

Refocusing Issue Management: Bridging academic and practitioner perspectives

A thesis submitted in fulfillment of the requirements for the degree
of
Doctor of Philosophy

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August 2008

Declaration

I certify that except where due acknowledgement has been made, the work is that of the author alone; the work has not been submitted previously, in whole or in part, to qualify for any other academic award; the content of the thesis is the result of work which has been carried out since the official commencement date of the approved research program; and, any editorial work, paid or unpaid, carried out by a third party is acknowledged.

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8 August, 2008

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**Refocusing Issue Management:
Bridging academic and practitioner perspectives**

Part One

Exegesis

Introduction

“Intelligence is the art of making complex things more simple, not vice versa.”

Andre Comte-Sponville (2002)
A short treatise on the great virtues.

Issue management¹ originated in the mid 1970s as a business discipline specifically designed to enable corporations to participate in, and not simply respond to, public policy issues which had the potential to impact the organization.

Over the subsequent 30 years it has evolved – and is continuing to evolve – into a broader, more sophisticated discipline² exercised not just by corporations but also by government agencies, not-for-profits and non-government organizations (NGOs) to develop strategies in relation to a wide range of public issues in their social and operating environments.

Understanding this evolution is essential to understanding the continuing importance of issue management itself, as both an academic and organizational discipline as well as a foundation, enabling activity which underlies some of the more recent and more

¹ The terms *issue* management and *issues* management are both in common use. According to industry folklore, Howard Chase, father of the discipline, once argued it should be issue management not issues management, in the same way that it is *brain* surgery, not *brains* surgery. Other than in specific quotes or references, the term *issue management* is used throughout this exegesis.

² Although the word ‘discipline’ also has a particular academic meaning, its application in this exegesis and in the accompanying published works follows common usage in both the practitioner and academic literature, from the practitioner-founder who described issue management as “a discipline and management science” (Chase, 1980, p. 5) to Robert Heath, a leading contemporary scholar, who labeled issue management as “an academic and organizational discipline” (Heath, 1997, p. 9).

fashionable management developments (outlined at 1.5.4. Positioning the Maturing Discipline)

The central theme of this exegesis is the positioning of issue management across the scholarly and business environments – drawing the best from both, along with the important role of advanced academic research and analysis in refocusing this relationship.

As early as 1986, Wartick and Rude warned that “if issue management is to be anything more than a passing fad, both practitioners and academicians must work towards resolving the identity problem related to issue management” (p. 134). And as recently as 2007, Heath conceded that issue management continues to have a periodic identity crisis (Robert Heath, personal communication, email, 22 October, 2007).

This integrative essay is designed to help address that identity crisis, to provide a narrative on the scope and scale of the challenge, and to propose both theoretical and practical ways forward to help bridge between academic and practitioner perspectives.

Howard Chase, the ‘father of issue management,’ commented very early on that “issue management demanded first a rationale, then a literature, then adaptation to academic and sound management disciplines” (Chase, 1984a, p 10). However, each of these steps assumes effective resolution of the ambiguity of identity regarding the nature of the discipline itself.

Issue management has two distinct facets, providing both technical and intellectual authority. On one level issue management has developed to offer a sophisticated suite of tools and processes, and on the other level it has become a comprehensive discipline which can deliver effective strategies to deal with the challenges and opportunities facing an organization.

Yet, while the tools and processes may be sophisticated, a crucial lack of consensus in the area of definitions and taxonomy is a hurdle to progress and a contributor to ambiguity both of language and purpose. The problem of inadequate and varying definitions, and the challenge it presents, is addressed in detail in the exegesis, and also in the associated publications, which offer alternative taxonomies.

Another very important element of this definitional challenge derives from the lack of clarity regarding the place of issue management within academic knowledge frameworks. Given the origins of issue management as a business-driven corporate activity, and given that its forebears included Forecasting and Future Studies, it was not surprising that initial academic interest came from within the broader business school environment. As this integrative essay outlines, some of the first substantial contributions to the academic literature during the early 1980s came from leading business scholars. While a strong business school involvement in all aspects of issue management continues to the present day, issue management later became more firmly embedded within a communication studies paradigm.

Among the first scholars to explore issue management more specifically within the context of formal communication studies were Crable and Vibbert (1985, 1986), who developed the concept of the catalytic model of issue management, followed by Heath and Nelson with a key monograph in 1986 (see further detail at 1.2 The Beginnings of Scholarly Development). Over the ensuing two decades issue management has established a firm place in formal communication studies.

A review of the literature shows that, after a relatively slow beginning, interest in issue management began to accelerate rapidly. For example, a University of Houston

review in 1990 reported 240 scholarly and professional articles as well as scholarly books and PR texts on the subject (Heath & Cousino, 1990), while my personal library, continuing up to the present, extends to over 600 scholarly and practitioner papers, case studies and monographs. The nature and direction of this growing literature reflects the fact that issue management continues to span between the strategic business school approach and development as a primarily communications/public relations activity.

As will be described in this exegesis, the business school approach is closely linked to how issues are identified and elevated, and how managers respond to them in organizational terms and in relation to strategic planning. On the other hand the communication scholarship has a greater focus on how specific issues are managed within and outside the organization.

Unfortunately, within the communications field, the identity problem for issue management is exacerbated by an unhelpful tendency in some areas to position issue management as virtually synonymous with issue communication. This vital distinction was succinctly described as long ago as 1986 by the communications scholars Nelson and Heath:

Without denigrating the importance of public relations and public affairs, where we differ with those holding a 'no difference' position is in our stress that issues management involves more than issue monitoring and communication activity. The key ingredient missing from traditional public relations and public affairs activities is a directional input into corporate strategic planning which allows companies to reassess their corporate goals, refine their codes of responsibility and accordingly alter

their operating procedures to avert a collision with hostile and entrenched public sentiment (1986, pp. 21-22)

Three more recent developments have made maintaining this distinction even more important. The first of these is the dramatic impact of new communication technology on issue management at all levels, while the second related development is the power shift made possible by technology such as the Internet, and the resulting democratization of issue management, especially for resource-poor NGOs, activists and community groups.

The third of these recent developments is the adoption of issue management by government agencies, which completes the evolution from an activity originally designed to enable business to actively participate in public policy formation to an activity which helps government agencies more effectively develop and implement fresh public policy.

These three developments, and other evolutionary maturity of issue management, have done little to help illuminate the relationship between the business school and communication faculty approaches. Indeed they may have clouded the matter even further. Specifically they have seen increased migration and diversification of issue management, and with it they have added to the complexity of the taxonomy challenge. They have also spread the discipline to new academic fields, such as environmental management, social policy, risk management and community relations.

Overview

In the face of this continuing ambiguity, the purpose of this integrative essay and associated publications is to help bridge the academic and practitioner perspectives by presenting fresh scholarship, a more nuanced and critical assessment of terms and definitions, and a more collaborative viewpoint. Specifically, Chapter 1 will outline the continuing evolution of issue management within a formal theoretical framework, will identify major academic research streams, disjunctures and challenges, and will situate my contribution to the field through examination of these themes and application from a selection from my published body of work.

In Chapter 2 the exegesis will identify and explore key conclusions and findings from the literature and my own writings as well as my specific innovations and contributions to knowledge in the field.

Some of my key contributions and propositions developed in this chapter are:

- Improved models, processes and taxonomy to promote understanding and implementation of issue management
- Better bridging between academic and practitioner perspectives for continuing development of the discipline
- Increasing legitimization of issue management within the Public Relations function and the implications for education and practice
- The use of Best Practice to establish and improve standards
- Growing adoption of issue management techniques by NGOs, not-for-profits and other non-corporates

- The evolving positioning of issue management in relation to others associated activities such as crisis management and risk management.

The exegesis concludes in Chapter 3 with discussion of principal themes and arguments across my publications, an outline of opportunities for future research, and a retrospective view of my work and personal participation in the field.

The published works submitted in Part Two with this integrative essay are considered both individually and as a sustained body of work which collectively comprises a cohesive intervention in the issue management field of knowledge. In Chapter 2 they will be presented and reviewed in the context of four overall themes which I originated to represent the four areas where this body of work has made a substantive contribution. The first two themes focus on issue management as a suite of tools and processes, while the remaining two focus on developing and advancing their application as part of a fully integrated management discipline.

The four themes and the publications associated with each are discussed in detail as follows:

Improving understanding and application of formal issue management models and process

1. *Don't Just Stand There – The Do-it Plan for Effective Issue Management*
Monograph. Issue Outcomes P/L, Melbourne, 2000
2. Developments in the Use of Process Models for Effective Issue Management
Asia Pacific Public Relations Journal, 2(2), 2000, 125-132
3. Issue Management: Process versus Progress
Journal of Public Affairs, 6(1), 2006, 69-74

4. Using Best Practice Indicators to Benchmark Issue Management

Public Relations Quarterly, 50(2), 2005, 8-11

5. Issue Management Best Practice Indicators

www.issuemanagement.org, 2005

Adding new tools to the core issue management technology

6. Towards a New Terminology: Optimising the Value of Issue Management

Journal of Communication Management, 7(2), 2002, 140-147

7. New Language needed to help move Issue Management onto the offensive

Asia Pacific Public Relations Journal, 5(1), 2004, 43-53

Explicating and analyzing growing NGO/Activist use of the discipline

8. Issue Definition: the Neglected Foundation of Effective Issue Management

Journal of Public Affairs, 4(2), 2004, 191-200

9. Systematic Objective Setting for Effective Issue Management

Journal of Public Affairs, 5(1), 2005, 33-42

10. Activist "Rules" and the Convergence with Issue Management

Journal of Communication Management, 10(4), 2006, 407-420

Repositioning issue management in relation to crisis management and other management disciplines

11. Issue Management and Crisis Management: An Integrated, Non-linear, Relational

Construct. *Public Relations Review*, 33(2), 2007, 147-157

12. Integrating Issue Management and Strategic Planning: Unfulfilled promise or

future opportunity? Awaiting publication, *International Journal of Strategic Communication*. January 2009.

Chapter 1 – The Developing Discipline

1.1 The Birth of Issue Management

Issue Management is unusual among management processes in that the moment of its formal birth is definitive and the record of its infant development is remarkably well documented. The date was 15 April 1976, which marked the publication of issue #1 of *Corporate Public Affairs and their Management* (CPI) in which editor and founder Howard Chase coined the expression ‘Issue Management’ (Chase, 1976).

Chase later characterized this moment as an event which “nailed the issue management manifesto to the cathedral door” (1984a, p. 15) and *Management Review* editorialized “If so unruly a child as issue management can be said to have a father, Chase is the parent” (“Issue Management: The corporation gets tough,” 1982, p. 4).

Chase’s colleague Ray Ewing, who chronicled the early days of the discipline, has described how some of the actual practices of issue management had existed “in protean form” before 1976. He said that from the mid 1960s, practitioners in the corporate world who were developing foresight and planning techniques in the social-political arena which impacted the economic viability of their companies thought of it as an ad hoc process, not a planned and continuous process. That was until 1976 when Chase gave the method its name. “This permitted those of us in the corporate world doing issues management to share our approaches and evolve a process that described what we were doing in a real world” (Ewing, 1990, p. 19).

Chase himself noted: “Without even a name until 15 April 1976, the issue management process has grown like Topsy” (1984a, p. 108).

Ewing reiterated this position when he concluded that, although most definitions of issues management are essentially similar, calling for analysis and evaluation of results, until Chase and a few other senior consultants rethought the public relations process and coined the term issue management, “public relations, unlike advertising, was unable to integrate into the planning and operational processes of the institutions it served” (1980, p. 14).

This ‘rethinking’ is an important common theme in the early commentary. In his seminal book *Issue Management – Origins of the Future* (1984a), Chase said the systems management of issues and policy demanded more than instinct for change or an executive disappointment in traditional public relations. “Issue management demanded first a rationale, then a literature, then adaptation to academic and sound management disciplines” (p. 10). In addition Chase identified the essentiality of *vision*, which he described as “the picture in one’s mind of what could actually happen when – and if – the private sector became co-equal with government and citizens in the formation of public policy, rather than being the tail of the policy kite flown by others” (p. 10).

However, it is evident from such early analysis that both Chase and Ewing recognized that vision and the coining of a new name alone would not have secured what Chase called the “new science” (Chase, 1977).

While naming the process in 1976 was undoubtedly a ground-breaking event, it was the publication of the first formal issue management process model in 1977 (the Chase-Jones model) which characterized the foundation upon which the structure was to be built (Chase & Jones, 1977).

The basic Chase-Jones Process Model, which is still regarded as “the most influential issue management model” (Coombs & Holloday, 2006), comprised five steps:

- (i) *Issue Identification*, leading through theory and research to
- (ii) *Issue Analysis*, followed by judgment and priority setting to reach
- (iii) *Issue Change Strategy Options*, leading through policy for change strategy to
- (iv) *Issue Action Program*, which leads through support for policy decision to
- (v) *Accomplishment of Issue Action Program Goal/Evaluation of Results*, then looping back to the first step.

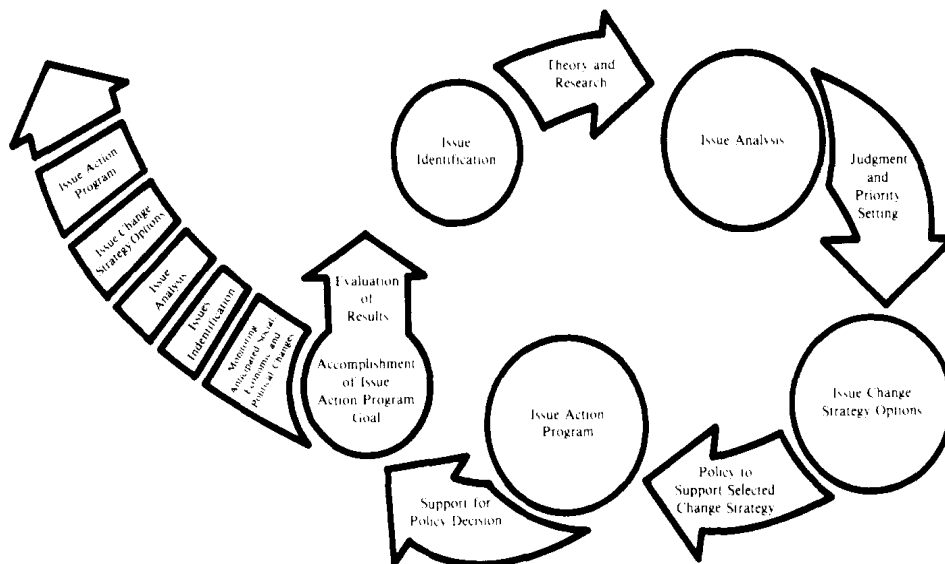


Fig 1: An overview of the Chase-Jones Issue Management Process Model (Chase & Jones, 1977)

This model was expanded into a ‘wall chart’ depicting what the authors called the Program Evaluation and Review Technique (PERT) Chart, which included 88 distinct

steps presented as a series of concentric circles within each of the elements above, and a Guide for its use.³

Models and graphic representations of key issue management processes are a very important element of the discipline (Ashley, 1996; Ashley & Morrison, 1997; Barrows & Morris, 1989; Brown, 1979; Camillus & Datta, 1991; Chase, 1984a; Crable & Vibbert, 1985; Dyer, 1996; Jaques, 2007a; Lamertz, Martens & Heugens, 2003; Nelson & Heath, 1986) and have been proposed as essential to issue management best practice (Jaques, 2005a). In addition there has been extensive use of models in illustrating the evolution of the concept of the issue life cycle (Gonzalez & Pratt, 1996; Mahon & Waddock, 1992; Zyglidopoulos, 2003). The development and criticality of process models to the discipline is explored at 2.2 in Chapter 2.

For the present purposes of historical context, the five-step 1977 Chase-Jones process model is generally accepted and widely cited as the first such model. The supporting PERT 'wall chart' has subsequently been somewhat eclipsed, possibly because it incorporated so many steps and concepts as to reduce its lasting utility.⁴

³ The chart can be seen as a 'fold out' at Chase 1984a, p 36. Working with Chase and Jones on this breakthrough project were Teresa Yancey Crane (later CEO of the Issue Management Council) and Elaine Goldman. The latter subsequently described the specific campaign which led to development of the model (Goldman & Auh, 1979).

⁴ In fact one of the original developers concedes the chart was intentionally made complicated in an attempt to gain 'legitimacy' in the eyes of the CEO and Board (Teresa Crane, personal communication, 26 September 2007).

1.2 The Beginnings of Scholarly Development

While the nature of issue management, as originally defined by pioneers such as Chase, was unequivocal, the subsequent form and focus of issue management have seen a marked and distinct evolution. A very important theme in the early days was that issue management developed to meet an identified corporate business need rather than originating in academia (though both Chase and Ewing were corporate practitioners who later became respected academics).

The definitive corporate origin of issue management is clearly illustrated by Archie Boe, then CEO of Allstate Insurance of Northbrook, Illinois, the man generally credited with appointing, in 1978, the first Executive level Issue Management Committee and the first Director of Issue Management. He described the management response to what he called ‘an unprecedented battering of business.’

Crisis and post-crisis management have been the only responses open to chief executive officers until recently. During the past few years, however, intensive study of the processes and forces which have brought about these changes has resulted in the belief that business can move to a pre-crisis management posture and participate in the public policy process that resolves these larger demands on business. The pre-crisis management approach is called issues management and is an important management tool available to today’s business leaders (Boe, 1979, p. 4).

The Director of Issue Management who Boe appointed was Ray Ewing (later a Professor at the Medill School of Journalism at Northwestern University, Chicago), who has stated: “The issues management technique that emerged in the business sector has

spread to other institutions under various guises. However, it is important to realize that this management process is an *ad hoc* development and not a theoretical invention” (1987, p. 7).

He added: “like all valuable new management techniques, practice developed and outran university business school theory” (p. 11). Ewing later wrote in the foreword to a landmark textbook that business school professors had told him issue management was “the first new major management technique developed where the corporate practice had outrun university theory” (Heath & Nelson, 1986, p. 7).

While such retrospective reconstruction may be of limited value two decades after the event, the more important fact here is that issue management was clearly and unambiguously seen by its founders not just arising from a corporate environment, but as a primarily corporate tool. Chase himself described issue management as “a methodology by which the private sector can get out of the unenviable position of being at the end of the crack-the-whip political line” (Chase, 1980, p. 5).

