GATEKEEPING APPLIED TO PUBLIC RELATIONS: HOW A NEWSROOM BEHAVIOR IMPROVES KNOWLEDGE MANAGEMENT

By

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To my family, with special care to my wife, Denise

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Gatekeeping is the idea behind the making of news and is a well-known behavior in newsrooms worldwide. The leading purpose of this thesis is to analyze whether the gatekeeping process applies to non-news organizations. The goal is to help public relations practitioners manage strategic information by discussing ways to improve their ability to gather and share knowledge. Journalism studies has embraced gatekeeping since the 1950s, but the idea has so far not been used in public relations theories as a management model. This thesis brings together several views on gatekeeping from journalism, compares the ways it is analyzed in the public relations field, and looks for analogies in three other branches of discussion in public relations: issues management, environmental scanning, and boundary spanning. The fieldwork consists of 16 in-depth phone interviews with top managers and middle managers involved in handling information for their communication areas or business units. The interviews question how participants select, evaluate, and share strategic information. The work assumes that gatekeeping exists in corporations, but that it is not as clear or as valued in corporations as it is in newsrooms. Nevertheless, the gatekeeping role has the potential to strengthen corporate knowledge and public relations management.

CHAPTER 1
FROM JOURNALISM TO PUBLIC RELATIONS

This study aims to explore how the journalism practice of gatekeeping applies to public relations. Gatekeeping is a newsroom working feature that journalists and journalism scholars use to define and name the judgment behind the act of gathering, filtering, and evaluating information in order to hold it back, or move it forward to others in a decision chain. Hence, this study seeks to apply the newsroom gatekeeping metaphor within non-news organizations, meaning companies handling any markets other than journalism.

Seeking Information in Journalism and in Public Relations

Gatekeeping is the function behind news making, so it is a model well known to journalists and publishers. In fact, it is the basis of daily work in news outlets worldwide, no matter the medium used as output. The gatekeeping idea is inherent not only to journalism but to any decision-making action, which is dependent on information gathering, selecting, and analyzing. Indeed, the concept is viewed in the social sciences as a metaphor for any turning point decision, made by anyone, who is then the gatekeeper of that message or piece of information. Thus, this thesis extrapolates from these sources—journalism and social sciences—the understanding of gatekeeping as the fundamental act responsible for building awareness and meaning, concepts related to what is labeled by business scholars as *knowledge management*. Knowledge means understanding information, the ability to learn about or be aware of something. So the goal here is to explore gatekeeping as the basis of a knowledge management model for public relations, despite remaining linked to how the idea is exercised in journalism, and by journalists.

This analysis advances by comparing arguments from the fields of journalism and public relations. Journalism studies contribute to the development of gatekeeping by embracing this concept originally conceived in a social science setting. This thesis then applies the current journalistic rationale of gatekeeping to three topics commonly discussed in public relations studies, topics referred by the following terms: *boundary spanning*, *environmental scanning*, and *issues management*. Among other ideas in the field, these three constructs share some likenesses and compatibilities with gatekeeping because they are also used to seek, select, and work to understand information. However, it should be observed that public relations theories do not address gatekeeping from a management angle, that is, the hunting for information and the effort to interpret its meanings as journalism implicitly does. Rather, public relations scholars usually cite the idea to describe the role of journalists or news outlets as a filter between corporate information and its external publics. This work aims to discuss these contrasting views of gatekeeping, assuming the approach has a significant impact on both public relations theories and practices. By incorporating a wide understanding of gatekeeping, public relations theories could offer better support to communication methods and routines in organizations.

About communication concepts. To avoid the misunderstanding of equal concepts named differently, this study embraces and adapts the definitions suggested by Shoemaker and Vos (2009):

> The stuff being moved about in the gatekeeping process is to be called *information*. Occasionally we refer to *units*, *bits*, or even *items* of information, but our purpose is to describe the flow of information in general terms. The information is generally about *events*. When the mass media aggregate information for presentation to the audience, we call these *messages*. Messages can include news, opinion, features, video, and more. Messages that actually become news are *news items*. (Shoemaker & Vos, 2009, p. 5, italics in the original)

In addition, Shoemaker and Vos describe mass media as "organizations that transmit information to many people" (2009, p. 5), a definition too broad for the purposes of this study, because all non-media organizations also transmit information to people. Thus, this thesis makes a marketing distinction between news organizations and non-news organizations based on the messages they handle, which attend to distinct publics needs: news messages and corporate messages. The former are produced in environments driven by a journalistic mind set focusing on a consumer public in search of news media products, while corporate messages—including messages from news organizations viewed as business—have the inherent slant shaped by the kind of strategic relation, or marketing positioning, that such corporations plan to build with their clients and other stakeholders. Also following the same authors, internet is not capitalized in this thesis, unless inside quotations, "just as we do not capitalize *newspaper* or *television*" (Shoemaker & Vos, 2009, p. 6, italics in the original), an approach extended for generic related terms, such as web site (but not the World Wide Web, or the Web, when these terms refer to the institutional internet information space ruled by global identifiers standardized by the international community known as World Wide Web Consortium, or W3C). This study relies on the Associated Press Stylebook to avoid the common conceptual misunderstanding between technological medium and mass media: The internet is "a decentralized, worldwide network of computers that can communicate with each other. . . . The World Wide Web, like e-mail, is a subset of *the Internet*. They are not synonymous and should not be used interchangeably" (Christian, Jacobsen, & Minthorn, 2009, p. 141, italics in the original).

How is Gatekeeping Defined in Journalism and in Public Relations?

Gatekeeping in journalism studies is a communication metaphor that tries to explain the rational procedure people use to make decisions. In short, to fit the needs of this introduction, any piece of information acquired by someone goes forward—or not—because of a decision made by that person, who is then the gatekeeper of that information. In addition, the information becomes more valuable for the gatekeeper just after it passes that metaphorical personal gate, meaning that the person will support his or her decision as much as possible, an idea that will be further explained in the next chapter. Distinctively, public relations does not see gatekeeping as a process, but as a filter that operates when practitioners intend to deliver information through media channels. In fact, the field of public relations does not even define gatekeeping as journalism does, although both professions essentially deal with the flow of information. Such contrast and other subtleties between journalism and public relations views of gatekeeping will also be further addressed in the literature review.

Prominent scholars in journalism studies considered gatekeeping a model inherent to human communication. According to Shoemaker (1991), the idea is "as old as the process of communication—the town crier had to decide what to announce and what to withhold" (p. 3). She defined gatekeeping as "the process by which the billions of messages that are available in the world get cut down and transformed into the hundreds of messages that reach a given person on a given day" (Shoemaker, 1991, p. 1). Despite the value of this interpretation, this thesis considers the metaphor as only an attempt to describe a much more complex process found in human nature. "Human being's interest in news has its roots in prehistory," asserted Shoemaker (1996, p. 34) in a later essay. Gatekeeping is framed here as a thought as old as humankind, because identifying or defining a problem (thus selecting a unit of information about something), and shaping a message related to it (which implies elaborating a thought on the topics involved, and thus building knowledge around them) is innate to human beings, meaning that it is an expression of human reasoning.

The history of human civilization offers endless cases of gatekeeping throughout the ages. The Altamira cave paintings, in Spain, are a relevant example from the Upper Paleolithic, about 15,000 years ago, because they express a decision made by ancient humans to emphasize a herd of bison above all other wild animals that could be represented on the cave walls. Egyptian hieroglyphs, Greek pottery, and the inscriptions on the walls and portals of ancient Roman architecture are other remarkable examples of decisions involving selecting information and shaping messages—including unwritten ones—to create meanings.

Because of this inherent connection to our human behavior, gatekeeping as a decision-making action reveals itself as a simple step, easy as a daily task, even though the previous examples depict the process as a highly complex social and neurological mechanism. Indeed, gatekeeping is simple, as an outcome task, because it is deeply connected to human nature. Everyone, everywhere, can put it into practice easily. In other words, we are all gatekeepers. Such an inevitable condition is usually undervalued in terms of how the concept is analyzed and understood, both in journalism and public relations, with a single difference: Journalism studies acknowledge and apply the metaphor almost unanimously; distinctively, public relations practitioners usually underestimate the gatekeeping idea or simply do not understand its full extension. This thesis aims to be a small step toward narrowing this gap.

A Tool to Improve Attention

Besides being simple yet powerful, gatekeeping has other interesting features. For example, it does not require specific investments from organizations, except work time. It is not a research project, with its inborn complexities. It does not demand heavy training, extra costs, or specialists. It only needs people, the same staff that is already on duty. The single requirement is to put it into practice. "You can observe a lot by just watching," said the U.S. baseball player Lawrence Peter "Yogi" Berra. Gatekeeping is a path to improve the importance of simple attention.

Gatekeeping is best realized as a tool, because it does not offer judgments or political preferences by itself. It can be simply defined as an instrument to help develop any public relations philosophy or style. From an academic perspective, a full understanding of the gatekeeping metaphor should always be a concern, since no theory toward public relations practice should avoid or undervalue a behavior set in human nature. From the practitioner's view, the concept can be applied immediately, with the unbeatable advantage of reliability. Theories can change in a few years or decades, unlike human behaviors. Gatekeeping is reliable because it is based on hundreds of centuries of usability, and in fact since the existence of human civilizations, if one can trust the anthropological examples cited above.

Are Public Relations Theories Blind to Important Journalism Practices?

Gatekeeping as an information flow model is a hidden piece in the public relations field, where it is discussed without the same prestige it gets in journalism. Boundary spanning is intended for hunting information, as well as environmental scanning. Issues management considers all of this, and offers a broad view of how to deal with the information flow. Despite these features, scholars develop these three branches of literature without mentioning the gatekeeping idea as defined in journalism. Such topics can be treated as main subjects of articles and chapters; they are usually listed as independent keywords in indexes; they can even be the purpose of an entire set of books, such as issues management, for example. When gatekeeping is considered in these contexts, it is usually a side concept or argument to support an ongoing discussion (although it is getting more acceptance as an independent subject, possibly because of the internet revolution, as will be clarified latter).

At large, gatekeeping is mentioned in public relations debates to portray the interaction of practitioners and journalists—treating the latter, therefore, as the gatekeepers who usually make decisions about the messages handled by the former public relations professionals. A common discussion in public relations literature involves how to bypass or avoid such decision turning points. This thesis works with the proposal of expanding the role of gatekeeping far from the context of relations between practitioners and journalists (or between organizations and news vehicles). What is considered here is the option of adapting this journalistic behavior as an insight to manage information inside the organization itself. By doing so, the organization can increase the chance of achieving excellence in knowledge management, and decrease the chance of being trapped by unexpected issues. "No surprises" is the motto used by Palese and Crane

(2002, p. 287) to explain the goal of a method they discuss about how to manage knowledge, what they define as corporate intelligence.

Furthermore, due to a single correlation, engaging public relations professionals with gatekeeping could improve the relationship with journalists and news outlets. As the organization starts to incorporate this basic journalism behavior, it will have a better chance of building an understanding with other organizations that act similarly. Practitioners would potentially have a better sense of how journalists think because they would be applying an equivalent skill in their environment.

The internet is a strong force in this direction because public relations operations are becoming news hubs due to the increased significance of controlled media, provided by emergent communication technologies. "Controlled mass medium" (C. White & Raman, 1999, p. 406) is a key term adopted by public relations scholars to define the vehicle or channel over which practitioners have full control. The technology existing now, available through and by the internet, gives practitioners the same role as editors in news organizations. From their desktops they can run a news outlet—a corporate blog or a web site—with worldwide coverage, in a 24/7 cycle (24 hours/seven days a week). Under these circumstances, they have to act as editors to achieve a similar level of control as journalists, and gatekeeping can contribute to making it possible. In fact, gatekeeping is one of the most important common newsroom skills.

Unlike journalism, public relations studies do not define gatekeeping theoretically as a management role, which leads to the assumption that scholars do not see it as a useful concept to help practitioners think strategically. It does not mean public relations debates overlook the journalism field, but it does mean that scholars mention the concept to propose strategies and tactics mainly with the goal of bypassing the gate role performed by journalists in newsrooms.

Lastly, this thesis potentially adds significance to public relations theories by identifying the aspect summarized in the previous paragraph, and by alerting to the advantages of building consciousness toward corporate gatekeeping—lacking a better keyword to describe an attempt to translate and apply in non-news organizations an idea fully developed in journalism companies. Thus, this study aims to influence the current body of knowledge by revealing and exploring the relevance of such an approach for practitioners.

To achieve this goal, the next section investigates and compares some relevant views found in the literature from journalism and public relations. The discussion relies on a field investigation based on a methodology of qualitative interviews with 15 representatives of companies from several markets, with three mains profiles: public relations or communication practitioners, public relations or communication directors or top managers, and top managers whose responsibilities include communication management with direct influence on the company's reputation or branding.

CHAPTER 2
LITERATURE REVIEW

The following two subsections analyze gatekeeping from journalistic and public relations angles. Both fields usually define or discuss gatekeeping with contrasting views, as anticipated in the introduction, and the review underlines these discrepancies as needed. The third subsection focuses on boundary spanning, environmental scanning, and issues management, ideas fostered in public relations debates with features comparable to the gatekeeping model, and this analysis aims to highlight them.

Gatekeeping in Journalism Studies

Journalism studies borrow the following gatekeeping model from social science, although the idea of selecting and rejecting information was concurrent in the field. The first gatekeeping model is considered by scholars to have been introduced by the social-psychologist Kurt Lewin in 1947, in an article published after his death, according to the history of the concept summarized by Shoemaker (1991). Lewin studied how to make social changes in a community, such as adapting food habits, and proposed a theory about channels and gatekeepers related to goods moving from outside source to the home, then to the table of a given family. His study considered several personal decisions, or "gates," allied to a grocery store and a family garden, treated as different channels to deliver food. At a given point these two channels merge within the house. Then, a new turning point is symbolized by the decision about what will be stored or cooked, when the meal finally finds its way to the table. He inferred that neutral rules, and one or more gatekeepers, were responsible for the movement along channels and gates. These gatekeepers hold more power than others in the decisions inside channels, gates, or over the entire activity.

In addition, positive and negative forces put pressure on every decision-making step (or gate). As Lewin explained, an expensive piece of meat is a negative force before one decides to buy it; when the decision is made, the high cost changes to a positive force within the following gates, because the buyer will have extra care with the product, making sure it will pass the entire channel accordingly, and reach the family table in proper conditions. Through this view, several individual choices follow to an endless line of selections within a channel, so the gate allegory stands as an in-or-out prompt: Either something (a piece of information, a decision) passes through the gate and follows the channel's path, or it stays out. The idea is applicable to tangibles and intangibles, like messages, as Lewin made clear: "This situation holds not only for food channels but also for the traveling of a news item through certain communication channels in a group" (as cited in Shoemaker, 1991, p. 9).

Gatekeepers of communication vehicles consider all the clashes and forces involved in their decision-making channel, as time constrains, amount of news available in a given day, and other pressures. Supporting this, in 1991 Shoemaker grounded her view after Donohue, Tichenor, and Olien (1972), and described gatekeeping as

> a broader process of information control that includes all aspects of message encoding: not just selection but also withholding, transmission, shaping, display, repetition, and timing of information as it goes from the sender to the receiver. In other words, the gate keeping process involves every aspect of message selection, handling, and control, whether the message is communicated through mass media or interpersonal channels. (Shoemaker, 1991, p. 1)

In 2009, Shoemaker expanded and updated her view of the topic, and proposed with Vos an entire theory about gatekeeping, embracing the role of new technologies, the internet in particular. The primary novelty is the current mass media feature of establishing a channel for returning information, since the internet offers tools to gather responses and improve dialogue with the audience as never before in the history of communication, a scope not provided in the previous model. This updated and deeper work also developed new thoughts on the forces surrounding each gate, reviewed other models of gatekeeping (although all of them preserve the basic idea of a pathway—a channel—directing the flow of information), reexamined other applications of the concept (in interpersonal and organizational communication, for instance), and other levels of analysis (with discussions from the individual level to the entire social context).

