

QUEEN  
JL  
103  
.C6  
C25  
1973



Consumer and  
Corporate Affairs

Consommation et  
Corporations

# study and recommendations



P-29,30

Industry Canada  
Library - Queen

JUN 26 2008

Industrie Canada  
Bibliothèque - Queen

HD 8013  
.C3C6  
467

I N D E X

INTRODUCTION	1
TERMS OF REFERENCE	2
CHAPTER ONE - THE PROGRAM	
SECTION 1	
Selection of Potential Members for the Speaker's Bureau	3
SECTION 2	
Guidelines for Participation and Policy	7
Speaker Categories	9
SECTION 3	
Outline of Themes	12
SECTION 4	
Training Seminars - number, frequency and location	17
SECTION 5	
Role of York Advertising in achieving Program Goals and Objectives	19
SECTION 6	
Master Plan	37
SECTION 7	
Estimated Costs	45
CONCLUSION	49
APPENDIX A	
APPENDIX B	
APPENDIX C	

## INTRODUCTION

Our proposal to the Department of Consumer and Corporate Affairs was based on a number of assumptions.

- 1) This Department -- through its powers of legislation and moral suasion -- touches the lives of practically every Canadian.
- 2) To be effective, the Department needs a broad base of public awareness, understanding and acceptance.
- 3) Canadian society comprises, however, many general and specific publics to whom the Department as a whole is relatively unknown and invisible.
- 4) One of a number of useful techniques for correcting that is a Speakers' Bureau which:
  - (a) trains a corps of people in the rudiments of public speaking, media interviews, and participation in other events such as seminars, panels, hot line shows and so on;
  - (b) actively seeks occasions for members of the Bureau to appear on such platforms;
  - (c) supports that activity with effective public relations through printed material, audio/visual aids, and press relations.

Nothing we have learned in the interviews we have conducted in preparing this study has challenged the validity of those premises.

We have, however, come to entertain very grave reservations about the practical applications that can flow from them.

TERMS OF REFERENCE

Our mandate lies in a letter from Kenn Prittie, Director of Information and Public Relations, which informed us that the Department's Executive Committee wished to proceed with Phase I of our proposal.

That part of our proposal reads as follows:

PHASE I -- PRE-PLANNING

In this preliminary stage we would:

- 1) Meet with Departmental officials to decide who will be invited to become a member of the Speaker's Bureau;
- 2) Work out the guidelines which will govern the participation of Departmental officials and others in this program with particular regard to policy areas and other sensitive subjects;
- 3) Decide on the broad outline of themes to be incorporated in any material prepared for this program;
- 4) Based on the number of people selected for this program, we shall work out the number, frequency and location of the training seminars;
- 5) Consult with the Departmental officials to reach a policy statement with respect to the goals and broad objectives of this program and the role of this organization in achieving them;
- 6) Produce a master plan covering the first twelve months of operation.

CHAPTER ONE - THE PROGRAM

SECTION 1 -- Meet with Departmental officials to decide who will be invited to become a member of the Speaker's Bureau.

Many of the Departmental officers we interviewed lost no time in telling us their concerns about taking any people away for training seminars or having them take on any significant number of speaking and/or public engagements.

An adequate corps of speakers would be, in our judgment, 35 to 40 people in the field and about 15 to 20 from head office for a total of 50 to 60 people.

With an average of 1.5 to 2 engagements per month such a corps could handle more than 1,000 per year which -- along with effective public relations support -- could have a tremendous cumulative impact.

We did not appreciate, however, as fully as we do now that the department is drastically understaffed and that any increased demands would cause a dislocation in priorities which would need to be weighed very carefully.

Any realistic assessment of the time frame for bringing the Department up to strength could not be less than two years.

It is obvious to us that our original expectation of being able to train a corps of 50 to 60 people in eight to ten weeks of intensive effort is simply unrealistic.

We now feel that we should proceed more slowly and take two years to build the Speaker's Bureau up to what we would regard as full strength.

The other factor which made it more difficult to decide on the criteria for becoming part of the Speakers' Bureau is that some Bureaus within the Department are -- by the very nature of their work -- almost completely centralized.

This means that getting good representation in the field is a more complicated process than it might otherwise be if each Bureau was completely decentralized.

There are certain priorities which are self-evident and we believe should be accommodated. One of these is strengthening the role and function of the Regional Directors.

If the Department is to have a strong identification across Canada, the regional offices will become the focus for that fact.

We believe, then, that the Speakers' Bureau Seminar program should begin as early as practicable with the six Regional Directors.

Consumer Consultants would be our next priority and we recommend that all Consultants take part in a Seminar some three to six months after the Directors.

The next group we recommend for training would be branch heads and division chiefs at head office. This group would be selected by their respective Assistant Deputy Ministers.

Proceeding at intervals of three to six months, we would recommend that the next group to receive training should be the program managers at the regional level.

The next group to be trained should be people at head office who are in more specialized positions with, perhaps, a narrower public frame of reference but very great importance to certain specialized groups such as lawyers, accountants, trustees in bankruptcy, engineers, trade associations and so on.



These recommendations have the advantage of extending the training period to accommodate the very real problems of staffing. But they also contemplate that the Speakers' Bureau operation will begin when the first group has completed its training.

We envisage the entire program building up steadily through these two years until it reached optimum size and strength.

SECTION 2 -- Work out the guidelines which will govern the participation of Departmental officials and others in this program with particular regard to policy areas and other sensitive subjects;

Among government departments, the Department of Consumer and Corporate Affairs is unusual and, perhaps, unique in that a substantial portion of its mandate has no basis in legislation, regulation or other statutory instruments.

To public servants accustomed to relating their activities to specific bills or sets of regulations, this is often an uncomfortable situation.

The Consumer Consultants and Regional Directors we interviewed estimated the number of complaints for which they had a specific remedy in law at between 10 and 25 per cent.

The Department must face the fact of the nature of the expectation they are creating in the other 75 to 90 per cent for whose complaints there may well be no specific answer.

It is conceivable that with experience some recurring problems can be identified and made the subject of appropriate legislation but there is unlikely ever to be a time

when all consumer complaints can be dealt with in specific legislation.

The Senior Departmental officials we interviewed seemed prepared to accept that as something they were willing to live with. In fact, it is not putting too strong an interpretation on what we learned to say these officers fully expected the Department to take an even stronger role as "intervenor" in areas in which there will never be supporting legislation.

