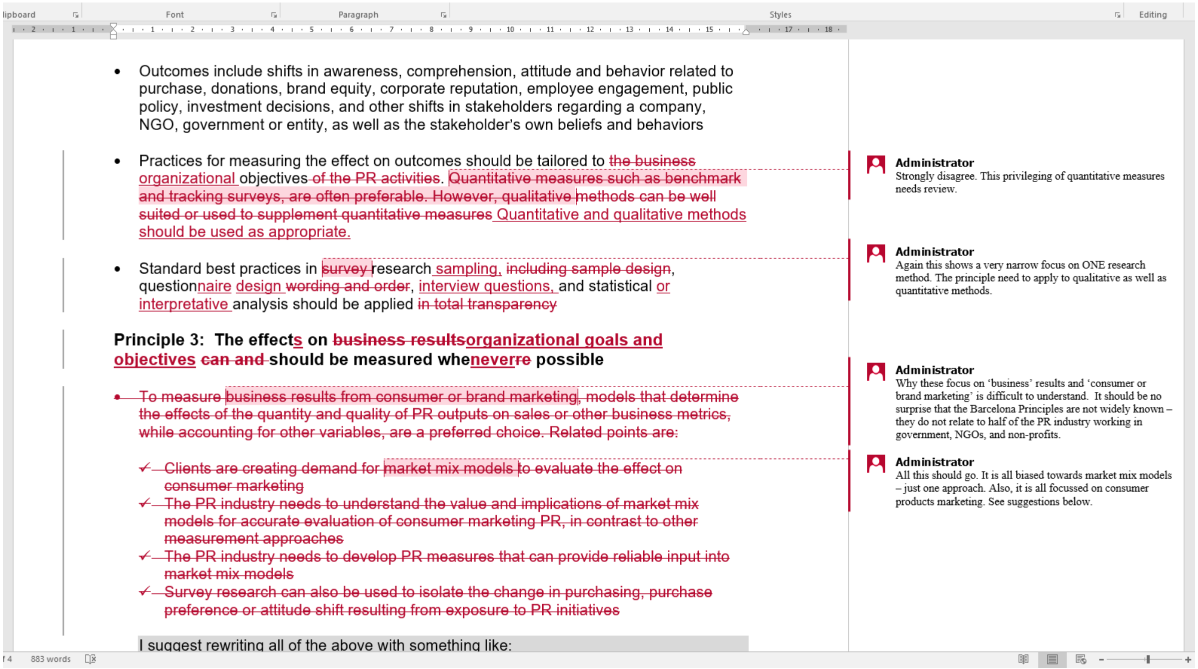
	Barcelona Principles (2010)	Barcelona Principles 2.0 (2015)
1	Importance of goal setting and measurement	Goal setting and measurement are fundamental to communication and public relations

2	Measuring the effect on outcomes is preferred to measuring outputs	Measuring communication outcomes is recommended versus only measuring outputs
3	The effect on business results can and should be measured where possible	The effect on organizational performance can and should be measured where possible
4	Media measurement requires quantity and quality	Measurement and evaluation require both qualitative and quantitative methods
5	AVEs are not the value of public relations	AVEs are not the value of communication
6	Social media can and should be measured	Social media can and should be measured consistently with other channels
7	Transparency and replicability are paramount to sound measurement	Measurement and evaluation should be transparent, consistent and valid

Perhaps unsurprisingly—due to the broad and unspecific formulations, but also the lack of expert involvement in the first version—, five years later in June 2015, delegates at the AMEC Summit on Measurement in Stockholm agreed that the principles should be updated and expanded. This time, convening and commensurating were more systematic. An international working group was formed, led by the agency CEO who initiated the forum discussion at the 2010 summit, to prepare and circulate a draft. The working group included academics and the five organizations involved in the original Barcelona Principles as well as the UK PR Consultants Association (PRCA). The Barcelona Principles 2.0 were released with much fanfare at an industry event in London in September 2015 (AMEC, 2015a; Jeffery, 2015).

The involvement of social scientists/academics in developing the Barcelona Principles 2.0 changed the dynamic of commensurating and defining and resulted in specific recognition of qualitative as well as quantitative methods of M&E (Principle 4) as well as removal of the requirement for replicability, replaced by emphasis of using "valid" methods and ensuring transparency to also account for qualitative methods in principle 7. Validity and transparency were argued to be important because of the widespread use of 'black box' methods of M&E (undisclosed calculations or algorithms), mainly in automated media content analysis.

FIGURE 2. Screen shot of draft Barcelona Principles 2.0 document reflecting the extent of suggested changes (dated June 29, 2015).



- Outcomes include shifts in awareness, comprehension, attitude and behavior related to purchase, donations, brand equity, corporate reputation, employee engagement, public policy, investment decisions, and other shifts in stakeholders regarding a company, NGO, government or entity, as well as the stakeholder's own beliefs and behaviors
- Practices for measuring the effect on outcomes should be tailored to ~~the business~~ organizational objectives ~~of the PR activities~~. ~~Quantitative measures such as benchmark and tracking surveys, are often preferable. However, qualitative methods can be well suited or used to supplement quantitative measures~~ Quantitative and qualitative methods should be used as appropriate.
- Standard best practices in ~~survey~~ research sampling, ~~including sample design~~, questionnaire design ~~wording and order~~, interview questions, and statistical or interpretative analysis should be applied ~~in total transparency~~

Principle 3: The effects on ~~business results~~organizational goals and objectives ~~can and~~ should be measured whenever~~re~~ possible

- ~~To measure business results from consumer or brand marketing, models that determine the effects of the quantity and quality of PR outputs on sales or other business metrics, while accounting for other variables, are a preferred choice. Related points are:~~
  - ~~Clients are creating demand for market mix models to evaluate the effect on consumer marketing~~
  - ~~The PR industry needs to understand the value and implications of market mix models for accurate evaluation of consumer marketing PR, in contrast to other measurement approaches~~
  - ~~The PR industry needs to develop PR measures that can provide reliable input into market mix models~~
  - ~~Survey research can also be used to isolate the change in purchasing, purchase preference or attitude shift resulting from exposure to PR initiatives~~

I suggest rewriting all of the above with something like:

Administrator
Strongly disagree. This privileging of quantitative measures needs review.