These approaches also discuss gatekeeping "in more complex terms," as Shoemaker anticipated in 1991 (p. 4), as the models presented in the last century could not express all the ramifications of the gatekeeping role in communication tasks, according to her evaluation. Indeed, several models try to fit the gatekeeping process, and Shoemaker proposed one to undertake people and groups. She also integrated other forces (akin to ideology and culture) and players (such as interest groups, markets, and government) in her model proposed in 1991, keeping the same concept in the current version proposed with Vos, but with a different design, meant to include the new "audience channel" (Shoemaker & Vos, 2009, pp. 123-125), the pipeline that conducts most of the content produced by or under direct influence of the public. This chapter elaborates some of these ideas, as well as proposals from other scholars. But first, it is important to show briefly how the original model of gatekeeping has evolved in journalism studies.

An Idea Grounded on Decades of Research

David Manning White (1950) first discussed the idea of gatekeepers in a news outlet in 1949, when he analyzed the decision making of a middle 40s journalist nicknamed "Mr. Gates," with roughly 25 years of experience as a reporter and copy editor. Mr. Gates was in charge of editing the wire service delivered to a morning newspaper with a circulation of around 30,000 copies in a U.S. Midwest city. White's research proposal is probably not a coincidence, because he worked as a research assistant for Lewin at the University of Iowa, and thus had the chance to get to know his ideas (Reese & Ballinger, 2001; Shoemaker, 1991; Shoemaker & Vos, 2009). Over one week, White studied Mr. Gates's decisions for rejecting about nine-tenth of daily wire copy provided by three major news distributors: United Press, Associated Press, and

International News Service. By analyzing the reasons provided by Mr. Gates for selecting a story, White speculated "how highly subjective, how reliant upon value-judgments based on the 'gate keeper's' own set of experiences, attitudes and expectations the communication of 'news' really is" (D. M. White, 1950, p. 65). Snider (1967) reproduced the research in 1966 with the same Mr. Gates, and found similar results.

Bleske repeated the research in 1990, this time with a woman nicknamed "Ms. Gates" (Bleske, 1991). With only five years of experience as journalist, Ms. Gates was working in a modernized newsroom facility, one that no longer used wired copy machines, but was instead an electronic environment. In addition, the newspaper's size had tripled, reaching a circulation of 90,000. Bleske examined the data, the amount and characteristics of news rejected, and the reasons for those decisions, and found similar results compared to the data gathered by White 40 years before: "Despite differences in newspaper size and gatekeeper gender, background and experience, news categories and the importance of those categories remained consistent" (Bleske, 1991, p. 78).

Although the results were alike, when comparing the differences and likenesses between the two sites, Bleske did not analyze gatekeeping as a work task, or a management pattern for handling information. As in other studies about news, Bleske takes for granted the decision making itself as a characteristic of newsrooms, and does not evaluate it as a process. His goal concerned the forces that drive the decisions—for example, category of news, prejudices, and audience, which nevertheless adds other levels of complexity to the gatekeeping construct. Surely, the media outlet needs to please a certain external audience, but news gatekeepers need also to please their internal audience, so scholars point out that gatekeeping is a complex relationship between individuals and their corporate environment. On this matter, Breed (1955) discussed how media organizations impose social controls within their usual arena, the newsroom, and showed that polices exist to accomplish that, although they are unwritten rules, probably "due to the existence of ethical norms of journalism" (Breed, 1955, p. 108). He understood that a "'policy' may be defined as the more or less consistent orientation shown by a paper, not only in its editorial but in its news columns and headlines as well, concerning selected issues and events" (Breed, 1955, p. 108).

In "formal organizations," as Breed (1955, p. 107) identifies non-news organizations, he stated that policies are usually developed by the top leaders, and made the parallel with news organizations, where the policy makers are the publishers and the executive editors. These managers "must also secure and maintain conformity to that policy at lower levels" (Breed, 1955, p. 107), what he named the "staffers:" reporters, copywriters, and others newsroom workers without managerial responsibilities. Still following his thoughts, a policy is put into practice by the idea of slanting, which "involves omission, differential selection, and preferential placement, such as 'featuring' a policy item, 'burying' an anti-policy story in an inside page, etc" (Breed, 1955, p. 108).

Since news policies are concealed guidelines, Breed explained that newsroom staffers learn them by doing, by being exposed to them through "socialization" of these norms, and "by osmosis" (Breed, 1955, p. 109). Non-media organizations are free to explicit their communication polices, because their business do not necessarily relate to the freedom of expression, as news outlets do. Business policies, however, include other levels of ethics, plus the handling of pressures enacted by several stakeholders. To polish these guidelines, non-news organizations can still benefit from that particular feature of news organizations: Newsroom polices are taught by doing, and the best way to shape them is by practice. In addition, a considerable amount of this knowledge process is compelled by challenges driven by unplanned events—the news. Thus, to succeed on these learning steps of knowledge management, informal meetings plays its role, as well formal meetings, known as the news conference, when executives and staff "discuss how to shape the story" (Breed, 1955, p. 110).

Other research projects identify further aspects of gatekeeping as the news outlet gets bigger or uses other technological apparatuses. Berkowitz (1990) studied the metaphor in a local news television, and precisely understood that the nature of the work cannot be limited to the "evaluation of stories according to their news merits" (p. 82). In addition, independent values such as time, closeness to the audience served, and people involved with the news affect the decision-making routines. He found several studies on news work that point to other dimensions, such as ideology, and how far the bounds of the news organization shape what is published or affect editorial creation tasks. Also, coherently with Breed, some discussions identify the decision-making process related to the gatekeeping of news as a group activity instead of a choice made by a single person. In this regard, Berkowitz (1990) gathered reports from several executives and staff describing gatekeeping as a social decision-making behavior, as opposed to a solitary task, although it is not "fully balanced group process and, therefore, had some inherent unpredictability." One producer he quoted as asserting:

> If you're sitting in the news conference, whatever the news director says is going to carry out a lot of weight. The person with the most influence is going to dictate what is covered. Producers or the managing editor will be influential if the news director isn't at the conference. (Berkowitz, 1990, p. 88)

The considerations above are examples of the social features of gatekeeping, and to some extent they are natural results of many people, thus, many gatekeepers working together.

Gatekeeping, a Management Task, a Filter, or Both

Comparing journalism and public relations views of gatekeeping can result in contrasting and similar approaches. The views contrast when journalism focuses on the concept design, portraying it as a management task, although this word—management—is barely used, since the trend is to call it a "process" (Donohue, Olien, & Tichenor, 1989; Whitney, 1981). Public relations usually does not think of gatekeeping as a management effort; rather, the tendency is to see it as a barrier to be bypassed. The journalistic approach is similar to the public relations view—as shown in the second subsection—when it portrays gatekeeping with a filtering purpose, linked to several roles in the newsroom.

Journalism, however, shows implicit agreement regarding gatekeeping, whether understood as a process or a filter. Listing a few examples, scholars expose discrepancies in tone, such as cultural differences, as mentioned by Peterson (1979); in the selection of individual items (Stempel III, 1985); with its relation with new social tendencies or new "social reality," as in ecology and environmental issues (Schoenfeld, 1980, p. 456); or with differences in news outlets by size or city size (rural versus metropolitan areas) when addressing a particular topic (women in this case), according to the analysis made by Gross and Merritt (1981). Several studies analyze gatekeeping in different contexts without opposing the main approach, which suggests how flexible the idea is. Comparing print and online journalism, Cassidy (2006) concluded, "the results for each group suggest print and online journalists are not a breed apart" (Cassidy, 2006, p. 18). The gatekeeping method remained intact in a radical change made by a newspaper, although it was a challenge for the editors (Smith, Tumlin, & Henning, 1988), in a study on the news mix offered by three television networks (Riffe, Ellis, Rogers, Van Ommeren, & Woodman, 1986), in a study comparing reasons to use releases by television and newspaper gatekeepers (Abbott & Brassfield, 1989), in a study comparing the effects of wire news on editors (Whitney & Becker, 1982), in a study about the gatekeeping function on local television news producers (Harmon, 1989), and in a study suggesting the integration of several views of gatekeeping in a single model (Chang, 2004).

Levels of analysis on gatekeeping

Thus, given the set of examples above, gatekeeping as a basic model is well accepted in mass communication—in the United States, at least—since the mid-1950s, with room to grow beyond this field. Shoemaker, for example, explored some studies connected to organizational information controls, and highlighted that it is possible to "see parts of the gatekeeping metaphor applied to interpersonal communication" (Shoemaker, 1991, p. 16). Reese and Ballinger (2001, p. 641) considered White's research a "classic," an emblematic example of a study that belongs to the "roots of a sociology of news," sharing this position with Warren Breed's analysis about the forces driven by levels of social control in newsrooms (Breed, 1955). Their article based its concerns on questions that have arisen since the late 1960s, such as "what forces shape the media message, what and who 'sets the media agenda'?" (Reese & Ballinger, 2001, p. 641).

Indeed, several forces might affect the gatekeeping process, a discussion that Shoemaker and Reese (1991) addressed in a study to discuss the manner and methods of shaping messages on media content. "Instead of taking media content as a given, we ask: What factors inside and outside media organization affect media content?" (Shoemaker & Reese, 1991, p. 1). To answer this question, they came to the following conclusions:

> The levels of analysis in communications research can be thought of as forming a continuum ranging from micro to macro—from the smallest units of a system to the largest. A *microlevel* study examines communication as an activity engaged in and affecting individual people; a *macrolevel* study examines social structures beyond the control of any one individual—social networks, organizations, and cultures. These levels function hierarchically: What happens at the lower levels is affected even to a large extent determined, by what happens at higher levels. (Shoemaker & Reese, 1991, pp. 8-9, italics in the original)

The authors identified five such layers, labeling them *individual*, *media routines*, *organization*, *extramedia* (sic), and *ideological* levels. The first level deals with personal and professional characteristics, backgrounds, and experiences that might affect a worker in charge of a mass communication job, including individual values, beliefs, and attitudes toward politics, for example, and how these traits might influence professional roles and the ethics attached to selecting content. The second level concerns the routines of producing media, a discussion linked to several scopes taken here, because this thesis focuses on how the information is handled to create knowledge and meaning. In other words, on what propels the decision making behind the construction of reality through the process of defining what news is (Gans, 2004; Hausman, 1990; Tuchman, 1978).

The third level targets the role of the organization itself on shaping content, considering the forces generated by its structure as a company, aligned by its ownership, and directed by an organizational chart that defines "roles and lines of authority" (Shoemaker & Reese, 1991, p. 119). Like any for-profit organization, news outlets have economic goals to achieve, and economic constrains to consider. So, besides handling the flow of information in timely ways, newsroom routines also express other forces. In this regard, Hirsch asserted in his discussion of the gatekeeping tradition that

> mass media professionals do not work in isolation, but must meet the expectations of their organizations, occupation, and (to a less obvious extent) ultimate audience. The "subjective bias" of selection decisions can be individual, organizational, or both. Thus, the issue of accounting for decisions taken by lower-level and other gatekeepers becomes an analysis of variance—both statistical and conceptual. To what extent an employee gatekeeper can base decisions on personal rather than organizational criteria is a major question for additional research. (Hirsch, 1977, p. 21)

His view does not conflict with the third level discussed by Shoemaker and Reese, although Hirsch organizes the levels of analysis in three dimensions instead of five—the individual, the organization, and the societal background where the organization operates (merging in a single step, for instance, the first two levels identified by Shoemaker and Reese, individual and media routines). In the third level supported by Shoemaker and Reese, corporate contexts raise questions about how far administrative and business concerns influence content, and how these forces reverberate loudly or softly in the lower levels of analysis—the individual and the routines mentioned above. For example, media conglomerates can improve their performance by simple synergy, "the ability for their products to complement and reinforce one another" (Shoemaker & Reese, 1991, p. 135). The organizational context that drives such synergy can foster or bend the influences on selecting and shaping messages, thus affecting the work of gatekeepers in several ways. Policies and slanting, to name a few, are common ways to achieve these goals, among other news handling routines, aroused to some extent by the newsroom social environment (for instance, Breed, 1955; Gans, 2004; Tuchman, 1973, 1978).

The last two levels of analysis get closer to the idea of power, the power that comes from other sectors of a given society, and the power of ideology. Starting with the fourth level, message selecting and encoding receive pressures from the sources of that information:

> The most obvious influence occurs when sources withhold information or lie, but they may also influence the news in more subtle ways, by providing the context within which all other information is evaluated, by providing usable information that is easier and cheaper to use than that from other sources (what Gandy [1982] calls "information subsidies"), and by monopolizing the journalists' time so that they don't have an opportunity to seek out sources with alternative views. (Shoemaker & Reese, 1991, p. 150)

Interest groups, public relations campaigns, advertisers, and the audience of a media product influence how the message is crafted—and thus affect the gatekeeping process, as do government, regulations, laws, forces driven by the marketplace, and the development of new technologies.

> Ideology, the fifth and last level of analysis, is also the most powerful, because it
>
> represents a societal-level phenomenon. This is in keeping with the European tradition of media studies, in which ideology is considered a total structure, compared with a system of individual attitudes and values. This ideological level subsumes all the others we have been talking about and, therefore, is the most macro of the levels in our hierarchy of influences model. The ideological level differs from the previous levels in that all the processes taking place at lower levels are considered to be working toward an ideologically related pattern of messages and on behalf of the higher power centers in society. (Shoemaker & Reese, 1991, p. 184)

In addition to power, Donohue, Tichenor, and Olien highlighted control as a fundamental feature of gatekeeping. Elaborating from several references, their view retrieved the human "historic recognition of a fundamental social principle: knowledge is basic to social power, and immense potential for developing power over other human lives rests with those who man the gates in the communication flow" (Donohue, et al., 1972, p. 41). They argued that the use and control of information is remarkably important to any large social organization.

Supporting the approach taken by this thesis, they connected the gatekeeping idea from news organizations to non-news organizations, and discuss the management of knowledge in the processes of decision making:

> Knowledge today is organized to a high degree at all levels of society, and mass media represent one form of this refinement. The way in which mass media knowledge enters into social decision-making may not be the same as the way knowledge is used for executive decisions in industry, but the general principle of knowledge control in the service of other social needs is as applicable to mass communication as to any other level of human discourse. If mass communication is in actuality control of information and knowledge, then, in light of the way decisions are made in a modern, pluralistic society, the study of the gatekeepers who execute control decisions in the knowledge flow is especially urgent. (Donohue, et al., 1972, p. 42)

The discussion above appraises the study of media systems, so the scholars' intention might be other than simply applying the gatekeeping idea in non-news organizations as proposed here, a variance that has to be considered. In addition, this thesis assumes their assumption that "all communication processes have a control function within them, either manifest or latent" (Donohue, et al., 1972, p. 43), although this research is less concerned with control than with management and handling of knowledge.

Regarding knowledge management, this thesis emphasizes the historical perspective of human communication. Shoemaker (1996) explained the hunting of information as an evolutionary result driven by biologic and cultural forces, because "it is characteristic of all humans, not just journalists, to monitor the world around us, and we share this characteristic with much of the animal kingdom" (Shoemaker, 1996, p. 32). From this anthropological view, news is any abnormal or atypical information, so the concern is to anticipate how far the uncommon can be also dangerous or lead to undesirable results of any kind. As a side, these are also the roots of the common sense concerning that important news are the bad news, so the usual complain of news consumers about the abundance of negative information in news outlets can be interpreted by the anthropologic evolution of humankind.