If this is the case, and it is recognized as Departmental policy, then participants in a Speakers' Bureau operation will need reassurance along these lines.

There is still another aspect of a potential Speakers' Bureau in which some strong, but careful, Departmental assurances will be needed.

That is in response to the concern expressed by several of the people interviewed that their careers might be jeopardized should they embarrass the Minister or the Department in the course of fulfilling a public engagement.

There is an inescapable risk implicit in the Speakers' Bureau proposal. Sometime, somewhere, somehow, someone

officially representing the Department is going to be caught by an embarrassing -- or potentially embarrassing -- statement.

Once again, this possibility was not one which appeared to seriously upset the senior officials in the Department. But their acceptance of that risk and their willingness to deal fairly with someone caught in it will have to be communicated to the prospective participants.

Part of that risk, of course, can be reduced by having carefully prepared factual statements. But unless the speaker is to be merely a Departmental parrot, occasions must inevitably -- and hopefully will -- arise when he is expected to get involved in question and answer situations.

#### SPEAKER CATEGORIES

We believe now that participants in this program may be broadly divided into 1) Generalist; 2) Specialists.

Generalists would be those who are deemed to be reasonably well informed about, and competent to speak on, the complete range of departmental activities. This group would include the Minister, Deputy Minister, the Assistant

Deputy Ministers, Regional Directors and Consumer Consultants.

Specialists are obviously those whose frame of reference is -- for one reason or another -- narrower than those named above and who would not in the ordinary course of events be expected to tackle subjects outside their particular specialty.

We do, however, contemplate that even the specialist will, as the occasions warrant, preface his remarks to a specialized audience with a brief statement of the purpose and functions of the Department as an introduction to the subject of particular interest to his audience.

It should be understood that this distinction will prevail throughout the Speakers' Bureau operation and that generalists will be encouraged to give the broadest possible view of the Department's role and function -- with due consideration for their audiences.

Specialists on the other hand will be expected to restrict themselves to their specific area of expertise in both speeches and question/answer sessions.

This latter restriction is subject to the caveat that, when appropriate, the specialists will be encouraged to give a brief description of the totality of the Department in either introductory or closing remarks.

SECTION 3 -- Decide on the broad outline of themes to be incorporated in any material prepared for this program

This part of our assignment proved most difficult of all.

Without intending to underscore the obvious, it must be said that there does not appear to have been a concerted effort to clearly articulate the Department's philosophical rationale and identify the function of its constituent parts within that rationale.

We found it impossible to state that rationale in any comprehensible way and we have not yet found a satisfactory statement of it.

We have read speeches going back to the House of Commons debates of May 1966, when legislation creating the Department was being debated, including several by Ministers, Deputy Ministers and other officials. To no avail.

We have read the departmental literature. It is only partially successful.

Two undated Departmental publications "Who we are ... and what we do" and "The Department and its functions" speak of "fostering an efficient and workable market system" and

getting "the best results from the market system". Yet the Department's philosophy -- as expressed in actions rather than words -- clearly contemplates the possibility of the Department "intervening" in situations where the marketplace has worked as well as it can be expected but there is still an injustice clearly perceived in the eyes of some consumer.

These brochures seem to echo a number of speeches by D.H.W. Henry, Q.C., a previous Director of Investigation and Research. But they suffer from a number of hidden assumptions and a failure to recognize the very much broader "social welfare" role the Department is fulfilling.

Implicit in Box 99, the appointment of Consumer Consultants, regionalization of administration and other factors is a recognition of the fact that society clearly expects -- and the Government is prepared to accept -- a very much stronger role for the Department in non-legislative areas.

Fostering the integrity of the marketplace may very well be a genuinely essential part of the Department's role but it does not begin to represent the realities of rampaging consumerism.



The brochure is also deficient in failing to do what Mr. Justice Henry's speeches took great pains to make clear: no legislation can protect a consumer from his own folly and imprudence; and greed and avarice are not localized phenomena in what is described as "the supply side" of the marketplace.

Because it does step so boldly into non-legislative areas, it is doubly important that the Department's rationale be stated as clearly and as forthrightly as possible. Doing so will prevent the twin dangers of arousing unfulfillable expectations and failing to fulfill reasonable ones.

The difficulty is compounded for the Department by the way it was created as an amalgam of quite disparate units from previously totally unrelated Departments.

These old, vertical loyalties die long lingering deaths. Since there has been little attempt at cross fertilization among the branches, most people in the Department are essentially in the same milieu they were in six years ago. Only the name has changed.

And names can be troublesome. There is not much doubt, for example, about what Departments like Justice, National

Defence, and Transport are all about. Their staffs encounter no particular trauma in expressing this to friends, relatives, the public or even the press.

But a number of Department of Consumer and Corporate Affairs people we spoke to informally and privately had very great difficulty expressing the purpose and function of their own Department.

We hope we have expressed the dilemma forcefully enough that a concerted effort will be made to develop such a statement. It should be a true, carefully considered, long-range, easily understood statement of guiding principles; broad enough to encompass the range of Departmental activities and sharp enough to answer the question: What can I expect of this Department?

Once developed that statement should be used as the basis for:

- a) a new brochure;
- b) a full-length speech text for our generalists;
- c) a five-minute introductory statement for our specialists;
- d) the theme for a public service announcement for radio and TV;
- e) newspaper ads of the institutional type.

A second broad theme we would need to develop would be an expansion of the statement of principles as it relates to the consumer side exclusively.

We have read talks and talk outlines now used by some of the Consumer Consultants when speaking about the Department as a whole. These are excellent and, with the injection of this statement of basic principles, could easily be adapted into first-class speeches for the general public.

The themes suggested here would provide sufficient grist for many months to come.

SECTION 4 -- Based on the number of people selected for this program, we shall work out the number, frequency and location of the training seminars;

On the basis of our recommendations in Section 1 we would recommend the following schedule of seminars to be held in Ottawa.

FIRST SEMINAR (English)

The participants would be the six regional directors. We would need not more than 60 days start-up time to be ready with all the material we need for this first effort. If we could be given authority to proceed by, say, March 1, the first seminar could be held around May 1.