Administrator
Again this shows a very narrow focus on ONE research method. The principle need to apply to qualitative as well as quantitative methods.

Administrator
Why these focus on 'business' results and 'consumer or brand marketing' is difficult to understand. It should be no surprise that the Barcelona Principles are not widely known – they do not relate to half of the PR industry working in government, NGOs, and non-profits.

Administrator
All this should go. It is all biased towards market mix models – just one approach. Also, it is all focussed on consumer products marketing. See suggestions below.

Despite these changes and strengthening of some wording, such as stating that measuring outcomes is "recommended" rather than simply "preferred", as well as broadening the principles beyond "business results" to "organizational performance", the 2015 BPs did not significantly advance towards standards, particularly in relation to any potential calculative framing. Furthermore, despite the then CEO of AMEC stating that "the launch of Barcelona Principles 2.0 represents the first stage in a global education programme" (Jeffery, 2015, para. 11), this initiative did not include or lead to certification or formalization to encourage implementation.

Reflections on the series of teleconferences involving the international working group members and examination of documents circulated within the group reveal that, although extensive changes were suggested, only minor modification of the wording and scope of the principles was adopted (as shown in Table 1). For example, Figure 2 shows some of the extensive editing of a section of a draft of the 2015 BPs undertaken by members of the academic advisory group, suggesting inclusion of qualitative methods rather than reliance on quantitative data, as well as broadening M&E beyond business and marketing objectives. While these suggestions were partly adopted, the same document suggested that principle 1 should specifically require ‘SMART Objectives’ as a standard way for formulating management goals (Doran, 1981), and suggested that advertising value equivalents (AVEs) be described as “not valid” and, therefore, they should not be used. However, principle 1 remained a general statement that goals and objectives are “fundamental” and the principle in relation to advertising value equivalents (AVEs) was made significantly less rigid to simply state that they are “not the value of communication” (see Table 1). The final wording of the BPs was determined by the working group in which the majority of members were practitioners. AMEC later conducted a ‘Say no to AVEs’ campaign,[1] but it stopped short of clearly renouncing AVEs in the 2015 BPs. In a sense, the campaign can be regarded as an attempt at symbolic work as it includes a unique visual element with the ‘Say no to AVEs’ banner/label (see Figure 3). However, while the label clearly ties into the BP principle 5, the banner was never visually or otherwise related to the BPs (rather to AMEC)—assumingly some potential for further establishment of the BPs was lost here.

Reflections from discussions, which are confirmed in archived e-mails from the period July–August 2015, highlight a lack of knowledge of research methodology among many of the participants, such as confusion and misinterpretation in relation to concepts such as reliability, probability and non-probability sampling, and various methods of data analysis. This observation is paralleled by the long-held view of Grunig (1983, p. 28), Watson and Noble (2014) and others that lack of knowledge is the primary obstacle to valid and rigorous M&E in public relations.

FIGURE 3. Say no to AVEs banner (AMEC 2015).

An M&E Framework “to Turn the Barcelona Principles Into Action”

Another more concrete attempt to develop and implement standards commenced in 2015 with the development of the AMEC Integrated Evaluation Framework (IEF), an interactive online

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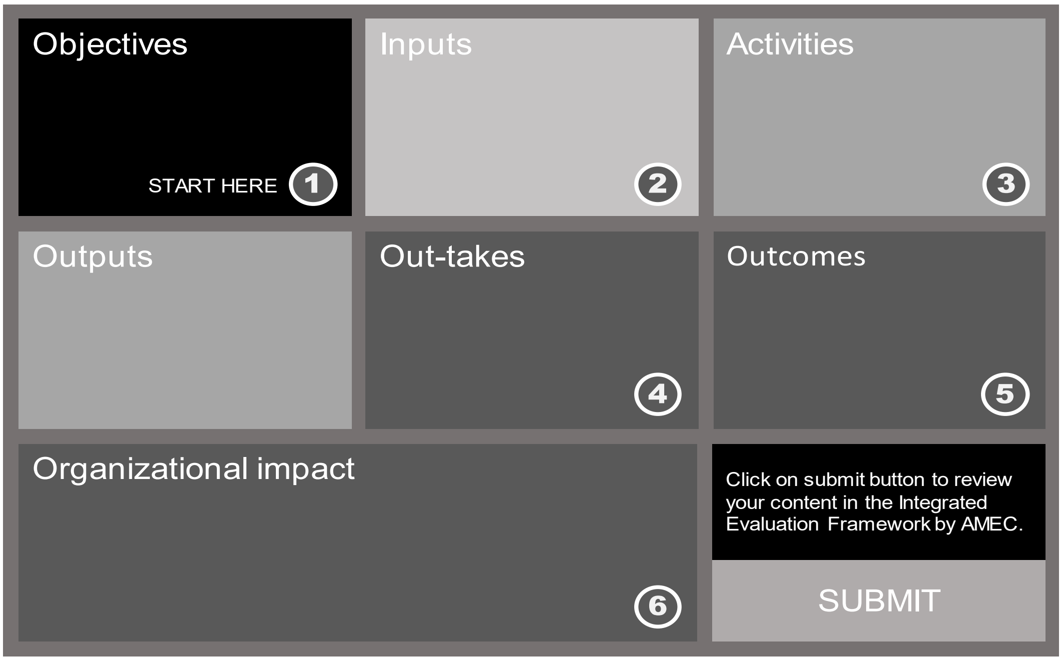
1 https://amecorg.com/say-no-to-aves

tool to plan and record M&E of a range of communication activities (see Figure 4). In launching IEF in early 2016, the then AMEC chairman frames it as analogical work in relation to the BPs: “this new framework shows how to ‘operationalize’ the Barcelona Principles and demonstrates how to turn principles into action” (Bagnall, 2019a, para. 8).