The approach taken by Shoemaker (1996), however, is remarkably distinct from the ecological idea proposed in the 1950s by public relations scholars (Cutlip, Center, & Broom, 2009, p. 167), an idea reminded by Greenwood (2010) in her recent advocacy of applying Charles Darwin's "evolutionary theory as a metatheory for conceptualizing public relations thought" (Greenwood, 2010, p. 458). The anthropological view adopted by Shoemaker is distinct yet simpler, because it is restricted to the communication domain, and potentially stronger, because she meets more easily the needs of the management of knowledge in organizations. Although Shoemaker is not debating public relations theory, her discussion addresses relationships and publics, as well.

By narrowing her focus in news gathering, Shoemaker first considered that "the desire to receive and transmit information about the environment is both biologically and culturally derived and, second, that both biology and culture have had a profound impact on the form that news content has taken" (Shoemaker, 1996, p. 33). Citing scholars such as Wilbur Schramm, Jacob L. Gewirtz, and Slobodan B. Petrovich, her analysis retrieved the ancient human communication behavior reveled in cave paintings about 20,000 years old, which this thesis considers one of the starting points of an evolution of social language still going on today. As she pointed out,

> it is hard to imagine a time or place in which the gathering and dissemination of news did not play an important role. The task of sharing knowledge about what was happening in the environment was performed in the traditional society by the watchman, in the modern society by both informed persons and the mass media (Schramm, 1971). The growth of the mass media is a natural outcome of the human obsession with news. (Shoemaker, 1996, p. 35)

Research questions

This thesis defines the three research questions (RQ) below, considering the theoretical views on gatekeeping summarized so far, but without losing the historical nature of human communication: To clarify, the focus here is management and handling of information, not the social power attached to the information held, even though this research has to consider power as an inherent component of virtually any communication context. Thus, the qualitative research proposed in the methodology section is conceived to target public relations practitioners at management levels, or managers who also deal with communications concerns.

The questions are designed to address three specific steps of the gatekeeping process, as described by Shoemaker and Vos (2009), but conceived to embody corporate strategic messages and meanings. The first step is about selection: "Gatekeeping begins when a communication worker forms information about an event into a message. This is the first gate for that event. Where does the pool of items/messages come from?" (Shoemaker & Vos, 2009, p. 22). The second step is regarding evaluation, which the authors see as the amount of newsworthiness, since their discussion relates to a news organization: "Newsworthiness is a cognitive construct that only partially predicts which events make it into the news . . . events are not inherently newsworthy; only people can decide whether an event is newsworthy" (p. 25). The third step concerns the transmission of information: "A journalist who deems the event sufficiently newsworthy allows it past the first gate by creating or directing the creation of a message that begins its way through the media organization" (p. 23). Their concerns relates gatekeeping to news organizations, but the research questions rather aim to explore how non-news organizations gather, analyze, and share strategic information related to improving business operations:

> RQ1: How do public relations professionals at management levels, or managers with communication responsibilities, identify or select information?
>
> RQ2: How do public relations professionals at management levels, or managers with communication responsibilities, filter or evaluate the selected information?
>
> RQ3: How do public relations professionals at management levels, or managers with communication responsibilities, organize this information, and share (or distribute) it with the rest of the organization?

Chapter 3 describes the research instrument (Appendix C), 20 questions developed from the research questions above. Before that, to add further contexts, the next subsection analyzes some discrepancies between journalism and public relations' views of gatekeeping. The third subsection reviews boundary spanning, environmental scanning, and issues management, constructs typically discussed in public relations studies that resemble the gatekeeping procedures described so far.

Gatekeeping in Public Relations Studies

In general, public relations scholars use gatekeeping mostly to refer to the relationship with journalists within a particular news vehicle, or to refer to the medium itself, as a gate between the organization and its publics. Public relations discussions, for instance, face the rise of the internet as an opportunity to bypass this news gate step, and improve the organization's capability of spreading and controlling information toward its publics. According to C. White and Raman (1999),

> the World Wide Web can be considered the first public relations mass medium in that it allows managed communication to flow directly between organizations and mass audiences without the gatekeeping function of other mass media; content is not filtered by journalists and editors. (C. White & Raman, 1999, p. 406)

Thus, they understand the web as a channel where practitioners can have full control of their messages. According to this approach, the filtering character of gatekeeping in newsrooms is something to avoid, with instances as e-releases (news releases delivered by internet, with or without special distribution services), because such a channel reduces "the gatekeeping role traditionally played by journalists in handling paper press releases" (Strobbe & Jacobs, 2005, p. 290). Ironically, the internet can as easily reduce the organization's power to control information, as it can increase it (Polesi, 2008). Coombs (1998) focused on that idea, when he discussed the empowerment of activism by network improvement: "The gatekeeping function of the organization is defeated as stakeholders can turn to web sites or other sources on the Internet for information about the organization and its behavior" (p. 300).

The quotations above define gatekeeping as a filter with unfriendly characteristics, and do not consider it a tool with positive attributes. The internet allows an organization to bypass journalists' gatekeeping of its good news—what corporations want to promote; the internet allows activists to bypass the organization's gatekeeping of its bad news—what corporations wish to hide. Both situations portray gatekeeping as a formula to conceal (or block) information—and knowledge, as an outcome. This thesis works with the assumption that gatekeeping is a model to find information, plus to understand and analyze it in a given context, thus creating a sort of organic knowledge along the way. The principle underlined here is that one can hide or block only the information available, or the knowledge someone is aware of, so gatekeeping exists in advance of the power it can enhance. In other words, at a given moment in a decision chain, a gatekeeper must first find, evaluate, and move a piece of information forward to who has power to decide, ultimately, what to do with such knowledge—that is, this power is enhanced by exerting control of information.

Moving ahead, gatekeeping is understood as a vortex of a

> triangular relationship among public relations, mass media, and the audience, [where] the mass media have power in two critical dimensions: (1) the power to potentially influence the public as studied in mass media effects research and (2) the power to perform a gatekeeping function through processes of selecting and framing issues that will be exposed to an audience. (Fortunato, 2000, p. 482)

With a similar tone, Harmon and C. White (2001) discussed the use of video news releases (VNRs) to aid television stations, which is an example of agenda building and information subsidies tactics that might circumvent gatekeeping decisions in these news outlets. Their study implicitly reinforces the assumption that gatekeeping is a barrier but it can be avoided, and the VNRS work as tangible instruments to accomplish that.

This view of gatekeeping is a Western idea also well accepted in Eastern public relations studies. The examples selected here embrace the approach described by Shoemaker, Berkowitz, and others in the academic articles discussed earlier. Gatekeeping can portray the "reporter's assumptions about public relations" (Park, 2001, p. 405), it can be a "monetary proposition" in Kazakhtan (Terry, 2005, p. 34), and it can affect international news coverage in South Korea (Kim & Yang, 2008). As in the United States, newsroom gatekeeping in the East can be bypassed using the internet, as Kirat (2007) reported from the United Arab Emirates. Practitioners in South Korea have even developed the third gatekeeping, as named by Lee and Berkowitz (2004), a tactic performed by screening Koreans newspapers' first editions, which consists of the first copies delivered early in the morning, while the final edition of the day is on the way. According to the researchers, this job is a cultural practice unique to that country not related to technological concerns, even though the largest newspaper can run more than two million copies per issue.

By analyzing other means of jumping the gatekeeping wall in news vehicles, scholars have argued that acceptance by a news gatekeeper may depend on the amount of "news value" (such as impact, conflict, oddity, and magnitude) of a given release or piece of corporate information. Morton and Warren (1992) found "a strong correlation between *reader service* and *impact*" (p. 47, italics in the original). They argued that "historically, news elements have been defined by news people; however, these elements are difficult for the public relations practitioner to utilize" (Morton & Warren, 1992, p. 50). According to their findings, a release increases its chances of being accepted by editors if it focuses on reader service:

> This involves looking at what your reader needs and how the information your organization is producing can meet readers' needs. . . .
>
> Thus, the aim should be to reevaluate any information not just on how profitable it will be to the company, but on how it can provide a reader service. (Morton & Warren, 1992, p. 51)

They suggested, therefore, that public relations practitioners should look at corporate news likewise editors of media vehicles evaluate what is worthy to publish, by interpreting what is appropriate to their readers. Morton and Warren's counsel can be taken as insight in favor of applying gatekeeping procedures internally by the organization, which is the approach assumed in this study. In doing so, an organization can potentially increase the acumen about its publics. That is the meaning of "looking at what your reader needs": The needs of any stakeholder with whom the company is interested in building a mutually beneficial relationship.

Information Management Skills in Public Relations

Boundary spanning, environmental scanning, and issues management are administrative efforts used by public relations for information gathering and decision making (among other tasks). They share implied connections with journalism practices, as with gatekeeping, because a gatekeeper will be in charge of these tasks by any means, even when this role is not as explicit as it is in a newsroom. Before going further, it is timely to stress that this thesis cannot address the extent and the importance of discussions concerning these three constructs, all of which are well studied by public relations scholars. However, this analysis can point out what is suitable to the gatekeeping metaphor, because the concepts mentioned above represent actions, tasks, tools, or teams organized to handle the flow of information, either when it travels from outside to inside the organization, or when it moves in the opposite direction, from inside to outside. "Organizations survive by making sense of and giving sense to their environments," asserted Sutcliffe (2000, p. 197).

She supported the idea discussed by scholars arguing that "information-gathering and information-processing roles—such as the kind of information managers have to work with, and the handling of information prior to decisions—are more crucial to the success of the firm than strategic decision making itself" (Sutcliffe, 2000, p. 198). Although Sutcliffe scanned several studies about the term *information processing*, there is no link with the approach taken by journalism, as proposed here. The "review [is] grounded primarily in the perceptual, interpretive, and enactment perspectives related to how organizations and their members come to know and cope with their environments through the processes of attention, interpretation, and action" (Sutcliffe, 2000, p. 204). Her study, however, has a clear view of one angle that this thesis also concerns: "Information flows from organizations to their environments have received fragmented attention in the organizational theory literature" (Sutcliffe, 2000, p. 213).

Issues Management

Managing issues is the most important concept aligned with handling the information that flows into organizations. It has been developed since the mid-1980s, when "the discipline was still being defined" (Heath, 1997, p. ix) as almost a single field, which correlates with the growing importance of globalization in this period. Despite this single relative importance, all three topics presented before are single index entries (with minor differences in the keyword used) in relevant books about public relations theory and methods, as in the volumes edited by Botan and Hazleton (2006), J. Grunig (Grunig, 1992), and Heath and Vasquez (2001). Issues management alone is indexed in Jablin and Putnam (2000), Ledingham and Bruning (2000), and other works (Heath, 1994; Heath, Toth, & Waymer, 2009), and is the main subject in Heath (1988, 1997). A keyword search of back issues of the scholarly journal *Public Relations Review* returned 219 articles on "issues management." More than 20 of them contained the concept in the title, which indicates that the topic is popular and has been studied extensively by scholars.

The idea is described by Renfro as a function "to enhance the current and long-term performance and standing of the corporation by anticipating change, promoting opportunities, and avoiding or mitigating threats" (as cited in Heath, 1997, p. x). A prolific author on the topic, Heath (1997) defined issues management as a link between public relations and the management roles, and includes among its core duties "the identification, monitoring, and analysis of trends in key publics' opinions" (Heath, 1997, p. 6). Although he is expressing in this page his worries about how these external opinions (from the organization's view) can "mature into public policy and regulatory or legislative constraint of the private sector," the goal of his understanding of issues management—identifying, monitoring, and analyzing—is highly related to what is done in the newsrooms, as explained in the previous sections of this chapter, and in the introduction.

Environmental Scanning

Botan (2006) considered environmental scanning the strategic research to govern preissues, which means any noticeable trend in the environment in which an organization exists and which depends on: "If issues are what publics decide are important, then preissues are occurrences in the environment to which publics have not yet attached significance, but could" (Botan, 2006, p. 241). He asserted that issues compound with publics to form the most important dimensions of the "grand strategies" that a given organization can develop, and "they are so central to public relations and to the strategies and tactics that can be employed in any given situation" (p. 236). In the context he discussed, it is impractical to address all early affairs because "most preissues will not develop into issues that are important to significant publics and so will not significantly affect the organization" (Botan, 2006, p. 241). In addition, preissues can be endless, so no organization would have resources to address all of them without making sure that a particular topic can be relevant. Such situation leads to the balance between action and inertia, although the latter might be a result of an inflexible characteristic of the organization, a behavior that might express its broad strategy:

> In the case of an extremely intransigent grand strategy, for example, the organization does not think publics have any right to an agenda of their own. Thus, the organization does not seek to engage publics about such views.
>
> In addition, those organizations holding an intransigent grand strategy often do not have the communication links with their environment needed for early assessments (e.g., advisory councils, community involvement programs, social audits). (Botan, 2006, p. 241)

Botan cited instances capable of scan topics beforehand, such as councils, audits, or programs to improve the involvement with communities. But here again the organization's profile directs the results, because detecting the need for change based on precocious evaluations can be criticized by top managers of intransigent organizations. Without the support of top decision makers, a negative evaluation about a preissue can be understood as a disloyalty with the organization, Botan suggested.

Gathering and selecting information is a primary function of gatekeeping, so such activity can improve the organization's ability to detect preissues. In fact, it is timely to evaluate how far formal programs cited by Botan, such as advisory councils and social audits, can offer acceptable results without including the gatekeeping ideas. At least public relations practitioners should discuss how gatekeepers—a role borrowed from journalism—could help to boost these programs.

Boundary Spanning

The idea of bridging the borders—or spanning the boundaries—of an organization comes from viewing it with a "system" focus, a set of subsystems controlled by a major management hub, as Grunig and Hunt (1984) explained: "As boundary personnel, public relations practitioners support other organizational subsystems by helping them to communicate across the boundaries of the organization to external publics and by helping them to communicate with other subsystems within the organization" (Grunig & Hunt, 1984, pp. 8-9).

It is possible to see boundary spanning simply as a label for one side of public relations practice, such as when issues management is set apart. "Every contribution practitioners make to issues management is mediated by the knowledge they accumulate through boundary-spanning activities and through their unique perch at the boundaries of their organizations" (Lauzen, 1997, p. 67). The label for the other side would be environmental scanning, because "issues management is the function of strategically aligning the corporation with the environment" (Bowen, 2002, p. 271) so acting close to the borders would improve the "opportunity to build relationships with external sources of information" (Lauzen, 1997, p. 67). This study relies on this academic approach to assume that both environmental scanning and boundary spanning overlap with issues management, or are practical expressions of the latter concept. By portraying issues management as a whole activity, environmental scanning and boundary spanning would be two arms of actions, two sides with maybe an unequal design, but a similarity in value and practical attitudes.

Modern and Contemporaneous Views of the Three Topics

Environment or boundaries, scanning or spanning: looking more closely, these keywords have almost adjacent meanings, but they just make sense when related to the whole activity of managing issues, in the studies cited previously here. This holistic view—to borrow the word used by Nelson and Heath (1986, p. 23) to describe their model for issues management—conflicts with the system approach set in the boundary spanning idea, and with the underlying sense of diverse isolated chambers within a corporate system. In a model with this design, composed by several subsystems, studies mentioned in the previous subheadings (for instance, Grunig & Hunt) sustain that, to some extent, public relations is the force supposedly capable to join through communication all these disjointed pieces and areas of a given corporation or institution.