SECOND SEMINAR (English)

All Consumer Consultants with the exception of the French-language Consultant in Quebec (a total of 11 if present figures remain constant) would be invited to the second seminar. It would be held at an interval of three to six months after the first, depending on Departmental priorities and other considerations.

THIRD SEMINAR (English)

Branch Heads and Division Chiefs as selected by the Assistant Deputy Minister would be invited to the third seminar. Six to 10 would be included and it would again be held at an interval of three to six months after the second seminar.

FOURTH SEMINAR (French)

One Consumer Consultant, two Branch Heads or Division Chiefs, four program managers from the regions and five head office specialists (all Francophone obviously) would participate in this seminar. It would be planned for three to six months after the previous one.

FIFTH SEMINAR (English)

Program Managers from the regions, chosen in consultation with their Regional Directors and head office supervisors, would be invited to the fifth seminar. Eight to 12 such people would participate in the seminar scheduled for three to six months after the previous one.

SIXTH SEMINAR (English)

This seminar would be for seven to 11 head office specialists selected in consultation with the Assistant Deputy Ministers and it would be held three to six months after seminar five

At the conclusion of this program we expect to have between 50 and 66 persons trained to participate in the Speakers' Bureau. At least 13 of these would be Francophone. These figures are not fixed and final but give a reasonable picture of what we recommend should happen.

SECTION 5 -- Consult with the Departmental officials to reach a policy statement with respect to the goals and broad objectives of this program and the role of this organization in achieving them;

The objective of this program is to create a Speakers' Bureau with a strong regional orientation which will strive to:

- a) communicate to the general public the philosophy, purpose, role and function of the Department of Consumer and Corporate affairs;
- b) create in general and specific publics a greater awareness, understanding and acceptance of the Department;
- c) develop for the Department a feedback mechanism -- as distinct from a complaint handling operation -- which can serve as a monitor of public opinion as it is expressed regionally.

Briefly stated the role of our organization would be to:

- a) create and train a corps of people within the Department to represent the Department effectively as public speakers and interview subjects for the media and community representatives;
- b) secure for the members of this corps opportunities to speak to service clubs, church and school groups, business organizations, consumer groups and other special interest associations;

- c) prepare suitable material for speakers' kits (including audio/visual aids whenever that is appropriate) which will convey the Department's story in a vigorous and timely manner;
- d) make available to these speakers -- and the Department generally -- a qualified public relations professional in each province who will help secure the speaking engagements and handle the publicity for each event to make sure the program achieves the maximum results.

We want to deal with each of these functions in more detail.

- a) create and train a corps of people within the Department to represent the Department effectively as public speakers and interview subject for the media and community representatives

Our experience in the past includes seminars organized along the lines which we describe here. Provincial Superior Court justices, presidents of large corporations, housewives, radio station managers, public servants and publishers have all been among the groups taking this training.

The original doubts that very much can be accomplished in such a concentrated period have evaporated in the light of actual experience.

Without even naming the Department, we have consulted with the colleagues who worked on similar projects with us in the past. They are prepared to do so again.

We are satisfied that appreciable results can be obtained by using this format.

It may be useful to outline approximately the manner in which these seminars would function.

1. A basic, 20-minute speech text about the Department would be prepared along with 30 to 40 accompanying slides. This speech would be designed to put the Department's philosophy in focus and underscore the activity of each bureau within that overall rationale. The slides would be designed to illustrate the text and also to be, in themselves, amusing and informative.
2. A group of approximately 12 persons recruited from within the Department would come to a suitable location for a three-day, intensive training seminar.
3. A nationally-recognized, highly-qualified public speaking instructor begins the session with a round-robin of two-minute introductions in which each participant



is encouraged to introduce himself and speak about his job, hobbies, civic interests or some other such topic. The lecturer then gives a brief demonstration of common public speaking faults and -- using the prepared text -- a brief, but definitive lecture on effective public speaking. When time is at a premium, this portion of the seminar can be conducted in an evening session as a preliminary to the shirtsleeve sessions which follow.

4. The group then is divided into smaller units of three or four persons each. A trained resource person is attached to each group. These smaller units go into separate rooms where each in turn gives approximately half the prepared text. As each person speaks, the rest of the unit and the instructor take notes. When all members of the unit have completed their portion the entire unit joins in a group dynamics type of discussion about the successes and failures of each other. The instructor makes no criticism at this juncture until all have commented on each others performance. The instructor then summarizes the consensus about each speaker. Each speaker then gives a portion of the speech. If there are four in the unit each gives successive quarters of the speech. This part of the agenda takes about 90 minutes and is usually followed by a coffe or lunch break.

5. The entire group reassembles for instruction on the use of audio/visual aids. This instruction continues for an hour or so and covers all the negative and positive features of incorporating such material into a presentation.

6. The practice units (with different combinations of individuals) then meet in separate rooms for an exercise similar to Part 4 with the addition of the audio/visual aids. This again takes about 90 minutes.

7. The entire group then reassembles. Each participant gives five minutes of the speech without aids and five minutes with. This can either be done consecutively or broken into two separate sections. The instructors then open up a free flowing discussion among all the participants and comment on each participant's performance. This part of the agenda needs about three hours allowing time for a coffee break.

8. The entire group reassembles in a TV studio for a lecture/demonstration by a qualified instructor. This lecture covers all the technical aspects of TV production: script writing, lighting, sound, makeup, graphics, telecine chains and film clips, staging and so on. This requires about one hour.

9. The practice units (with yet another combination of individuals) then visit and study each part of the TV operation in turn: studio, control room, lighting and sound, graphics. This will take about 90 minutes.

10. The group reassembles for a lecture/demonstration on appearing on camera. Techniques for appearing alone, in groups, in interview situations and others are demonstrated. This requires about one hour.

11. Each individual is then given a choice of doing a solo statement, being interviewed, or taking part in a round table discussion. All of this is televised and taped on videotape. The material is also recorded on audio tape.

12. In the final session all video and audio tapes are played back for further comments from the participants first and then from the instructors.

Experience teaches us that in such an intensive three-day seminar a lot of valuable knowledge can be transmitted along with a good grounding in public appearances. Admittedly, it covers only the rudiments of the subjects involved but it has proven to be enough to give potential Speakers' Bureau participants a feeling of confidence as they approach speaking engagements and media interviews.