This corporate perspective is reinforced at even the most superficial level in the title of the newsletter Chase founded in 1976 - *Corporate Public Issues and their Management* (known as CPI) - and in the title of Ewing’s 1987 monograph - *Managing the New Bottom Line: Issues Management for Senior Executives*.

Indeed, writings in the early days were heavily influenced by private sector corporate practitioners, such as Chase (1976, 1977, 1980, 1982, 1984a) and his colleagues Barry Jones (1980, Jones & Chase, 1979) and Ray Ewing (1979, 1980, 1987, 1990), as well as Charles Arrington and Richard Sawaya of Atlantic Richfield (1984a, 1984b, 1988); James K. Brown of the Conference Board (1979); Douglas Bergner of the Public Affairs

Council (1982); and the consultants Joseph Coates (1986), William Renfro (1987, 1993) and later William Ashley of United Airlines (1995, 1996a, 1996b and 1997).

Given the origins of issue management as a business-driven corporate activity, and given that its forebears included Forecasting and Future Studies, it was not surprising that the initial academic interest came in the broader business school environment, which saw substantial contributions from academics including John Fleming at the University of Southern California (1980), Liam Fahey and his colleagues at Pittsburgh (1981) including William King (1984, 1985), and the prolific Rogene Buchholz at the University of Texas at Dallas and later Loyola University, New Orleans (1982a, 1982b, 1985; Buchholz et al 1985).

These business scholars focused largely on defining the terms and parameters of the new discipline and positioning it within broader corporate management, predominantly alongside strategic planning. Others assessed issue management within a statistical and economic analysis, for example Guy Stanley (1985).

Among the first scholars to explore issue management more specifically within the context of formal communication studies were Richard Crable and Steven Vibbert at Purdue University (1985, 1986) who built on the work of Chase and Jones and developed the concept of the catalytic model. This positioning within communication studies was in turn consolidated by Robert Heath and Alan Nelson (1986), whose important monograph *Issues Management: Corporate Public Policymaking in an Information Society* was introduced by Ewing as “the first in-depth analysis of the new management technique from the standpoint of communication theory” (Heath & Nelson, 1986, p. 7).

Heath subsequently became one of the most prolific and original scholars in the field of issue management, anchoring the discipline firmly within communication studies as a part of the academic body of public relations.

1.3 Review of the First Decade

Chase boldly asserted early on that issue management was “not merely a new technique, but an innovative breakthrough in general management design” (1979, p. 34) and the first decade (1976-1986) saw both practitioner and academic resources applied primarily to establishing and defining the new discipline and its processes.

This progression was not without dissent, most notably from the public relations scholars William Ehling and Michael Hesse, who used a survey of PRSA⁵ members to question whether issue management was in fact a new concept or a simply “pretentious” new term for everyday activities with “nothing that is scientific either in the conceptualization or in analytical techniques” (Ehling & Hesse, 1983, p. 23). They were also critical of Chase, Jones and Ewing, who they characterized as “promulgators and propagators” of issue management.⁶

⁵ Public Relations Society of America. Howard Chase was one of the six founders in 1947 and was President in 1956

⁶ Shortly afterwards Chase, then aged 74, wrote an opinion piece for The Wall Street Journal which he impishly entitled *No Matter How Well Packaged, Corporate Fads Fail Fast* (Chase, 1984b). He declared: “Issue-oriented management process, systematically integrated into line-management decision-making, is the enemy of corporate faddism. Once the high-priority issue is identified, filtered through issue task forces drawn from both line and staff, the designated issue action program produces more lasting results than any quick-fix dreamed up by the most inventive faddists. When all is said and done, the issue management process offers the opportunity for alleged rugged individualists to act less like sheep.”

A more significant and balanced assessment at that time is the still widely cited paper by Pennsylvania State University academic Steven Wartick and his practitioner colleague Robert Rude (New York State Electric and Gas Co.) which bore the provocative title *Issues Management: Corporate Fad or Corporate Function?* (Wartick & Rude 1986). After a very thorough analysis of the first ten years, they warned: “If issue management is to be anything more than a passing corporate fad, both practitioners and academicians must work toward resolving the identity problem related to issue management” (p. 139). They said this did not mean that everyone doing issue management must use the same exact model, or produce the same results, or be evaluated on the same success criteria. However they concluded that if those involved in issue management could work toward establishing the filling of a void and professionalization as complements instead of substitutes, then the future of IM was bright.

A subsequent retrospective review of the same first decade by the communication scholars Robert Heath and Kenneth Cousino (1990) offered the cautiously optimistic interpretation that issues management was a robust contribution to the public relations discipline and created additional rationale for empowering public relations practitioners by: involving them in strategic planning; making them responsible for issue scanning and monitoring; integrating their advice and influence into standards of corporate social responsibility; and encouraging sustained issue communication with key publics. “Although no definition of issues management has achieved consensus,” they said, “it continues to mature and show substantial promise” (p. 6).

Heath and Cousino (1990) assessed the then status of issue management, reviewing five studies based on surveys or extensive interviews among the profession which

considered different aspects of the period, namely Post, Murray, Dickie and Mahon (1982), Fox (1983), Ehling and Hesse (1983), Wartick and Rude (1986), Hainsworth and Meng (1988). They closed by commenting: “One safe conclusion from these studies is that a lot more research is needed to obtain an accurate picture of the practice of corporate issue management” (1990, p. 16). This present exegesis continues the response to the call for further research.

1.4 A Theoretical research framework

Before addressing the principal research streams which emerged in the late 1980s and continue to this day, it is important to review the public relations/communications academic framework within which issue management evolved and is evolving.

With virtually no consensus on a definition of issue management,⁷ it is not surprising that there is equally little consensus on a theoretical framework for issue management. Indeed, this reflects and forms part of the challenge of identifying and explicating a theoretical framework for the entire practice of public relations.

Regarding public relations as a whole, this lack of consensus was explored by Pearson (1990) who reviewed the leading scholarship at that time, and remarked: “It has been argued on a number of occasions that public relations is in a sorry state with respect to discipline-specific theory development” (p. 219). Similarly Heath (2006a) has been moved to observe: “Public relations is, at best, an ugly duckling with prospects for a better future or, at worst, an irredeemable bete noir. Researchers and practitioners are challenged to understand what can move our study, teaching and practice” (p. 93).

⁷ The evolution and challenge of competing definitions is explored below at 1.5.2 Evolving the Taxonomy.

The scholarly effort to conceptualize a general theory for public relations has been very extensive, generating a long roster of possible approaches, including, but not confined to, Structuration Theory (Durham, 2005; Witmer, 2006); Game Theory (Murphy, 1989); Rhetorical Theory (Toth & Heath, 1992); Excellence Theory (Grunig, Grunig & Dozier, 2002, 2006); Relationship Theory (Ledingham, 2003, 2006; Ledingham & Bruning, 1998, 2000; Phillips, 2006); Persuasion Theory (Hamilton, 1989); Communitarianism (Leeper, 2001); Stakeholder Theory (Rawlings, 2006); and Systems Theory (Chase, 1984a; Grunig, 1989; Pearson, 1990). In addition Prior-Miller (1989) has assessed four other major social scientific theories in terms of their value to public relations research, namely Symbolic Interactionism, Exchange Theory, Conflict Theory and Structural-functional Theory.

This broader academic debate lies beyond the scope of this exegesis, and remains far from resolved. Yet it is an essential starting point to understand my position, as some of these theoretical approaches to public relations also have explicit applicability to issue management.

Analysis of the literature shows that a number of serious attempts have been made to explicate a theoretical framework for issue management and some elements within the discipline, although no consensus has yet emerged to support any singular theoretical framework.

A brief overview of this analysis is presented below, but broadly my argument here is that the concept of *Systems Theory* and an associated rhetorical rationale provides the most useful context in which to consider issue management as a whole, while *Sensemaking Theory* provides a firm framework for one of the most critical areas of the

discipline, namely the key transition from issue identification, framing and selling to strategy development. I will consider each of these in turn. In addition I will discuss Framing Theory as another option.

1.4.1 Systems Theory and Rhetorical Rationale

Building directly on the literature in relation to public relations as a whole, scholars have explored a number of possible theoretical frameworks for issue management.

One of the most thorough analyses of the overall field of issue management is that of Janet Bridges (2004) who addressed six theoretical frameworks – “loosely referred to as theories” – and provided detailed references and sources for each; namely Systems Theory, Powerful Stakeholder Theory, Legitimacy Gap Theory, Issue Lifecycle Theory, Rhetorical Analysis, and Social Exchange Theory. She also discussed two mass communication theories: Agenda Setting and Framing.

Bridges noted that: “although initially these theoretical approaches may seem discrete, closer analysis indicates that they are important parts of a single perspective” (2004, p. 69). She proposed that the different theories for issue management are in fact interdependent and she concluded that, from an applied perspective, none of them provide definitive empirical evidence about corporate issues campaigns, but that “each provides a partial foundation for corporate campaign decision making, and most can provide some application to social-issue campaigns” (Bridges, 2004, p. 73).

Her previous paper with Richard Nelson (Bridges & Nelson, 2000) had set out to “place issue management firmly within the sphere of public relations” (p. 95). The authors argued that many theoretical approaches fail to recognize that issue management

operates to both avoid or mitigate threats and also to promote opportunities, and they suggested that a Relational Approach is the preferred option to address this duality.

Some years earlier, Nelson and his colleague Robert Heath (1986) had advocated a Systems Model for corporate issue management. They proposed that only a systems approach generates the theoretical capacity to establish issue management as an holistic rather than piecemeal activity, capable of integrating a range of both internal and external corporate activities.

Heath himself (1990) subsequently explored in extensive detail the theoretical underpinnings and research foundations of issue management and proposed systems theory as a macrolevel framework, focusing on the relations between organizations and their environments to explain the dynamics unique to public policy contests and adjustment (p. 41).

He said the systems approach defines and gives scope to other factors relevant to how organizations and their stakeholders function as separate but interdependent entities (p. 41) and that system theory offers taxonomies and general principles which prescribe relationships and characteristics that are essential to organizations (p. 45).

Furthermore, he argued that the feedback function, which is a central characteristic of systems theory,⁸ is equally a central characteristic of effective issue management, as posited within the classic two-way symmetrical model of public relations formulated by

⁸ The communications scholar Gerald Goldhaber (1986) described a systems loop as being input from the environment, throughout, and output, with feedback coming back on the loop to be reinput to the organization. This feedback represents the effects of other organizations or groups of the organization and leads it to adapt or change to coexist better with its environment (cited in Plowman 2005).

Grunig, Grunig and Dozier (2002, 2006) in their famous studies of communication excellence.

Describing the systems approach, Plowman (2005) commented that it can be considered a meta-theory for public relations, and he emphasized the importance to systems theory of common interests and self-interests. “Enlightened self interests,” he said, “meld the intersubjective and social ends of systems theory thought, because positive relationships in the long term means adapting, adjusting and changing to other stakeholders in the environment” (p. 841).

Heath’s continued advocacy of system theory as a macrolevel framework has been supported by others (such as Bronn & Bronn, 2002). At the same time Heath explored a rhetorical approach as a means to operationalize issue management. Working with Shannon Bowen he assessed a specific case study, namely the Enron collapse, to provide an instructive example of systems theory and a rhetorical rationale working together (Bowen & Heath, 2005).

Reflecting what Janet Bridges (2004) had called the threat/opportunity duality of issue management, Heath (2006b) suggested two extremes of strategic options: (a) denying the legitimacy gap or (b) stewarding change. At one end of the spectrum was a symbolic view of issues management, while on the other end rested the operational approach, which suggests that executive managements of organizations need to constantly adjust their policies to please and appease their external critics. Heath said that between these polar extremes could be found variations and a blend of positions, with a stewardship commitment to communications to the extent that rhetorical stances can

solve the legitimacy gap, but with the proviso that the organization may also need to make small or even dramatic policy and management changes to reduce that gap.

Taking issue management as its purest level – the contest of ideas – Heath (2006b) concluded:

Rhetoric at its best is the process of advocacy and counter-advocacy. It is the rationale for suasive discourse. Rhetoric assumes that ideas appropriately framed and presented can affect strategic and ethical changes. It assumes that the symmetry of relationships is best defined by the ability of ideas to sustain themselves under the scrutiny of public discourse (pp. 92-93).⁹

A key limitation of Heath's position in this area is his acknowledged assumption of the symmetry of relationships. Such symmetry within the broader context of public relations has an established theoretical basis (Grunig, 1989; Grunig, Grunig & Dozier, 2002). But more recent research, including my own, has challenged this symmetry, particularly in relation to the degree, motivation and processes of NGO/activist advocacy and participation (Deegan & Blomquist, 2006; Jaques, 2004a, 2005b, 2006b; Karagianni & Cornelissen, 2006; Kozinets & Handelman, 2004; West & Larue, 2005; Yaziji, 2005a, 2005b).¹⁰

Similarly recognising a rhetorical relationship beyond the pure contest of ideas, Kuhn (1997) also positioned issue management in the context of corporate discourse, asserting that in all issue management situations, organization rhetors attempt to influence the

⁹ Heath further explored this systems/rhetorical approach in a broader paper published in the same year on the future directions for public relations research (Heath, 2006a).

¹⁰ My analysis of the increasing role of NGOs/activists in the evolution of issue management is detailed in my three published papers discussed in Chapter 2 (2.3)

attention given by the public to various aspects of the matter in contention. “In issue management campaigns,” he said, “an organization’s public discourse is *argumentative* rhetoric intended to serve some strategic end” (Kuhn, 1997, p. 189. italics in original).

This concept is also reflected by George Dionisopoulos and Richard Crable (1988) who presented structural domination over an issue’s definition as “a rich source of rhetorical advantage” (p. 135). In a case study of nuclear power industry rhetoric before and after following the Three Mile Island incident, in 1979, they argued that the post-accident rhetoric to portray nuclear power as a key answer to America’s need for increased energy was far more strategic than responding to the immediate physical impact of the accident itself.

An integrated approach, similar to that advocated by Heath (2006b) is contained in a paper by Maureen Taylor, Gabriel Vasquez and John Doorley (2003) which examines a case study of the relationship between a major drug company and AIDS activists. This paper, by two academics and a PR practitioner, reviews three of the dominant research traditions of issue management – a systems approach, a strategic approach and the rhetorical approach – and proposes that all three need to be integrated into what they describe as an Engagement Framework.

Other specific theoretical frameworks which have been posited to help conceptualize and develop issue management include the Expectational Gap construct (Reichart, 2003) and the Symbolic Interactionist perspective (Lamertz, Martens & Heugens, 2003).¹¹

As previously described, issue management was unambiguously born within a corporate environment and much of the early literature focused on issue management as a vehicle for the contest between corporations and third parties – both government and non-government – attempting to establish controls through public policy.

However, as issue management has migrated beyond the corporation, issue management is increasingly perceived moving beyond a corporate persuasive perspective towards what Heath has called a social harmony viewpoint. Heath's evolving view is reflected in his *Encyclopedia of Public Relations*: "Issue management is a strategic set of functions used to reduce friction and increase harmony between organizations and their publics in the public policy arena" (Heath, 2005, p. 460. See also Heath, 2006b).

Given the evolving nature and growing complexity of issue management, and in line with the foregoing discussion, my own research and analysis supports Heath's contention that Systems Theory provides the best macrolevel framework for the increasingly interdependent relationships which lie at the heart of the discipline.

In summary, the candidacy of systems approach as a preferred theoretical framework is supported by a number of key merits, including the following – (a) it is broad enough to provide a strategic, holistic capacity rather than operating piecemeal; (b) it defines and

¹¹ The Expectational Gap construct characterizes a gap between the actions of the organization concerned and the expectations of its stakeholders. The concept is explored at 1.5.2. Evolving the Taxonomy.

The Symbolic Interactionist perspective acknowledges that the essence of many social issues is a constructed reality which exists primarily in the minds of the parties concerned – sometimes expressed in the maxim "perception IS reality"

offers taxonomies to characterize interdependent relationships between organizations and their stakeholders; (c) it provides a core feedback function which is essential to effective issue management; (d) it is sufficiently flexible to accommodate the ongoing evolution of issue management beyond the narrow confines of corporate persuasion; and (e) it encompasses the concept of overlapping self-interests which promote mutual gains outcomes and increased social harmony.

Furthermore, building on Heath's position, and given that an issue can be perceived as an expectation gap or a contestable matter, or a problem in need of resolution,¹² and that issue management is "best conceived as dialogue" (Heath 2006a, p. 62), I contend that a rhetorical approach within a systems framework represents the optimal paradigm for both internal and external dialogue.

1.4.2 Sensemaking

Unlike the lack of consensus as to the most appropriate theoretical framework for issue management as a whole, there appears to be a good case for one preferred construct for a key subsidiary area of issue management, namely identification, framing and selling of issues.

Sensemaking as defined and developed by Karl Weick (for example 1988, 1993, 1995, 1999) is described at its simplest level by Weick himself as "the making of sense" (1995, p. 4). In an organizational context, Weick and others have characterized seven properties of sensemaking which clarify that it is not simply understanding or interpretation (Weick 1995, 1999, Weick, Sutcliffe & Obstfeld 2005). These seven properties can be seen to

¹² For my analysis of these and other approaches to issue definition, see below at 1.5.2 Evolving the Taxonomy.

have a demonstrable relevance within both the context and process of issue management. Based on the sources cited these properties can be paraphrased and summarized as follows:

- (i) *It is social* - Sensemaking is influenced by the actual, implied or imagined presence of others. Sensible meanings tend to be those for which there is social support, consensual validation and shared relevance, often established by communication and exchanging ideas with others.
- (ii) *It is grounded in personal identity* - A person's sense of who he or she is and is becoming within a setting, what threats to this sense the self the setting contains, and what is available to enhance, continue or render efficacious that sense of who one is.
- (iii) *It is retrospective* - Because the perceived world is visualized in terms of what people notice in events which have already happened, sensemaking is influenced by ability to appreciate the past rather than project the future.
- (iv) *It is based on salient cues* - From all the action around them, individuals preferentially attend to certain extracted cues, as well as environmental conditions, which affect their sense of what is happening.
- (v) *It is ongoing* - Because experience is a continuous flow, the work of sensemaking is never done. Thus sensemaking is constrained not only by past events but by the speed with which events flow into the past and interpretations become outdated.
- (vi) *It is based on plausibility rather than accuracy* - It can often involve more intuition than careful analysis and systematic elimination of suboptimal choices.