Key educational features of the AMEC framework are that it includes a free, non-proprietary online tool (AMEC, 2016) as well as a range of materials including an extensive ‘taxonomy’ of evaluation that lists in table form each stage of communication programs and campaigns and describes the key steps involved, the metrics and milestones that are relevant for measurement, and the methods that are applicable (Macnamara, 2016). The online tool is also to be understood as important artefact in the standardization attempt that signals applicability and relevance and underlines the symbolic value of its implementation.

FIGURE 4. The AMEC Integrated Evaluation Framework online evaluation tool (AMEC, 2016).



The IEF was developed by a small team led by the AMEC chairman and coordinated by the AMEC CEO. The core development team was made up of an academic, an evaluation specialist from a government agency, a Head of Insights at a global media analytics firm, and a Group Managing Director of a global communications agency (Bagnall, 2019b).

A wider group of M&E and research specialists were consulted during the development including actors form other global media analytics firms, measurement consultants, national and international public relations agencies (Bagnall, 2019b). A number of other industry leaders contributed articles and case studies to accompany the IEF. Shortly after the launch, then CEO of AMEC said:

> We fully engaged AMEC's Academic Advisory Group in developing the new integrated evaluation framework. Also we worked with professional researchers and communication practitioners. And, even after many months of development, a key step has been to put the framework out to a range of partner organizations to test it and give us feedback for fine-tuning. (B. Leggetter, personal communication, October 15, 2016)

The process of developing the IEF indicates that the work on commensurating and defining involved considerable input from and consultation with experts including academics, professional researchers and specialists in reputation tracking and insights, as well as potential users. However, despite recommendations to engage in analogical work, especially following program evaluation theory including widely used program logic models (Macnamara, 2015, 2018; Macnamara & Likely, 2017), the AMEC IEF uses a six-stage model of evaluation. This complies partly with the most widely used program logic models (Kellogg Foundation, 2004; Taylor-Power & Henert, 2008), but adds "outtakes", which has been used in some public relations evaluation models (Fairchild, 1997; Lindenmann, 2003) and restricts impact to measuring "organizational impact" (see Figure 4). Measuring impact on stakeholders and society in addition to measuring impact on an organization, which is recommended in academic research literature (Grunig, Grunig & Dozier, 2002, p. 91-92; Gregory & Willis, 2013), is not referred to in the AMEC IEF. Thus, despite its considerable progress in providing a free online tool (educating and symbolic work), the development of the IEF shows some significant limitations in calculative framing, arguably failing to frame a terminology and mimic rules that are already legitimized through research literature and practice in other fields.

Participation in development of the AMEC IEF over a period of almost nine months revealed a high level of interest, commitment, goodwill, and even passion for implementing rigorous evaluation among leaders in media analysis, reputation tracking, data analytics, and heads of research and insights in PR and communication firms. However, many of those involved rose to these positions without formal qualifications in research methodology or specialist knowledge of program evaluation, which is well-developed in fields such as public administration, education, international development, and business performance management (AUTHOR 3, 2018). Furthermore, AMEC's membership does not include any of the major social research or market research firms (such as Ipsos, Nielsen, GfK, or Kantar). AMEC drew on the expertise of its then seven-member Academic Advisory Group in developing the IEF, and continues to do so. However, the input of the researchers/academics in this group comprises merely advice, which is often voted down or compromised by consultation committees and the boards of industry organizations that ultimately approve initiatives based on majority views. Then then CEO of AMEC reflected in an interview:

> It would be a massive claim to say that AMEC's Integrated Evaluation Framework is perfect. No doubt it can be improved still further … But we believe this is a major step forward for the communication industry and accomplishes its remit to provide a step-by-step guide for aligning communication with organizational objectives, conducting formative research, planning and setting objectives, and measuring beyond outputs to also include evaluation of outcomes and organizational impact. (R. Bagnall, personal communication, October 15, 2016)

The IEF has been widely supported in efforts of promoted and education to practitioners internationally through activities such as Measurement Month (each year with Webinars, regional conferences) and through social media such as blogs. For example, in 2017 AMEC committed to spending 60 per cent of its total budget on "education of the global marketplace on measurement" (https://amecorg.com), much of which evolves around the IEF. As part of this, AMEC also operates an online college that conducts a 10-week e-learning course several times a year and issues an AMEC International Certificate in Measurement. AMEC's Strategic Plan 2015-2017 stated as one of its leading objectives:

> Put education at the heart of AMEC's work through the development of education programs for client organizations as well as for the staff of member companies, through a professional development curriculum and through conferences. (AMEC, 2015c, para. 4)

Therefore, it could be argued that AMEC is at least well on the way to enhancing the value of principles, guidelines, and tools that it has developed through promotion, education and valorizing them. Nowadays, these educational efforts also include knowledge building around the Barcelona Principles, which did—in their first iteration—did not have such engagement support. Nevertheless, surveys indicate that there is still a long way to go to create widespread industry understanding and implementation of M&E based on the IEF and the BPs. For example, a report presented to the 2018 AMEC Summit on Measurement in Prague revealed that around one-fifth of PR practitioners continue to use AVEs (CIPR, 2017), although a 2017 PR and Communication Association (PRCA) survey put the figure much higher at more than a third (Smith, 2017).