Accordingly, to fulfill this goal of putting areas together, various lines of thought have discussed the role of issues management in public relations. As reviewed by Nelson and Heath (1986), "these important developments stem from the desire by executive leaderships to integrate with long-term social changes through proactive—as compared to reactive—intervention in the public interest process" (Nelson & Heath, 1986, p. 20). They proposed to base issues management on system theories and organizational communication, in order to support the decision making of top directors, and other managers. Their model discuss ways to achieve some command of actions, and track the environment, with the purpose of narrowing the organizational performance and the organizational behavior expected by the public. The idea of a "high-level function" to connect lower areas in the organization is also in Bowen (2002), who attested that "elite issues managers lead their organisations in not only adapting to change, but also in using an ethical paradigm to analyse and implement that adaptation" (Bowen, 2002, p. 271).

Other studies, however, maintain that reality is different or simply "too complex" (Cancel, Cameron, Sallot, & Mitrook, 1997, p. 32), and by doing so these works express a more contemporaneous concern, as Curtin and Gaither (2005) elaborated: "Critics charge that normative theories based on functional models of practice do not capture the dynamic characteristics of relationships and discursive nature of meaning, which form the core of public relations practice" (Curtin & Gaither, 2005, p. 91). Several critics of "these dominant functionalist concepts started to emerge during the late 1980s," according to Holtzhausen (2002, p. 252), who maintains a "postmodern" agenda, an array of thoughts deeply against the view of public relations as a management function. According to her, the focus taken by the majority of theories on public relations "is typical of a modernist approach to organizations, which privileges a management discourse and emphasizes upper management's goals for the organization as given and legitimate" (Holtzhausen, 2002, p. 251). She argued in the same page that the modern view of public relations is an attempt to disregard any "dissention and conflict," and to enhance the power of the organization:

> The role of communication in this approach is to ensure information transfer from the supervisor to the subordinate to gain compliance and to establish networks to ensure the organization's power in relations with the public. This perspective includes the concepts of strategic message design, management of culture, and total quality management. (Holtzhausen, 2002, pp. 251-252)

Meaning and discourse are important ingredients here, as well as rhetoric, which "has to do with relationships—how they are shaped—typically between organizations and individuals" (Toth & Heath, 1992, p. xiii). According to Toth and Heath, rhetoric emerged more intensively in the 1980s as a contrasting point against the "systems world," as Toth (1992, p. 4) put. She acknowledged that "systems and rhetorical/critical scholars of public relations have begun finding complementary contributions to an understanding of public relations" (Toth, 1992, p. 4), and this agreement has evolved since then in these authors' publications (Heath, et al., 2009). This apparently consentient with the modernist or positivist approach described by Holtzhausen might be a reflection of a world still ruled by organizations of this kind, although it is beyond the purposes of this thesis to analyze to what extent this is a transitional time frame from modern to postmodern organizations.

Some arguments exposed by Holtzhausen, however, deserves attention, because they might open new opportunities to public relations practices, such as the increasing importance of discourse, and the interaction among knowledge, power, ideology, truth, and the handling of dissension. Gatekeeping is applicable in all these topics, even thought the postmodernist set of claims, statements and philosophies has to be questioned, in special when applied to business environment. Accordingly, Gaither and Curtin proposed to use the circuit of culture model, as presented by du Gay, Hall, Janes, Mackay, and Negus (1997), to fulfill what they saw as a lack of "an alternative theoretical basis that encompasses identity, difference and power" (Curtin & Gaither, 2005, p. 92). Their concern was to move

> from the linear transmission-based communication models of Shannon and Weaver (1949) and Lasswell (1948), which drove the postpositivist media effects tradition, to a model of discursive process, which underlies more recent paradigmatic formulations. In Carey’s (1989) terms, the new model recasts communication as ritual; that is, as a cultural form. It positions communication as a synergistic, nonlinear, dynamic process. (Curtin & Gaither, 2005, p. 93)

Today, in sum, practitioners can still embody the original boundary spanning activity, but they are not confined to normative theories. A diverse set of philosophies or methods is available to put into practice. Public relations professionals can safely assert that taking the two-way symmetrical model to solve daily problems "depends on a whole lot of things," as Cancel et al. (1997, p. 31) argued when they presented their "contingency theory of accommodation" as an alternative (Cancel, et al., 1997, p. 31). Practitioners can rely on the circuit of culture, mentioned before, and remodel boundary spanning with the notion of being "cultural agents operating mainly within the sites of production and consumption to create meaning through the shaping and transfer of information . . . [which] places public relations practitioners as key players in the cultural economy" (Curtin &

Gaither, 2005, p. 107). Or they can take a postmodern posture and understand that public relations "becomes a process that legitimates many different and heterogeneous forms of meaning and understanding, in stead of a modernist approach based on consensus determined by the most powerful, in this case management" (Holtzhausen, 2002, p. 257).

Assuming both the rhetorical and the postmodern orientations noted above are applicable and relevant to the practice, this thesis understands that gatekeeping could also contribute to helping public relations professionals build a better and more reliable corporate meaning and discourse. Assuming the systems approach still plays a significant role in the majority of organizations, the gatekeeping model could at least make clear some behaviors never or only slightly illuminated before, by simply applying this fundamental newsroom practice in a different environment, the environment of non-news organizations. All things considered, it is timely to remember that gatekeeping is attached to human nature and the history of communication, so its applicability can always be both possible and reliable. It is possible because, as mentioned earlier, gatekeeping is inborn in people, and it is reliable because it has been applied in news organizations worldwide for centuries—for example, since the advent of the printed media.

Next, Chapter 3 introduces and describes the methods considered by this study, and outlines the research instrument.

CHAPTER 3
METHODOLOGY

This study has adopted a qualitative approach to gather data on how public relations practitioners manage information and knowledge on a daily basis, a research strategy that employed in-depth interviews designed to follow a semi-structured questionnaire. The fieldwork relies on a convenient sampling of participants, representatives of organizations with diverse sizes (in number of employees or revenue, for instance), and handling distinct markets and business. The majority of these companies are multinationals, and the researcher has identified participants in the United States and Brazil. The latter is the most well-represented region in the sampling because it is the researcher's country of origin, a facet that inherently bends the process of recruitment toward Brazilian professionals, even in case they work in the United States.

The researcher conducted 17 interviews, 16 by phone (one participant sent written responses via e-mail to the topics listed in Appendix B). The telephone interviews were recorded on a personal computer (several recording applications are available, some of them set with an open-source license). The next chapter, which includes the research findings, adds details about the sample characteristics. The appendix includes a summary of each interview, with a topical profile of the interviewee and a brief description of the company they work for. Names are disclosed to add credibility to the results.

Research Strategies: Method, Procedures, Sampling, and Recruitment

As a method, qualitative research has "no commonly accepted definition," according to Wimmer and Dominick (2006, p. 113) in their discussion on the philosophies and goals of this investigation approach. Their statement was reinforced for instance by Lockyer (2008), who added that "qualitative research has meant different things at different times across its history" (Lockyer, 2008, para. 1). To further understand such a context, Wimmer and Dominick (2006) pointed out that social science investigations are modeled by one out of these three criteria: positivist (also objectivist), interpretive, or critical. "Each of these represents a model or a **paradigm** for research—*an accepted set of theories, procedures, and assumptions about how researchers look at the world*" (Wimmer & Dominick, 2006, p. 113, bold and italics in the original). The authors, however, stressed the importance of the relations between the positivist and the interpretive approaches.

In sum, positivist and interpretive views represent almost opposite philosophies, with effects in all sciences, while the critical model is attached only to the humanities, when the researcher's interest considers levels of social power, politics, and ideology. Positivism has a close relation to quantitative research because it relies on objective measurements. Besides its view of reality as independent and objective information, the positivist approach also considers that, whatever reality is, it can be divided, and studied as separated parts. Contrastingly, research under an interpretive frame understands reality as something subjective and holistic—so reality makes sense only when related to the researcher, and it cannot be divided; thus, it has to be understood as a whole, despite the existence of segments. In practice, these two distinctive views affect several sides of the research process: its design, its settings, its instrument of measure, the role of the researcher, and the way theory is built under these two views. Discounting the polemic between qualitative and quantitative research, the authors considered that both approaches have inherent values, and can achieve the desired result if well designed. "Qualitative research uses a flexible questioning approach . . . Quantitative research uses a static or standardized set of questions" (Wimmer & Dominick, 2006, p. 116).

Another relevant characteristic between the two strategies involves how the data are collected and analyzed. One side reflects the deductive style of quantitative methods—usually driven by hypotheses developed before the research step, and to be confirmed or rejected by the data gathered; the other side mirrors the inductive strain of qualitative manners—when "data are collected relevant to some topic and are grouped into appropriate and meaningful categories; [and] explanations emerge from the data themselves" (Wimmer & Dominick, 2006, p. 116). This latter pattern, indeed, fully describes this thesis's fieldwork.

The Field Procedure

Qualitative methods embrace many ways of collecting data. Among them, this thesis has chosen to interview current public relations professionals, from diverse organizations, to evaluate how information is managed on a daily basis—an exploratory attitude consistent with perhaps the first attempt to analyze gatekeeping as a management attitude, a typical journalistic behavior, in the public relations context, meaning in a non-news environment. The research employs the in-depth interview format because this method enables distinct angles about the topic under investigation to be explored.

In-depth interviews "are often referred to as semi-structured interviews because the researcher retains some control over the direction and content to be discussed, yet participants are free to elaborate or take the interview in new but related directions" (Cook, 2008, para. 1). Unlike in structured interviews, "the researcher is not required to prepare an extensive list of questions; rather, the researcher is required to be aware of the major domains of experience likely to be discussed by the participant" (Cook, 2008, para. 1). Cook discussed the limits of this approach, noting that the method often combines other forms of collecting data, "such as observations, diaries, and documents" (2008, para. 3), an improvement this research could not address. Besides being time-consuming, local observation would imply presence in several locations spread across large countries such as Brazil and the United States. This constraint is highlighted in the final chapter.

According to Firmin (2008a, 2008b), a semi-structured interview is the middle point on a chain linking opposite sides, the unstructured (also known as open interview) facing the structured method. His explanation accurately described the approach taken by this thesis—a blend of both:

> One extreme involves open interviews that utilize minimal structure. There is no direction given or hints as to what the researcher might suspect to find. The participant is encouraged to speak freely, taking the interview in whatever direction. . . .
>
> Structured interviews exist at the other end of the method pendulum. When using this method, the researcher typically has garnered tentative hypotheses regarding what the participant might contribute to the interview. These hypotheses might be generated via previous research, literature reviews, pilot studies, or a priori reasoning. (Firmin, 2008a, para. 2-3)

The Sampling Process and Recruitment

The research sampling frame combines convenience and purposive samplings, mainly through the researcher's professional network. The researcher asked colleagues and friends to inform about potential participants; this task was done mostly by e-mail, and sometimes by phone. In a few instances, the researcher contacted a potential participant directly. The researcher has considered the snowball technique, as well. However, few interviewees have informed other potential participants, so the sample was rarely gathered with the support of those who got to know the main topics from the questionnaire. In fact, such a pattern has occurred with just one interviewee out of 17.

The recruitment was done in two steps. After the potential participant had been identified, the first step was to send a request, tailored to each person, so each message was personalized for the recipient. Requests sent to acquaintances or unknown people followed the structure shown in Appendix A; invitations sent to professional colleagues usually presented the same content, but with a somewhat more informal approach. After setting up the interview, the second step was to send another e-mail as a follow up, listing briefly the three main topics of the questionnaire: how the information is identified or selected, how this selected information is filtered or evaluated, and how it is organized and shared (or distributed). Appendix B shows a model of this message, meant to work as a guide or an outline for the actual interview, which followed the research instrument (Appendix C), a set of questions to which no interviewee has had access. In reality, the interviews did not address all the questions, although the three topics—select, filter, and share—were usually mentioned along the conversations.

Alternatively, after the first step, the negotiation to obtain the consent of the participant was conducted by phone instead of e-mail. The outline (Appendix B) sometimes was sent before the confirmation, to encourage the prospective participant to accept the invitation. All the participants received the letter of consent by e-mail, with instructions to read it and express their acknowledgment by phone, or by replying to the message. The researcher will keep these recording files for three years, following the orientation expressed by the IRB 02 protocol, the Behavioral/Non-Medical authorization monitored by the Institutional Review Board to conduct research at the University of Florida.

The approach was designed to avoid biased responses, in particular when participants have the tendency to positively support the research object. Therefore, the keyword gatekeeping was never disclosed in previous contacts or conversations with participants. Over the recruitment, the interview was described as a research project about daily public relations tasks on knowledge management, so its goal was to describe ways to manage non-administrative information, the information that could affect positively or negatively the organization's reputation.

The Research Instrument and Protocol

The research instrument (Appendix C) addresses exploratory concerns on how practitioners act as gatekeepers, how they select, filter, and manage information; thus, how they seize insights and, as a result, create knowledge in the process. Appendix B shows an outline sent in advance for each interviewee with the purpose of establishing a clear plan for the interview. The topics look for how the gatekeeping function, as found in newsrooms' daily tasks, could be correlated with activities found in the selected company. Also, special care was given to analyzing how the gatekeeping role in journalism could be translated to the selected company environment.

Developed by the researcher, the research instrument was never disclosed for the interviewees; it was used only as a guide by the researcher, since the sampling frame includes distinct organizations with different communications needs and procedures. Indeed, no interview has addressed all the questions as they are listed in the Appendix C, although all the interviews followed the main topics outlined in the Appendix B (gathering, filtering, and sharing, for instance).

The interviews were conducted by phone, except one participant, who sent information through e-mail, answering the topics outlined in the Appendix B, which proved to be incompatible with the others because the phone interviews followed the questions listed in the Appendix C, with specific concerns. In addition, by the end of the conversation, the participants were invited to add any thoughts related to the topics that they might want to include. In almost all the cases, this free time allowed the participants to provide valuable information that otherwise would not be addressed through the questions.

The qualitative research of this thesis does not generalize the results for other organizations. The information presented in the findings is analyzed only under the context of the selected organizations. In addition, although this thesis is grounded on theories about gatekeeping, its main goal is to explore this idea within an environment other than newsrooms—with its results, this thesis does not pretend to expand the gatekeeping theory in journalism, or public relations.

CHAPTER 4
FINDINGS

The next subsection summarizes some features of the sample, followed by four subsections that compile information gathered from the research questions stated in Chapter 2. The selected organizations are based in two countries: United States (US) and Brazil (BR), but it does not necessarily represent the region of their operations, which can go from regional to global, characteristics that will be pointed out as needed. All the companies names cited throughout this research maybe registered trademarks of their respective owners, and are used here only to identify the interviewees' organizations, and the context they belong or represent. To easy reading, the trademark or registration symbol is included only in the first time the organization's name appears.

Sample Summary

This research probed information from 16 in-depth interviews done by phone, a sum of around 10 hours and 40 minutes of conversations guided by 20 questions (Appendix C); each interview lasted an average of 40 minutes. One participant decided to send written response based on the outline of topics (Appendix B). The 17 participants—nine females and eight males—represent 16 organizations. Appendices D through T list the interviews in the order they were done, summarize information about these 17 organizational units and cultures, and include full quotations of topics presented in this chapter. To increase credibility, the research proposed to disclose all participants' names and their respective organizations, which are identified by the name they are most known and by the country where they are based. Participants who requested to conceal their names or the name of their organizations—a shortcut to make clear the testimony is a personal statement—are identified by the interview number: Organization 5 and 15, and Ms. 15.