Plausible sense is constrained by agreements with others, consistency with ones own stake in events, the recent past, visible cues, projects that are demonstrably under way, scenarios that are familiar, and outcomes that have tangible effects.

(vii) *It enacts sensible environments* - Action in itself helps make sense of what one is up against, as when one asks questions, tries a negotiating gambit, builds a prototype to evoke reactions, makes a declaration to test the response or probes something to see how it reacts.

Building on these characteristics, I believe sensemaking has a particular relevance in the identification and framing of issues because of two important elements: (1) the nature of issue themselves and (2) the form and processes of issue management. I will expand on each of these in turn.

1.4.2.1 The nature of issues

Moving beyond simple definitions, describing the nature and quality of typical issues reinforces why sensemaking is so useful.

Issues are typically characterized by some or all of the following qualities: (a) ambiguous and often hard to concisely define; (b) high risk for participants - both individuals and organizations; (c) fueled by contention, not consensus; (d) take place in the glare of publicity; (e) no obvious way forward; (f) involve opinion more than objective measurement; (g) emotion may prevail over 'scientific fact'; (h) need to be resolved (negotiated outcome) not solved ('right' answer) (Jaques, 2006c).

Given these qualities, sensemaking theory can bring real value to the early phases of issue management – especially labeling and selling issues, as outlined below. An issue

has been described as a gap between corporate practice and stakeholder expectations (Regester & Larkin, 2002) and this ‘expectation gap theme’ has a good alignment with sensemaking.¹³ Weick, Sutcliffe and Obstfeld (2005) put it this way: “Explicit efforts at sensemaking tend to occur when the current state of the world is perceived to be different from the expected state of the world” (p. 409).

In addition, the concept of sensemaking in helping to define the self has particular relevance to activist and advocacy groups involved in issue management. For such groups the issue or campaign itself rather than any outcome can sometimes be a primary defining motivation. This motivational concept is explored, for example, by Kozinets and Handelman (2004), West and Larue (2005) and Karagianni and Cornelissen (2006).

Similarly, the sensemaking concept of ‘plausibility rather than accuracy’ resonates distinctly within this characterization of issues. As Weick, Sutcliffe and Obstfeld (2005) commented: “Sensemaking is not about truth and getting it right. Instead, it is about continued redrafting of an emerging story so that it becomes more comprehensible, incorporates more of the observed data and is more resilient in the face of criticism” (p. 415).

1.4.2.2 Form and processes

The second important reason why sensemaking has such relevance in this context is its explicit link to action, which is central to all effective issue management. While the ambiguous and emotive nature of many issues can sometimes promote an excessive focus

¹³ The Expectation Gap theme of issue definition is discussed in detail at 1.5.2 Evolving the Taxonomy

on planning and analysis, sensemaking theory clarifies that not only must the process lead to action, but that the action itself can help make sense of the issue.

Although planning and strategy are essential elements in issue management, it is by nature a highly iterative discipline and sensemaking too emphasizes such a talk-action-talk-action flow. Additionally, the quality of sensemaking being ongoing, and the recognition that ‘sensemaking is never done’ are exquisitely aligned with the nature of issue management. It is a maxim that ‘issues never die, they only go to sleep.’ This is vividly portrayed in high profile, decades-long issue campaigns, such as the fight between the tobacco industry and its opponents (Pollay, 1990; Pratt, 2001) and the protracted confrontation between pro and anti-abortion forces (Andsager, 2000; Olavsky, 1988).

These and similar well-documented longitudinal case studies illustrate the way in which issue management campaigns can ebb and flow over the years, transitioning from outright warfare to periods of apparent truce, but always ongoing. Sensemaking helps interpret and re-interpret this constant evolution. Activist strategies to reposition issues as part of issue evolution are further explored in Chapter 2 in discussion of my paper on issue definition (Jaques, 2004a).

Turning to the work of Weick himself, the champion of sensemaking has written extensively on its application to the broad field of organizational communication (for example Weick, 1987) and it is acknowledged that his early theorization has been ‘appropriated’ to that application (Tompkins, 1987). Indeed, Walker (2006) has gone further and explored sensemaking directly as a research method for Public Relations.

Despite this, Weick and his colleagues do not appear to have associated this thinking specifically with the overall discipline of issue management. However, Weick has applied sensemaking analysis directly to the related field of crisis management. In this application he has written about the general principle of sensemaking in crisis situations (Weick, 1988) and also in specific high profile crises, including the 1949 fatal forest fire at Mann Gulch, Montana (Weick, 1993); the 1977 air disaster at Tenerife (Weick, 1990); and the 1986 Challenger launch disaster (Weick, 1997).¹⁴

Such crisis-related analysis provides legitimate insight into the theoretical foundation of issue management as a whole and, as previously described, other scholars have applied sensemaking directly to one specific sub-area of issue management, namely the identification, framing and selling of issues (though mainly in the context of organizational management). This continuing research stream is explored at 1.5.3 Labeling and Selling Issues.

1.4.3 Framing

Before leaving consideration of a theoretical research framework for issue management, I will refer to one alternative which has been proposed in this context – namely Framing. While this is not my preferred option as a theoretical concept, framing has been seriously discussed in relation to issue management and therefore merits a brief examination.

¹⁴ For a more recent analysis of sensemaking during organizational crisis see Roberts, Madsen and Desai (2007)

In the same way that sensemaking began in sociology and came to be applied in many other fields, so too framing theory developed with anthropologist-psychologist Gregory Bateson and sociologist Erving Goffman.¹⁵

It later became a major theoretical foundation in other fields, particularly media research, communication and political science. Indeed, Entman (1993) referred to its “omnipresence across the social sciences and humanities” (p. 51).

There are many definitions of framing, but for the present purposes I turn to Gamson and Modigliani (1987) who described a frame as “a central organizing idea or storyline that provides meaning to an unfolding strip of events, weaving a connection among them. The frame suggests what the controversy is about, the essence of the issue” (p. 143). Specifically a framing effect is said to occur when an issue or event is described in such a way as to emphasise a subset of potentially relevant consideration, causing individuals to focus on these considerations when constructing their opinions (Druckman, 2001).

Framing has an evident relevance for public relations in general (Hallahan, 1999) and is also has merit when applied in issue management. In this respect Mahon and Wartick (2003) detailed how framing was used to position the pharmaceutical manufacturers Johnson and Johnson as ‘victims’ in the notorious 1982 Tylenol poisoning, when unknown persons fatally laced headache capsules with cyanide. Mahon and Wartick (2003), and also Hallahan (1999), have described framing of an issue as a powerful tool in public relations, and Mahon and Wartick explored the practical application of framing

¹⁵ Systematic discussion of framing and reframing is commonly traced to the British scholar Gregory Bateson (1904-1980), particularly in the monograph *Steps to an ecology of Mind* (1972, New York, Ballentine). His theory was taken up by the American Erving Goffman (1922-1982) whose seminal work was *Frame Analysis: An Essay on the organization of experience* (1974, Cambridge, MA: Harvard University Press)

in issue management. They went so far as to conclude that framing of an issue should, in fact, be the first step for every organization in its preliminary analysis.

This approach to framing, both as labeling and as a phase of agenda-setting, is well developed in media studies (Maher, 2001). But in contrast to sensemaking, which has a distinct iterative capacity which provides for new understanding through feedback and consultation, frames are more consistent over time and new information is unlikely to significantly alter their meaning (Hertog & McLeod, 2001). Moreover Nelson and Oxley (1999) proposed that framing is effective in changing the way people think about an issue but not necessarily in changing their basic beliefs and opinion.

In the context of issue management, the intervention of headline events can occasionally change the overall frame of a major issue. For example the Three Mile Island accident of 1979 changed the frame of nuclear power from largely favourable modern progress to alarming runaway technology (Gamson & Modigliani, 1989).

Dionisopoulos and Crable (1988) also examined the Three Mile Island incident, introducing the concept of definitional hegemony to focus on the mechanisms by which discussion can be influenced in ways designed to have a policy impact, and how it applied in this case. More recently the global warming debate has triggered a rehabilitation of nuclear power, a transformation which has been described as “one of the clearest examples of framing that can be offered” (Mahon & Wartick, 2003, p. 30).

However such dramatic and high profile examples appear to be the exception and I do not believe they constitute a basis for applying a formal research theory. Accordingly, for the vast majority of public problems which come to be the focus of formal issue management, I would argue that sensemaking provides greater flexibility and interactive

responsiveness than Framing. Moreover, I believe the capacity of sensemaking to help structure a strategic rather than tactical plan provides a more adaptable and comprehensive theoretical framework.

1.5 Current Directions in Research

While the first decade of issue management was largely devoted to establishing definitions and promoting the new science and its process models, some of the longer term themes of scholarship and development for the subsequent decades were already in place.

In recent years practitioners and consultants have tended to continue to focus their writing and research mainly on issue management as a corporate discipline (Catania, 2002; Larkin, 2003; Oliver & Donnelly, 2007; Palese & Crane, 2002; Schanz 2006) and as a discipline for non-corporate organizations such as NGOs, not-for-profits and government agencies (Beaudoin, 2004; Blood, 2004; Illia, Schmid, Fischbach, Hangartner & Rivola, 2004; Minnis, 2001; Morton, 2006).

In the academic field, however, I have identified five distinct research streams beyond such direct application which emerge from the work of academics and some practitioners, namely: Alignment with Strategic Planning; Evolving the Taxonomy; Labeling and selling issues; Positioning the maturing discipline; and Migration beyond the corporation.

These distinct streams inevitably have areas of overlap, but for the purposes of analysis I will review each in sequence.

1.5.1 Alignment with Strategic Planning

The first of these research themes, which had already begun to surface in the early 1980s, was the effort to align issue management more explicitly with business strategy development, which is a challenge for both positioning and taxonomy. As previously outlined, this work began with business school academics such as John Fleming at USC (1980), Liam Fahey (1981) and William King (1984, 1985) at Pittsburgh, Rogene Buchholz at Texas and Loyola (1982a, 1982b, 1985; Buchholz et al. 1985) and James Post and his colleagues at Boston (1982, 1996). The widespread interest in this field is further reflected by later contributors including Johan Murphy at Pretoria (1989) and Bruce Perrott in Sydney (1995, 1996).

These and other business scholars have written extensively about issue management as a concept which can and should be fully integrated into the formulation and implementation of overall strategy.

They were supported in this field by a handful of leading American practitioners writing in the academic literature, including Thomas Marx of General Motors (1986, 1990, 1991) and Richard Sawaya and Charles Arrington of Atlantic Richfield (1988). This topic is further explored in Chapter 2 (2.4) in discussion of my paper on the relationship between issue management and strategic planning (Jaques, 2009).

One important element of the scholarship concerned with aligning issue management and business strategy was the introduction of new taxonomies, specifically Strategic Issue Management (SIM)¹⁶ and Strategic Issue Diagnosis (SID).

¹⁶ Not to be confused with Social Issues in Management (SIM). See for example Vogel (1986), Mahon & Wartick (2003). Strategic Issue Management (SIM) is sometimes presented as SIMS (Strategic Issue Management Systems).

This particular field has itself witnessed a distinct definitional evolution. The expression *strategic issue management* can obviously have two quite separate meanings – (a) strategically managing issues or (b) managing strategic issues – and this distinction has contributed substantially to definitional ambiguity. Yet, shortly after the establishment of issue management, the poorly defined expression Strategic Issue Management (SIM) entered into common use and was seemingly credited with an independent identity.

While early scholars and practitioners focused on defining issues and issue management, it appears the added descriptor *strategic* may have been developed in order to help position the burgeoning discipline as a strategic management function rather than to redefine either the focus or the process.

One of the earliest scholars to adopt the new Strategic Issue Management terminology was Igor Ansoff (1980) who used this as the title of a seminal paper which crystallized his thinking. Ansoff asserted that the concept of strategic issues first appeared during the evolution of strategic planning, but he made it clear that in the context of SIM, strategic simply meant important or significant. He also argued very strongly that SIM is a process not just for planning the response, but for resolving the issue. Unless those separate roles are established, he said, “SIM may degenerate into paralysis by repeated analysis” (1980, p. 134).

An exception to Ansoff’s unambiguous action-orientation is the work of Jane Dutton of the Business School at the University of Michigan, who conceptualised and described the separate idea of Strategic Issue Diagnosis (SID). Two papers, which positioned SID as a sensemaking process, argued that strategic issues require a “wider-than-decision

focus” (Dutton, Fahey and Narayanan, 1983, p. 321), and are “events which have not yet achieved the status of a decision event” (Dutton & Duncan, 1987, p. 280). Indeed these scholars described the need to avoid what they called “the boundedness of decision making” (Dutton, Fahey & Narayanan, 1983, p. 321) and went so far as to argue that SID can take place *independent* of strategy.

Sensemaking as such has a proven utility to issue management, as previously described. Yet while the SID concept has retained some currency within organizational scholarship, a search of the literature suggests it has not gained lasting academic support.

Meanwhile, the expression strategic issue management (SIM) has in many publications become virtually synonymous with issue management, leading to a mistaken perception that issue management techniques should be applied only (or preferentially) to priority or *strategic* issues and that, implicitly, the discipline has no application to local or tactical or operational issues.

Within the mainstream organizational and issue management literature there appears to be broad agreement that issue management should be a strategic management activity. This is the meaning communicated, for example, in Heath’s pivotal 1988 and 1997 books which both include Strategic Issues Management in the title,¹⁷ and which both focus on the strategic aspect of issue management rather than on the management of strategic issues. The same positioning is also the evident intent conveyed in the writings of pioneers such as Chase, Jones and Ewing.

¹⁷ *Strategic Issues Management: How organizations Influence and Respond to Public Interests and Policies* (1988); *Strategic Issues Management: Organisations and Public Policy Challenges* (1997).

In stark contrast with this consensus there is an entire lack of any agreement as to what terminology specifically characterises a strategic issue. Moreover, Dutton herself has argued: “No issue is inherently strategic. Rather, an issue becomes strategic when top management believes that it has relevance for organizational performance” (Dutton & Ashford, 1993, p. 397). This is in clear contradiction of other scholars, such as Stanley (1985), who has argued that strategic issues are, by definition, those future challenges operating within a two to three year time horizon.

Lack of an adequate distinction has permitted the expressions *issue management* and *strategic issue management* to become virtually interchangeable, spurred on by the notion that the only issues which merit management attention are strategic issues. In reality issues may be tactical, operational or strategic, and issue management as a discipline can be equally relevant in addressing each category. Responsible management *should* consider all possible issues and contingencies, not just those in high priority areas.

In other words, not every issue is a strategic issue and not all issue management is strategic. Or looked at another way, not all issue management is management of strategic issues (although all issue management should be strategic in its approach and implementation). And of course not all strategic management involves dealing with issues.

Absence of distinctive terminology to convey this aspect of issue management has led to an almost circular or self-fulfilling proposition, i.e. strategic issue management deals with strategic issues, therefore issue management is strategic. Indeed, King has proposed the rather unhelpful definition: “Strategic issue management is a process whereby strategic issues may become an integral element of strategic management” (1984, p. 529).

Following this approach, any issue strategically managed would constitute part of strategic management. But issue management as a discipline must make its own case for being strategic, and therefore its own case for being positioned to contribute to strategic planning.

A product of this present terminological inadequacy is that *strategic* has become a synonym for *important*, and as a result the management of all important issues has become identified as strategic issue management, and by association can seemingly be assumed to be part of strategic planning. Future research is needed to determine an expanded, more versatile, taxonomy of issues in order to provide a better definition of those which are important or key or major, without defaulting to the adjective *strategic*. This topic too is further explored in Chapter 2 (2.4) in discussion of my paper on the relationship between issue management and strategic planning (Jaques, 2009).

1.5.2 Evolving the Taxonomy

In the same way that scholars are struggling to find terminology to distinguish *strategic* issues and align to strategic management, some of the other taxonomies within issue management were also an early area of study and remain a rich vein for research.

Within the overall review of a taxonomy of issue management, there are two distinct areas of discussion – an improved taxonomy to *label* what an issue is and what issue management is, and a second separate area which is *labeling* particular issues. The latter of these will be discussed in detail in the following section, 1.5.3 Labeling and selling issues.

With regard to what is an issue, the pioneer Howard Chase and his colleague Barry Jones established the early definition that an issue is “an unsettled matter which is ready for decision” (Chase, 1984a, p. 38). Over the ensuing 20 years, an issue has been defined in many different ways which generally fall under three broad headings.

As long ago as 1994, Wartick and Mahon reviewed the literature and identified three distinct definitional issue constructs – the Controversy theme, the Expectational Gaps theme and the Impact theme. My analysis develops and amends this approach, substituting for the first concept the description Disputation theme, as I believe the word controversy can itself be perceived as a loaded term.

The disputation theme

Following the lead provided by the 1984 Chase-Jones definition, referred to above, a number of scholars and commentators introduced other definitions developing the disputation theme. A typical early example of this approach would be Crable and Vibbert: “An issue occurs when a problem becomes focused in a particular question that calls for dispute and some sort of resolution” (1986, p. 62). Others substituted alternative qualifiers such as “a public dispute in which the public interest is unclear” (Stanley, 1985, p. 18) or which “leads to confrontations and political battles” (Lerbinger, 1997, p. 318).

Unfortunately the disputation approach can become very general and also rather passive. This limitation is exemplified in a more recent presentation of the disputation theme from Heath and Combs: “An issue is a contestable difference of opinion, a matter of fact, evaluation or policy that is important to the parties concerned” (2006, p. 262).

Yet the disputation theme has some real merit, particularly insofar as it emphasises that an issue demands, by definition, a dispute between two or more parties, “usually over allocation of resources or the treatment or portrayal of groups in society” (Hallahan, 1999, p. 217).

This approach supports the fundamental concept that no issue exists if the matter under discussion is so self-evident that there are no contending opinions. The principal limitation of this theme is that many disputes exist in society which would not be classified as ‘issues’ in the sense of requiring the full application of formal issue management. In other words, while every issue involves matters of dispute, not every dispute constitutes an issue.

The expectation gap theme

The concept of an issue being a gap in expectation is even more simply presented. This theme too was originally developed very early (for example Ryberg, 1982) and came to be defined as a gap between the actions of the organization concerned and the expectations of its stakeholders (Issue Management Council, www.issuemanagement.org. n.d.; Regester & Larkin, 2002).