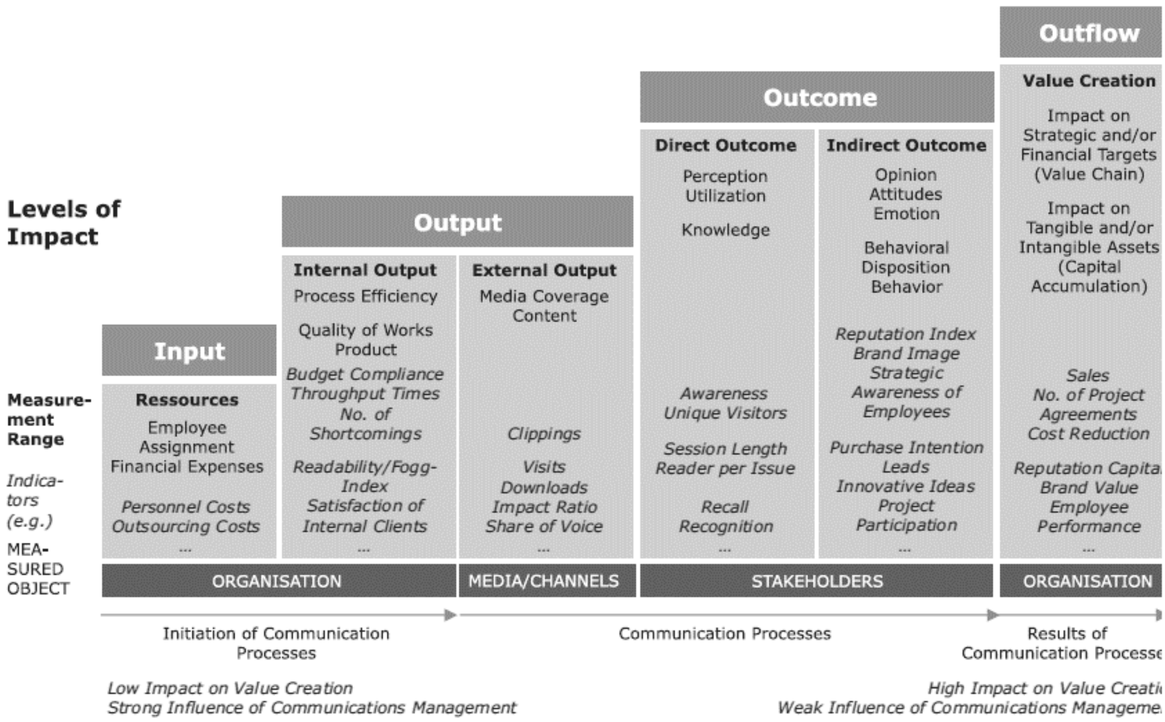
A Standardization Grassroots Initiative Involving Management Accountants

The debate on public relations M&E took off in Germany in the mid-1990s. Barbara Baerns, at that time one of only two public relations professors in the country, edited a book on evaluating PR effects (1995) that outlined different types of measurement and explained applied research methods in the field. Five years later, the German Public Relations Association (DPRG), a membership organization, and the German Association of Public Relations Agencies (GPRA), an industry body, published a well-received brochure on measuring communication (DPRG & GPRA, 2000).

In 2004, several incidents inspired a movement that later culminated in the development of the DPRG/ICV Framework. Independently of each other, a group of consultants and a researcher linked the M&E debate in communications to management theory by proposing the use of communication scorecards (Hering, Schuppener, & Sommerhalder, 2004; AUTHOR 3, 2004). The GPRA commissioned a task force and two consultants to develop a "Communication Value System" (Lange, 2005) that was to be used as a consulting tool by its members, but later abandoned because the agencies did not buy into the idea. Most importantly, the professional association, DPRG, restarted its measurement task force under the leadership of the owner of a renowned national agency not organized within the GPRA. Both associations hosted a joint congress in Frankfurt with 300 participants from communication departments, PR and marketing agencies, management consultancies, and academia. Different approaches and best practices identified at this gathering were published in an edited book (Zerfass et al., 2005) that was very well received in the community.

From then on, the DPRG management and measurement task force (named “Value creation through communication”) was a key driver of the debate. Jointly led by a practitioner and an academic, it provided a forum for those engaged in the field. Approximately three to four meetings with a revolving number of up to 20 participants were scheduled each year. Monitoring and market research companies were represented, but never played a major role. Instead, the vision of combining communication with management approaches and reaching out to communication leaders and general managers in companies guided the work. Several practitioners developed generic value links for internal communication, consumer communication or investor relations (Pfannenberg, 2010). This was more than a theoretical exercise—some of those involved ran consulting projects or in-house projects in the field and shared their experiences. Two other members of the task force launched a website (communicationcontrolling.de) jointly hosted a University and the DPRG, which served as central point of contact for everybody interested in the topic for more than a decade. Results from the task force, contributions and best practices by individual members, and a series of whitepapers (“Dossiers”) were published. Last but not least, a one-day national congress on communication measurement attracting up to 80 people each year was organized by two college professors in the Rhine-Main area.

FIGURE 5: The DPRG/ICV Framework (DPRG & ICV, 2011b, p.13)



From 2006 onwards, another group convened in a task force of the International Controller Association (ICV), the professional association of management accountants in Germany. While communication departments and activities are not a traditional objective of their services, the huge money spend for public relations and marketing communications attracted their interest. The group was interested in explaining communication processes and their results in the language of management and auditing. The goal was to develop approaches for managing (and not only measuring and evaluating) communications.

The two task forces (DRPG and ICV) joined forces in 2008 and developed a framework that combined the levels of *communication activities and impact* (exposure in media and channels; attention, use, and cognitions, emotions or attitudes of audiences) mostly discussed in the public relations and marketing field with the dimensions of *resources invested* (input) and *effects achieved* (output) focused by management accountants (Pollmann, 2015, pp. 9-14). After various discussions, the proposal for the so-called DPRG/ICV Framework, also known as “Communication Controlling” approach, was sketched out by two academics and then commented upon in November 2008 by 13 further members of the two task forces.

Several suggestions were integrated and the framework was approved by the DPRG task force in January 2009, followed by an official approval through the DPRG executive board in spring 2009. The ICV task force developed another document, the “ICV statement on communication controlling” (ICV, 2010). It was officially approved by the association and thus serves as an official guideline for all management accountants in Germany auditing communication processes and departments.