A typical agenda for such a seminar would be as follows:

FIRST DAY

- 9:00 a.m. - Introduction and Lecture (Part 3)
- 10:00 a.m. - Coffee
- 10:30 a.m. - First practice session (Part 4)
- 12 noon - Lunch
- 1:30 p.m. - Audio/visual instruction (Part 5)
- 2:30 p.m. - Coffee
- 3:00 p.m. - Second practice session (Part 6)
- 4:30 p.m. - Adjourn

SECOND DAY

- 9:00 a.m. - Group practice session (Part 7)
- 10:00 a.m. - Coffee
- 10:30 a.m. - Group practice session resumes
- 12 noon - Lunch
- 1:30 p.m. - TV lecture (Part 8)
- 2:30 p.m. - Coffee
- 3:00 p.m. - TV practice session (Part 9)
- 4:30 p.m. - Adjourn

THIRD DAY

- 9:00 a.m. - TV appearance lecture (Part 10)
- 10:00 a.m. - Coffee
- 10:30 a.m. - Taping Sessions (Part 11)

12 noon - Lunch  
1:30 p.m. - Playback Session (Part 12)  
2:30 p.m. - Coffee  
3:00 p.m. - Playback Session resumes  
4:30 p.m. - Closing Remarks  
5:00 p.m. - The End

- b) secure for the members of this corps opportunities to speak to service clubs, church and school groups, business organizations, consumer groups and other special interest associations.

In previous situations we have performed this function very simply. Once the speakers were trained we prepared small ads for publications reaching these groups and announced the availability of speakers. This was supplemented by a brochure which was mailed to potential audiences.

Since we are faced here with clear restraints in time, this approach would be unwise to the point of foolhardiness.

We would propose for this program that we begin more modestly by having our regional public relations consultants discuss with the Regional Director:

- a) the nature and scope of the speaking and public engagement workload now being handled within his region (including engagements taken by head office representatives);

- b) come to some agreement about what would be desirable in that region in terms of audiences, subject matter, etc.;
- c) communicate the substance of that discussion to us so that these regional considerations can be reviewed in the light of national (i.e. head office) priorities.

This way the public relations consultant with his special knowledge, judgment and expertise, could help the Regional Director more accurately assess the regional need and these, in turn, can be worked into the national picture.

Concurrently with this process, we would be arranging for the training seminar for the Regional Directors.

That would mean that by the time the Regional Directors were properly prepared, the groundwork would have been laid for their first engagements.

A similar process would occur at each step of the expansion of the program through the various levels we have outlined earlier.

If, at some point in time, there was general agreement that the corps of speakers was sufficiently large that

there would be no risk of embarrassment by having to refuse requests, then more widespread techniques such as a brochure and advertising could be considered.

- c) prepare suitable material for speakers' kits (including audio/visual whenever that is appropriate) which will convey the Department's story in a vigorous and timely manner.

There was, frankly, fairly general unhappiness among the field people with the quality, quantity and effectiveness of the support material they receive.

We have no mandate to review the Department's brochure producing policies and we do so only as they relate to a proposed Speakers' Bureau.

To achieve the degree of national penetration the Department needs would require brochures in quantities in the hundreds of thousands or even the millions.

Such a decision must not be made lightly for it requires encumbering very substantial amounts of money. All too often factors ranging from official whim to sheer vanity dictate the production of brochures which are unnecessary, irrelevant and -- in the final analysis -- destructive.

The prelude to the use of any public relations technique including brochures, must be the posing of three simple questions:

What do we need to say?

To whom do we want to say it?

Is this the best technique for communicating this message to those people?

The Department now has what can only be described as a bewildering array of printed material.

People in the field describe them variously as "erratic", "unco-ordinated", "poor quality", "badly written", and so on. There is general criticism of the minimal quantities which are supplied even when a good brochure is produced. There is criticism too, that the people in the field (who presume they are presumed to be "on the firing line" and hence more knowledgeable about certain subjects such as consumer credit) have no input into these publications.

We were only slightly astonished to learn that there is no apparent co-ordination of the Department's publishing program. This means that a very important part of its "public face" -- its publications -- bear no resemblance to each other and reflect a mindless approach to the needs of the people the Department is trying to serve.



A minor example of what we mean is that three consecutive consumer research reports (Nos. 1, 2 and 3) are totally dissimilar to each other and appear to the casual observer to have been produced more to serve some internally perceived anxiety rather than some clearly perceived public need.

This example is not put forward to criticize the consumer research branch whose responsibilities and expertise presumably do not extend to the publishing industry. Nor is it meant as criticism of the Information and Public Relations Branch whose expertise presumably does extend to publishing but whose internal mandate may not incorporate the authority to do so. Nor even is it a criticism of the Publishers -- Information Canada -- which presumably simply reacted to an initiative from the Department.

It is meant as a strong suggestion that there is an urgent need for a long, hard look at the Department's publishing policies with a view to achieving a co-ordination and a rationalization of what must be deemed to be an important part of its communications function.

We will need a brochure which is not only well written, but well written in very simple language, instantly compre-

hensible to anyone. It must also be well rendered -- not translated -- into whichever language it was not originally written. Its design and typography must be bright, clean and attractive. It must be produced in very large quantities. It must be immediately put to use and distributed in substantial quantities to the regional offices.

We believe ourselves to be capable of producing such a publication and are prepared to offer evidence in the form of materials produced for other clients.

The Department may prefer to deal with another supplier or even rely on its own staff. The fact will remain that such a brochure will be an integral part of the Speakers' Bureau operation.

We will also need a number of prepared texts. We recommend the following:

1. One full-length text (20 - 25 minutes) generally describing the philosophy, purpose, role and function of the Department.
2. One full-length text dealing with the application of this philosophy to the consumer field.
3. A brief (5 - 7 minutes) text condensing the general text described in No. 1.
4. Brief texts outlining the function of each constituent part of the Department.

The uses of the first and second text are obvious. No. 3 would be designed for use in prefatory or closing remarks when the main subject matter is directed to specialized audiences. No. 4 would be written for use by speakers who are expected to allude to programs with which they are not personally familiar.

Both No. 1 and No. 2 would lend themselves to audio/visual aids.

Slides, filmstrips or films could be developed to support each of them. These would be produced as witty and engaging aids to focus attention and strengthen impact.