This theme has retained some currency, particularly in the practitioner literature, where it has the merit of simplicity. It also has strong support among the activist/NGO community and in the field of Corporate Social Responsibility, where corporate performance versus stakeholder expectation is a primary focus. Furthermore, this approach provides a strong alignment with the sensemaking construct (as discussed at 1.4). However, the gap theme does not appear to have retained continuing support in the

scholarly literature as a preferred definition of an issue. I suggest this is because the concept of an expectation gap it is too general, lacks sufficient specificity, and is very subjective. And like the disputation theme, it can also be a very passive concept. A gap in stakeholder expectation can certainly *lead* to an issue, especially if the gap and/or the stakeholder are of sufficient importance. And analysis of the gap (as in sensemaking theory) can help *characterize* an issue. But I don't believe the case has been made that the gap itself constitutes an issue as such.

The impact theme

The third approach, the impact theme, was typified very early in work then being done by the Conference Board,¹⁸ which introduced what it called "impact taxonomy." The Board's adopted definition was: "An issue is a condition or pressure, either internal or external to an organization that, if it continues, will have a significant effect on the functioning of the organization or its future interests" (Brown, 1979, p. 1). A subsequent paper by Robert Moore of the Conference Board defined an emerging issue as "a trend or condition, internal or external, that, if continued would have a significant effect on how the company is operated over the period of its business plan" (Moore, 1979, p. 43).

The following year Ansoff proposed the alternative qualifier: "... which is likely to have an important impact on the ability of the enterprise to meet its objectives" (1980, p. 133).

¹⁸ The Conference Board is a New York-based not-for-profit international business research organization. The Board's influential 75 page research report by James Brown (1979) was entitled *The Business of Issues: Coping with the Company's Environments*.

The impact theme has subsequently been much adapted and modified in a variety of forms. For the purposes of the present study, I propose to use one of the most recent and effective modifications of the Conference Board's early version:

An issue is a condition or event, either internal or external to the organization which, if it continues, will have a significant effect of the functioning or performance of the organization or on its future interests (Reger & Larkin, 2002, p. 42).

This impact approach has a limitation in that it is less applicable to community/NGO groups, which sometimes elect to participate in an issue which they feel impacts society as a whole rather than impacting their particular organization. However it has some very strong merits which reinforce its candidacy as a leading working definition.

The first of these merits is that the impact theme in general, and the Reger and Larkin presentation in particular, emphasizes the dynamic nature of an issue. Unlike the passivity of the other two approaches, which focus on an existing dispute or gap, the impact theme highlights the continuous nature of the issue as a moving and developing risk. Moreover its future focus on potential effect emphasizes the importance of intervention, which is very much aligned with a generally more proactive modern response.

Perhaps most importantly, the impact definition also provides a very clear statement that the focus is, and must be, on what is *significant*. While the general characteristics of issues were summarised at 1.4.2.1 the Nature of Issues, the emphasis on significance within the impact approach is critical. Organizations face problems every day and there are appropriate problem-solving tools for most applications. A key challenge is that the

task is sometimes made more difficult by the almost careless use of the word ‘issue.’¹⁹ The great strength of the impact theme in issue definition is its emphasis that issue management is not a general-purpose problem-solving tool, applied to every dispute or gap in expectation, but is most effectively employed when the impact is, or is likely to be, significant.²⁰

In addition to these three overall approaches to defining an issue, there have also been efforts to define sub-categories of issues. The most important of these is *strategic issues* (as previously discussed), but there are other sub-classifications, such as

risk issues – Where there is a *real or perceived* risk to public health, safety or the environment (Regester & Larkin, 2002)

public policy issues – where a specific course of action taken collectively by society or by a legitimate representative of society, which reflects the interests of society or particular segments of society, affects personal or institutional destiny (Heath, 1997).

In a similar vein Crable and Vibbert (1986) describe four types of issues;

issues of fact – where facts are said to have unquestioned, universal acceptance, for example an issue resulting from a shortage of raw materials, where there either is or is not such a shortage.

issues of definition or category – where the issue revolves around competing definitions, for example where a company is accused of ‘price

¹⁹ The importance of distinguishing between an issue and a problem is discussed in Jaques (2007b) although that paper is not included in the body of work submitted with this exegesis.

²⁰ For practical application of the impact theme, see elaboration of my original formula Problem + Impact = Issue at 2.1 in discussion of my monograph (Jaques, 2000a)

gouging’

issues of value – which involve judgment of whether something is good or bad, ethical or unethical, right or wrong, responsible or irresponsible, such as when a company’s products are put to questionable use, for example the manufacture of Agent Orange

issues of policy – which involve disputes over what actions should or should not be taken in a particular situation

Although detailed discussion of these and other similar constructs is beyond the scope of this exegesis, these examples and the previous definitions reinforce the scope and breadth of the definitions.

Yet, while I would argue that there is now reasonable consensus about what is an issue (or more accurately what is encompassed within the definition) there is virtually no consensus at all on how to define issue management. There have been many attempts, some of which are captured below where I have categorized and tabulated these definitions under two distinct headings (Fig 2). The first category reflects the early emphasis on participation in the public policy process. The second, generally more recent category, emphasizes a focus on internal processes.

| Issue Management Comparative Definitions | |
|---|--|
| Public Policy Process Approach | Internal Process Approach |
| Issue management is the management of organizational and community resources through the public policy process to advance organizational interests and rights by striking a mutual balance with those of stakeholders and stakeholders (Heath & Coombs, 2006) | Issue management is the management process whose goal is to help preserve markets, reduce risk, create opportunities and manage image as an organizational asset for the benefit of both an organization and its shareholders (Tucker, Broom & Caywood, 1993) |
| Issue management is systematic identification and action regarding public policy matters of concern to an organization (PRSA, 1987) | Issue management is the process by which the corporation can identify, evaluate and respond to those social and political issues which might significantly impact on it (Johnson, 1983) |
| Issues management is a process to organize a company's expertise to enable it to participate effectively in the shaping and resolution of public issues that critically impinge upon its operations (Arrington & Sawaya, 1984a) | The overriding goal of an issues management function is to enhance the current and long-term performance and standing of the corporation by anticipating change, promoting opportunities and avoiding or mitigating threat (Renfro, 1993) |
| Issues Management is not the management of issues through public policy forums or management of the public policy process itself. It is the management of an institution's resources and efforts to <i>participate</i> in the successful resolution of issues in our public policy process (Ewing, 1987) | Issue management is the orchestrating of a positive plan for dealing with issues rather than merely reacting to them. It is a tool used in corporations and trade associations to come to an earlier and more constructive understanding of the issues an organization or industry will face in the next few years (Coates, Coates, Jarratt & Heinz, 1986) |
| Issues management is a program which a company uses to increase its knowledge of the public policy process and enhance the sophistication and effectiveness of its involvement in that process (Public Affairs Council, 1978) | Issues management is the strategic use of issues analysis and strategic responses to help organizations make adaptations needed to achieve harmony and foster mutual interests with the communities in which they operate (Heath, 1997) |
| Issue management is the capacity to understand, mobilize, coordinate and direct all strategic and policy planning functions, and all public affairs/public relations skills, toward achievement of one objective: meaningful participation in creation of public policy that affects personal and institutional destiny (Chase, 1982) | Issue management attempts to minimise surprises which accompany social and political change by serving as an early warning system for potential environmental threats and attempts to promote more systematic and effective responses to particular issues by serving as a co-ordinating and integrating force within the corporation (Wartick & Rude, 1986) |

Fig 2: Table of comparative definitions

In addition to these broad categories, this presentation of definitions also illustrates, inter alia, the evolution of issue management and its migration beyond just the corporate environment. Meanwhile, an added level of complexity overlaying these widely ranging definitions has been the introduction of some novel constructs which attempt to conceptualize new aspects of the discipline.

| Novel constructs and some of their leading advocates | | |
|---|---|--|
| Anticipatory Management | Ashley, 1995, 1996; Ashley & Morrison, 1996, 1997 | Anticipatory management comprises tools and techniques to anticipate and shape an organization's future. It is built on an intelligence-flow decision processed model which focuses on uncovering emerging issues to afford organizational leaders the opportunity to evaluate and make timely decisions based on the issue's seriousness and potential impact on the organization (Ashley & Morrison, 1996) |
| Risk Issue Management | Leiss, 2001 | Whereas risk management responds to health and environmental risks as assessed by scientific measurement, risk issue management responds to risk controversy as played out in society at large among influential stakeholder interest groups competing to steer the risk management outcome towards a preferred policy option (Leiss, 2001) |
| Reputation Risk Management | Larkin, 2003 | The objective of reputation risk management is to recognize that uncertainty around current and emerging risks poses both threats and opportunities for reputation, and to be effective seeks to reduce the former and increase the latter (Larkin, 2003) |
| Environmental Issue Management | Heugens, 2006; Hoffman & Ocasio, 2001. | Strategic environmental issue management responds to forthcoming events in the environmental domain or involving environmental stakeholders which are likely to have an important impact on the ability of the enterprise to meet its objectives (Hoffman & Ocasio, 2001) |
| Strategic Issue Management | Ansoff, 1980; Camillus & Datta, 1991; Reeves, 1993; Schwarz, 2005 | Can be viewed either as strategically managing issues or managing strategic issues (see detailed discussion at 1.5.1 Alignment with Strategic Planning) |

Fig 3: Novel Constructs

The overall definitional challenge is reflected by William Miller (1987, p. 125) who wrote: “Issue management isn’t quite public relations. Neither is it government relations, nor public affairs, nor lobbying, nor crisis management, nor futurism, nor strategic planning. It embraces all of these disciplines, and maybe a few more.”

Miller’s quandary is cited by Heath (1990), who then offered his own interpretation of the same challenge. “Issues management is not just communication, strategic planning, monitoring, forecasting or refining and implementing codes of conduct. It is all these and more” (p. 40).

In the same year, Heath and a colleague said no definition of issue management has achieved consensus (Heath & Cousino, 1990. p. 6), and seven years later he confirmed the same conclusion (Heath, 1997, p. 5). No subsequent development suggests that after many more years we are no closer to consensus.

However, although Heath’s observation is undoubtedly true, its significance is less clear. The preceding summary of definitions illustrates and confirms that there is little consensus on exact wording. But I would argue that this lack of consensus is not necessarily an insuperable obstacle. In fact the existing large body of issue management literature would suggest it certainly has not hindered a very active and productive scholarly and practitioner debate.

While lack of consensus on an agreed definition of issue management may provide an opportunity for future research, my own study has led me to the conclusion that much of this argument is in reality about the actual or potential positioning of issue management relative to other related activities. In this respect I have argued that definitions provide a useful starting point and genuinely merit appropriate discussion, but that they are

insufficient alone for a full understanding (Jaques, 2007a). (In an original analysis of definitions in the field of crisis and disaster management, Rockett (1999) concluded that it did not matter, for practical or theoretical purposes, how terms are defined, so long as there is agreement, at the point of definition, as to their meaning)

In my view, an excessive focus on ‘dueling definitions’ is not very helpful, and research should instead focus on clusters of activity and their inter-relationship. In other words, to describe communication disciplines in conceptual terms of what they are and what they contribute rather than through a cleverly concise formula of words. This approach is fully expanded in my relational model (Jaques, 2007a) discussed in Chapter 2 (2.4). In addition my papers on new terminology (Jaques 2002a, 2004b), also discussed in Chapter 2 (2.2), suggest an alternative taxonomy to replace the old concepts of proactive and reactive issue management.

1.5.3 Labeling and selling issues

The problems relating specifically to taxonomy and aligning issue management relative to strategic planning lead directly to the third major research stream, namely the labeling and selling of the broader issue management concept itself.

Two of the direct forebears of issue management were Forecasting and Future Studies, so it was logical that issue scanning and forecasting were key areas of early research during the first decade of both practitioner and academic literature (for example Ewing, 1979; Fahey & King, 1977; Fahey, King & Narayanan, 1981; Fleming, 1981).

More recently a great deal of practitioner focus has moved on through strategy development to the action/implementation phase, while at the same time a major stream

of academic research has focused in much more depth on the early phases of the issue management process. Based on a number of research literatures, including sensemaking, it would appear this element has reverted from a communication context back into the business school environment.

As previously described, there are persuasive reasons why sensemaking has relevance for what might be referred to as the 'front end' of issue management, such as issue scanning, identification and characterization. While communications scholars and practitioners have explored the mechanical processes of issue scanning (for example Brown, 1979; Coates, Coates, Jarratt & Heinz, 1986; Coombs, 1999; Davidson, 1991; Ramsey, 1993) and have explored both numerical and non-numerical methods for assigning priorities (for example Day & Schoemaker, 2005; Dyer, 1996; Ferguson, 1994; Gollner, 1983; Murphy, 1989), the sensemaking literature provides an in-depth perspective into how these issues are 'labeled' and how the way in which they are 'sold' to senior management can substantially influence the resources applied and the likelihood of success.

Early work in this field was led by the management scholar Jane Dutton (Dutton, 1986, 1988; Dutton & Ashford, 1993; Dutton, Ashford, O'Neill, Hayes & Wierba, 1997; Dutton & Duncan, 1987a, 1987b; Dutton, Fahey & Narayanan, 1983; Dutton & Jackson, 1987; Dutton, Walton & Abrahamson, 1989; Jackson & Dutton, 1988).

The sensemaking scholarship of Dutton and her colleagues, which draws on the pioneering work of Weick (previously described), is extensive and comprehensive, though sometimes couched in a somewhat opaque academic framework. It is also important to note that Dutton's conception of a *strategic issue* relates primarily to

business/investment problems, not *public issues* in the broader sense (see for example Dutton, 1988). Yet the fundamental concepts developed within this organizational communication literature have real utility for practical issue management.

Building on her early work related to the identification and diagnosis of strategic issues (Dutton, Fahey & Narayanan, 1983), Dutton developed a taxonomy of ‘crisis and non-crisis issues’ (1986) and concluded that the more an issue is perceived to be a crisis (or likely to become a crisis) the greater the resources devoted to that issue and the greater the centralization of authority by top-level decision makers.

Her subsequent and widely cited paper with Susan Jackson (1987) proposed that the meaning of an issue is not inherent in the issue itself, and that the organization’s internal environment has a major effect on the meanings that evolve. Furthermore, that events labeled as crises represent different meaning and different frames of understanding than events labeled as opportunities, and that the meaning given affects both the course of action an organization selects and the implementation of that action.

This significant conceptual model was then tested by the authors in two studies, one of managers attending executive development courses and the other involving MBA alumni of a large university (Jackson & Dutton, 1988). Broadly, the research supported their theory, based on cognitive categorization, that managers respond in distinctly different ways depending on whether the issue is discerned as a threat or as an opportunity. The researchers argued that *threat issues* are perceived as negative events, where managers feel a low level of control because of the context of the actions of others. By contrast *opportunity issues* are perceived as positive events, with strong feelings of

control, autonomy to take action and with a high perceived potential for successful resolution.

They also found a distinct threat bias, namely that respondents were quick to acknowledge the presence of threats and were reluctant to disavow them, but were quick to disavow the presence of opportunities and needed to be convinced of their presence

Much of the later writing in this field by Dutton and her colleagues focused on development and explication of this fundamental concept – that decision-makers sort issues into categories, and that consequent labeling has a vital influence on how decisions are made and how organizations select and resource response strategies.

Following Dutton's lead, and in particular her influential paper with Susan Jackson (1987), research in this field has been further developed by a number of other scholars, almost all from an organizational management perspective.

One of the most important aspects of this subsequent scholarship has been research taking the theoretical concept of sensemaking in relation to organization processes for issue scanning and interpretation and applying that to measurable organizational performance. I will refer briefly to five major empirical studies within this research stream which illustrate this progression.

Firstly, following some earlier work in the health management environment (Ashmos, McDaniel & Duchon, 1990, Thomas & McDaniel 1990) Thomas, Clarke and Gioia (1993) surveyed CEOs in Texas hospitals in order to articulate and empirically investigate linkages between sensemaking processes and organizational performance in the strategic arena. Using a basic model represented as a scanning-interpretation-action-

performance sequence, they found that there are demonstrable links between sensemaking and variations in organizational performance.

Building on this study, and their own earlier work (and Gioia & Thomas 1996), Ashmos, Duchon and Bodensteiner (1997) validated for the first time by empirical research the hypothesis of Dutton and Jackson (1987) that differences in the way issues are labeled opportunity or crisis affects the degree to which top level executives participate in deciding the issues. Moreover, they posited from their research a very significant conclusion for practical issue management, namely that the way managers frame issues and the language they use to present issues to others in the organization have significant impact on how those issues will be decided and ultimately the kinds of solutions devised by participants.

A later study by Ashmos, Duchon and McDaniel (1998) suggested there is in fact no significant variation between issue interpretation and issue participation as hypothesized by Dutton and Jackson (1987) though the direction of the relationship was as predicted. However they did observe a direct link between rule orientation and issue interpretation – namely that those in rule-oriented organizations tended to see issues as threats, whereas those in less rule-oriented organizations could see an issue as an opportunity.

About the same time, in another research project with application for practical issue management, Dutton and Ashford took their issue selling hypothesis (1993) and with colleagues (Dutton, Ashford, O'Neill, Hayes & Weirba, 1997) completed two empirical studies into what motivates middle managers as they decide on selling strategic issues to top managers. The combined research concluded that middle managers' discretionary issue-selling behaviours are important for strategic adaptation, and that their reading of

the organizational context is a major determinant of how they hold back or bring forward information of strategic value to the organization.

Finally, the important area of managerial discretion and organizational context in respect to issue interpretation was further explored in a major case comparison study of the Canadian oil industry (Sharma, Pablo & Vredenburg, 1999). Analysing the environmental responsiveness over a 15 year period of seven companies to what they call “the business-natural environment interface” the authors found that the primary dimensions of responsiveness on which the subject organizations split were in the degree of discretion reflected in the actions taken and the extent to which firms attempted to take control of their dealings with environmental issues. In terms of practical application of their research, the authors concluded that organizations that create a context in which their employees are influenced to embrace environmental issues as opportunities tend to reap significant benefits from a number of sources – lower cost of input materials, higher process effectiveness, lower energy use, waste use and recycling, differentiated products, and higher levels of corporate reputation and goodwill.²¹

Unfortunately, much of this sensemaking writing on issue scanning and interpretation which can be applied specifically to issue management has been confined to the organizational literature (such as *Strategic Management Journal*, *Academy of Management Review*, *Administrative Science Quarterly*, *Journal of Applied Business Research*, and *Journal of Management Studies*) where it is considered primarily in relation to strategic issues linked directly to strategic organizational planning.