The research sample includes the following organizations: Odebrecht® (construction and engineering; one BR operation, one US operation), John C. Lincoln (hospitals and health services;

two US regional facilities in Phoenix, Arizona), TotalCom® (advertising and communication services; BR operation also have subsidiaries and business with partners in other countries), Organization 5 (agriculture protection chemicals division of the US operation), Unigel® (chemicals, fertilizers, plastics, and packaging), TAM® (air transportation), Aberje® (communication and public relations professional association), and the Brazilian operations or subsidiaries of the following organizations: Monsanto® (agricultural, biotechnology, and protection chemicals), Carrefour® (supermarkets and other grocery store formats), Oracle® (information technologies and services), CB Richard Ellis® (real estate services and consulting), Coca-Cola (beverage and food), Jones Lang LaSalle® (real estate and investment management), Organization 15 (hydropower equipment and services), Fiat® (automotive industry), and Paramount Pictures™ (home entertainment segment).

About the country of origin, the sample includes seven organizations from the United States, five from Brazil, and one each from three other countries: France, Germany, and Italy. Three participants were working in the United States at the moment of the interview. One interview was conducted in English; all others, in Portuguese. The researcher is responsible for translating and adapting the citations from Portuguese into English. Two organizations can be classified as not-for-profit (John C. Lincoln and Aberje); eight organizations are public, with shares listed on the stock exchanges (Organization 5, Monsanto, Carrefour, Oracle, CB Richard Ellis, Coca-cola, Jones Lang LaSalle, and TAM); the remaining organizations are private or closed companies, meaning incorporated companies without public offer of shares at the moment (Odebrecht, TotalCom, Unigel, Organization 15, Fiat, and Paramount). Appendix U summarizes this information.

The findings are grouped by the research questions (RQ), and by topics raised by the participants during the interviews. Seven topics include a case, which describes with more detail the way a particular organization or interviewee handles the issue related to that topic. Although some topics are equally raised by several participants, the findings does not quantify this information, due to the generic meaning of the qualitative approach inherent to the in-depth interviews applied to the sample. However, tendencies are highlighted when expressed by the majority of the participants.

RQ1: Selecting Information

A unit of information is identified when it is considered strategic or relevant to non-news organizations, so the participants expressed this decision as a reflection of the perceived impact that such information has or may have on their business. The degree of this impact defines the newsworthiness—to apply the concept used in newsrooms—of this information, and increase its chances of being selected, and, thus, of passing through what is the first gate in the metaphor used by the gatekeeping theory. The next subsection addresses what apparently drives the criteria guiding this first gatekeeping step. In addition to internal culture, which defines the uniqueness of each organizational environment, the findings detected other forces that might drive the perception about the importance of information to be identified and selected: the role of the client, the market, and the community, or the society as a whole entity. Regarding public relations, adding strategic value to communication correlates with the embracement of practitioners in the top decision-making board, no matter how the communication function is named inside the organizations included in the sample. These topics are summarized in the following subsections. Specific cases are described as needed.

Criteria Follow Strategy

The findings suggest that some organizations value communication as a strategic component of their decision-making processes, while in other organizations this appraisal is not as clear. Organizations that value communication as a strategic tool have the tendency to describe a more clear set of criteria to define information with potential relevance to them. Inversely, organizations where the strategic face of communication is less evident also tend to describe with less accuracy the criteria they use to identify and select information. In some organizations, the criteria used to find strategic information is driven by the effects it will have on the business, as this testimony described:

> Information is strategic to the extent that it is related to the business of the company, and it is weighed according to how it affects the sector, from the global to the local economy. (Lage, Fiat BR, in-depth phone interview, Feb. 4, 2011, full quotation in Appendix S)

Lage argued that several non-economic topics have also to be considered, which relates to the environment where the company operates, such as political and social variables. Defining relevance to identify information might follow very close the strategic canons set by an organization, as Nassar expressed: "Relevance to us is something inside a risk matrix, which is linked to the identity, mission, and vision of our members" (Nassar, Aberje, in-depth phone interview, Jan. 28, 2011, full quotation in Appendix O). According to his description, middle managers not only identify but also evaluate selected information using strategic planning tools, such as the analytical matrix known as SWOT (an acronym for Strengths, Weaknesses, Opportunities, and Threats). His argument indicates that Aberje applies this approach in daily basis, what will be detailed in the subsection about systematic searching of information.

Internal Culture Defines the Value of Communication

The previous example suggests that organization size apparently does not affect whether the communication is viewed as a strategic or a tactical task. Indeed, the findings suggest that internal culture might have more influence in the strategic importance attributed to communication than business size (in terms of revenue), organizational size (in terms of number of operational units or number of employers), or number of clients directly attended. As a consequence, internal culture—an expression of the grand strategy proposed by Botan (2006)—

influences the gatekeeping process, by establishing the level of interaction between the organization and its publics, specially publics outside of its boundaries.

Following this, organizational culture might also explain to what extent communication is considered strategic—and a valuable ingredient of decision making—or just a tactical tool used to move on decisions already taken. The research sample includes relatively small organizations that explicitly value the strategic component of communication, for instance the already cited Aberje, while other bigger organizations were described with a lesser commitment on that, for instance, Unigel, portrayed in the next subsection. Cultural background apparently correlates with the ways corporate gatekeeping is practiced on a daily basis, since the communication activity is expressed by distinct levels of commitment, running from informal meetings with team players or top managers to sharp weekly meetings meant to produce tangible evaluations and plans—or a lack of meetings at all, with no monitoring, reports, or systematic evaluation of external or internal environments. The case of Unigel is timely because the low commitment with the strategic value of communication described by the participant might require a closer look to make sure it does not accomplish strategic results as it looks at first sight—maybe it is just enough for the organization's purposes at the moment, at least until a new crisis occurs.

The case of Unigel. In the case below, external communication is outsourced, and internal communication is handled by a human resources professional because the organization's main concern is to address their employees, a job done mainly through intranet, e-mail, printed newsletters, and bulletins hung in murals every two weeks. This communication is mainly related to work relations between the organization and its employees. The participant describes the company as conservative and low profile, and does not emphasize gathering and evaluating information:

> Relevance is complicated. Our communication is usually elaborated by request, top-down. When a communication demand exists, the board of directors call us to elaborate some news. [Gathering] information about the market, linked to management or strategic areas is not done. [Also,] there is no interface between human resources, or the communication subsystem, and the departments. We do not search for information. (Neves, Unigel, in-depth phone interview, Jan. 19, 2011, full quotation in Appendix K)

Neves noted that this approach reflects the way the shareholders understand communication, at least in relation to their business: The operation competes globally, which demands high standards, but she describes the organization as being "very calm," meaning that the communication demands are not very intense. By not getting organized to look for information, she apparently attributes a low value to the strategic component of communication. This is reflected in part by the positioning of the communication function in the organizational chart, as a "subsystem" of human resources. As Neves described, the channels used work with the idea of a center—the organization's top management—delivering news to its internal public, including the most far off—the boundaries represented by the operational workers of the industrial plants. In her evaluation, internal communication is important to improve internal motivation, which is done by offering space to employees to share information, and by making them feel "they are part of the process" (Neves, Unigel, in-depth phone interview, Jan. 19, 2011, full citation in Appendix K).

Despite the importance of such information or communication strategies to improve the relationship with employees, the effects on business results are achieved in ways that this thesis cannot measure, or even address. Nevertheless, for Unigel, this internal communication has achieved a strategic value in the long run, Neves implicitly expressed. She reported that they started this approach in 2005, after one of the units of the group face a crisis with the community of a city named Cubatão. The problem forced them to hire an outsourced consultancy to handle external communication, and the communication to their internal publics.

Still, she apparently does not invest in selecting and evaluating information, but her testimony suggested that sharing information of any kind—for example, regular news about any subject that might be of interest to the internal public—is valuable. Since the information shared is selected and evaluated at some point, the three steps of the gatekeeping process exist at some time and levels, for example, when Neves works to make these daily news possible, sometimes with the guidance of directors. Her testimony, however, did not describe the existence of a clear gatekeeping process, in part because such task may not be too demanding in everyday tasks, and maybe in part because it was not emphasized during the interview. Thus, on the research question topic, she did not express whether such work of selecting information has any strategic value.

Systematic Searching of Information

The description above contrasts with the Brazilian operation of the German company identified here as Organization 15. According to Ms. 15, the Brazilian branch started a management and quality program about three years ago, when, among other actions, they improved the company vision, mission and values, and decided to create more recently a unit to exclusively handle strategic issues where communication is included. She described a precise knowledge management cycle, starting every Monday, with a two-hour meeting with the communication group, the engineers, and the project managers. "Our engineers and project managers are our sources of information" (Ms. 15, Organization 15, in-depth phone interview, Feb. 2, 2011, full quotation in Appendix R).

Through the information provided by the project managers, the communication teamwork has an outlook of what is planned for a full month ahead; every week, this outlook is updated, according to the reality, since the projects can face delays or other problems. In the next day, Tuesdays, at 9 a.m., the communication team discuss the briefing of the previous meeting, and decide which actions they will propose. These actions are planned in the next two days, when they elaborate estimates, design the schedules, and add other details. By the end of Thursday, they have a report with about 30 pages, and other attachments, which is submitted to the board of top managers, the "headers." This board also has a weekly meeting the following Monday, so these managers work on the planning done in the week before, while the same communication workgroup is currently working on the report for the next week.

The case of Aberje. In some organizations, the commitment to systematically search for information might reach the standards defined by the International Organization of Standardizations (ISO). That is the case of Aberje, which started to implement these processes in the early 2000s. The organization was certified ISO 9001 in 2008, by DNV (Det Norske Veritas) Foundation, and they have been audited by independent services over the last six years. The results of these ten years of reengineering are meaningful: Considering only procedural outcomes, they have gone from a result of around R$300,000/year to R$7 million/year, Nassar reported. According to his testimony, "globalization is for all," meaning that they compete worldwide with other associations, and look for members in the United States, for instance, a goal made possible only because the association has governance and processes.

At Aberje, gathering information is a weekly process starting on Mondays, with a two-hour meeting held in a "war room," involving their team of 23 people, with the purpose of raising all information available. They rely, for instance, on keywords retrieved from internet search services, and work based on the four "pillars" that define the organization's vision and mission: relationship, education, knowledge management, and recognition. Each pillar is conducted by three or four managers, who define in this first forum what they call "horizontal meetings," when the topics will be analyzed in depth. A step further is to interpret information, the level of defining an opinion about it, which is usually the decision layer made by the command of the organization. He also considered:

> Strategic selection of information, strategic evaluation, and strategic opinion [about it], you cannot define which one is more important. If you don't have a good selection, you start your process in a fragile manner. (Nassar, Aberje, in-depth phone interview, Jan. 28, 2011, full quotation in Appendix O)

Taking a simple case as an example, the educational pillar has detected a potential infrastructural problem related to hotel occupancy and air transportation in Brazil, due to the FIFA World Cup™ of soccer scheduled for 2014, the Olympic Games in 2016, and more than a hundred of international events planned in the country during this period. This setting will impact several of their nationwide communication workshops and seminars, attended by around 5,000 people per year. Based on that, they have defined actions to at least lessen the problem.

Criteria Follow the Client

Retaking aspects that influence the criteria used to identify and select information, four participants expressed their feelings by including, with some emphasis, the role of their clients in relation to their business. In these testimonies, key words related to the organization's mission and vision are not mentioned to define relevance. Instead, the daily business sets the criteria, as this participant put it:

> Our goal is to communicate to our clients the value of technology. What drives the grower to buy our product is the perspective that [the investment] will return, otherwise he won't buy it. (Madureira, Organization 5, in-depth phone interview, Jan. 17, 2011, full quotation in Appendix H)

To Madureira, information is attached to the product and the specifications of their system of crop management. To some extent, these are practical information concerns, easy to detect and solve at what he considers a low level of impact, when the client is simply not following the directions correctly.

Detached from routine concerns as described above, a higher degree of communication impact relates to instances that arouse distinct technological views of Organization 5's approach. This is the case when, for example, technicians or consultants linked to a farmer association express negative opinions, or disagreements about their products specifications. A problem with this scope is usually identified as quickly as possible, and shared with other areas of the company, because in such cases it is necessary to take an approach at a higher institutional level. This is done by asking the support of the public relations area, and its team of communication specialists. To monitor for issues like that, Madureira gathers information informally, primarily through the five members of his team, who follow up conversations with about 50 regional managers, who, in turn, deal with around 200 technicians, consultants, and other agricultural production related workers in the field. He had considered more sophisticated information channels, but such move would not be worthwhile. Madureira, however, highlights the importance of monitoring social networks, although his unity does not perform a systematic work on this matter.

Criteria Follow the Market

Two out of the four participants mentioned in the previous subsection also define relevance of information through the perspective of their clients, but add the market as an entire entity, in addition to contexts such as politics, policies, and public opinion. This view results in an attitude a little more focused on the interests of the organization, as this testimony describes:

> Some information is important to the client, and we need to promote it. Some information about the group is important to the market, and we need to disclose it, for example, the group has acquired a new company, it is entering a new segment. Everything we can promote about our services, or institutional information that allows the market to understand the group, is considered relevant. (Peluso, TotalCom, in-depth phone interview, Dec. 17, 2010, full quotation in Appendix F)

Gathering information in these contexts can be a result of external monitoring of potential problems, and news media act, in such cases, as a considerable input. The findings suggest that the organization profile also drives the guidelines to identify relevancy. In the case of full-service organizations such as TotalCom, mentioned above, the most important source of relevant information is the top manager of the group, Eduardo Fischer. He usually notifies at first hand all the information that will be disclosed, be it positive news such as information about growing or the involvement with a new client, or negative ones, such as the loss of talent, a campaign that didn't achieve the expected results, or the loss of an important account.

Criteria Follow the Society

Other interviewees expand the idea of a client-driven criteria, and view relevance in the information related to the community, so the society replaces the market as a whole entity. The findings suggest that this approach fits better the needs of organizations oriented to the consumer, with products or services, and results in a tone of a commitment with a long-term organizational strategy:

> Relevance is the people, the programs, the services. Relevance is specifically related to what we do and what we provide to the community. (Fuchs, John C. Lincoln Hospital, in-depth phone interview, Dec. 6, 2010, full quotation in Appendix E)

> Our biggest concern is to understand the dynamics of our market. We need to be a resonance box of the society, so the company will be sensitive to what is important to the society as a whole. (Simões, Coca-Cola BR, in-depth phone interview, Jan. 31, 2011, full quotation in Appendix P)

In such contexts, new key words emerge from the testimonies: emotions, feelings, credibility, excellence, and sustainability, to list the most mentioned. According to Simões, communication areas are the only organizational task force truly committed to listen to external publics, and to build dialogue with the society. In his opinion, by continuously looking for relevant information, this function was responsible for identifying the issue of sustainability, for instance, a topic raised in the last 15 years, first under the view of social responsibility, which has evolved to the meaning of sustainability and social business over time.

Defensive/Offensive Strategies and New Contexts Also Set Criteria

The importance of information can change overtime to reflect specific needs, for example, recent changes in the organization business history. That is the case of Oracle, which has bought more than 60 companies over the last six years, including, more recently, the hardware company

Sun, a merging operation that ended in Latin America in June of 2010. The most relevant information relates now to the actual positioning of the organization, which moved from the status of a software operation only to that of a hardware business, as well, as Auricchio described (In-depth phone interview, Jan. 19, 2011, Appendix L). His concern relates to the ways this transition is taking place, a demand that impacts internal and external publics at the same time: Internal publics need to think about an entire new approach, and external publics should be able to rely on a wider range of offerings. The key word for relevancy is now "integrated solutions" of both software and hardware, in addition to a new worldwide public, the developers of the Java programming language.