Reflecting on the standard setting process, it has to be noted that the DPRG taskforce originally focused on applying management models, especially strategy maps and value links (Kaplan & Norton, 2004), to public relations and corporate communications (Pfannenberg, 2010). This was based on traditional public relations evaluation models (DPRG & GPRA, 2000; Lindenmann, 2003). The cooperation between practitioners and academics had already been established, when the desire to establish a common wording evolved—mainly because the discourse between those with a communication background and those with a management accounting and controlling background showed that key terms were used quite differently, and sometimes even contradictory. Thus, the standard framing was clearly aimed at finding a common wording and relating them to existing concepts. The terminology created for the DPRG/ICV Framework was a compromise (Pollmann, 2015, p. 11), as it had to be linked to existing debates in management and communications, as well as to all areas of communication (not only public relations, but also marketing, etc.).

> It was important to bring in practitioners as well as academics, communicators as well as consultants, and to analyze the existing literature not only in our country, but also models developed in Sweden, in the United States, United Kingdom, and so on. (M. Buchele, personal communication, August 1, 2019)

> An essential aspect in the development of the framework was its connectivity to standard models of impact research in theory and practice. In addition, it was necessary to develop the framework in a consensual process involving all committed experts and working groups as well as controllers. Against this background, it was a requirement not to create new terms, but to select from existing terms and to sharpen them (J. Sass, personal communication, April 1, 2019).

The need to link the terminology to previous models was understandable, as nobody saw a chance to establish totally new terms at that time. However, this, over time, proved to be a weakness of the framework. Today, many practitioners involved complain that the terminology is too fuzzy and too academic:

> Instead of choosing words every practitioner can immediately understand, the task force agreed on terms that most communicators found too complicated and that puzzled management accountants as they were in line with their jargon (C. Storck, personal communication, August 1, 2019)

Two problems emerged that are rooted in the framing phase. First, the framework helps to understand the overall process of managing and evaluating communications. But it is not very concrete when it comes to indicators, measurement methods, etc. Some examples are mentioned in the framework and in the documents that explain it, but those are neither comprehensive nor consistent. Secondly, the colleagues involved did not agree on the ultimate goal of the framework. While many seemed to be satisfied with establishing a common terminology, others pushed towards developing the framework into a management approach. This was not part of the joint standardization process, but done later by the ICV task force:

> In order to explain how communication creates value, we developed a management model that integrates the different dimensions outlined in the framework. It asks practitioners to run through the phases two times: from top to bottom and from bottom to top. Define the expected value creation for the organization and what it means for the behavior, attitude and perception of stakeholders, placements in the media or channels, production of communication activities, and resources needed. This allows you to guide communication activities. Afterwards, track the communication activities and their results along the same dimensions. (R. Stobbe, personal communication, August 1, 2019)

Engaging in the standard was strongly emphasized in the DPRG/ICV framework process. Within a few months, the framework gained much attention and was institutionalized in the German-speaking countries. The German marketing communication association (*Kommunikationsverband*) as well as the Austrian and Swiss PR associations (PRVA, SPRV) officially approved the framework. Moreover, all members of the task forces immediately engaged in promoting the framework in different communities. A leaflet was produced and widely distributed among public relations practitioners. A second edited book (Zerfass et al., 2010) explained the framework along with measurement approaches and best practices from renowned companies like Henkel, Deutsche Telekom, and B. Braun. The framework was explained in a brochure published in German and English (DPRG & ICV, 2011a; 2011b); several thousand copies were printed or downloaded. Practitioners presented the framework at industry conferences; task force leaders wrote articles for professional magazines; professors presented it at academic conferences and used it immediately in the classroom. The framework is described as a de facto standard in every German public relations textbook and academic handbooks (e.g., Zerfass et al., 2015). Consultants started to use the framework in projects with clients—and were quite successful. Several projects using the framework were shortlisted or won the German PR award in the next years. The dissemination activities continue until today. Members of the ICV task force published a “starter kit” for introducing management and measurement in communications (Buchele, Pollmann, & Schmidt, 2016).

However, the DPRG task force decided to refocus its activities in 2012, the annual measurement congress was not continued and the website is still existing, but—due to a lack of financial resources—has not been updated any more. It is clear that the enthusiasm of the framing and engaging phases has disappeared. Many of the actors involved have shifted their attention to other topics and challenges within the field—probably because they were satisfied with the framework and their individual needs were met. This is understandable, as all activities were solely based on the personal interests and resources of the colleagues involved (with no systematic support from the associations).

There is no official logo or approval scheme for the DPRG/ICV framework—and in fact, it is not actively managed by anybody. Nevertheless, the DPRG/ICV framework has been valorized in different ways. Many in-house practitioners and consultants use the standard as a reference when developing measurement approaches—it is so well known in the German-speaking countries that it boosts the acceptance of any proposal. Secondly, at least two groups of companies that measure communication activities with shared methods have integrated the framework in their models: The Corporate Communication Cluster Vienna, a group of Austrian companies that collectively measure their reputation and other indictors (www.cccv.at), and WebXF, an initiative of almost 30 German companies benchmarking their online and social media communications (www.webxf.org). Thirdly, the ICV task force has applied the framework and additional methods in 35 workshops in different organizations until now. The basic idea is that task force members meet at a host company and try to solve one of their practical challenges by developing a measurement or management approach.