²¹ For a more recent study on how individuals, as environmental champions, convince and enable organizations to turn environmental issues into corporate programmes and innovations, see Andersson & Bateman (2000).

As a result, applied sensemaking theory has been somewhat neglected in the mainstream public affairs/communication literature. I believe there would be real merit in this approach being reconceptualized, specifically in relation to issue management as a defined discipline, and repositioned in the communication literature to promote both academic and practitioner understanding of the crucial step between issue identification and strategy development.

1.5.4 Positioning the maturing discipline

The last two research streams to be discussed – positioning the maturing discipline and migration beyond the corporation – are less easy to delineate in terms of scope and reflect considerable overlap and commonality. As a result, considering them separately demands some arbitrary distinctions. Yet that does not make these final two research streams any less significant.

The first of these – positioning the maturing issue management discipline – flows directly out of the preceding discussion of definitions and taxonomies, where the passage of time has seen distinct change.

In the same way that novel constructions have been put forward to expand or redefine issues and issue management, other management activities have evolved in parallel – some of them to directly compete or impinge on areas traditionally occupied by issue management.

These parallel developments include: Stakeholder Relations/Management; Risk Communication; Environmental Risk Management; Community Outreach; Government Relations; External Affairs; Corporate Citizenship; Public Policy Management;

Reputation Management; Mutual Gains Dispute Resolution; Disaster Prevention; Crisis Management; Corporate Social Responsibility; Triple Bottom line Reporting; and Managing Sustainability.²²

While a full analysis of each of these is outside the scope of this exegesis, there is real value in attempting to understand some of the reasoning behind these parallel/overlapping developments.

Clearly there is much more to this than management ‘fashion’. One important factor is a response to changing societal expectation, and this is considered in the following section (1.5.5) on the migration of issue management beyond the corporate environment. Another part of the problem here lies with the multi-faceted and somewhat fluid nature of issue management. As previously described, there is reasonably good consensus on what an issue is, but little on what issue management is. Therefore the discipline itself is vulnerable to encroachment or dilution by other activities.

Moreover, the fundamental purpose of issue management contains, for some people, a negative connotation which fuels support for apparent substitutes.²³ This negative connotation is most often presented as a perception of issue management as unethical or manipulative, as exemplified in Edward Bernays’ notorious and much-cited characterization of public relations as ‘engineered consent’ (Bernays, 1947).

²² For definitions of each of these activities see the Encyclopedia of Public Relations (Heath, 2005)

²³ The question of ethics in issue management is discussed in Jaques (2002b) although this paper is not included in the body of work submitted with this exegesis. More recently this important relationship has been explored in detail by Bowen and Heath (2005)

This ethical concern was present from the earliest days of issue management and was well expressed by the American scholars Jeanne Logsdon and David Palmer (1988) writing in the *Journal of Business Ethics*.

We agree that issues management can help to integrate social responsibility and responsiveness into decision-making, but much more attention must be given to the role of ethical norms and principles in achieving this integration. We are concerned that issues management is being praised as the *benign* tool to implement desirable social performance without a full exploration of its less-than-benign potential (p. 191).

They said it was critical for the development of issues management that practitioners and scholars consider the potential to manipulate adversely the evolution of social issues and public policy and accordingly develop norms and guidelines to minimise such practices

This approach is similarly reflected in the effort by the Dow Chemical Company in the 1990s to entirely replace the phrase issue management with Opportunity Management. This bold, though ultimately unsuccessful, move (cited in Jaques, 2002a) was indicative of the mood to reposition the discipline.

Another response has been to create impetus for the development of competing activities (such as listed above), but this area too remains very fluid and is itself subject to ambiguity and encroachment. For instance the 'communications function' now often refers to activities within the IT department, while the expression Risk Management is reserved by some companies exclusively for financial risk communication, and thus resides solely in the Treasury/Credit function.

In the same way, the ambiguity surrounding issue management is further heightened as issue management itself evolves from simply responding to and participation in public policy to the application of issue management tools and processes to a range of other corporate external activities. These would include marketing support, branding, crisis prevention and product promotion, as well as internal tasks, such as selling a proposed merger, promoting a voluntary redundancy programme or union negotiations over pay and conditions.

And finally there is the very real – though often unhelpful – element of what is fashionable in management. For example Triple Bottom Line reporting enjoyed a period as ‘activity de jour’, but this was largely supplanted by a renewed focus on Corporate Social Responsibility (CSR), which in turn appears to be fading in the face of a rising popularity of Managing Sustainability and similar concepts.

The impact of this element of ‘fashion’ may also be reflected in recent trends in the scholarly literature. It is significant that during ten years since Heath’s book (1997) there were no major new texts devoted specifically to issue management, while Crisis Management and the other activities listed above have seen a veritable flood of new publications.²⁴

Returning to this positioning as a research stream, some scholars have explored the field by attempting to more fully define and explicate some of the competing activities (for example Ashley, 1995; Carroll, 1999; Heugens, 2006; Larkin, 2003; Ledingham, 2006) or by attempting to link or directly compare two or more of the key activities (for

²⁴ A revised edition of Heath’s 1997 text, co-authored with Michael Palenchar, was published in the United States just as this exegesis was due for completion. It was not yet available in Australia and accordingly is not included in the references.
Strategic Issues Management: Organizations and Public Policy Challenges. Sage, 2008

example Bronn & Bronn, 2002; Camillus & Datta; 1991, Fleming, 1980; Sawaya & Arrington, 1988).

Others have attempted to demonstrate a higher level approach, for example presenting a number of related activities in a relational construct (Jaques, 2007a) or positioning issue management as an umbrella discipline. Robert Heath is a leading proponent of the latter approach. He argues, for example, that crisis management is a *part* of issue management and not vice versa, indeed that crisis management is actually a *function* of issue management (Heath, 1997, p. 289). He also believes that an excessive focus on defining and positioning individual element activities is a mistake.

Issue management periodically has an identity crisis. I think that comes from times when it thinks small. For example, the Corporate Social Responsibility literature is robust, but I see it as part of issue management, not a competitor. Since 1997, in my *Strategic Issue Management* book, I have continued to argue that Corporate Responsibility is one of the pillars of issue management, but is not issue management. It is a response to what Sethi called the legitimacy gap, and a communication gap. Thirty five years ago, under fire, companies continued to do business as usual and issued a brief statement blasting their critics. Now the ballgame is quite different, but it should not be limited to changes/improved CR standards alone. There are issues to be worked that need dialogue. I see all of this as one fabric, under issue management, not such that any part can stand alone. It all relates to the best way to manage issues to make society more fully functioning and to make society more fully functioning so that issues can

be solved (Robert Heath, personal communication, email, 22 October, 2007).

Unlike some of the other research streams, where the direction if not the ultimate destination is reasonably clear, this challenge of positioning issue management remains volatile and very fluid. As will be described in Chapter 2, a number of my own submitted writings have been designed specifically to help bring fresh clarity and focus to this debate.

1.5.5 Migration beyond the corporation

The fifth and last of these research streams, migration of issue management beyond the corporate environment, has been a very distinct evolutionary change. I would argue that it has been a healthy development which has helped invigorate and expand the discipline, and which reflects to a large degree both the changing nature of issue management and also society's maturing expectations in terms of transparency and participation.

Initially issue management began as a corporate response to adverse public policy and the desire to move from reaction to participation. This eventually led to both business and government using issue management processes to promote their positions.

This also led to consumer and activists groups utilizing issue management processes not only to resist big business and big government, but to demand greater public participation. And this in turn led to an increased expectation that big government and big

business *should* provide for greater public participation²⁵ and issue management processes began to be used by big government and big business to facilitate that participation.

At the heart of this evolution is a dramatic change in societal expectation. As previously stated, the definition of an issue as a gap between corporate practice and stakeholder expectations (Regester & Larkin, 2002) has retained strong NGO/activist support, and over the last 20 years the nature of that expectational gap has undergone major changes. For instance it is clear that some of the novel constructions previously mentioned – such as Stakeholder Relations/Management, Risk Communication, Environmental Risk Management and Community Outreach – represent corporate responses to this increasing demand for participation. And it is equally clear that organizations beyond the corporate environment are adopting and expanding these concepts, as well as tools such as issue management, in the process of acting to address these new societal expectations.²⁶

Nowhere is this changing expectation of participation more evident than in the area of environmental issues, where the key reasons were succinctly itemized by Yosie and Herft (1998). They said forces driving the evolution of environmental stakeholder processes include: a lack of public confidence and trust in the environmental decision-making of many government agencies and corporations; the increasing transparency of institutions whose decisions affect environmental quality; greater societal expectations for improved environmental quality; the enhanced ability of citizens to participate in

²⁵ For example planning approval processes in many western jurisdictions now require evidence of public participation and/or consultation as a pre-condition of application.

²⁶ See my paper on the activist convergence with issue management (Jaques, 2006b) discussed in Chapter 2 (2.3).

stakeholder processes; the growing diffusion of information technology and an associated decentralization of decision-making in large institutions; and policy commitments made by government agencies and industries to expand stakeholder participation in their decision-making processes.

While their overview was developed specifically to support an exploration of stakeholder processes in environmental decision-making, it provides an excellent template to help explain the broader maturing of issue management and participation, both inside and beyond the corporate environment.

And as these shifts have taken place, so too has issue management migrated to become a process and tool for all the different sectors concerned, from business to government to NGOs and activists. A number of research streams fall within this broader category of how issue management is migrating beyond the corporation and indeed how, in some cases, it is being explicitly turned against the very idea of the corporation (see Academic Activism section below). Some of these subsidiary research streams have seen extensive scholarship over many decades but, in the interests of brevity and currency, the citations below will refer mainly to work published in the last ten years.

Activist engagement.

The first of these subsidiary research streams focuses on collaboration between corporations and NGOs, sometimes referred to as activist engagement. By working with activists and other stakeholders (Yaziji, 2005b, called it *Gaining a Competitive Advantage by Sleeping with the Enemy*) the tools and processes of issue management have increasingly spread beyond the corporate environment, not least simply because of the need for common ground, common language and common techniques (for example

Argenti, 2004; Burchell & Cook, 2006; Crane, 1998; Jaques, 2006b; Livesey, 1999; Plante & Bendell, 1998; Taylor, Vasquez & Doorley, 2003).

Government adoption

The second area which has seen migration of issue management techniques is among government legislatures and government agencies, where the tools and processes are used, not to resist or modify public policy as originally conceived by the corporate founders of the discipline, but to promote and implement such policies. For example, Minnis (2001) has described the adoption of issue management by public sector wildlife management organizations in the United States. The goal of issue management, she said, “is to help conservation agencies produce wildlife management plans that meet conservation objectives while affording the maximum support by and service to stakeholders” (p. 988).

Similarly, Ferguson (1993) has described the use of issue management by Canadian Federal Government agencies, and Galloway (2005) has examined its application by Australian local governments in community engagement.

Scholarship in this field also addresses the growing use of issue management by government agencies to promote policies in relation to specific controversial issues, such as genetically modified organisms (Brainard & Siplon, 2002; Henderson, 2005), or to respond to the aftermath of crisis situations such as a major public health scare (Gregory, 2005; Smith, 1991) or a collapsing international reputation (Ogbandah, 1999).

NGOs

The third sub-area of scholarly research, which is one of the strongest, relates to the way in which NGOs and activists have not only adopted issue management processes to drive their own issues, but have used such techniques to position themselves as a major force in the setting of policy and regulations, taking the role described by Maclean and Nalinakumari as ‘the New Rule Makers’ (for example Beaudoin, 2004; Cameron, Campo & Brossard, 2003; Doh & Guay, 2006; Maclean & Nalinakumari, 2004).

Community Groups

Beyond high profile and sometimes well-funded activists and NGOs is another area of research bearing on the migration of issue management, namely the adoption of these tools and processes by loosely structured community groups, often assembled around opposition to a particular policy or proposal. This field of research has a strong case-study bias (for example Demetrious, 1999, 2002; Galloway, 2005; Jackson, 2000; Mackey, 2001a).

Impact of technology

Extending across most of the previously mentioned areas is another research stream which supports migration of issue management beyond the corporation, namely the democratization of the discipline. This has been made possible largely by developing communication technology, which has dramatically altered the balance of power between have’s and have-nots. Research into the impact on issue management by the Internet and other new communication technology is very extensive and has grown rapidly (for

example Blood, 2000; Bray, 1998; Coombs, 1998; Greene, 2001; Heath, 1998; Illia, 2003; Kahn & Kellner, 2004; Taylor, Kent & White, 2001; Turnbull, 2001).

Academic activism

A final field of research in this area, which bears tangentially on the migration of issue management beyond the corporate environment, is the work of activist academics who analyse the use of issue management by corporations and the consequential issue management response of activist organizations. Some of this writing can best be described as ‘attack activism’ and forms part of the very extensive, stand-alone anti-corporate/anti-globalization movement. Yet, while this broader area of research lies outside the immediate field of issue management, it clarifies the way issue management is used by both ‘sides.’ It also extends our understanding of how issue management has migrated from its original corporate conception to become a tool for direct attack on companies and the entire structure of the corporation (for example Beder, 1997, 1999, 2006; Lubbers, 2002; Starr, 2000; Tesh, 2002).

1.6 Chapter Summary

In order to help bridge between the academic and practitioner perspectives, this chapter has explored the birth and development of issue management, particularly its evolution from a primarily corporate focussed practitioner activity into a broadly based academic discipline. This analysis considered possible theoretical frameworks for the

maturing discipline as well as setting out in detail some of the key current directions in research. In addition this chapter introduced a fresh conceptual approach to the way in which issues and issue management can be categorized and also introduced five key research themes which underlie the development of the field. Chapter 2 considers each of these subjects in discussion of my submitted body of published work.

Chapter 2 - Review of Publications

Introduction

Issue management has two distinct facets, providing both the technical and intellectual authority which has enabled it to evolve within the communication and management fields as a scholarly and practitioner discipline. On one level issue management has developed as a sophisticated suite of proven tools and processes, and on the other level it has become a comprehensive discipline which can deliver effective strategies to deal with the challenges and opportunities facing any organization.

The published works submitted with this integrative essay (Part Two) and analysed in this chapter, reflect this broad evolution and also the migration of issue management beyond its early corporate perspective to other areas of enterprise, particularly non-government organizations (NGOs). As outlined in Chapter 1, the published works are presented both individually and as a sustained, cohesive thesis, providing intervention into the knowledge field within the framework of four original themes as follows:

- 2.1 Improving understanding and application of formal issue management models and process.
- 2.2 Adding new tools to the core issue management technology.
- 2.3 Explicating and analyzing growing NGO/Activist use of the discipline.
- 2.4 Repositioning issue management in relation to crisis management and other management disciplines.

I created these categories to allow my writings, and those of others in the field, to be assigned into manageable areas aligned with disciplinary expectations, both for

convenience of analysis and also to identify and explore common concepts and conclusions.

The first two themes focus on issue management as a suite of tools and processes. The second two themes focus on developing and advancing their application as part of a fully integrated discipline. Each is considered in turn, along with my associated publications.

2.1 Improving understanding and application of formal issue management models and process

As described in Chapter 1 (at 1.1 The Birth of Issue Management), formal issue management models and processes have, from the earliest days, been a feature of the discipline, and scholarly research in this area is a very important component of its continuing development. This section covers five submitted publications, including my first book and first peer-reviewed paper.

These first two were published in 2000 and flowed directly from the research field which focuses on the use of models and graphic representations of key issue management processes. After some years of work in Government and Corporate issue management I had come to some key realizations which motivated these early works and which have been consistent themes and key building blocks in my subsequent writing and teaching.

While these and some additional concepts have been developed and matured in later writing, my key points at that time were: (a) most corporate personnel involved in steering and managing public issues are not communication or issue management professionals, but executive and line managers; (b) many existing issue management models and processes are too complicated or too theoretical for such managers, and: (c)

many issue management processes focus to excess on scanning and prioritization and give insufficient weight to the vital link to strategy development and front-line implementation.

Don't Just Stand There – The Do-it Plan for Effective Issue Management

Monograph. Issue Outcomes P/L, Melbourne, 2000

My book *Don't Just Stand There* (Jaques, 2000a, now in its second printing) was written specifically with these considerations in mind. While the language and writing style were intentionally selected to make issue management accessible to non-communication professionals, the book has also been recommended for undergraduate students at several Australian institutions (including Charles Sturt University, Bathurst and Deakin University, Geelong).

The acceptance of its approach is typified by the book review by lecturer Steve Mackey at Deakin University, who wrote: “This indispensable Australian book takes half a working day to read but is full of sensible and witty scenarios which can be unpacked into many hours of teaching.” He concluded: “After trying to decide which chapters I could legitimately photocopy for my students to study I gave up and decided they would have to buy the whole . . . book” (Mackey, 2001b, p. 151).

Similarly, the internationally-adopted Australian university textbook *Strategic public relations: a practical guide to success* (Harrison, 2003) reproduces the Do-it Plan, and describes me as “one of the world’s leading authorities on issue management” (p. 489).

My book introduced the subject in this way:

Issue management is now emerging as a business discipline which enables executives in all functions to proactively respond to public issues and to help protect their organization against costly and damaging impacts. When it comes to dealing with unfamiliar and uncomfortable public issues, managers often feel powerless and frustrated. That's usually because they let issues control them Issue management enables managers to take an active part in setting the agenda and shaping the issues which affect them – using the Do-It Plan for effective issue management (Jaques, 2000a, p. 10).

A specific contribution to knowledge in this book, and an element which has been adopted in some academic courses (as above) is the Do-It Plan model, which was a culmination of analysis of existing models.

The Do-It Plan for effective issue management is not an elaborate new system and is not another management fad. It is an elementary four-step process to help managers secure influence over public issues which are likely to adversely impact their organization, and will enable them to produce results (Jaques, 2000a, p. 14).