Such material can be produced to supplement the text or, by using a voice over, to stand on its own.

Once again, it was the regional people who were most vocal in expressing their need for this kind of support material.

- d) make available to these speakers -- and the Department generally -- a qualified public relations professional in each region who will help secure the speaking engagements and handle the publicity for each event to make sure the program achieves the maximum results.

An essential ingredient in our proposal is a "marrying up" of the Department's newly strengthened regional operations

and our own regionally oriented public relations and communications organization.

We now retain in the five major regions of Canada locally-based firms of qualified public relations practitioners which are, in effect, sub-contractors to us as the general contractors.

To push that analogy further: we negotiate with national clients on the guidelines, terms and conditions that will apply to a given contract. Those negotiations take into account the expected role of each sub-contractor and the costs anticipated for his part of the operation.

We then take responsibility for the performance of those features which are agreed to be "national" in scope and for direction and supervision of the activities of the regional consultants in those aspects which are deemed to be "regional" in character.

Our regional consultant has five basic responsibilities.

They are:

- a) to advise us on how the overall program need to be adapted to the particular needs of his region;
- b) carry out the program, with the adaptations agreed upon, in his region;

- c) report back to us the results of the program and recommend further adaptations;
- d) report on the program in his region with emphasis on techniques which may be usefully applied in other regions;
- e) monitor the total program and report back his assessment of public response and changing perceptions in his region.

In all of this he will have a direct, day-to-day, one-on-one working relationship with the Department's own regional staff and Director.

His situation will compare with, for example, a regional program manager in that his workaday relations will be with his regional superior while the broad policy guidelines and direction will come from "head office".

We see our regional consultant's role as one of tactical and technical expertise applied in a manner which relieves much of the routine workload from the regional office as the Speakers' Bureau operation unfolds.

We have been impressed by the public workload carried by field people already and the calendar of speaking engagements now being filled by head office personnel.

We have been saddened, however, by the evidence that many of these engagements now take place in a public relations

vacuum. By that we mean: the speech takes place all right and the immediate audience derives what benefit is possible. But the full impact of the event is mitigated by the fact that the full range of public relations techniques were not fully utilized to produce the maximum possible benefit.

Every speaking engagement -- from the smallest service club to a giant international conference -- requires time and effort.

When that time and effort is expended without effective support by way of prior announcements, press arrangements, interview opportunities, photographic coverage and so on the cost/benefit ratio gets seriously askew.

Our proposal places at the service of the Regional Director a highly competent practitioner whose special talent it is to accomplish precisely these goals.

It also means that the national effort will be equally well supported either by us directly when circumstances warrant or by our regional consultant.

The regional consultant, then, will be required to:

- 1) Review with the Regional Director and his staff the total requirement for speaking engagements in that region. That review will take into account requests arriving spontaneously as well as audiences and territories which are being missed or overlooked.
- 2) Recommend to the national consultant such adaptations of the overall program as in the judgment of himself and the Regional Director are best suited to that region.
- 3) Secure such speaking engagements as are agreed upon in consultation with the Regional Director and his staff and are consistent with national policy.
- 4) Make sure basic prepared texts are appropriately "regionalized" so that examples and figures cited relate to the region in which the speech is being given.
- 5) Send announcements of the engagement to the local media along with head and shoulder shots of the speaker.
- 6) Contact local media to arrange coverage of the speech and for additional local interviews.
- 7) Co-ordinate all speaking engagements -- solicited and unsolicited -- to minimize overlap and duplication and to ensure reasonable distribution among, age groups, special interest groups, geographical areas and so on.
- 8) Report back to the National consultant regularly on the effectiveness of the program recommending adaptations or techniques which might be applied elsewhere.

We believe this kind of practical, professional help will be of enormous benefit to the Department's regional office in particular and, ultimately, redound to the credit of the Department in general.

SECTION 6 -- Produce a master plan covering the first twelve months.

In light of the conclusions we have reached and expressed earlier, we are now looking at a 24 month time frame.

Because of the necessity of stretching out the training period, this plan combines what we described as "Phase II -- Training and Preparation" and "Phase III --- Operation" in our original proposal.

As of the moment our authority was confirmed we would commence to operate the Speakers' Bureau for the Department.

Several phases of activity would begin concurrently.

First of all, we would begin intensive discussions with senior members of the Department with a view to helping develop a cogent articulation of the Department's philosophy.

From that would flow the production of the speech texts referred to in a previous section.

From them we would develop the support materials -- brochure and audio/visual aids -- which are essential to this program.



The second phase would be the gradual evolution of effective public relations support for speaking engagements already in the calendar.

This activity would include making sure there is full and complete briefing of the speaker as to the nature, size, and probable interests of the audience, whenever this is appropriate.

It would also include making announcements in the press or specialized media about the forthcoming event.

It would include making sure that all possible ancillary publicity -- press conferences, radio and TV interviews -- is developed as and when appropriate.

This phase would be basically the responsibility of the national consultant with the support, as and when needed, of our regional consultants.

The third phase would be preparation -- including production of a manual -- for the first training seminar. Since this seminar requires the material produced as a result of the efforts described earlier, its timing is clearly tied to them.

It seems reasonable to believe the first such seminar could take place within 60 days of the start of operations.

The fourth, would be the process of dialogue, discussion and consultation at the regional level between the public relations consultant and the Regional Director and his staff.

The first Phase, to all intents and purposes, ends when the basic textual and audio/visual material is ready. There may be, from time to time, a need to update or upgrade that material but, essentially, that part of the operation has a relatively fixed time frame.

The second phase, would, as we see it, be a constantly evolving process. As the capability of the Speakers' Bureau and its operations expanded so, too, would the need for public relations support at the national and regional level.

It seems reasonable to conclude that this support would be geometrically progressive as capabilities and resources expand. It may well be, however, that it would build to such an extent that it might eventually make more sense for the Department itself to assume some portions of it.

For the present, we are dealing with a proposal which is based on the assumption that the Department prefers to have this operation initiated and developed by outside consultants to whom they do not have the long-term contractual commitments they would have to specialized staff people hired to perform equivalent duties.

The third phase leads of course into the eventual sequence of six training seminars. This operation has relatively finite parameters in terms of man hours and other costs.

The fourth phase also represents a slowly-escalating work load as the supply of trained speakers increases and speaking engagements multiply.