TABLE 2: Characteristics of standardization work in four major measurement and evaluation standards attempts

	Barcelona Principles	Integrated Evaluation Framework	DPRG/ICV Evaluation Framework	UK GCS Evaluation Framework
Commensurating and defining	• Seven best practice principles (defining "dos" and "don'ts"), • language of rules rather 'soft' (minimally 'hardened' in 2015 BPs, e.g., "preferred" to "recommended") • 2010 BPs: no systematic attempt to unify terminology. Concepts emerged from the conversation and forums. • 2015: working group focused on refining terminology. However, many suggestions to further commensurate terms and concepts were disregarded.	• Concepts and measures were made relatable in a systematic step-wise process of initial development (small expert group) and "fine tuning" by involving possible future adopters/users • Synthesizes previous international PR M&E models as well as (partially) program logic models.	• "Mainstreaming" of terms through publication of (authorative) books and whitepapers ("Dossiers") in a long phase of commensurating and defining • Emerging co-operation between DPRG and ICV focused on finding a common terminology for "managers", "accountants/controllers", and "communicators" (focus on building consensus across diverse groups of practitioners; crossing disciplinary boundaries) • Synthesizes previous PR M&E models developed internationally • Terms and rules focus rather on concepts than on measures and methods	• In part integrative focus to draw from terminologies and concepts developed by AMEC, PRIA, PRSA and IPR and in program evaluation • However establishment of own terminology deviating from both AMEC IEF and program logic models
Mimicking and analogical work	• Incorporating pre-existing templates (such as SMART objectives) were suggested (in the process towards the 2015 version) though not included. • Explicit conformity with general standards in social scientific research (principle 4 and 7), specifically in the 2015 version	• Recommendation to mimic common program logic models was partly disregarded • Explicitly framed as an "operationalization" of the Barcelona Principles	• Strong influence of established management approaches (e.g. balanced scorecard, strategy maps, value links) • Influence of auditing concepts through ICV (later labeling of framework as "communication controlling") • Current calls to go beyond taking up legitimate concepts (necessary for consensus) and start replacing them with more "intuitive" terms for practitioners	• Emphasis on mimicking common program logic models (as in AMEC IEF)

Convening	• Since about 2003 'lose alliances' through industry conferences • 2010 BPs: open forum discussion at ESM (preceded by a longer "march to standards" in the IRP summits, commissions, and task forces), no systematic inclusion of relevant experts such as academics. • 2015 BPs: International working group consisting of experts, academics/researchers, and membership organizations	• Small expert team for initial development steps, wider group of specialists and future adopters for improvement/refinement, • involvement of an "academic advisory group", distribution to partner organizations for testing • Strong reliance on advisory group as many of the involved developers were not experts in evaluation	• Grassroots development • Parallel/independent efforts of consultants, practitioners, and researchers • DPRG-commissioned task force • ICV-commissioned task force • Joined DPRG/ICV congress • Joined DPRG/ICV task force (2008 onwards) • Annual national congress (including practitioners and academics)	• Work closely with academics, such as in professional development seminars and review M&E materials • Worked closely with AMEC as a "pool" and "resource" • Appointment of a head of M&E to lead all UK Government M&E (temporary) • Appointment of a full-time Director of Insights (permanent)

TABLE 2 continued

	Barcelona Principles	**Integrated Evaluation Framework**	**DPRG/ICV Evaluation Framework**	**UK GCS Evaluation Framework**
Educating	• 2010 BPs: No systematic knowledge building around the principles (despite such announcements by AMEC), manly AMEC annual summit • 2015 BPs: Also profit from the more sophisticated educational efforts that emerged through the standardization work on the AMEC IEF	• AMEC annual summit • free, non-proprietary online tool • Resources database with cases, taxonomy, methods etc. • Promotion of "Measurement Month" as a platform to educate about the IEF	• Annual national congress • communicationcontrolling.de as a resource base • Brochures (German/English) and leaflet • Two edited books with cases of application • Widely used in university-level PR education in German-speaking countries (textbooks) • ICV "starter kit"	• 2015 GCS user guide • Professional development program for staff (run by academics and professional researchers) • 2018 booklet/guidelines

		• Online college (e-learning course) • International Certificate in Measurement		
Symbolic work	• An initial “declaration” signed by seminal actors such as IPR, PRSA, ICCO • subsequent “pledge” • no certification • “Say no to AVEs” label/banner	• Online tool serves as an artefact that underlines the practical value of the IEF	Book publications as an outcome of conferences • Joint website of a University and DPRG • Statements and approvals published in 2009 by DPRG and ICV • “ICV guideline” for management accountants • Official approvals by PR associations in Germany, Austria and Switzerland and related associations (marketing, management accountants) • PR awards linked to the framework	• In general, symbolic work less central as evaluation is mandated in the UK GCS • GCS regularly showcased in keynotes at conferences for M&E in the UK and internationally • M&E lead from the Prime Minister’s Office and the Cabinet Office
Normative shifts	• Normative shifts to gain more adopters between the initial declaration (2010) and the relaunched principles (2015) (e.g., broadening the principles beyond “business results” to “organizational performance”)		• ICV task force shifted framework towards a management approach	• Evaluation Council actively oversees normative shifts as it reviews campaign proposals to ensure framework-adequate M&E

An Institution's Internal Initiative Towards Standards

In late 2015, the Government Communications Service in the United Kingdom (GCS) commenced development of an evaluation framework to promote and guide evaluation conducted by the 4,000 communication professionals employed in the UK civil service across about 200 departments. This initiative was collaborative, drawing heavily on the work of AMEC and academics, as acknowledged in the introduction of the published 'GCS Evaluation Framework' first released in December 2015 and updated in January 2016, which stated:

> A great many models and frameworks were referenced in the development of this Government Communications Service Evaluation Framework including the work of AMEC, PRIA, PRSA and IPR. Thank you to everyone who helped with its development including colleagues from across the GCS, academics such as Professor Anne Gregory and Professor Jim Macnamara, and the Evaluation Council – in particular Richard Bagnall, Neil Wholey, David Rockland and Kevin Money. (Government Communications Service, 2016a)

In terms of establishing common terminology and rules, the evaluation model adopted by the GCS as part of its framework used some of the most common logic model terms for the stages of programs and campaigns—namely, *inputs*, *outputs*, *outcomes* and *impact* (Kellogg Foundation, 2004; Taylor-Power & Henert, 2008). However, drawing on the AMEC IEF, it deviated by adding *outtakes* and did not include *activities*. Thus, it ultimately deviated from both the AMEC IEF as well as program evaluation literature to create yet another terminology.