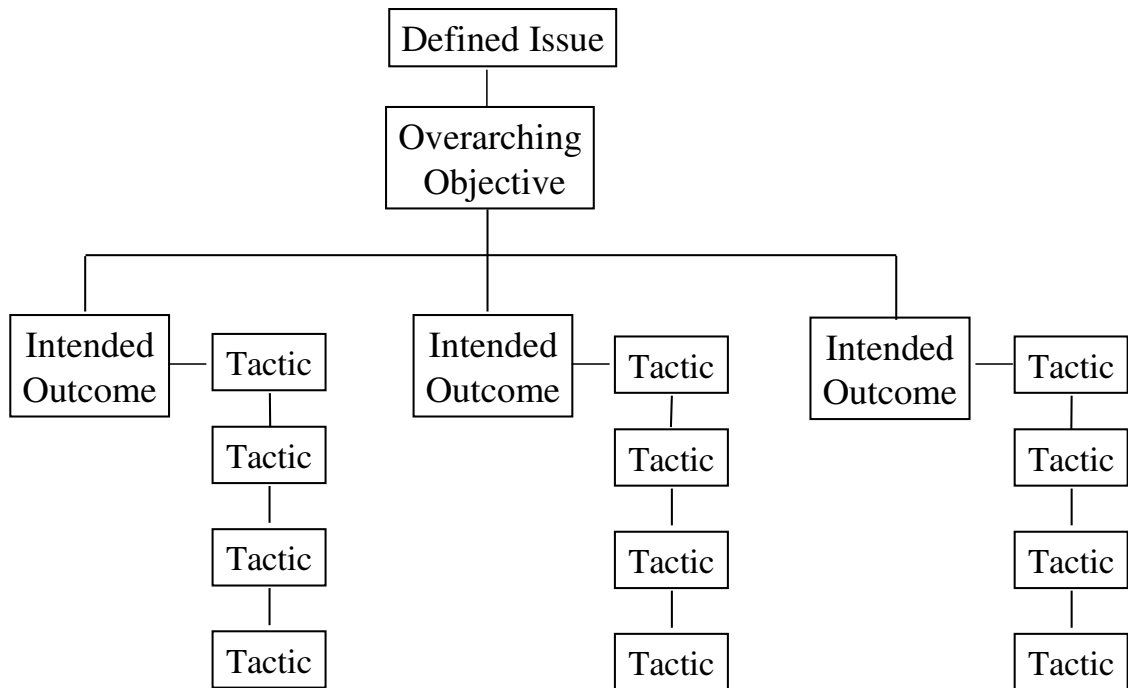


Fig 4: the Do-It Plan (Jaques 2000a, p. 15)

Do-It is an acronym for the four steps of the process – Definition, Objective, Intended Outcomes, Tactics – and is also a reminder that issue management is not a ‘spectator sport’ but is about getting involved and taking action.²⁷

While the model itself follows a classic structure, its first key innovation is the emphasis contained in the first two steps – issue definition and objective setting. Following the standard Strategic Planning process, the task phase is presented as a limited number of ‘sub-objectives,’ each with supporting tactics.

²⁷ This model coined the expression Intended Outcome. Whereas the traditional expression Desired Outcome identifies *what you would like to see happen*, the Intended Outcome is action-focused and identifies *what you intend to make happen*.

Practitioner issue management literature often focuses strongly on strategy and tactics, yet without the first two phases firmly in place – definition and objective setting – any issue management plan is likely to fail. Not only do the first two phases provide the foundation upon which the entire issue strategy is built but they are designed to give much greater focus to the vital link between issue identification and development of practical strategy.

These two key phases are introduced in the monograph and, as part of a planned research design, each was later expanded and explored in detail within a formal scholarly context – respectively *Issue Definition: the Neglected Foundation of Effective Issue Management* (Jaques, 2004a) and *Systematic Objective Setting for Effective Issue Management* (Jaques, 2005b).

While these two steps will be examined as stand-alone elements later in this Chapter (at 2.3), a further important innovation in respect of defining the issue was the introduction of the following presentational concept:

Problem + Impact = Issue

This formula was developed as a visual device to emphasise that a major social problem, for instance, might be an issue for society, but it qualifies as an issue for the organization only if it has a defined economic, commercial or reputational impact on that organization. As an example, climate change is undoubtedly a major global challenge, but for many business corporations its impact is mainly indirect, such as selection of resources and the need to reduce global warming emissions from operations. But for

other organizations, such as insurance companies or government agencies critically concerned about rising sea levels and the frequency of storms, floods and forest fires, it has a much more direct impact and must be explicitly embedded into strategic planning. (See previous discussion of the impact theme at 1.5.2. Evolving the Taxonomy)

The Problem + Impact = Issue formula has its optimal effectiveness in an organizational environment, where the organization itself has the capacity to be directly impacted by an issue. This can apply not only to corporations and commercial organizations but also other operational entities including some NGOs, not for profits, community groups and government agencies.

However, it is acknowledged that the formula is less applicable for some activist and advocacy organizations which may select the issues they contest not necessarily by the direct impact of the issue on them but by its perceived impact on broader society and by their own desire or capacity to impact the issue.²⁸

In addition to fostering an appreciation of impact, the Problem + Impact = Issue formula also serves to reinforce for the organization concerned the importance of a singular interpretation of the issue, which, as will shortly be described, further ensures focus and facilitates the evaluation phases.

The book uses examples and scenarios to illustrate each of the four steps of the Do-It Plan and their interrelationship, bringing them together in an appendix with a fully worked hypothetical case study. Most importantly, the model also emphasizes that an issue management plan should focus on measurable strategies and name-bound time-bound actions, rather than on volumes of background, economic and political overview,

²⁸ For a more recent review of how activist organizations select issues and make decisions on participation, see Blood (2004)

stakeholder analysis and scenario review. Such documentation and analysis can create real value, depending on the issue, but the plan itself needs to be specific, action-focused, achievable, and measurable.

The remaining innovation in my monograph is a fresh approach to evaluation, which provides a novel and practical method to measure and report progress. Issue evaluation can be notoriously difficult and elusive (Kim & Kim, 2000; Levy, 1987). Where an issue is singular and easily defined – such as a corporation fighting to block some adverse regulation or a community group fighting to block demolition of an historic building – it is relatively easy to measure success. Either the organization succeeded or it failed in its purpose. But evaluation is much more difficult in relation to progress against issues which are less concrete, are multi-faceted, evolve over time and may extend over many years.

By its structured design, the Do-It Plan provides ease of evaluation not necessarily just confined to the Overall Objective. By dividing the issue management plan into formally recorded Intended Outcomes and subsidiary Tactics, evaluation can be relatively simple and objective.

Progress should be measured against the recorded decisions of the Issue Management Team. In this way it is a fairly straightforward exercise to assess which tactics have been completed, and in turn whether or not each intended outcome has been delivered. In other words, with a formal plan comprising intended outcomes and tactics (which it has already been agreed will achieve the objective) evaluating progress is against the

specific outcomes and tactics, not against the far less specific general issue under consideration (Jaques, 2000a, p. 108).

I then suggest by way of example that it is notoriously difficult to evaluate progress against a vague objective such as 'Improve staff morale.' But if morale is evaluated through staff turnover or productivity, there are proven statistical tools to measure progress. And when specific actions have been agreed to address the 'morale issue,' a good level of objectivity can be secured by determining whether or not those plans have been successfully put into effect.

In summary, the key consideration here is that where issues are relatively short term or where there is an easily definable objective purpose, a traditional outcome measure is appropriate. This approach is well illustrated in typical case study literature (see for example Catania, 2002; Demetrious, 2002; Henderson, 2005). But for many real life issues, which may be prolonged and subjective, a different measure is required both for progress and achievement.

In these circumstances, the innovation within the Do-It Plan is that evaluation is not against the issue itself, but against the issue management plan which it has been agreed will move the issue towards resolution. Thus the steps forward are assessed not so much as outputs, but as tactical milestones on a longer journey. Moreover, the statistical or measurable elements – frequently vital for effective upward reporting – are most often found not in the problem which forms the issue but in its Impact (see also discussion of the impact theme of issue management at 1.5.2 Evolving the taxonomy).

It is certainly easier and more objective to assess whether an individual tactic for instance has been successfully completed than to judge progress

against the broad issue itself. And this evaluation is also much easier to communicate to others.

Furthermore, by assessment against the individual tasks set out in the agreed tactics, it is also possible to evaluate not only outright success or failure but also partial success – for example three out of five tactics completed, one still in hand and one not yet commenced. This leads to a good understanding of what can still be done and what should be done next time. It also provides the capacity not only to determine whether a particular Intended Outcome has been fully achieved, but also to objectively track progress towards its completion (Jaques, 2000a, p. 109).

Developments in the Use of Process Models for Effective Issue Management

Asia Pacific Public Relations Journal, 2(2), 2000,125-132.

This paper (Jaques, 2000b) is the first of a series analysing in greater depth the Do-It Plan and its constituent elements. Its purpose was not just to introduce the new model into the scholarly literature, but to position it within the context of a review of the development of issue management process models.

The paper explored some earlier process models (as described at 1.1 the Birth of Issue Management) and warned that “a common weakness arising from all three systems approaches to issue management – workflow models, environmental scanning and life-cycle analysis – is a lack of attention to the critical transition from issue identification to practical action” (Jaques, 2000b, p. 128).

As well as presenting and explaining the Do-It Plan model, the paper also introduced the expression ‘tool box method’ to the issue management vocabulary to convey the approach used when practitioners faced with a problem or issue put their effort into selecting a fashionable or convenient tool from the standard armoury of public relations methods, rather than properly defining the issue and determining an effectively planned objective.

I concluded:

Many existing Issue Management models underestimate or even ignore the challenge of setting in place logical and organized actions to address an Issue once it has been identified. The traditional ‘tool box method’ assumes that automatic application of the known public relations technologies will resolve the issue. But that approach often focuses on seeking an answer before the question is clearly understood. The Do-It Plan provides a more systematic approach to issue management and a better opportunity to deliver bottom-line results (Jaques, 2000b, p. 131).

Issue Management: Process versus Progress

Journal of Public Affairs, 6(1), 2006, 69-74.

The next element in my analysis (Jaques, 2006a), revisits and expands considerably upon the earlier theme regarding the use of issue management process models. This later paper acknowledged that of all the tools and techniques applied within the field of public affairs and corporate communication, issue management has a particular tendency to

attract excessive process, sometimes at the expense of real progress. I proposed that properly understanding the causes and sources of this emphasis on process would help illuminate possible hurdles to the long-term success of issue management as an academic study and as an effective practitioner tool.

I offered possible solutions which would enable issue management to achieve an optimal balance between the need to follow a disciplined approach while at the same time formulating and implementing creative and original strategies.

There are a number of likely reasons why issue management attracts more than its share of process. These include – but are not limited to – an attempt to position issue management alongside comparable management disciplines where extensive process may be more appropriate; over-use of computer-based issue management systems or software; inappropriate application of fashionable management initiatives such as TQM and Six Sigma; and the sometimes unwarranted drive for measurement tools (Jaques, 2006a, p. 69).

The paper then developed each of these reasons, with particular focus on the rise of computer-based issue management systems, databases and the Internet, and warned, in an echo of the ‘tool box method,’ that these are primarily tools – albeit very sophisticated – which support but cannot replace the element of innovation which is often demanded in successful issue management.

After describing some of the reasons why such tools are attractive, and how they can lead to an unhealthy fixation on statistical measurements in pursuit of ‘hard’ evaluation, I emphasized that a broader consequence of excessive focus on measurement can be to

create confusion between the process itself and the planned outcomes. And that the essential difference can be characterized by the distinction between ‘what we are trying to do’ (process) and ‘what we are trying to achieve’ (outcomes).

As a way forward I proposed six key recommendations in order to balance formal process against bottom-line achievement in managing issues:

- (1) Accept and embrace the fact that issue management is not all science but contains very important elements of art and judgment.
- (2) Understand the difference between measurement and evaluation and apply statistical measures only where they make sense and add value.
- (3) Recognize the value of process and, where applicable, implement it willingly.
- (4) Ensure a proper balance between discipline and creativity.
- (5) Remember that a process is not a plan.
- (6) Always bear in mind that the purpose of issue management is outcomes, not outputs. (Jaques, 2006a, p. 73)

The Best Practice Project

Using Best Practice Indicators to Benchmark Issue Management

Public Relations Quarterly, 50(2), 2005, 8-11.

Issue Management Best Practice Indicators

www.issuemanagement.org, 2005.

My work in leading the Issue Management Council (IMC) Best Practice (BP) project is set out in two submitted works (*IMC, 2005* and Jaques, 2005a) and also in two lead articles by the editor of *Corporate Public Issues* (Best Practices: Steps Along the Journey, 2004; IMC Board Defines Best Practice, 2003). It is also explored in my unpublished speeches at IMC conferences in Washington (24 March, 2004); Chicago (27 April, 2005); Philadelphia (10 May, 2006); and Dallas (15 May, 2007); and at the Australian Communicators Collaborative Conference (Melbourne, 4 September, 2006).

The original impetus for this project came from recognition that while there are many tools and techniques for evaluating progress in dealing with particular issues, how does an organization evaluate progress in developing and implementing the issue management discipline itself? The result was the IMC Best Practice Indicators, designed to “make excellence actionable.” (*IMC Board Defines Best Practice*, 2003, p. 57). CPI said I had championed the project to develop the nine indicators after recognizing “the emerging need for a global set of standards that could serve as useful developmental objectives for companies at different stages of implementation” (p. 59).

Describing the origins of the project, CPI quoted me as follows:

While every (organization) has its own ideas about issues and issue management, it is essential from time to time to be able to assess your own progress against an objective measurement. I pursued this project to determine what is the overall ‘best in class’ standard. In addition to IMC board member input I took a global view of best practices employed at a wide range of companies and industries. We distilled the best concepts from the many different people and organizations which have made the greatest impact in perhaps only one or two of the areas covered. By identifying the best in each area we developed practical and realistic standards across the whole discipline (*IMC Board Defines Best Practice*, 2005, p. 59).

To deliver this project I led a small team from among fellow IMC Directors to collate various existing models and agree on the broad shape of the Best Practices – namely how many were needed and in what general categories. I then drafted the BP indicators and co-ordinated responses through a number of iterations before securing a consensus. CPI later quoted me emphasizing that this initiative is intended to extend beyond for-profit corporations to address the needs of the social sector, including NGOs, not-for-profits, large health systems, universities, trade associations and other institutions, which equally need to address, quantify and then manage critical issues.

The background to the project (outlined in Jaques, 2005a) provides insight into some of the challenges of issue management itself. As previously described (at 1.1 the Birth of Issue Management), from its earliest days issue management had a strong focus on

models which crystallize and set out the process in order to facilitate its communication and to optimize its effectiveness.

Accordingly the IMC review began as a traditional benchmark study to consider the question “Is there a best model?” It quickly became obvious that while there are principles underlying issue management which have a widespread or even universal application, it is impossible to identify any model which is best across all circumstances. Because of the genuinely distinct needs of different organizations there cannot be a single ‘one size fits all’ model. Secondly, it was evident that selecting or developing a ‘best model’ could endorse a prescriptive approach which would inevitably be highly subjective and might tend to freeze the development of the discipline.

I concluded therefore that, rather than attempt to define a single best practice model, it would be more productive and effective to define common indicators found in excellent models and to crystallize these into formalized definitions of best practice. My intention was that such characteristics would assist practitioners and organizations in considering not only “how am I doing?” (evaluation compared with other organizations) but also “how do I do it?” (capturing the key elements of the process to establish an issue management system).

The key steps in the process then emerged: (a) identify ‘best in class’ from different organizations and models; (b) visualize what Best Practice looks like; (c) bring together aspirational objectives; and (d) provide for both ‘new entry’ and ‘peak level’ performance.

An examination of published issue management process models showed a number of common elements which are built on the underlying principle of the discipline – namely recognizing issues early and taking pre-emptive structured action to deliver outcomes

aligned with strategic planning. In line with this underlying objective, the nine Best Practice Indicators, as published in my paper (Jaques, 2005a, p. 9) and on the IMC website (Fig 5), were divided into three categories – how your issue management is *Structured*, how it is *Implemented* and how it is *Integrated* with other parts of the organization.



PREAMBLE

In less than three decades, Issue Management has become established as a distinct business discipline, with proven capacity to add strategic value to organizations. During that time practitioners and academics around the world have explored ways to optimize the new discipline and to stretch the boundaries of where its strengths can best contribute to corporate and societal advancement.

The nine Best Practice Indicators formulated by the Issue Management Council capture leading edge performance by the best in class throughout the world. An organization would not necessarily require all the standards in place to be best in class and, as needs and emphases vary greatly between different fields of enterprise, the standards carry no weighting.

NINE ISSUE MANAGEMENT BEST PRACTICE INDICATORS

STRUCTURE

There is an established mechanism to identify current and future issues through environmental scanning/issue analysis.

The organization has adopted a formal process to assign and manage issues.

Responsibility for stewardship of the issue management process is clearly assigned and mechanisms are in place to build organizational expertise in the discipline.

IMPLEMENTATION

"Ownership" of each major issue is clearly assigned at an operational level with accountability and results linked to performance reviews.

Progress against key issues is formally reviewed with organizational "owners" on a regular basis and the status of each is monitored at the highest management level.

The Executive Committee/Board has fiduciary oversight of issue management; has mechanisms in place to report progress to Directors and/or external stakeholders; and has authority to intervene in the event of non-compliance or misalignment.

INTEGRATION

Formal channels exist for managers at all levels to identify and elevate potential issues for possible integration into broader strategic planning, including external stakeholder management.

Management of current and future issues is well embedded within the strategic planning and implementation processes of organizational clients/owners.

Issue management is recognized and organizationally positioned as a core management function that is not confined to a single function or department.

Issue Management Council, 2003

Fig 5: Issue Management Best Practice Indicators (www.isssuemanagement.org)

Viewing this from an academic perspective, Professor John Mahon said:

The Best Practice Indicators bridge the gap between practice and research as they inform the practitioner as to the best practices and serve simultaneously as a guide to research and teaching for the academician. The Indicators help to ground both the practitioner and academic in a common shared context (*IMC Board Defines Best Practice*, 2003, p. 59).

Following publication of the BP Indicators in September 2003 (*IMC Board Defines Best Practice*, 2003, pp. 57-59) – and my corporate work on an unrelated implementation manual for the chemical industry Responsible Care Codes – I recognized that the Indicators required supporting documentation to further facilitate implementation.

Over the next few months this led to Phase Two of the project, which acknowledged that different organizations – particularly across different stages of maturity – may interpret ‘achievement’ of each BP Indicator in different ways. Accordingly I developed what came to be called ‘Reference Points’ for each Indicator (again writing the first draft and co-ordinating input from other IMC Board members). In the same way that the Indicators are not standards but are intended as guidance to what can be achieved by organizations operating at Best Practice, so too the Reference Points are not intended as audit checks or compulsory requirements. Instead, the five Reference Points assigned against each of the nine Indicators provide examples of what procedures or documentation an organization might establish to demonstrate achievement of a particular BP Indicator. Phase Two of the project, with Reference Points for each BP Indicator, was launched in January 2004 (*Best Practices: Steps along the Journey*, 2004; IMC, 2005; Jaques, 2005a).