So the findings suggest that organizational contexts work to shape information worthy of being identified and selected as relevant to whatever communication purposes. Indeed, the result of adapting the organization to its context can be labeled, for instance, with defensive or offensive meanings. Such oscillation of actions usually is more intense in organizations with strong interactions with the final consumer of products or services, as well as markets highly monitored by social activism, usually through organized groups driven by ideological biases. The sample includes a supermarket with more than 170 stories spread through Brazil, which represents a daily direct attendance of over one million people; an air company with 100,000 passengers per day, flying to South America, North America, and Europe; and the impact of technology applied to agricultural development, with special attention to the genetically modified organisms (GMOs), an issue still highly sensitive, and easily spread through all media channels. Defensive and offensive strategies influence information gathering, thus, the characteristics that raise attention or concerns of communicators:

> Everything related to agriculture and biotechnology is relevant information for us . . . The source of information [is important because it] already informs the bias driving that information: scientific studies with the endorsement of consultants, public institutions, [and the] utterance of opinion leaders. (Magella, Monsanto BR, in-depth phone interview, Jan. 18, 2011, full quotation in Appendix I)

> I will divide it into two fronts: Relevance applies to the defense or the promotion of the brand. (Pitoschia, Carrefour, in-depth phone interview, Jan. 19, 2011, full quotation in Appendix J)

> We are bombarded daily by demands of all kinds, relating to the operation, the aviation market, [financial] results, campaigns. [This is a] risk we combat every day [in order] to implement proactive topics . . . something else than simply meet the press. (Mendonça, TAM, in-depth phone interview, Jan. 28, 2011, full quotation in Appendix N)

Gathering Information With News Providers

Organizations use to rely on services like news clipping to gather information produced by the media, although this summary of headlines and news, printed or broadcast, is usually reactive: since it is already published, it is already in the public sphere. The advent of social media brings gradually a sense of real time to issues and information that might be important to organizations, so several participants cited the importance of monitoring the web, and its social tools: blogs, Twitter, Facebook, and other social networks.

The case of Odebrecht BR. After facing a crisis due to its close relations with the Brazilian government, Odebrecht BR went a step further on news clippings and other information gathering services, and decided about 20 years ago to subscribe to the news service providers directly, like Reuters and others. Such services provide information to newspapers and other news outlets worldwide just as the wire services selected by Mr. Gates in the references included in Chapter 2. According to its corporate communication director Márcio Polidoro, by doing that Odebrecht BR has the chance to act in advance, sometimes even before the news gets published.

Today, they have a news provider to handle this service, a daily report starting around 11a.m. with the goal to deliver "in real time" any information worldwide that might impact their business. This includes news published in the internet, and in social media tools, as blogs and Twitter. In parallel, the methodology evolved to another tool, an index of media image, enhanced by CDN (Companhia de Notícias), a leading Brazilian public relations and communications consultancy, which started to work for Odebrecht around 1994. Known today as *Iquem* (Índice de Qualidade de Exposição na Mídia/Quality of Media Exposure Index), this tool works by monitoring, constantly and nationwide, all printed news mentioning the company. It also attributes an index to the level of this exposition, based on parameters of weighing the news—a different measure is applied whether it is a headline or a small note, for instance—and weighing the impact of distinct news outlets—a national newspaper or a local small one. The result is a balance of the organization image as a brand, delivered daily around 9a.m. In addition, Odebrecht uses a third tool to analyze the tendency of news in general, delivered by e-mail every morning to top managers, a topic that will be addressed in the last subsection. Regarding the news services, Polidoro considered that quick access to information has a direct impact on their business. He explained with an international case:

> One day the financial controller [department] of Venezuela government published in their site the following information: they will apply a fine on Odebrecht Venezuela for nonpayment of taxes related to 2006-2007. Immediately, a Reuters' reporter based in Miami, whose job was to look for this kind of information, simply replicated the information published by this public institution of Venezuela within the Reuters' network. Our system detected it couple of minutes later, and this information reached me, and it was directed immediately to the president of the company, who called me, picked up the phone and called the director in Venezuela asking him about the issue, if he knew something about it. He didn't. So the director in Venezuela didn't know the information, and this information was already being distributed worldwide. . . . The information was public even before the company had been notified of that, a company [that was already] defined as a defendant in an action for tax evasion. So [our director in Venezuela] contacted the department of the treasury to explain the problem, Odebrecht produced a position note in the same day, and the topic was clarified. In fact, it was only a misinterpretation on a specific procedure of tax payment, and the topic was solved: it didn't reverberate, it wasn't published anywhere, but the news circulated throughout the internet. So this was a communication action that helped a business strategy in a fundamental way. If that reverberates in Venezuela, for instance, it would be terrible, since we are a foreign company, acting in an important market, with big business with the Venezuelan government. (Polidoro, Odebrecht BR, in-depth phone interview, Jan. 15, 2011, Appendix G).

RQ2: Evaluating the Selected Information

The gatekeeping allegory moves one step forward by the way organizations filter and evaluate the information previously identified and selected, thus, by moving it through other gates inside the organization, when this information runs from outside to inside, or by directing or redirecting it from inside to outside. (In this regard, one might consider that news organizations are also meant to gather information from the outside to inside, from the public sphere to inside newsrooms, reprocess it throughout editorial strategies and tactics, and, then, give this reprocessed information back to the society, by making or calling it news.) In the findings gathered by this research, experience, journalistic flair, criteria, and knowledge are key words that describe how the evaluation expedient is achieved in non-news environments, although these words could be applied in news organizations with the same significance. These four branches are addressed next.

Experience, Subjectivity

The following comments clarify some ways information is evaluated, starting with the idea of experience, which leads to a certain level of subjectivity in the decision-making process of moving information forward, especially to top managers. Such point was raised by the concerns underlining questions 8, 10, and 12 of the qualitative instrument (Appendix C), an inquiry with this meaning: How practitioners decide what topic is important enough to discuss with their managers?

> It is such a hard question to answer, because it is a judgmental issue! I think it is one of those things you just know. I've done this for 40 years, and after 40 years you know what is important, [and] what is not important. (Fuchs, John C. Lincoln Hospital, in-depth phone interview, Dec. 6, 2010, full quotation in Appendix E)

> This question is a little difficult, because this evaluation is very subjective. You measure the temperature of what is going on at the moment. Some topics we know will not reverberate, so the evaluation is very subjective on what we are experimenting at that moment. (Pinheiro, Odebrecht US, in-depth phone interview, Dec. 2, 2010, full quotation in Appendix D)

To some extent, the participants expressed some reluctance to answer, which indicates that the gatekeeping behavior is not necessarily perceived but fully practiced. According to the testimonies, information is weighed through a judgmental process, a subjective action, guided by their experience in the field, and aided by the amount of time they have been involved with the organization; in addition, evaluation is achieved by sharing thoughts with others, so the social component of gatekeeping also emerged from the sample.

The case of Monsanto BR. A worldwide organization like Monsanto opens the opportunity to map issues in other countries before they reverberate in Brazilian media and society, Magella reported. He makes the decision of investing in a particular topic, and his sources includes "chatting with other leaders [in the company], journalistic feeling, daily news . . . something written by a columnist, [or] the subject of an article (Magella, Monsanto BR, in-depth phone interview, Jan. 18, 2011, full quotation in Appendix I). Magella exemplified his view with the research project conducted by the European Union regarding the ten years of monitoring what is known as genetically modified organisms (GMOs). The study concluded that biotechnology is as safe as non-transgenic food. The document was announced at the end of 2010, and Magella realized that the topic did not reverberate in Brazil as much as it could, since the European Commission, which conducted the project, is a reliable source. He asked to monitor the social network trend about the study, and the service detected in fact, besides a low response about the topic, a negative evaluation expressed by organizations opposed to GMOs, attesting that the results of the European research should not be taken for granted. Based on these results, Magella decided to promote that study, because he has understood that all the biotechnology market can improve its credibility due to a positive evaluation provided by a source with good reputation worldwide.

Journalistic Flair, Sensibility

Besides Magella, above, three participants mentioned the key word sensibility, and one specifically mentioned the journalist's flair, meaning the capability of being sensible to outside or inside demands with some news appeal. Feeling, sensibility, or flair of a news reporter, however, work best with an input, which means that sensitiveness needs a topic with an inherent value to be discovered and evaluated, as the case of Carrefour describes next.

An acute perception to identify topics can also help to drive corporate research projects, which is considered by public relations theories and practices the most important organizational instrument to evaluate information. Simões supports this devotion to formal research projects, which he considers the only practical instrument of business. He added the proviso, however, that feeling and sensibility work before the organization invests in such strategic effort. Following this view, the daily relationship built with external publics, throughout social connections, is the most important input to define the hypothesis that might be proved or not by formal research.

> To formulate the hypothesis, we need to pass through this first step, which is to listen. We listen to the press a lot, health groups, people linked to environment initiatives, for instance. We [need] to listen actively, and everything. (Simões, Coca-Cola BR, in-depth phone interview, Jan. 31, 2011, full quotation in Appendix P)

Simões advocated to avoid the "ostrich strategy"— represented by the action of "stick your head in the ground, and don't pay attention to what is going on around"—and to be open to talk with any organization that might look for them, even when the approach is somewhat aggressive. The idea is to know everything about what the other side is addressing. By doing that, Simões suggested that the communication area builds the connections between the organization and society, a responsibility that no other organization sector can handle effectively. Even marketing, usually viewed as an area intrinsically related to the consumer, cannot do such environmental scanning. On this, Simões argued marketing sectors develop a connection with the consumer mediated through market research, since it is impossible to be in touch with millions of people who engage their brand. He suggested that the same applies to brand related to products or services.

The case of Carrefour BR. Feeling about news, also known as journalistic flair, represents a professional asset according to the testimony described in the following case. According to Pitoschia, background in journalism helps in evaluating a unit of information because the newsworthiness of a topic depends of other forces than simply considering it a "good idea:"

> The topic defines itself. You know you can [offer this] to a news budgeter, we can invite the journalist to check it in the store, so we are safe to work. It depends on the topic, and on what the organization is proposing to address. Sometimes the company has something hidden here, and nobody has discovered it is news. (Pitoschia, Carrefour BR, in-depth phone interview, Jan. 19, 2011, full quotation in Appendix J)

Pitoschia related a case about a new store that Carrefour was launching in Rio Grande do Sul. This is the most Southern state in Brazil, with an intense esteem for their culture and traditions. Her first action was to figure out something about it. One of the store's uniqueness was the offering of regional products, so she evaluated that meeting the regional expectation would be a good journalistic hook to explore. She also found, however, that the store located in Porto Alegre, the capital of that state, used to maintain a bus prepared to work as a "school" to teach 36 ways to prepare chimarrão, a tea beverage extremely representative of that Southern region. The bus used to travel to several cities in the countryside, sponsored by the organization. Based on that "spectacular" finding, she managed to get a two-pages article in *Veja*, the biggest Brazilian weekly news and politics magazine (similar to Newsweek, for instance). Her experience as a journalist, knowledge of the market, of newspaper mechanics, and of what would be relevant to a corporate communication helped her to filter topics with positive potential to invest. In addition, her journalistic flair alerts her of topics that should never reach the press, due to their potential negative impact.

Criteria for Evaluating Information

Criteria is important not only to select information but also to evaluate it. Some participants suggested that their evaluations are usually guided by a main reference, or a set of guidelines meant to filter information. The sample includes cases when this set of criteria is unwritten, even though the organization defines a clear communication direction, establishing how to communicate with the client, and which messages should be developed. In other cases, the participant expressed a clear guideline used by his area to evaluate information:

> Our criteria are national relevance, since regional issues will be addressed locally, or something that endangers people's lives, let's say [an accident] with a truck filled up with phosphoric acid, this is something . . . that becomes a national issue. Also, [our] seven sustainability areas: human resources; our product portfolio; the [consuming] of our products, regarding health, positively or negatively; community; and three areas related to the environment: water, recycling of our packaging, and carbon emission. (Simões, Coca-Cola BR, in-depth phone interview, Jan. 31, 2011, full quotation in Appendix P)

Knowledge as a Social Activity

The findings suggest that the use of word knowledge works as an expression of a more systematized procedure or format. Also, it is implicit that experience and feeling are more attached to individual evaluations or decisions, while knowledge translates itself as a social construction, or an evaluation procedure built through interaction with others, by sharing and exchanging ideas. Evaluating information as a person or as a group might be viewed, however, as two distinct instances of a pendulum. Participants in management positions express these behaviors interchangeably, and resort to both as needed, although most of them mentioned that the majority of decisions is done by sharing discussions with others. Following this, evaluations always end up as a social construction. Few participants expressed decisions about information as a personal attribute. Testimonies of social construction of knowledge can be accessed in the appendices F (Peluso), H (Madureira), L (Auricchio), M (Garcia), and N (Mendonça).

Other Perceptions Enhance Evaluations

Attention to details and a wide range of areas to consider make a difference in the perceptions that drive the analysis and evaluation of information. In fact, attention to detail is the capability to see hidden features in a unit of information, although, in a strict sense, adding a new bias to information is not gatekeeping, but slanting, a construct not included in this thesis. This matter, however, will be briefly discussed in the next section.

The capability of adding a new bias to information is pointed out by Lage, from Fiat BR, as a desirable characteristic of the communication area he supervises. For example, he illustrated this idea with a recent news about the restriction of credit to consumers, a kind of news that might look trivial and commonplace, but receives a special attention from his communication area.

> We conduct a different reading of this information, we add a new bias, we subsidize the other directors, so they are able to deal with that. We need to view information with other eyes, so we can [evaluate] whether we can be offensive or defensive about it. (Lage, Fiat BR, in-depth phone interview, Feb. 4, 2011, full quotation in Appendix S).

The information is relevant for the sales system of Fiat and its retail market because credit restriction can arouse a defensive behavior on the consumer, and negatively impact sales. According to Lage, this type of information is constantly monitored and immediately passed along, so the company can develop an opinion about it, including to be prepared for any request for speeches about the topic.

A wider range of areas to consider—the other point introduced above—is less about information and more about the people responsible for evaluating it, according to the argument expressed by Nassar, from Aberje. In his view, the middle managers are the owners of a considerable amount of information (and knowledge, as a consequence), and the ability to decide about such information is related to other levels than simply professional expertise:

> These managers have to be refined, because [they] will make decisions about issues not only within the technical range, but also including ethics and aesthetics. A manager without culture cannot even integrate this strategic scope. (Nassar, Aberje, in-depth phone interview, Jan. 28, 2011, full quotation in Appendix O)

The solution to this demand, Nassar noted, involves the development of new skills and competences of this middle management group, a development that relies on continuous education, such as pursuing a master's or a doctoral degree, or other kind of specialization.

Lastly, systematic evaluation of corporate image also helps determine strategic directions, as Polidoro, for Odebrecht BR, reported. The already mentioned daily report *Iquem*, about news tendencies, includes recommendations that can result in valuable opportunities. In 2010, the company realized that the hydroelectric of Santo Antonio (in Rio Madeira, Amazon area) was an issue with good potential to communicate, due to its environmental care, and its social receptivity. They invested in promoting the project worldwide, and achieved good results. The topic was addressed by more than 40 long articles, and was on the covers of the Wall Street Journal and Financial Times, for example. Polidoro looked for these newspapers to oppose the environmental organizations that usually emphasize Amazon issues in the United States and in Europe.

RQ3: Sharing Knowledge

Gatekeeping is a process with a clear direction in newsrooms: It works to produce news vehicles, whether printed, broadcast, or networked, and all of them have in common the purpose of share information systematically (Chapter 5 discusses this topic). Non-news organizations also worry about sharing information, and public relations practitioners are usually in charge of handling a considerable amount of such tasks. The findings suggest, however, distinct levels of sharing information systematically, and dissimilar ways to do so. Also, participants express several levels of value to consistently deliver information, the channels used to accomplish that, and its format—written or unwritten, such as meetings or corporate TV broadcast.