PHASE I would involve:

- consultations with Departmental officials
- writing or helping with the writing of a Departmental statement
- writing and editing: two full-length texts, one brief introductory text, six texts re branch activities
- rendering all of above into the other official language
- designing, writing, rendering, typesetting and composing one brochure
- preparing and producing 30 to 40 slides to illustrate textual material

- writing, translating and producing manual for use by participants.

PHASE II would involve:

- analysing the current public engagement role of the head office group (including the Minister). This now appears to run between 90 and 100 per year.
- making recommendations as to the acceptance/rejection of head office speaking engagements, with particular reference to ensuring an acceptable distribution among interest groups, geographical areas, etc.
- briefing the speaker on the nature, size and special interests of the group he will be meeting.
- preparing brief biographical sketches for distribution to the media.
- preparing and placing news stories announcing the speaking engagements in the appropriate media.
- helping as necessary with the preparation or adaptation of texts.
- contracting media where the speech or appearance is to happen. (this may be done either by the national consultants directly or by our regional consultant on the spot)
- ensuring delivery of speech texts if, as and when necessary.

- whenever it is appropriate we, or our regional consultants, would contact other interview programs, hot line shows and so on to arrange additional exposure.
- whenever necessary -- depending mainly on the size and importance of the audience -- either the regional or national consultant would be in attendance to look after the press requirements, such as TV or photographic coverage.
- ensure that supplies of brochures, press releases, speech texts and so on are available if, as and when required.
- directing and supervising all activities of our regional consultants.

PHASE III would involve:

- making arrangements at a suitable location. The location would need several small meeting rooms, nearby lunch facilities, and it would be helpful to have TV facility handy. Some place like Algonquin College would be ideal. We have not as yet approached the College because our instructions were quite explicit about not committing the Department beyond the submission of this report. We anticipate no problem, however.
- setting dates for the seminars based on availability of instructors, trainees and facilities.
- arranging sub-contracts with instructors.
- preparing a manual which would include the prepared texts, as well as the basic lecture notes.

- translating the above manual.
- conducting the seminars.

PHASE IV would involve:

- our regional consultant conducting intensive discussions with the Department's regional staff with a view to assessing the Speakers' Bureau's potential resources and needs in that region.
- discussions between the regional and national consultants on the objectives and mechanics of the program.
- support by our regional consultant (similar to that outlined in Phase II at the national level) for speaking engagements already on the regional calendar.
- preparation for the availability of the Regional Director after his training seminar. This would involve arranging for public engagements for the Regional Director as previously decided in discussions with him and the national consultant.
- continuing support for speaking engagements taken by the Regional Director as well as those taken by other regional staff in response to public requests. (This role obviously expands as the scope of the program grows.)
- reporting to the national consultant on the day-to-day results of the program with recommendations for adaptations in his own region and, if applicable, in other regions.

- monitoring the results of the program in terms of changing perceptions of the Department.
- advising the Regional Director, directly, and the Department, through the national consultant, on public attitudes towards Departmental policies.
- acting as a consultant to the Regional Directors as required.

SECTION 7 -- Estimated Costs

In estimating the expected cost of such programs as these we work from a basic fee schedule as follows:

Executive Time for consultations	\$ 50.00 per hour
Senior Consultants and Creative Artists	\$ 40.00 per hour
Junior Consultants and Art Staff	\$ 30.00 per hour
Research Assistants	\$ 20.00 per hour
Clerical Helpful (other than routine secretarial services)	\$ 15.00 per hour

All invoices are supported by time sheets and vouchers for out-of-pocket disbursements.

It is always hazardous trying to predict with cretainy the workload any project will generate but we believe that the following figures are as realistic as possible in the light of previous experiences.

PHASE I

Consultations with senior officials	10 hrs at \$50	\$ 500.00
Writing and assisting with statement	12 hrs at \$40	480.00
Writing two full length texts	20 hrs at \$40	800.00
Writing seven brief texts	15 hrs at \$40	600.00
Rendering all above to other language	15,000 words at 8¢	1200.00
Design, write, typeset and artwork	16-20 p.p. E & F	4000.00 *
Slide design, create and produce	6 sets 30-40	2000.00
Writing translating and producing training manual		<u>1500.00</u>
		\$11,080.00



\* normally for government clients we do the work down to camera-ready art stage and then tendering for actual production is done by the Department of Supply and Services. This figure does not include the actual printing and binding.

## PHASE II

We are persuaded that the first year of this operation will need approximately 10 hours per month of senior consultant's time on the average and a steadily increasing amount of junior consultants time.

We have broken the costs down by quarters as we believe the workload will increase in roughly quarterly increments as the training seminars are organized.

For the first year then:

Senior consultants 10 hours per month at \$ 40 for 12 months	\$ 4800.00
Junior Consultants;	
1st. quarter; 20 hours per month at \$ 30 for three months	1800.00
2nd. quarter; 30 hours per month at \$ 30 for three months	2700.00
3rd. quarter; 40 hours per month at \$ 30 for three months	3600.00
4th. quarter; 50 hours per month at \$ 30 for three months	4500.00
	<u>\$17400.00</u>

For the second year we estimate:

Senior Consultant: 20 hours per month at \$ 40 for 12 months	\$ 9600.00
Junior Consultant:	
1st. quarter; 40 hours per month at \$ 30 for three months	3600.00
2nd. quarter; 50 hours per month at \$ 30 for three months	4500.00
3rd. quarter; 60 hours per month at \$ 30 for three months	5400.00
4th. quarter; 70 hours per month at \$ 30 for three months	6300.00
	<u>\$29400.00</u>

PHASE III

We have previously estimated the cost of each seminar at \$ 2,000 each. This assumes of course the travel expenses for the Departmental people is paid from their normal travel funds.

The \$2,000 figure covers the rental of premises, retainers for instructors, rental of necessary equipment, provision of necessary staff from our organization for a period of three days.

The cost of Phase III -- based on six seminars -- is \$ 12,000.

PHASE IV

On the basis of programs we are currently operating we estimate the following budget for our regional consultants.

	<u>Year One</u>	<u>Year Two</u>
B. C.	\$ 10,000	\$ 15,000
Prairies	12,000	18,000
Ontario	14,000	20,000
Quebec	11,000	16,500
Atlantic	7,000	10,500
	<u>\$ 54,000</u>	<u>\$ 80,000</u>

Our normal procedure is to have the consultants bill us each month on the basis of a flat monthly retainer pro-rated over the year. We, in turn, bill the client each month for the total of that month's expenditure.