2.2 Adding new tools to the core issue management technology

The second major theme within which the submitted publications are to be considered focuses on developing and advancing the application of effective tools and techniques as part of a fully integrated academic and management discipline.

Being a discipline where the precise use of words is often of the essence, issue management has seen more than its share of debate in the literature on definitions and taxonomy. While there has been extensive previous discussion in this exegesis on the importance and development of terminology, the two publications covered in this section address one particular challenge from different perspectives – namely how to characterise different modes of issue management.

Towards a New Terminology: Optimising the Value of Issue Management

Journal of Communication Management, 7(2), 2002, 140-147.

In the first paper (Jaques, 2002a) I presented information to demonstrate how issue management and crisis management became popularly regarded as the ‘Siamese twins of public relations’ while at the same time many scholars and practitioners now accept that the two activities are distinctly different disciplines.

An important challenge in breaking this nexus between issue management and crisis management is the lack of an agreed terminology which can adequately communicate the different elements within issue management, and these two papers contribute to this challenge by introducing completely new language.

The most commonly used current vocabulary within the discipline to distinguish different approaches to Issue Management is **proactive** and **reactive**.

While the words proactive and reactive routinely appear in Issue Life Cycles, many experienced issue managers understand the need for involvement even earlier than the traditional points of intervention in order to be effective. In recognition of this, the Intel Corporation for example introduced a useful term - **preactive** - to define the involvement stage which exists *before* that more normally defined as proactive – leading then through reactive and on to pre-crisis and crisis.

The principal problem with proactive and reactive as they are used in issue management is that they do not define the issue itself so much as they define an organisation's stance or response in relation to that issue. . . . Furthermore the words proactive and reactive themselves have an inherent inconsistency from organisation to organisation. For example, a particular issue may clearly be in very pressing or pre-crisis mode, and yet the organisation concerned can still choose (albeit unwisely) to remain in reactive mode, often proceeding down that dangerous track littered with corporate excuses such as "Let's not *make* it an issue" or "Let's not make it *our* issue".

Similarly, that same issue in a different organisation might be at the earliest stage of development and the organisation potentially impacted still has the choice between a generally proactive stance – "let's do

something before it gets worse” – or the classic reactive stance – “let’s sit tight, monitor the issue and see how it develops”.

In other words a single issue at a given stage of development within a given organisation can be dealt with either proactively or reactively. At the same time two different organisations could respond to the same issue in two different ways – proactively or reactively (Jaques, 2002a, p. 142).

I identified that the proactive/reactive taxonomy used to describe the mode of response had been appropriated – or misappropriated – to define the issue itself by distinguishing between issues a company must respond to and those issues where it voluntarily enters the debate. I proposed instead new language to address this lack of an adequate and agreed terminology by characterizing two issue categories – **Defensive** and **Offensive** – designed primarily for use within an organizational application.

A **defensive** issue would be defined as one where an organisation faces or is likely to face a hostile or potentially hostile public or regulatory environment. The organisation must choose either to respond or not to respond, and if it does respond it can do so either reactively or proactively.

An **offensive** issue would be one where the organisation is not required to react to any external environment, but chooses voluntarily to generate an issue. This would normally be in the expectation that the issue being generated has the potential to create a positive environment or yield positive outcomes for the organisation. This concept is already well-established among NGOs and other community organisations, some of which exist almost entirely to initiate and promote a specific issue.

The word offensive does, of course, have the alternative meaning of being disgusting or repulsive, or of being intended to cause offence. But modern usage, particularly in the sporting arena, has strongly reinforced the original military meaning of taking the offence, or of launching an offensive campaign. In fact the ‘twinning’ of offensive and defensive helps emphasise and define the distinction (Jaques, 2002a, p. 145).

New Language needed to help move Issue Management onto the offensive

Asia Pacific Public Relations Journal, 5(1), 2004, 43-53.

My second paper within this theme (Jaques, 2004b) again reviewed the literature in relation to evolving issue management terminology, but focused more closely not on the ambiguity of the proactive/reactive conundrum but on my new offensive/defensive distinction. I presented the distinction within the context of agenda-setting and provided detailed analysis of two high profile and very public Australian case studies to illustrate and characterize true offensive issue management.

The first was the sustained effort by a small group of furniture retailers in Victoria to drive the issue of Sunday shopping and change the trading laws of the state. The other was the ambitious campaign to persuade the Australian government and public that high-level nuclear waste from around the world should be brought to Australia for disposal.

Both were behind-the-scenes campaigns ‘revealed’ after news media investigation.²⁹

After describing detail of the first case I concluded that, from a public affairs perspective, the Victorian shop trading campaign had all the hallmarks of classic offensive issue management, namely: a determination to aggressively drive the agenda and change status quo; an alliance of like-minded proponents prepared to take a risk; a well funded and clearly focused strategy, and; as is often the case with successful issue management, a campaign organisation which is not necessarily obvious (at least to the general public) until after the event (Jaques, 2004b, p. 49).

The second case study concerned a four-year campaign by Pangea Resources Australia, with heavy backing by British Nuclear Fuels Limited, to push a proposal for a giant underground storage dump in Australia for high level radioactive waste from foreign nuclear power plants. While unsuccessful in the short term, this campaign, like the Victorian Sunday trading issue, shows some of the hallmarks of classic offensive issue management, namely: a clearly stated objective to place the issue on the public and political agenda; a very blunt admission of the difficulty faced and a statement of long term commitment, and; every appearance of sufficient financial backing to sustain a highly controversial challenge (Jaques, 2004b, p. 51).

My conclusion was: “Lack of generally accepted terminology in the field is self-evidently not the only barrier to full optimisation of the discipline, but adequately

²⁹ Full citations for each case are provided in the original journal publications. The primary sources were; Elias, D. (*The Age*, 21 September, 1996) ‘Revealed: How big retailers plotted for Sunday Hours,’ and Daly, M. (*Sunday Age*, 28 February, 1999) ‘A company has spent millions searching the world for the ideal place to bury the plant’s mounting repository of nuclear debris: They found it in Australia.’

distinguishing these two key modes seems essential to supporting their proper development” (Jaques, 2004b, p. 52).

In addition, the question of the relationship between issue management and crisis management was revisited and further elaborated in my subsequent paper (Jaques, 2007) discussed below at 2.4.

2.3 Explicating and analyzing growing NGO/Activist use of the discipline

The migration of issue management beyond its original corporate origins has developed as a substantial research theme, particularly in relation to its adoption by activists, community groups and other non-Government organizations, as well as by Government itself. This third section covers three publications following the sequence set out in the Do-It Plan (Jaques, 2000a). The first two publications reviewed here explore the initial steps – Defining the Issue and Objective Setting – setting these elements within the context of NGO/Activist application of the discipline. The third paper identifies and addresses the convergence between activist and corporate methodology.

Issue Definition: the Neglected Foundation of Effective Issue Management

Journal of Public Affairs, 4(2), 2004, 191-200

This paper (Jaques, 2004a) builds on the premise that proper definition is a vital foundation for effective issue management, and that Issue Managers must appreciate “not only the principles by which they should attempt to understand, define and name their

own issue, but also recognise and combat the techniques often used by opponents in an attempt to redefine the issue to their competing agenda” (Jaques 2004a, p. 191).

Issue definition comprises two separate elements – language selection and agenda setting – and this paper addresses both elements.

The importance of the right language to frame an issue cannot be over-stated, as is demonstrated by classic examples such as the transformation of pro-abortion and anti-abortion to pro-choice and pro-life (Jackson & Center, 1995); successfully renaming the gambling industry the gaming industry (Luntz, 2007); or the failed effort to rename sewage sludge as biosolid (Mackey, 2001a). More recently, and remarkably successful, was the concerted effort by the White House, initiated by Frank Luntz, to reposition the alarming threat of ‘global warming’ as the more neutral-sounding ‘climate change’.³⁰

However, while language selection is important, issue definition in terms of agenda setting is probably more significant in the longer term. Indeed, the early scholars Crable and Vibbert (1985) identified definition as a key strategy in the potential status level of their innovative Catalytic Model of issue management. The model was specifically designed to encompass a process to *catalyse* an issue to help it find its place on the public agenda, for which they coined the concept of *agenda-stimulation*.

In this paper I pointed out that while an organization or corporation may understand the principle of agenda-setting to define and prioritize its own issues, there is a critical and much less well understood countervailing force which means that the organization is by no means alone in defining its own issues.

³⁰ This dramatic transition was initiated by pollster and language guru Frank Luntz in a controversial memorandum to the US Republican Party “The Environment: A cleaner, safer, healthier America,” which was leaked to the news media in 2003. Available, for example, at www.pbs.org/wgbh/pages/frontline/hotpolitics/interviews/luntz.html

The key proposition presented here concerns the involvement of other parties – such as NGOs, community groups and shareholder activists – who may have equal or even greater influence on what issues are on the agenda and how they are framed or redefined.

In order to properly understand this phenomenon I built on the work of Heath (1997) who said: “Activists use redefinition to place a new interpretation on a situation, a product (such as cigarettes) or service, a corporation or industry, or a governmental agency. If the reinterpretation catches on, especially with reporters and followers, the company, industry or agency has become vulnerable to change.” (p. 168).

In this way issue I propose that definition itself has developed as a specific tactical measure adopted by some activist groups. By in-depth examination of this phenomenon I identified and named three distinct approaches to issue redefinition:

The Moving Target approach – where the issue is progressively redefined, yet remains within a given discipline, to constantly move the grounds of the debate and keep the responders off balance.

The Transitional Target approach – where the issue is redefined to evolve out of its ‘natural’ area of facts and statistics to softer and more arguable areas such as morals, ethics or politics.

The Multiple Target approach – where the apparent issue is defined in many different ways simultaneously to deliberately create confusion and make it more difficult to respond (Jaques, 2004a, p. 194).

From this I produced an innovative grid to capture and illustrate these categories:

| Activist Issue Redefinition Grid | | | |
|---|---|---|---|
| | Moving Target Approach | Transitional Target Approach | Multiple Target Approach |
| Field of Debate | Remains generally within a given objective discipline | Deliberately moves from objective fact to subjective responses | Covers as many different fields as possible, both subjective and objective |
| Timing | Issue progressively redefined as each concern is addressed | Moves ground before objective concerns can be addressed | Multiple concerns and allegations are raised simultaneously |
| Broad Purpose | Maintains appearance of objective debate but keeps responder off balance with fresh plausible allegations | Maximizes emotive content of issue by focus on areas of opinion such as ethics, values or standards | Confuses responder, exhausts his resources and maximizes the number and variety of different stakeholders |

Fig 6: Activist Issue Redefinition grid (Jaques, 2004a, p. 195).

I then elaborated on each approach, using a relevant example to illustrate the mechanisms of each mode, namely the anti-chemical movement (the moving target approach); the campaign against ‘gas-guzzling’ SUVs (the transitional target approach); and the world-wide anti-globalization movement (the multiple target approach).³¹

I argued in conclusion that target organizations facing adverse public issues need to gain a proper appreciation of the importance of language in defining issues.

³¹ Analysis and detailed sources for each example are provided in the published journal paper.

Systematic Objective Setting for Effective Issue Management

Journal of Public Affairs, 5(1), 2005, 33-42

Turning to the next step in the Do-It Plan model, in this paper I elaborated in detail on the importance of a systematic approach to Objective Setting (Jaques, 2005b).

While a great deal of scholarly and practitioner effort has been devoted to understanding and formalizing objective setting in strategic planning (for example SMART goals)³² much less effort has been committed to the process of objective setting in issue management. Moreover such objective setting has unique requirements which distinguish it from broader corporate planning processes, and this paper developed a rationale and proposed specific guidelines to help establish strategic objectives for effective issue management.

After considering objective setting in a broader communication planning sense, I identified and characterized six key guidelines for objective setting in the context of issue management:

A single over-arching objective – while there may be sub-objectives or sub-goals, the discipline of just one over-arching issue objective delivers real benefits in terms of focus and operational effectiveness.

Alignment with corporate strategy – may seem self-evident but reinforces that the objective must actually deliver progress against the

³² The concept of SMART goals is said to have been coined by George T. Doran, “There's a S. M. A. R. T. Way to Write Management Goals and Objectives,” *Management Review*, 70(11), November 1981, 35-36

broader corporate purpose, for example to protect sales of a controversial product and not just to ‘get us out of the headlines.’

Addressing the issues – to ensure the objective set specifically addresses or responds to the identified issues, for example to stoutly defend in detail a corporate position under critical attack, not just to ‘protect our corporate reputation.’

Clear and unambiguous – while some issues are very complex and may have different impacts on various parts of the organization, the objective should reflect the formal and agreed support of all internal stakeholders.

Ease of communication – having a clear and unambiguous objective is insufficient if it cannot be equally clearly enunciated and communicated, for example to senior management, to external and internal stakeholders, to analysts or to the news media.

Top management support – day to day management of the issue may reside with the leaders of the business or function most directly affected, but senior management must understand and actively support the agreed objective (Jaques, 2005b, 35-38).

This paper then reviewed three high-profile international case studies which illustrate instances where success appears to be limited and where the strategic objective was far from evident, namely: defense of cigarette smoking; promotion of biotechnology; and the fast food industry response to the so-called ‘obesity issue.’

In summary my paper concluded that objective setting for issue management should be seen and recognized as having unique requirements which distinguish it from broader

corporate planning processes, and which distinguishes it from other disciplines such as marketing.

Activist "Rules" and the Convergence with Issue Management

Journal of Communication Management, 10(4), 2006, 407-420

The third publication reviewed under this category is my paper (Jaques, 2006b) examining the convergence between activist and corporate methodology.

This paper characterized commonalities between activist and corporate communicators, who are often perceived as natural antagonists within the context of managing public and community issues. Moreover, it explored for the first time the previously largely unrecognized convergence between the tools and techniques of activism and business disciplines such as issue management.

I based this analysis on study of the work of the American community activist pioneer Saul Alinsky (1971) who developed the first 'rules' for activism, which have remained in constant use by activists for over three decades. While my research shows that the expression 'issue management' is rarely used by modern activists and NGOs, the tools and techniques of activism and those of issue management are increasingly merging together, with activism encroaching into the boardroom while at the same time the formal processes of issue management spread beyond the corporate environment.

This conclusion was illustrated by a modern set of activists rules (by Herb Chao Gunther of the San Francisco-based public Media Centre, 1985) which directly mirror

Alinsky's work a decade earlier, while the work of the ultra conservative 'corporate warrior' Nick Nichols (2001) was developed as an explicit homage to Alinsky.

After analyzing these and other modern sources to determine the causes and courses of the parallel development, I proposed that the strands of convergence are drawn together from a number of trends and activities, including:

- (i) Development and promulgation of rules, and the overlap of common content within those rules.
- (ii) Evolution of common tactics, language and strategic objective-setting.
- (iii) Democratization of communication through the Internet, which helps level the power equation.
- (iv) Increasingly equal participation of community groups and other stakeholders in corporate issue management, such as community outreach, corporate social responsibility and external issue advisory boards.
- (v) Growing professionalization of some activist groups, bringing greater equalization of education, skills and political access.
- (vi) Rapid growth in the absolute number of activist groups and NGOs, which brings greater strength across the spectrum and offers options other than at the extremes.
- (vii) Recognition by Governments and companies that they must modify their own attitudes and processes to effectively engage with the new non-governmental order (Jaques, 2004b, p. 416).

I concluded that while some activists and some companies will resist change, issue management has the potential to become a bridging process between activists and their natural targets, principally big business and big government.³³

The aligns closely with Heath's concept of issue management as a set of processes for reducing friction and increasing social harmony (described at 1.4.1) and also Plowman (2005), who says it is not so much a matter of finding consensus or common ground or complete resolution of any conflict, but rather "a matter of settling issues in overlapping areas of self-interests." The objective, he says, is "sustainability through mutual self-regulation, self-restriction, and adjustment in a society of continuous conflicts and disagreement" (p 842).

I believe recognising and responding to the elements of this convergence is essential if competing parties are to be able to work together and benefit from a mutual gains approach.

2.4 Repositioning issue management in relation to crisis management and other management disciplines

The fourth and final category of publications for review relates to developing improved understanding of the relationship between issue management and other management disciplines.

This field has to date attracted much less scholarly attention than the previous three categories. Researchers have examined the overlap and interface between many related

³³ This conclusion builds on the pioneer writings on the mutual gains approach of Lawrence Susskind and Patrick Field (1996) *Dealing with an Angry Public – the Mutual Gains approach to resolving Disputes*. New York: The Free Press.

activities, including issue management, crisis management, emergency response, risk communication and disaster recovery. But there has not been a great deal of scholarly writing on the potential for integration of these activities into a relational construct.

This section covers two papers, the first introducing a fresh construct to position some of these inter-relationships, and the second specifically exploring parallels between issue management and strategic planning.

Issue Management and Crisis Management: An Integrated, Non-linear, Relational Construct. *Public Relations Review*, 33(2), 2007, 147-157

This conceptual paper (Jaques, 2007a) builds on my previous research and published works regarding definitions of issue management and crisis management and the evolution of process models. Additionally the paper addresses the more complex question of whether it is issue management or crisis management which is the ‘umbrella’ concept.

Despite extensive attempts to define and differentiate issue management and crisis management, the definitional approach – and linear life-cycle models which focus on the elements – fail to capture the full dynamics of the disciplines. Instead of a focus on definitions, I proposed an innovative non-linear, relational construct which considers issue and crisis management in the context of interdependent activities and clusters of activity which must be managed at different stages.

While issue management is sometimes positioned as a ‘crisis prevention’ tool, this model presents a new concept of issue management with a role in both the pre-crisis and post-crisis phases.

My new model follows the classic disaster management format, reconceptualizing crisis management in a cyclical rather than linear format to emphasise the continuity of the construct, and rejects the idea of crisis management as ‘what to do after the crisis event.’ Instead it posits and expands on crisis management as comprising two pre-crisis phases – crisis preparedness and crisis prevention – and two crisis management phases – crisis incident management and post-crisis management.

The final innovation in the model is a focus on clusters of activities rather than distinct definitions, and the presentation of these clusters in a relational rather than sequential mode.