Informal Sharing of Knowledge

On one hand, participants share information in a very informal way, usually through face-to-face meetings, when they build knowledge by discussing the issues they are working on. For example, Pinheiro, from Odebrecht US, shares information with her team through weekly meetings, usually scheduled every Monday, although this is not mandatory. This meeting helps her to "align" the thoughts of the group under her coordination. Her team is formed by five females working on all demands as needed, but with distinct focuses, although all of them related to tactical outcomes, such as organizing events, producing printed material or maintaining the web site. Pinheiro values these meetings as an opportunity to inform the group about all the current projects, and to make sure everyone is on the "same page," although sometimes she suggested that the meeting can achieve a more strategic level. "It is really the quality moment we have to exchange ideas" (Pinheiro, Odebrecht US, in-depth phone interview, Dec. 2, 2010, full quotation in Appendix D). However, the responsibility for solving problems relies on her, and this task might need the interaction of the country manager. In addition, any action has also to deal and proceed with the agreement of the contract director, the manager heading each of the five ongoing projects in that country. Under the entrepreneurial culture fostered by Odebrecht worldwide, each one of these contract directors gives the final word on any action that might affect the project they are in charge of; by this view, this director is the ultimate gatekeeper of a particular engineering project.

The case of John C. Lincoln. So far, gatekeeping has been mainly presented and described as a bottom-up process, meaning its direction goes from lower levels of management to decision makers positioned in upper levels in the organizational hierarchy. Because this keyword has never been disclosed to the participants, Fuchs, from John C. Lincoln, pointed out, without mentioning gatekeeping or any similar concept, that such process of information gathering and evaluation can also flow in the opposite direction. This is the case when top managers look for facts or advice nested in the lower-level management positions, to search the knowledge nurtured by experience, for instance. On this, she suggested that her 25 years of practice in Arizona is longer than the professional background of many journalists she provides support. Additionally, her 12 years of work in the organization also helps practitioners above her hierarchically. "I am a walking file cabinet," she said, without any tone of arrogance, since she also expressed she has open access to her supervisors, and, thus, they exchange information easily by several ways or channels, such as notes dropped in each other offices, text messages, phone calls, or even through posts in the social network Facebook. Yet, it would be rare to need to go straight to the top managers, since the organization has a "clear chain of command," in her view:

> The vice president of marketing and communications [one level below the chief executive officer (CEO)] has being here for about four years, and my boss, the director of public relations has being here for [about] three years, so in my brain I've got organizational history that nobody else has. (Fuchs, John C. Lincoln Hospital, in-depth phone interview, Dec. 6, 2010, full quotation in Appendix E)

Even though the CEO works in the organization a little longer then her, Fuchs reported that her historical knowledge is always relevant to share, because it can portray, for example, the revival of old issues with the experience acquired in the past. An example of that was the reaction in December 2010 against the closing of the birthing center, a financial decision planned a long time ago, to focus the hospital's efforts on other defined core areas. They could anticipate nurses and mothers protest much likely the way it happened around five years before, when the topic was first discussed, and the hospital started to make changes in the birthing facilities, according to her. The decision demanded a large communication effort on planning and research, given the emotional impact of closing a service that has been delivering babies over several decades, for the community near the hospital. Therefore, the knowledge of the past has helped them develop such a plan, albeit they would be sensitive to the case even if they never had faced something similar before, Fuchs said.

Systematic Ways of Sharing Knowledge

If sharing information can be very informal on one hand, on the other hand the findings suggest several ways or channels to systematically spread knowledge through the organization. A system means also a method, or a plan, so this strategy usually inherently leads to a tangible form of distribution, adding as an outcome the ability to archive and retrieve such information. Some of these channels follow the one-to-many approach taken by traditional media; others work with the interaction made possible by the new technologies raised by the internet. Usually, the result is a mix of both traditional and online format, so bulletin boards, personal letters, newsletters, magazines, intranet tools, e-mail, online chats, webcasts, and even an internal TV network were mentioned by the participants.

Like other organizations in the sample, most of them spread in several sites or countries, Oracle BR distributes information through several channels at once. According to Auricchio, they conduct webcasts every quarter with the CEO of the company to announce its results; the event is held in an auditorium, and people who are invited to attend have the opportunity to ask questions, as well. Supporting human resources or the legal area, he also uses e-mail to publicize information and updates, which is distributed daily, under his supervision. Recently, he managed to implement a corporate TV network, meant to substitute the traditional bulletin board with printed information, an information channel that will aggregate other existing ones. The company also has a weekly online newsletter, distributed in the entire Latin America region, including Brazil.

In general, the typical information spread through these channels has a low strategic value by itself, but this value can be increased. Indeed, information or knowledge distributed or gathered through systematic channels can have a higher level of strategic meaning, and this feature does not correlate with a wider or narrower audience. Apparently a more suitable way to evaluate the strategic value of information widely distributed is considering the level of impact of this information on the business or on its operation. For example, 30 years of corporate knowledge archived in a single source can make a difference, as Peluso noted:

> We have an intranet, where the information about the group is shared with all collaborators. Our asset is intangible, it is [our] intelligence: we don't have factories, products, we sell ideas and communication solutions, so the main asset of the company is information. [The intranet includes an] area about the corporate memory, so any collaborator can search what this group has already worked on, which solutions it has created, which [important] campaigns it has developed, what strategies it has already done for big clients. (Peluso, TotalCom, in-depth phone interview, Dec. 17, 2010, full quotation in Appendix F)

The intranet is also a tool to promote everything that deserves to be shared with the other units. For example, a new practice, or a big action that ended up with a good result and visibility is usually advocated thought this channel. Although human resources is the area responsible for managing the intranet, the person in charge of that works in the communication office, and the work is supervised by Peluso. By doing that, the intranet manager can access the information faster, and align with the communication area the tone of each message. In addition, Peluso defines the criteria of what kind of information that goes to external publics needs also to be shared internally.

Peluso said that this service is more accessed by the eight units physically distant from the headquarter, a two-story loft used by the two remaining units, where such information is shared in a more quickly and informal manner. She uses e-mail marketing and monitors how many people open these messages and how they surf inside this intranet. They send around three messages per week, but even small notes can be highly important, Peluso argued. She also receives suggestions from this public, around three messages per month, besides tips passed informally, which she usually "gatekeeps," by evaluating them more carefully before deciding to share the topic within the intranet.

The findings gathered other experiences of sharing information systematically. Monsanto BR implemented in 2010 an internal chat tool, and scheduled monthly one-hour meetings with top managers, so everyone interested in asking questions or exchanging ideas with that manager can join the chat room. This tool helps the top managers, usually based in the headquarters located in the São Paulo city area, to keep in contact with the other 40 units spread out in the country. The experience was viewed as a "best practice," according to Magella, and raised the interest of other Monsanto subsidiaries worldwide, like India, for example. As mentioned before, Odebrecht BR has a morning news service delivered by e-mail to the top managers, with an analysis of the most important nationwide topics published by Brazilian newspapers and magazines. Named *Café com Notícia* (*Coffee with News*), this service provides a macropolitical and macroeconomical sector analysis, so the managers involved can have an idea of the most important news, and also an analysis of them.

The case of Fiat BR. In September 2008, Fiat BR introduced *Monitor Grupo Fiat*, a weekly newsletter since January 2009, delivered by e-mail every Friday to around 70 leaders of the organization. According to Lage, this initiative offers a better support to these executives, "a balance of the week," by providing them an analysis of the news and the market, and pointing out regional economic evaluations that might affect the business performance of the company in the country. Even information regarding the competitors is included, if relevant. The newsletter becomes daily whenever needed. In fact, the newsletter was launched during the 2008 American economic crisis, when it started with two daily issues, but given the intense flow of information in that period, it reached several issues daily, updated every two hours, if necessary. The publication is edited internally by a senior journalist, and it is divided by units of business—the market segments where the company works, such as cars, trucks, and agriculture.

Lage used the newsletter to argue that systematic information is very important to the business. Being systematic, however, is not limited to tangible products; it can take other actions. He explained with a recent case, when they started to check the radio specifically to receive advanced updates about the weather over a rainy season in the Belo Horizonte area, the capital and the most developed city of Minas Gerais state. By doing so, they discovered that a hailstorm would reach the region in three days. The operational areas were informed, and had enough time to rent sheds around the city, to move their vehicles usually parked in open yards. They managed to protect all their fleet based on this single information, which represented a considerable economic savings, according to him.

> Systematic information [is necessary], so the perception about it can be wider, more democratized, [thus,] all the areas can use it the best way possible, preventively or offensively. Systematize means we work the information, we interpret it, and contribute [to make possible for] the other agents of the company to get a benefit [out of it]. (Lage, Fiat BR, in-depth phone interview, Feb. 4, 2011, full quotation in Appendix S)

Lage argued that communication has been considered strategic in the company over the last ten years. As the director responsible for this area, he has a seat on the board of directors, a decision committee integrated by ten executives, plus the president. He also supervises the image committee, a group formed to conduct research evaluations about the company. The task demands a team meeting every two weeks, with the corporate communication (the area he is directly responsible), and directors from the other communication areas: marketing (handled by the commercial area), and internal communication (handled by human resources). The communication strategic plan of the company is defined by this image committee, which adds "synergy" to these areas. It also helps to build a strong sense of direction, because all the contracts regarding investments, and the characteristics of these communication efforts, are implemented as a result of a decision made by this committee, a decision drawn up in minutes to reinforce the commitment in written. Introduced about four year ago, this committee works to accomplish a unified communication, and to build a stronger timeline of these actions, by emphasizing distinct publics—internal or external—according to the topics involved.

He attributed this intensive care to the characteristics of the retail market of cars, a demand not as intense in the segment of trucks and tractors, for example. Lage explained that this work also leads the company to stay ahead: "While other organizations are all talking about sustainability, we are very far ahead. We are introducing right now a huge plan, a diagnostics about reputation" (Lage, Fiat BR, in-depth phone interview, Feb. 4, 2011, full quotation in

Appendix S). In his view, reputation is a feature increasingly valued by the consumer, society, and the markets in general. Their plan is to embrace the idea of reputation within the company, in order to make it part of its internal culture.

Unexpected Findings

The interviews returned topics labeled here as unexpected findings, summarized below. Some of these topics were raised during the conversations, while others are evaluations made by the researcher, who acts in all these cases as a gatekeeper, as well, because they could be left out of the results. The following topics, thus, address communication regarding marketing, human resources, and public relations. It also addresses research and relationship building, usually two key concepts discussed in public relations, and the communication of low-profile organizations. This subsection ends with an evaluation of the outline (Appendix B), based on the only written participation.

Marketing

A research developed in the public relations field about gatekeeping—an intrinsic communication behavior linked to journalism practices—might end up finding clues about the differences between the communication employed by marketing and public relations practitioners. The findings suggest that the distinct approaches of both fields might rely on the sources of information monitored or gathered by people behind these functions. The gatekeeping function—selecting, evaluating, and sharing information—also exists in marketing, but this field is driven by numbers. Such feature—sometimes portrayed as an anecdotal evidence—did appear in the interview conducted with the only participant linked to the area:

> Marketing is a strategic function within the company. Our goal is to bring income and profitability to the company out of our films, which are our products. We control it through reports, including accounting and finances, even to understand whether the investments, or the costs [related to a product] were appropriate or not. Regarding the consumer, the measurement we have is the result [achieved by] the retail store. (Freitas, Paramount BR, in-depth phone interview, Feb. 10, 2011, full quotation in Appendix T)

Her area works exchanging ideas with the person responsible for communications and media relations. In some cases, marketing provides inputs for these public relations actions; sometimes it is the opposite. Despite this relationship, her final evaluations of results still rely on reports driven by numeric performance, although in a broad sense she includes intangible variables to decide about a particular plan. "We look for any opportunity to develop a partnership with someone related to the films [we promote]," Freitas noted. For example, the launching of the anniversary edition of *Breakfast at Tiffany's*—a film released in 1961, and one of the greatest performs of Audrey Hepburn—was improved, with the support of the public relations area, by an exhibition of Hepburn's dresses by Senac, a nationwide technical school that also offers fashion design courses.

Human Resources

As with marketing, the field of public relations also handles discussions of the role of human resources, especially in the cases it deals with the communication to internal publics, mainly the employees. Polidoro draws a clear line to divide communication related to the "intangible," meaning what impacts the image of the organization, against the communication to employees. He explained:

> Communication is the medium through we protect the intangible. Businesses go by, we have being involved in mining, agriculture, cellulose, then we had only engineering and petrochemicals, now we are involved in other businesses. In 20 years, we don't know what we'll have. But the intangible is symbolized by the image of the word Odebrecht, and the attributes it carries. Communication [is necessary] whenever you want to take care of the intangible. This action also needs to be directed to people inside [the organization], because the best builder of the corporate image is always who work for it. [Nevertheless,] the communication toward a teamwork is a responsibility of the leader [the director of a site, a plant or a unit]. We cannot see internal communication as something pertaining to a department located in the 32nd floor of a headquarter in São Paulo. It does not have any efficacy, it does not solve the problem of our construction site in New Orleans [USA]. Regarding people, mood, relationship, I understand this is not communication [in a strict sense], this is related to people, human resources, it is related to the leadership of the leaders. (Polidoro, Odebrecht BR, in-depth phone interview, Jan. 15, 2011, full quotation in Appendix G)

Public Relations

Brazil is cited by scholars as an example of a country where public relations is a regulated profession, a characteristic nonexistent in the United States, for instance. The reality, however, shows that major organizations do not rely on the public relations field to manage their communication functions. Instead, anyone can practice corporate communication, and the sample includes professionals with distinct backgrounds. In addition, none of the participants mentions public relations as their actual function. Chapter 5 discusses this topic.

Research and Relationship Building

Theories emphasize the role of research in almost all public relation actions. The findings suggest, however, a broader daily task of observing and interacting with the environment that might be more useful in the short run. According to this view, research is a middle and long-term tool, driven by the perceptions raised by the daily work of selecting and evaluating information, the process explained by the gatekeeping theory. Similar arguments apply to the concept of relationship building. Chapter 5 discusses these topics.

Low Profile Communication

Two participants explicitly defined their organizations as low profile: Unigel and CB Richard Ellis. How far this characteristic affects internal systems for gathering and evaluating strategic information? Future research could explore this question. The topic will be retaken in the conclusion subsection. However, it is timely to present some testimonies from the participants:

> The organization profile is very conservative and low profile regarding any publicity, which is typical of Unigel. It retracts the way the shareholder understands communication. He is very low profile. [Despite our gross revenue], it is a company you don't see in the newspapers, in the media, in the magazines. (Neves, Unigel, in-depth phone interview, Jan. 19, 2011)

> I consider [our organization] low profile, due to the kind of business we work. Since it involves most of the time strategies from our clients, we usually are not authorized to promote our cases. (Garcia, CB Richard Ellis, in-depth phone interview, Jan. 21, 2011)

Outline Disguised the Purpose of the Interview

Only one participant avoided the phone interview, and sent written answers based on the outline (Appendix B), with a broad description of the topics discussed in this work. This unexpected feedback collaborated indirectly to make sure that the outline was specific enough to give a previous idea to the participant about the subject of the research, so the interviewee could feel more comfortable about a distant meeting, while, at the same time, this anticipated guideline was equally generic, thus, disguising properly the main purpose of the phone interview, which is to analyze gatekeeping and information handling procedures. The answers follow Appendix B, an outline sent by e-mail:

> Answers to modules 1 and 2 [identification and selection, filtering and evaluation]: The communication of the organization with its external publics aims to promote the positioning and image to the market, involving the publicity of its services, scope of the company, and quality. Information regarding new clients, data about the real estate sector, its perspectives and best practices are analyzed and discussed with the board of directors. In order to disclose information, we request to our clients a formal authorization regarding using their names.
>
> Answers to module 3 [organizing and sharing]: We handle our own channels to promote information to the market: Web, newsletter, media relations specialists, e-mail marketing, media, [T]witter. The majority of information, when approved, is handled through those channels. Only media actions involve financial approval. (Aranha, written answers sent by e-mail, Feb 1, 2011)

CHAPTER 5
DISCUSSION AND CONCLUSION

This thesis explored the gatekeeping concept in non-news organizations as the function responsible for handling information and developing knowledge. The results of this research raise discussions at two broad distinct levels: public relations theories and public relations practices. From the perspective of public relations theory, this research represents an attempt to apply ideas traditionally attached to the journalism field in the public relations environment. An entire debate can follow this focus, questioning, for example, how far communication would be a field above journalism and public relations, and how far the characteristics that drive journalists and newsrooms also affect public relations practices. Related to that, public relations theories usually rely on several branches of knowledge—including many thoughts found in the social sciences, and even in the business literature—but rarely look for support in journalism studies. Yet both disciplines commonly use the same buildings that headquarter schools and colleges of communication worldwide. But still both worlds have the tendency to travel apart, and this work is aware of it.