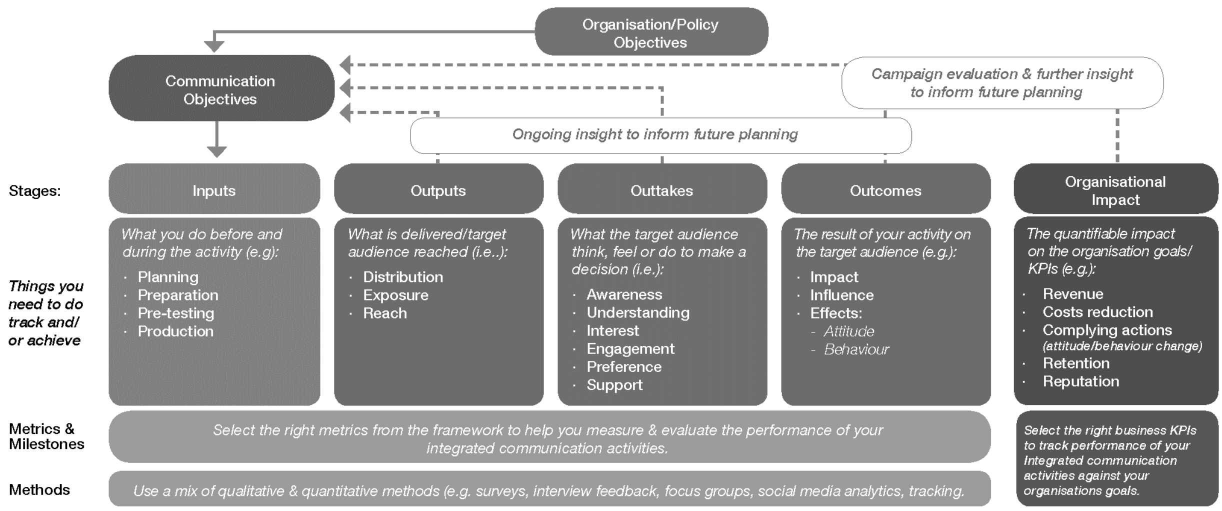
Implementation of the GCS Evaluation Framework has been supported through publication of a "comprehensive user guide" (Government Communications Service, 2015) and, while no formal certification has been implemented, a level of control and recognition of implementation of the GCS framework is administered through its Evaluation Council, which can reject communication campaign proposals that are assessed as lacking adequate formative and summative evaluation—thus overseeing potential normative shift. Also, the GCS conducts a professional development program for its staff that includes regular evaluation master classes conducted by academics and commercial researchers, and appoints 'evaluation champions' in each UK government department and agency. The Head of Evaluation in the GCS at the time, who was seconded from Her Majesty's Revenue and Customs (HMRC) specifically to promote M&E across the UK civil service, said in relation to the GCS's approach:

> Professional development was very important to achieving implementation of best practice evaluation in UK government departments and ALBs [arm's length bodies]. Many of the communication professionals working in the UK civil service were keen to evaluate, but lacked the knowledge and skills. We brought in experts from many fields including academics and professional researchers to run regular master classes and do clinics with GCS staff. (P. Njoku, personal communication, August 19, 2016)

Thus, the GCS has gone a considerable way to enhance the engage and valorize to encourage implementation of its evaluation framework. The framework was updated in 2018 in a 30-page booklet providing further guidelines on implementation (Government Communications Service, 2018). In addition, after the Head of Evaluation's temporary appointment ended, the GCS created the permanent position of Director of Insights as part of its initiative to institutionalize formative and summative evaluation. The incumbent since 2017 works closely with the Executive Director of the GCS, who has been a passionate advocate for M&E since his appointment in December 2012. Another unique feature of the GCS that has given momentum to M&E is that both the Director of Insights and the Executive Director of the GCS as well as other senior GCS staff are based in Number 10, Downing Street (the Office of the Prime Minister) and the Cabinet Office, Whitehall—which is arguably also symbolic for the relevance of the GCS framework.

Notwithstanding, observation of M&E practice in the GCS showed that most evaluation reporting by UK Government departments and agencies is provided via 'dashboards'—one or two-page summaries of key metrics—due to management requirements for simplicity and avoidance of 'data overload'. While useful for presenting evaluation data visually, these are highly reductionist, as most include only four or five charts and bullet-points of information. In addition, evidence that even the UK GCS initiative has a way to go before standards for evaluation are established was the finding of a 2016–2017 survey of 2,034 GCS staff that "evaluation and audience insights" were among the lowest rated skills of communication staff (Government Communications Service, 2016). Thus, there remains much to be done in relation to education even within the UK GCS. Nonetheless, while symbolic work is less central on the case of the GCS (as evaluation is more formally mandated here) compared to the other cases discussed above, the activities related to the development and implementation of its M&E framework show significant consequences, in a way positioning the UK GCS as somewhat of a 'industry leader'. The framework gained international recognition (AUTHOR 3, 2018, p. 111) and the GCS Executive Director has been a keynote speaker to the main global M&E summit three times in the past five years.

FIGURE 6: GCS Evaluation Framework (GCS, 2015, p. 4).



5. Discussion and Conclusion:

Remarks on Standardization Dynamics in PR M&E

Regardless of a significant series of standards attempts in recent decades, practitioners and academics alike are still lamenting that M&E standards are not widely adopted. This poses the pressing question of how M&E standards actually evolve from their early development to later application and compliance (or not). An important and incremental part towards better understanding this phenomenon is stronger emphasis on understanding the actual standardization processes itself. In this article, we have discussed the trajectories of four seminal standards attempts of recent years based on central elements of standardization work (Slager et al., 2012)—including forms of calculative framing, engaging, and valorizing.