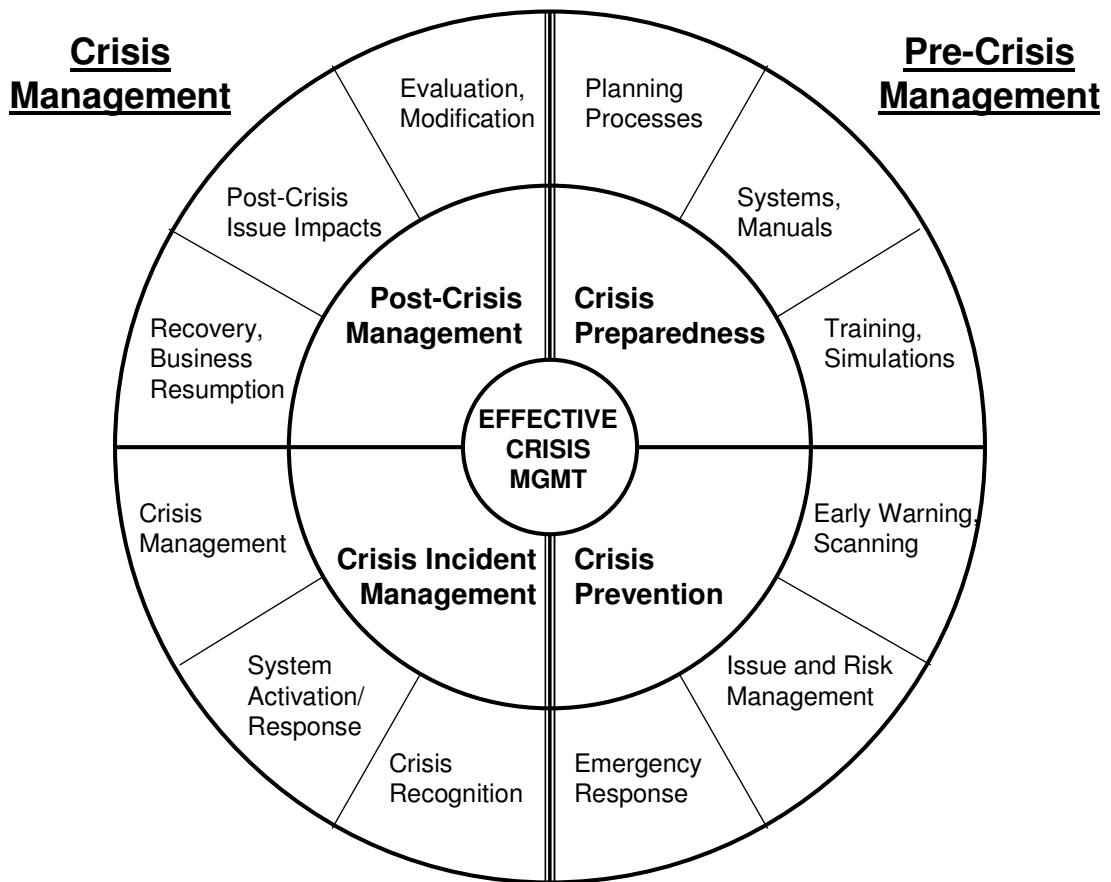


Fig 7: Issue-Crisis relational model (Jaques, 2007a, p. 150)

This new model is predicated on the holistic view of crisis management, that crisis prevention and crisis preparedness are just as much parts of the overall process as the tactical steps to take once a crisis strikes. Furthermore, that the post-crisis cluster of activities has a critical function looping back to preparing for and managing future crises.

The model's non-linear structure emphasizes that the elements should be seen as 'clusters' of related and integrated disciplines, not as 'steps' to be undertaken in a sequential fashion. And while the pre-crisis and crisis management hemispheres of the model have an obvious temporal relationship, the individual elements may occur either over-lapping or

simultaneously. In fact crisis prevention and crisis preparedness for example most often *should* happen simultaneously.

Moreover, not only do some of the adjacent elements or clusters overlap but there is a substantial overlap or commonality between some non-adjacent elements, for example between early warning/scanning and crisis recognition. Similarly, the post-crisis learnings of one organization can provide early warning and improved crisis preparedness for *other* organizations (Jaques, 2007a, p. 150).

I concluded that when considering activities such as issue management and crisis management, definitions provide a useful starting point but are insufficient alone for a full understanding of the distinctions. As a result I developed this model to position the disciplines in the context of a broader coalescence of management processes. This relational approach presents them within clusters of actions, focused on more effectively preventing and managing crisis, and intended to address the weaknesses identified in the previous theoretical models, particularly the limitations of a purely definitional or linear approach.

In this way the model aims to promote an improved theoretical understanding of the different disciplines and at the same time helps deliver real bottom line impact – minimizing human and financial cost and reducing both the risk and impact of adverse events (Jaques, 2007a, p. 156).

**Integrating Issue Management with Strategic Planning: Unfulfilled
promise or future opportunity?**

International Journal of Strategic Communication, Awaiting Publication.
January 2009

Continuing the theme of understanding and explicating the positioning of issue management in relation to other management disciplines, this second and final paper (Jaques, 2009) addresses the pivotal relationship between issue management and strategic planning and explores in detail the use of the adjective *strategic* in respect to issues.³⁴

Issue Management evolved from Environmental Scanning and other precursor tools to help business organizations recognize and respond proactively to an increasing variety of external issues beyond traditional economic and business-competitive challenges. Some early scholars and practitioner advocates of issue management perceived an important link to strategic planning but this formative vision remains only partly realized in operational practice. This paper considers and compares the two disciplines, including the almost careless use of the word *strategic* and the need for more versatile taxonomies. It then explores reasons why the early promise of integration has gone largely unfulfilled, and suggests ways forward to achieve greater alignment.

The paper completes my analysis of the evolution of definitions relating to issue management, this time more specifically in relation to strategic planning. I conclude that one of the paradoxical distinctions between strategic planning and issue management is that while strategic planning has undergone substantial evolution over the decades, it has

³⁴ This paper is currently awaiting publication (January 2009) It is included (as an appendix to Part Two) because its subject content is a core element of the overall trajectory of my exegesis. It also represents part of my ongoing engagement with and further contribution to the field.

continued with a broadly unchanged definition and remains a formal planning methodology, primarily for business, government and major institutions. By contrast, while the fundamental principles of issue management have not changed substantially, its core definition has seen a distinct evolution, driven by migration outside its business origins, a dramatic shift in societal expectations, and other changes.

In addition, unlike strategic planning, issue management has also spawned many novel constructs including Strategic Issue Diagnosis, crisis issues versus non-crisis strategic issues, Anticipatory Management, crisis issues versus opportunity issues, Risk Issue Management and Environmental Issue Management.³⁵

I propose in the paper that by far the most important and pervasive of such novel developments is Strategic Issue Management, and the paper traces in particular detail the introduction of this important construct, concluding that the word *strategic* in this context has become a virtual synonym for *important*. I then propose that an expanded more versatile taxonomy is needed to provide a better definition of those issues which are truly important without defaulting to the over-used description *strategic* (see Future Research in Chapter 3 at 3.1).

An analysis of the literature allowed me to tabulate and compare the differences between issue management and strategic planning, and assess the reasons for the failure of the early hope of integration. Typical of this analysis is the work of Richard Nelson and Robert Heath (1986) who identified three causes of poor integration, namely: lack of an issues management department resulting in the function being conducted by an ad hoc interdepartmental committee or being assigned to public affairs or government affairs;

³⁵ The paper under discussion provides detailed citations for all of these constructs.

lack of directional input into corporate strategic planning; and a credibility gap poisoned by some issue managers lacking good grounding in systems theory and organizational communication being regarded as interfering with rather than helping operations (p. 21-22).

After reviewing and assessing the available scholarship, I concluded that organizations should pursue complementarity rather than integration at a functional level, allowing issue management to retain its inherent strengths while at the same time broadening and strengthening strategic planning. In terms of a way forward to achieve improved integration I proposed, *inter alia*, further development of the concept of the strategic communication planning process, which has developed strongly since the 1990s (for example Austin & Pinkleton, 2001; Ferguson, 1999; Smith, 2005).

Finally, in addition to ongoing development of strategic communication planning as a formal corporate activity, I proposed in this paper that the longer-term way forward lies in three key areas of future research: (a) development of a comprehensive theoretical framework; (b) adoption of improved cross-disciplinary taxonomy; and (c) better coordination between organizational and communication scholarship.

Chapter 3 - Conclusion

Issue Management as a concept was first coined in 1976 and did not develop into a recognised activity until the early 1980s. As cited at the start of Chapter 1, Howard Chase, the 'father of issue management,' said the new discipline demanded first a rationale, then a literature, then adaptation to academic and sound management disciplines (1984a), while Wartick and Rude (1986) called for practitioners and academicians to work together to resolve the identity problem related to issue management and to achieve greater professionalization.

Three decades later the question must be asked whether this bridge between the academic and practitioner/management perspectives has been fully established. Far from being rhetorical, the question has important implications both for the practice and academy, particularly in terms of the future direction for issue management.

As detailed in Chapter 1, the impact of communication technology, the democratization of issue management and the migration of issue management beyond the corporation, have all contributed to an ongoing identity problem, further exacerbated by the introduction and encroachment of more fashionable management developments, such as Corporate Social Responsibility and Reputation Management, and by growing convergence with related functions such as Crisis Management and Risk Communication.

It is also clear from the analysis in this exegesis that the future of issue management will be played out in both the academic and practitioner spheres, and it is therefore essential that both elements, even if not always in full agreement, are at very least extremely well aligned. The essential nature of a bridge is not that the territory on one

side is inherently more valuable, but that an effective link between the two sides enhances the value of them both. Similarly, a central objective of this integrative essay and the associated publications has been to draw the very best from each element, and to advance academic research and analysis in order to refocus the relationship between the two perspectives.

The capacity to do so is enhanced by the fact that issue management remains a fairly young and fluid discipline. As a result a relatively small number of academics and practitioner advocates (many identified in Chapter 1) have been able to shape the broad outline of the process and its application in both a corporate and non-corporate context. And there is a similar opportunity to also shape its future.

Among those who have written and lectured extensively on issue management, I am one of the few to focus in-depth on just this one specific area of applied communication. Supported by an extensive speaking and teaching programme over the last ten years in Australia, New Zealand, Asia and the United States to promote and advocate issue management (activities outside the immediate scope of this exegesis), the published works submitted here constitute a cohesive and comprehensive contribution to development and broader knowledge of the discipline.

While each published work and its interrelation with the whole submission has been examined in this integrative essay, I will summarise here the new concepts and models introduced. These include:

- (i) the Do-it Plan – a new Issue Management process model to make issue management accessible to students and practitioners (Jaques, 2000a, 2000b).

- (ii) an original analysis of the existing language used to define issue response – reactive vs proactive - and a proposed improved new taxonomy – offensive vs defensive (Jaques 2002a, 2004b).
- (iii) the Activist Issue Redefinition Grid, which graphically presents a newly conceptualized analysis of NGO strategies to influence issues through redefinition (Jaques, 2004a).
- (iv) proposed new guidelines for Issue Management objective setting (Jaques, 2005b).
- (v) a fresh understanding of the convergence between Corporate and NGO issue management strategies and tactics (Jaques, 2006b).
- (vi) a new Integrated, Non-linear Relational Construct which models the interrelationship between issue and crisis management and related process (Jaques, 2007a).
- (vii) six key recommendations to balance formal process against bottom line achievement in managing issues (Jaques, 2006a).
- (viii) internationally accepted Best Practice Indicators for Issue Management (Jaques, 2005a and www.issuemanagement.org).
- (ix) an original parallel examination of Issue Management and Strategic Planning (Jaques, 2009)

3.1 Future Research

In addition to reviewing in detail the literature of the discipline, and other related disciplines, I have proposed in this exegesis a theoretical foundation for issue management.

Furthermore I have identified some key areas for future research, including: (a) work to establish and formalize an optimal theoretical framework for issue management; (b) further development of Best Practice, particularly on organizational ownership of both issues and the issue management process; and (c) further work to extend and resolve four of the five key research streams identified, namely: reassessing the alignment with Strategic Planning; progressing the development of agreed taxonomy; improving understanding of positioning the maturing discipline; and better explication of issue management migration into other fields.

While each of these areas is explored within the body of this exegesis, I believe the most important are understanding how issue management is positioned, particularly in relation to its evolutionary migration beyond the corporation, and its adoption by activists, community organizations and not-for-profits. This area certainly has the greatest potential to change the nature of issue management itself, both for corporations and others. Parallel with this development there is also a growing body of anti-corporate writing focused explicitly on claimed abuses by corporate public relations and issue management, some of it driven by what I have called “academic activism.” (see 1.5.5.) Academic and activist criticism of the public relations industry is nothing new, but this approach seems to be assuming an increasing vigour, typified by two recent books by the Scottish academics David Miller and William Dinan – *Thinker, Faker, Spinner, Spy: Corporate*

PR and the assault on democracy (2007) and *A Century of Spin: How public relations became the cutting edge of corporate power* (2008) – who characterize the industry role as ‘ideological warfare,’ and the Australian Bob Burton – *Inside Spin: The dark underbelly of the PR industry* (2007). The focus of these and similar recent writings is often allegations of misused or misapplied issue management, but I don’t believe that corporate writers in general, and the public relations industry in particular, are well placed to respond. With activist organizations both adopting and criticizing issue management techniques and processes, an important opportunity exists for high quality, research-based academic analysis.

In addition to these areas for research specifically discussed in the text, I also propose four further avenues for future study:

(a) *exploring and clarifying the relative roles of Legal and Public Affairs counsel in issue management.* There is an extensive literature on the role of legal counsel in public affairs generally and also crisis management specifically, but there has been very little research on how legal and public affairs counsel interact and balance in managing issues.

(b) *further explicating the integration of issue management both for crisis prevention and as a post-crisis requirement.* The integrated model presented in the submitted publications shows issue management as part of the cluster of activities aimed at crisis prevention, and also as one of the tools for use post crisis. Both of these applications require further research, along with development of the concept of longer term post-crisis issues.

(c) *developing issue management as a tool for internal communication.* While classic issue management focuses on matters which are wholly or partly external to the organization, some of the issue management tools and processes have potential for application for internal communication and this remains to be explored and characterized.

(d) *improving statistical and non-statistical issue prioritization tools.* A number of issue prioritization methodologies have been developed, but there has been little research into their relative merits, or indeed whether formalized prioritization is effective at all.

Given this range of objectives and opportunities there is valuable work to be done in order to further understand and develop issue management, and I look forward to being able to participate and contribute to some of this future research.

3.2 A Retrospective View

When, as an issue management practitioner, I began this writing programme, my initial intention was to help develop tools and processes which would take the best from scholarly writing and make this more accessible to other practitioners, primarily in a corporate context. Some of my first published writing reflects this more basic objective, and that has to be acknowledged as a limitation of the earlier work.

However, over time, and with a greater personal involvement in teaching and exposure to some of the leading scholars in the field, I began to develop a much more balanced and collaborative approach. This new perspective recognizes the great value of the more theoretical and scholarly contribution, as well as the standalone value of

academic reflection and inquiry to the production of fresh knowledge about issue management and the broader organizational and social context in which it operates. At the same time I also increasingly recognized the potential importance to the discipline as a whole of new practitioner applications, such as the rapidly developing participation of NGOs, community groups and other non-corporate issue managers.

Through this period, my own research and writing has matured substantially and I have been able to exercise a much broader and more balanced standpoint between the academic and practitioner perspectives. Moreover, my extensive reading, both as a practitioner and as a tyro academic, has reinforced the need for common language and unambiguous meaning to help underpin that more balanced standpoint. Andre Comte-Sponville was cited at the start of the exegesis writing: “Intelligence is the art of making complex things more simple, not vice versa.” My strong focus on language and comprehension throughout this body of work has aimed to achieve such simplicity.

Apart from a small number of academic activists whose negative perspective on issue management forms part of a broader agenda (as referred to above), it became clear to me that a simplistic either/or approach has very little merit compared to the benefits of a partnership between practitioners and academics. Furthermore, it also became clear that both can learn from a more collaborative approach, especially where there is willingness to consider the other’s assumptions and world view.

Accordingly, the overall single most important theme running through this body of work is not just to help develop issue management as an effective key tool for senior management, but to draw on the experience and ideas of practitioners, and the intellectual and academic rigour of scholars, to advance the discipline for the benefit of both.

My hope is that these works and integrating essay, and my active role in both arenas, will contribute to that objective.

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**Refocusing Issue Management:
Bridging academic and practitioner perspectives**

Part Two

**Submitted Publications
(subject to copyright)**

Publications submitted as substantive works to be considered for the award of PhD

Improving understanding and application of formal issue management models and process

1. *Don't Just Stand There – The Do-it Plan for Effective Issue Management*. Monograph. Issue Outcomes P/L, Melbourne, 2000
2. Developments in the Use of Process Models for Effective Issue Management
Asia-Pacific Public Relations Journal, 2(2), 2000, 125-132
3. Issue Management: Process versus Progress
Journal of Public Affairs, 6(1), 2006, 69-74
4. Using Best Practice Indicators to Benchmark Issue Management
Public Relations Quarterly, 50(2), 2005, 8-11
5. Issue Management Best Practice Indicators
www.issuemanagement.org, 2005

Adding new tools to the core issue management technology

6. Towards a New Terminology: Optimising the Value of Issue Management.
Journal of Communication Management, 7(2), 2002, 140-147
7. New Language needed to help move Issue Management onto the offensive
Asia Pacific Public Relations Journal, 5(1), 2004, 43-53

Explicating and analyzing growing NGO/Activist use of the discipline

8. Issue Definition: the Neglected Foundation of Effective Issue Management
Journal of Public Affairs, 4(2), 2004, 191-200
9. Systematic Objective Setting for Effective Issue Management
Journal of Public Affairs, 5(1), 2005, 33-42
10. Activist "Rules" and the Convergence with Issue Management
Journal of Communication Management, 10(4), 2006, 407-420

Repositioning issue management in relation to crisis management and other management disciplines

11. Issue Management and Crisis Management: An Integrated, Non-linear, Relational Construct. *Public Relations Review*, 33(2), 2007, 147-157

Appendix

12. Integrating Issue Management and Strategic Planning: Unfulfilled promise or future opportunity? *International Journal of Strategic Communication*, Awaiting publication, January 2009.