To look at the cost from another standpoint we could put it like this:

	<u>Year One</u>	<u>Year Two</u>
Phase I	\$ 11,000	nil
Phase II	18,000	\$ 30,000
Phase III	8,000	4,000
Phase IV	54,000	81,000
	<u>\$ 91,000</u>	<u>\$115,000</u>

We anticipate that the Department would not, in any case, commit itself beyond the first year and we fully understand that position.

For our own part, we would want a full review of the program after a year's experience with a view to making such changes and improvements as may be warranted.

CONCLUSION

We believe that the program as outlined in these pages will achieve for the Department of Consumer and Corporate Affairs a significant improvement in its public perception.

We appreciate the opportunity of submitting this proposal and look forward to being of service to the Department in its challenging program.

YORK ADVERTISING LIMITED

C. Clyde Batten  
December 1973

# YORK ADVERTISING LIMITED

215 McLEOD STREET, OTTAWA, K2P 0Z8, CANADA • TELEPHONE 613-237-7260

## APPENDIX A

Ottawa, April 16, 1973

Mr. K.A. Prittie,  
Director of Information and  
Public Relations,  
Department of Consumer and  
Corporate Affairs,  
219 Laurier Avenue West,  
Ottawa, Ontario  
K1A 0C9

Dear Kenn:

The conversation we had Friday about developing a speakers bureau program for the Department of Consumer and Corporate Affairs was very helpful and instructive. With your Department's urgent need to communicate to the people of Canada the scope of legislation which exists for their benefit, I know you will find such a program a very effective component of your overall planning.

Our experience in the past with the Centennial Commission, The Canadian Bar Association and other national organizations has convinced us of the efficacy of a speaking platform program combined with proper publicity efforts surrounding each engagement.

In brief, what we would set out to do is:

- a) create and train a corps of people within the Department to represent the Department effectively as public speakers and interview subjects for the media and community representatives;
- b) secure for the members of this corps opportunities to speak to service clubs, church and school groups, business organizations, consumer groups and other special interest associations;
- c) prepare suitable material for speakers' kits (including audio/visual aids whenever that is appropriate) which will convey the Department's story in a vigorous and timely manner;

- d) make available to these speakers -- and the Department generally -- a qualified public relations professional in each province who will help secure the speaking engagements and handle the publicity for each event to make sure the program achieves the maximum results.

To carry this program out properly we see it breaking down into three phases: Pre-Planning; Training and Preparation; Speaker's Bureau Operation.

#### PHASE I -- PRE-PLANNING

In this preliminary stage we would:

- 1) Meet with Departmental officials to decide who will be invited to become a member of the Speaker's Bureau;
- 2) Work out the guidelines which will govern the participation of Departmental officials and others in this program with particular regard to policy areas and other sensitive subjects;
- 3) Decide on the broad outline of themes to be incorporated in any material prepared for this program;
- 4) Based on the number of people selected for this program, we shall work out the number, frequency and location of the training seminars;
- 5) Consult with the Departmental officials to reach a policy statement with respect to the goals and broad objectives of this program and the role of this organization in achieving them;
- 6) Produce a master plan covering the first twelve months of operation.

#### PHASE II -- TRAINING AND PREPARATION

During this phase we would:

- 1) Produce speech texts and other audio/visual aids consistent with the policy decisions reached in Phase I;
- 2) Decide on precise locations for training seminars in line with the decisions reached earlier;
- 3) Organize teaching staff for the seminars including experts in public speaking, radio and television interviewing, and general media relations;

- 4) Conduct training seminars in at least five locations and at least one in the French language;
- 5) Brief regional public relations consultants on the scope and nature of the program and their role in it;
- 6) Carry out an experimental speaking engagement in each region under the careful supervision of the regional consultant;
- 7) Prepare promotional material to tell the public of the availability of speakers and their topics;
- 8) Develop precise administrative machinery for the handling of requests, their screening and processing;
- 9) Launch the program with appropriate publicity.

#### PHASE III -- OPERATION

The actual operation will be substantially decentralized. Requests for speakers are funnelled through provincial contacts (a Box 99 in each provincial capital, for example).

The regional consultant screens them all to weed out frivolous requests, decide which should be handled as national events involving the Minister or senior officials, and coordinate the details of actual organization.

National requests will be passed on to this office for handling and appropriate action.

Provincial requests will be organized by the provincial consultant. He will:

- 1) Make sure basic texts are appropriately "regionalized" so that examples and figures cited relate to the province in which the speech is being given;
- 2) Send announcements of the engagement to the local media with head and shoulder shots of the speaker;
- 3) Contact local media to arrange for coverage of the speech and for additional interviews;
- 4) Coordinate speaking engagements to minimize overlap or duplication;
- 5) Report back to Ottawa regularly on the effectiveness of the program and recommend changes or adaptations particularly relevant in his jurisdiction.

At the national level we would carry out this role for engagements regarded as "national" in scope. We would arrange such engagements, make suitable advance announcements, make sure the press coverage was well handled and that all possible interviews were achieved.

We would report to the Department each month on the progress of the program with particular emphasis on streamlining and improving it as we go along.

#### TRAINING SEMINARS

Our previous experience shows that we can teach quite untutored people the basic skills of public speaking and being interviewed for the media in three days.

We have found that groups of 12 are optimum and certainly never more than 16. We split these groups into units of four people who go through the whole program on a round-robin basis and all emerge at the end to demonstrate their new skills.

We have available to us a number of people with considerable experience in teaching these skills and we would develop, as part of Phase II, a training manual.

#### TIMING AND COSTS

Phase I will require between 100 and 120 hours of work on our part. At a fee schedule of \$30.00 per hour, that comes to a range of \$3,000 to \$3,600.

It would also require some allotment for travel to discuss and coordinate the program with our own principals. We estimate that travel costs would be on the order of \$1,000 to \$1,200 and would be supported by the appropriate vouchers and receipts.

It will take approximately eight weeks to complete this phase, but we would expect some flexibility up to ten weeks.