First, as a main element of *standards design,* calculative framing, i.e., the creation of the rules that come to frame the practices of adopters, shows different patterns across the four instances. While the Barcelona Principles (BPs) in their first iteration nearly entirely neglected systematic framing, the 2015 version—also bolstered by a stronger attempt at engaging—induced calculative framing practices but, ultimately, did not take on board some of the more comprehensive terms and concepts that were suggested and worked on in the process leading up to the revised version. The future trajectory of the BPs might thus see even more revisions, mostly since a wide application is still to be seen and most standardization "starts rather than ends with adoption" (Haack et al., 2012). Later initiatives to work towards the IEF as a global framework for M&E have emphasized more rigorous and direct forms of calculative framing from the start (lead mostly by the work of a small expert group), while some of the commensurating and mimicking work actually performed here did not find its way into the final framework. Further, the initiatives leading up to the DPRG/ICV framework show a comparatively informal approach to calculative framing, with may platforms of debate and publications (volumes, whitepapers) as the main way to emerge a common terminology and make it relatable across a broad audience. Finally, the calculative framing of the GCS framework came underway using, to large extent, the very recent momentum of commensurating that existed in the groups surrounding the AMEC IEF. Further, while the BPs, IEF, and GCS commensurate and mimic to a point and then still establish rather unique definitions and terminologies, the DPRG/ICV framework—mainly through its heterogeneous/grassroots approach—appeared to be more thorough on commensurating and mimicking but today, as argued by some, lacks a unique, relatable, and intuitive terminology.

Second, looking at the observed instances of *engaging,* i.e., the building of sustainable relationships with both experts and standard adopters, there were much more similarities across the different standards attempts—specifically with regard to convening. With the exception of the first version of the BPs, all instances have in large part focused their standardization work on this dimension on working groups/task forces. Such convening relied in large part on the initiative of single or very small groups of engaged experts. Most key actors across all these groups are well connected, which shows especially in the overlap of engaging and framing occurring across the AMEC initiatives and the UK GCS. Interestingly, even though such connections exist in significant ways also with the group that developed the DPRG/ICV framework, cross-engagement here was very marginal. While representatives from monitoring companies and service providers were involved in the DPRG task force, they played no major role and did not promote the German insights within their global organizations (among them AMEC). This might explain why the German developments—although the DPRG was far ahead at that time and helped AMEC to organize their first international measurement congress 2008 in Berlin—did never resonate in the global debate enlivened by the Barcelona Principles. The framework gained attention, however, by researchers, as some academics and practitioners with academic background were engaged in various global task forces. It can be argued that the communications industry in Germany, the fourth largest market in the world, is so substantial that practitioners interested in M&E did not see a need to spread their insights or frameworks in other regions. On the flip side, international initiatives like those propagated by AMEC do not resonate in the German-speaking countries either. Overall, the grassroots approach of the German communications community has led to a relatively advanced state of PR M&E practices and standardization in the region. But it has neither resonated internationally nor has it been able to establish an ongoing process that reiterates the joint efforts of communicators, management accountants (controllers), practitioners and academics.

Third, looking at the different instances of *valorizing,* i.e. the attempts to build value for a standard beyond its technical requirements as a dynamic to co-construct legitimacy, the four instances vary significantly, owing to their different contexts. The DPRG/ICV framework, in contrast to all the others, is not actively managed by anybody, meaning there is nobody formally in charge of delivering certification or evaluating and enhancing the standard in any other way (such as overseeing normative shifts). The strongest contrast here is to the development of the CGS framework that was paralleled by a stepwise creation of positions that were put in charge of oversight, which to a degree formalized valorization. As a result, the GCS framework has seen slightly more formal ways of shifting norms, namely through the Evaluation Council. Generally speaking, normative shifts are hard to observe in all three other cases—here these are mostly implicit and soft (e.g., though using the standard in industry awards to “keep out” non-compliers). It is an interesting question whether future M&E standards attempt can go a step further and come on the way in the form of *de jure* standards. This seems to be a viable option as interest between actors in the field are so diverse that processes will not necessarily lead to conformity by themselves. Such top down volition and monitoring, however, needs strong and large membership organizations, or even (as in the UK) chartered bodies that can exercise some legal power to sanction members.

Limitations and future directions

An essential part of the ethnographic approach is to reflect on the subjective research position and the process in which the data was retrieved. Here it is important to note that, while we did not compose an ethnography in the strict sense of emerging an ethnographic protocol, we conducted our ethnographic inquiry largely by relying on memory protocols. Different to ethnographic protocols (in a strict sense) these are more susceptible to ex-post rationalizations. In this vein, the validity of our descriptions can be challenged. However, we have balanced this by referencing numerous publications (white papers, leaflets, websites etc.) as well as using other participant data (such as email protocols, conversation notes, minutes and protocols from meetings, and personal communication with others involved) to validate our own recollections.

Furthermore, owing to the data available to us, we see that a specific focus emerged from our analysis. Broadly speaking, when looking at the dynamics of standardization, most studies focus on one of three related topics (Haack, Schoeneborn, & Wickert, 2012)*:* The diffusion dynamics of standards (i.e. what are the organizational contingencies related to the spatiotemporal diffusion of a standard and what motivates adopters?); the entrenchment dynamics of standards (i.e., how are standards implemented and how are they further consolidated through organizational practices?) and the narration dynamics of standards (how are standards propelled through the discourse of multiple actors and how are they, thereby, talked into existence?). Our analysis foremost revealed specifics about the dynamics of the standardization process related to two of these topical foci: development and diffusion, as well as implementation and consolidation (while focusing less on the public discourse between actors after implementation). Ultimately, if standards like the Barcelona Principles gain more traction in the years to come, it would be very valuable to look at the narrations through which these standards are constituted in the 'post-adoption' process within the industry (e.g. looking at trade publications)—such as Haak et al. (2012) have done looking at corporate responsibility standards. This can then shed further light on how different interpretations of M&E practices converge through social interaction to consolidate a standard and slowly change practices on a larger scale.

As the research in this paper, such studies can contribute to the academic public relations literature by analyzing standardization in one of its most important domains, as effective M&E has long been said to be a “Holy Grail” in the field (Noble, 1999). As this research puts its focus specifically on making visible the dynamics of standardization in this domain, it does not aim to be conductive in any way to “finding the Grail”, but it explicates the central dynamics of the “Grail Quest” itself.

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