Phase II will be more expensive because of the cost of holding the seminars. Assuming that all travel charges for Departmental people to take part in these seminars will be paid out of normal travel allowances, we estimate, on the basis of our previous experience, that each seminar will cost \$2,000 for space and equipment rental, payment to teaching experts, and other preparation costs. That means that five seminars (B.C., Prairies, Ontario, Quebec (French), and Atlantic Provinces) will cost about \$10,000.



In addition, the costs of preparing basic texts in both languages will be approximately \$1,500. Audio/visual aids would be extra.

Developing promotional material and press releases to start the flow of invitations will take another \$2,000.

The total cost of Phase II will be in the range of \$15,000, plus or minus 10%. That is between \$13,500 and \$16,500.

This phase should again require eight to ten weeks to complete.

Phase III costs are based on a formula related to regional population and our experience in these regions in the past. Programs we are currently running in these areas have budgets as follows:

British Columbia	\$ 9,000
Prairies	11,000
Ontario	12,000
Quebec	10,000
Atlantic Provinces	<u>6,000</u>
	\$48,000
National program and supervision	<u>24,000</u>
	\$72,000

Each regional consultant is given this as a maximum annual budget. He is required to bill us each month for the time spent and we in turn accumulate all those invoices, add our own charges at the national level and submit the invoice monthly to the Departmental officials.

The breakdown in summary then is:

Phase I	eight to ten weeks	up to \$5,000
Phase II	eight to ten weeks	\$13,500 to \$16,500
Phase III	one year	to a maximum of \$72,000

If we could get approval in principle for the program and approval in concrete terms for Phase I, we could have this program fully operational by mid-September or October 1.

This seems to cover the basic structure of the proposal. I want to emphasize that we have developed similar programs in the past and have all the resources available to make it a truly effective part of your communications program.

The results -- in terms of excellent community awareness, identification and participation -- have proven themselves in the past and will, I am sure, do so again for your Department.

I look forward to hearing from you and to the opportunity of being of some help to the Department in its monumental task.

Kindest personal regards,

C. Clyde Batten

CCB/mb

Room 1301, Canadian Bldg.  
219 Laurier Avenue West  
Ottawa, Ontario  
K1A 0C9

October 2, 1973

Your file    Votre référence

Our file    Notre référence    813-2

Mr. C. Clyde Batten  
York Advertising Limited  
335 Catherine Street  
Ottawa, Ontario  
K1R 5T4

Dear Clyde:

We have had further discussions within the branch concerning your proposal to assist us in developing and carrying out a Speaker's Bureau program for Consumer and Corporate Affairs personnel. I am sorry this has taken so long to come to the discussion stage but I would like to advise you now that we feel your assistance could be of value to us in undertaking what you in your proposal describe as phase 1. That is, the pre-planning stage under which you would produce a master plan covering the first twelve months of operation.

At this time, the department doesn't wish to make any firm commitment to proceed with further phases of the proposal. However, if you would be interested in pursuing the pre-planning phase, I would like to get together with you to work out costs and plan of attack.

I will be out of the office for the balance of this week, but will be back on Tuesday, October 9th and would be happy to meet with you any time next week, if this would be convenient.

Yours sincerely,

Kenn Prittie  
Director  
Information & Public  
Relations Branch

"APPENDIX C"

The methodology we adopted was, in one sense, extremely simple but in another, exceptionally complex.

We considered a number of approaches -- surveys, polls, and in-depth interviews -- and opted finally for the straightforward face-to-face interview.

This method has the admitted drawback of eliciting highly subjective responses but that didn't deter us, finally, because the whole subject matter is fundamentally subjective.

We have interviewed then -- in sessions averaging 90 minutes -- all the people on the following list. Distilling common responses from their answers and listening hard for the kernel of objective truth behind the subjective plaint, brought us, we believe, to conclusions which have the substance of truth and the merit of common sense.

People interviewed:

Archibald, Carla, Consumer Consultant, DCCA, Halifax  
Bolger, C.M., Assistant Deputy Minister, DCCA, Ottawa  
Bourque, S., Regional Director, DCCA, Montreal  
Carter, John, Kimberley Information Services, St. John's, Nfld  
Chislett, Wilfred, Wilfred Chislett & Associates, Winnipeg  
Code, David, Assistant Director, I & P.R., DCCA, Ottawa  
Connolly, Peter, Executive Assistant to the Minister,  
DCCA, Ottawa.  
Downing, Nancy L., Consumer Consultant, DCCA, Montreal  
Dunn, Gladys, Director, Consumer Services Branch, DCCA, Ottawa  
Empke, W., Regional Director, DCCA, Halifax  
Fell, J., Regional Director, DCCA, Toronto  
Gairns, R.C., Press Assistant, DCCA, Ottawa  
Howard, J.L., Assistant Deputy Minister, DCCA, Ottawa  
James, Dr. R.W., Director, Consumer Research Bureau,  
DCCA, Ottawa  
Johnson, Harvey, Johnson Public Relations, Regina  
Laidlaw, Q.C., A.M., Assistant Deputy Minister, DCCA, Ottawa  
Legris, E., Executive Assistant, Consumer Affairs Bureau  
MacLean, R.W., Director, Standards Branch, DCCA, Ottawa  
Monaghan, M.C., Regional Director DCCA, Vancouver  
Nantel, Roger, Beauregard, Landry et Nantel, Montreal  
Prittie, Kenn, Director, Information and Public Relations,  
DCCA, Ottawa  
Quinland, Q.C., J.J., Acting Director of Investigation and  
Research DCCA, Ottawa  
Quiring, D., Regional Director, DCCA, Winnipeg  
Sansom, John, Sansom and O'Briend Ltd., Halifax  
Seaborn J.B., Assistant Deputy Minister, DCCA, Ottawa  
Smith, Lois, Consumer Consultant, DCCA, Vancouver  
Smylie, Robert, R.T. Smylie and Associates, Toronto  
Wilson, S.R., Meek/Wilson Ltd., Vancouver  
Yankewicz, Tannis, Consumer Consultant, DCCA, Winnipeg

About 20 people in the Department shared their views with us without being aware of our study or its purpose. These informal views were essential to an understanding of the internal preoccupations of the Department.

Likewise several members of the press were asked in informal conversations about their views of the Department. These views were by no means definitive but added to our overall grasp of the difficulties facing the Department in communicating its message.