The following discussion concerns only the public relations practice perspective—in particular, the implications for managing corporate knowledge. As a result, some public relations mechanics is also implied, for instance, how to organize people. By discussing practical implications, this thesis aims to improve the professional field of corporate communication. It does that by contributing to make communication a strategic value embraced by public relations practitioners, journalists, and anyone else who understands that organizations are important players for making a better world. The next subsection focuses on implications for communication practices in organizations. Another subsection discusses the constraints of this thesis, and suggests future research in subtopics raised here, or in the ways journalism and public relations fields interacts. The final subsection states a brief conclusion.

Implications of Gatekeeping in Corporate Communication

Knowledge management is a complex concern, and the findings of this research can drive discussions in several directions. The following topics summarizes some of these possibilities, such as organizational opinion, bias, and systematic information. There might be other discussions, so the purpose here is to open a debate that can raise the interest of communication professionals in general. Worthy to add, the subjects are examined without trying to generalize any proposal or idea, due to the exploratory character of this study, with its inherent restraints, detailed later. Even ignoring these drawbacks, the discussion avoids generalizations because each organization is a unique universe, with its own contexts, and any assumption has to accept this as a reality. Corporate communication solutions might fit one situation, but they do not fit all. Few ideas, however, are wide and flexible enough to work under all circumstances, and this thesis assumes that gatekeeping is one of them, although the process it represents is also almost invisible for reasons that are not worth considering now.

Indeed, it is suitable to note that no interviewee has mentioned gatekeeping as an acquainted task, although the activity exists implicitly in the work of selecting, analyzing, and sharing information, as the quotations make it clear. Occasionally, participants considered information gathering, for instance, a result of specialized services, some of them produced by external providers, without highlighting that this role is also done internally anyway. In other words, the findings suggest that non-news organizations do have gatekeepers, but this management task is not as clear as it is in news organizations, meaning that it is not institutionalized as it is in a newsroom. For example, newsrooms are usually organized by editorial sectors, such as economy, politics, sports, and business, and people inside each sector also have clear gatekeeping functions, such as those of reporters, producers, and editors. Non-news organizations can also be divided into sectors, and the findings show some interesting examples of that. Nassar mentioned four sectors—pillars developed from their mission statement—to focus the attention of managers at Aberje. Simões listed seven sustainability areas with national relevance, in addition to anything related to the safety of Coca-Cola's products. In these two examples, probably one or more gatekeepers are in charge of checking at least the topics with more intense impact, but it is not clear how far these fields of interest are recognized by the rest of organization as unquestionable sectors. Further, it is not clear whether this acknowledgment would improve managing information about these topics.

Gatekeeping and Management Efficiency

The previous insight leads to stress the parallel between information control and knowledge management in news organizations, and its possible counterpart in the side of non-news organizations, assuming that gatekeeping exists in both environments, but it is outspoken only in newsrooms. On this, the literature reviewed in this work testifies that gatekeeping is explicitly recognized by journalists professionals in their daily tasks within newsrooms, so the role of the gatekeeping behavior is connected to the products of news organizations. Advancing suggestions for future research, a possible project designed to discuss journalism practices could address to how far news media products can exist without gatekeeping procedures. Such research, however, would have to define what is quality, in other words, which qualitative characteristics define the existence of news vehicles, and the role of gatekeeping to achieve such standard, a discussion linked with the next paragraph.

Taking the parallelism to the other side, gatekeeping is less evident in non-news organizations, but future research could examine how far this work in such contexts would be able to achieve more efficiently public relations tasks, such as managing crisis, identifying donors (in case of nonprofit institutions), cultivating clients, among other demands from stakeholders considered strategic to the organization grown and survival. The correlation drafted here revels its linkages according to this research concern: Gatekeeping is an explicit behavior in newsrooms, and it might contribute to the quality of the final product delivered by news organizations. This product is a piece of information created to communicate any topic under a particular discourse. If that is true, a research project could address the relation between an environment with a clear corporate gatekeeping function—newsrooms, in this case—against one environment where this behavior is less obvious, such as a public relations department, or a business office. The research goal would be to analyze to what extent the lack or emphasis on gatekeeping as a management role produces weaker or better communication practices, or corporate discourse.

Gatekeeping, Structure and Agency

Still advancing research suggestions, an even larger question can be addressed by including the idea of structure and agency. According to Jonathan (2010),

> the structure-agency question is one of the oldest issues in social science, and one that is destined never to reach a satisfactory conclusion. The three contending positions here are: (1) that structure largely determines agency, (2) that agents constitute structures, and (3) that structure and agency are mutually constitutive. (Jonathan, 2010, Structure and Agency section, para. 1)

Also known as macro-micro problem or levels of analysis, the topic is discussed mainly by sociologists, but it has interferences in many other fields, such as medicine, education, and business (for instance, Gorton, 2000; Jackson, 2006; Shilling, 1992). Public relations practitioners, as an example, might face every day the macro-micro concern, the one between the individual set of personal policies—the ethics behind the profession—and the policies settled by the organization he or she works for. As gatekeeping, the concept of structure and agency applies in daily lives of every humankind, and to some extent it is equally concealed as the former.

Regarding the structure side, individuals do not have control over the social environment they belong or live, thus, according to Musolf,

> race, class, sex, ideology, institutions, organizational hierarchy, groups, geographical location, period of history, mode of production, generational cohort, family, culture, roles and rules are all examples of social facts, the structural dimension of social life. We are born into situations that have existed before us and that will exist after we are gone. In general, structure refers to social arrangements, social relations, and social practices which exert enormous power and constraint over our lives. (Musolf, 2003, p. 1)

On the other side of this swinging relation is the micro level represented by the individual. This is where the gatekeeping metaphor applies to. The idea of agency, still according to Musolf,

> refers to the fact that we make culture, history, and policy, though not under conditions of our own choosing. Human behavior is embedded in, and emerges through, social interaction. Human beings are producers as well as produced, shapers as well as shaped, influencing as well as influenced. Social action is volitional, purposeful, and meaningful, even though some social facts constrain life chances. Actors reflect, rather than respond by reflex. Agency emerges through the ability of humans to ascribe meaning to objects and events, to define the situation based on those meanings, and then to act. Endowed with agency, the oppressed can oppose structures. (Musolf, 2003, p. 3)

These discussions raise the topic of individual responsibility, for instance, meaning the ways an individual can work for change high levels of social forces, the forces driven by the macro levels of structures. Future research provided by these theoretical backgrounds could analyze the gatekeeping influence in the agency concept, by assigning to the decision-making process the flux of intended and unintended consequences of individual actions.

In addition, future research could develop a similar analysis as presented by Shoemaker and Reese, the five rings overlapped on one another to illustrate their hierarchical model, stratified as individual, media routines, organization, extramedia (sic), and ideological levels, as mentioned earlier. Sounds obvious the structure and agency idea underneath their approach, thus, both lines of thoughts could merge. Applied to organizations, such investigation could evolve to a model specifically adapted to public relations needs, although a proposal with this goal would represent a long and systematic research agenda.

Corporate Opinion or Positioning

The findings suggest that organizations transform information into knowledge when they build an opinion about a particular subject. The problem is to reach this end point. In fact, any administrative decision is an opinion about a problem, but organizations face routinely the challenging to analyze more complex demands imposed by relations with stakeholders. The challenging in such cases is the organizational intelligence to interpret a piece of information by applying to that a new bias, a point of view that should reflect, ideally, the values nurtured by the organization. Following precisely the literature on journalism, adding new bias to a piece of information is not gatekeeping but slanting, a construct this thesis does not address. Remembering Breed, slanting "involves omission, differential selection, and preferential placement" (Breed, 1955, p. 108). This thesis rather defines it with the idea of "differential selection," which leads to the view that slanting is the most valuable skill of any journalist, the talent to pay attention to the detail that will make a difference in the end, whether it is an article or an entire news outlet.

Lage noted that an important knowledge management improvement is the ability of his communication area to "interpret" information and give a distinctive bias to a unit of news when needed. In his case, an internal team is in charge of that, under his supervision. In particular, a senior editor is responsible for editing a weekly newsletter, with analyses of news and other information. Although Lage tries to not overstate the newsletter as a strategic tool, because it "just" aids the leaders, he considers the online report an example of systematic information, detailed next. The newsletter helps the top managers constantly foresee information by systematically interpret the news to the top managers of Fiat BR, so it is a periodic exercise of spreading corporate opinion on trends and topics. The newsletter probably reflects, in some level, evaluations and decisions made by Lage, and his communication area, through the informal meetings they have often.

Systematic Information

In newsrooms, gatekeeping is a process with a clear direction: It works as an essential part of news vehicles production, whether printed, broadcast, or networked. All these formats have in common the purpose of systematically share information with an audience wider than the internal public of the newsroom responsible for working on that information. This thesis understands gatekeeping as a process not necessarily to attend a wider audience. The difference about what organizations do with the information they gather—whether news organizations or non-news organizations—is a matter of their marketing purposes. The gatekeeping role is the same whether the purpose of this task is to deliver information to a large audience or a small one.

Non-news organizations usually value both sides, internal and external, and the findings suggest that sharing with a large audience or a small one is just a matter of purpose. Usually, strategic information is shared only with top managers, and even the examples reported here were carefully chosen: Participants reported the cases they felt secure enough about, the information that might not represent a strategic risk, and did not share examples they believed could expose too much the internal characteristics they see as important.

The findings, however, suggest distinct degrees of how far the researched organizations share systematically the information gathered, and how much the participants value this feature. Although news organizations have a high compromise with a systematic delivery of information, because it is an essential feature of their product, the fieldwork tried to not overstate it as a compulsory subject or a managerial concern, so the topic was asked naturally as much as possible during the conversations. Some participants raised the topic almost without encouragement, while other participants misunderstood the concern addressed by the researcher. In general, participants cited periodical internal communication—newsletters and bulletin boards—as examples of sharing information regularly, although these channels usually deliver information without intrinsic strategic value. The testimonies suggested that strategic information is delivered mainly to a smaller audience.

The Communications and Public Relations Functions

Scholars cite Brazil as an example of a country where public relations is a regulated profession, unlike the United States, for example, where the profession follows other criteria, such as achieved legitimacy and accreditation. The reality, however, shows that major organizations operating in Brazil do not rely on the public relations field to manage their communication functions. Only two participants have public relations as their first background. Indeed, anyone can practice corporate communication, and the sample includes professionals with distinct backgrounds. This is done by not assigning to public relations the official definition of this job in the organizational diagram. Making it clear, if an organization hires someone as a public relation practitioner, this person has to be a certified public relations professional; for instance, any journalist interested in the job could not be hired without an additional public relations certificate.

Thus, organizations usually define the work as pertaining to communication instead public relations, so the hiring step can consider any communication professional—the companies can hire anyone they feel qualified to the job, not only certified public relations practitioners. So regulating public relations superficially makes the professional or the profession more strong. In practice, it turns out a weakness. Additionally, none of the participants mention public relations as their actual function through e-mail messages or through professional social networks such as LinkedIn.

In addition, the findings suggested that the organizations, and the participants involved, are comfortable with this setup. Fifteen out of 17 participants do not have any public relations background in their curriculums. Despite that, organizations and professionals have been achieving good results, as far this research can reach. For example, a good result includes the idea that drives public relations theories about the strategic component of the profession, which is engaging practitioners in the top decision-making process. The findings suggest that organizations value communication, but this corporate culture or attitude does not correlate with an academic background in public relations carried by the professionals in charge of communications. For example, out of 14 participants able to influence the decision making of top managers—formally integrated in the board of directors or not—only two have academic skills in public relations. With a natural manner, participants in top positions still define public relations "traditionally:" It is a subset of a wider communication area, the subset responsible for handling events, social meetings, and any other action with this closer meaning of building social relations with a public. During the interviews, the key words "public relations" was mentioned less than the key words "strategic communication." This might be an insight about what practitioners see as more important.

Marketing, Human Resources, Policies

The participants indirectly address several views and relations about what communication means for areas known as marketing or human resources. To some extent, gatekeeping theories can clarify the reasons for the distinct approaches of communication when they are conducted by such areas. The findings suggest that, since the gatekeeping is an inherent human attitude, what comes in, comes out. The output of a message depends on its input. It is a gatekeeping decision what a communication practitioner defines as the starting point for the information selecting step. Also, this research could not focus in deep on corporate policies, and how far these hidden or open guidelines help building a set of criteria necessary to aid the gatekeeping function in daily basis.

Gatekeeping and Research

Public relations theories usually stress the need of actions based on research and relationship building. The findings suggest that research is important, but the daily task of gatekeeping is also essential. A single analogy makes this clear: Research would be the engine that empowers public relations and communication management, but such a car still needs a driver to handle its power every day. Gatekeeping also helps finding information that research cannot find. So daily intercommunication and qualitative information gathering have the potential to anticipate future tendencies, on one side, and to handle immediate changes in the environment, on the other. Research might set strategies for building relationships, but work on them routinely is a dynamic guided mostly by gatekeeping processes.

Limitations and Future Research

In-depth interviews work better when associated with field observation, so the information gathered can be examined in practice. Observations allow to realize differences between the way a participant describes a task and the way it is routinely done, so it can change the perceptions about the findings, thus, the analyses of the results. Future research could include field observations in organizations, or reproduce the already cited Mr. Gates study, but this time, in non-news organizations. Just as gatekeeping, other newsroom behaviors could be applied to the public relations practices. In fact, it opens a wide branch of study that could straiten both fields, a tendency guided by the merge of distinct media, made possible by current technologies. Next, four other topics that might deserve new investigations.

Nonbusiness Organizations

Most organizations in this research are driven by profits. Even the only two not-for-profit organizations, John C. Lincoln and Aberje, seek results in ways that cannot be comparable to charities. A future research could analyze how far the findings would be similar in the public relations management of governmental agencies, nonprofit organizations (NPOs), or nongovernmental organizations (NGOs).

Differences Among Countries

A singular circumstance drove the organizations selected for this research, so all of them operate in the Brazilian market, except John C. Lincoln. The research was not designed with this purpose, as explained in Chapter 3. Neglecting this, a deeper analysis of those organizations could explore whether gatekeeping procedures apply distinctly in the decision making practiced in the country of origin of these organizations, comparing to the same procedure in Brazil. Taking an international and more diverse perspective, future research could compare the decision-making procedures among several countries, but perhaps preserving the gatekeeping steps defined in the research questions: information gathering, filtering, and sharing. Such research project might include culture as an ingredient of diversity.

Internal Culture

The findings suggest that internal culture has significant influence on the strategic value of building knowledge around concerns that might hit an organization. The sample brought cases in two extremes of a chain, meaning that communication can be positioned close to the decision center, or stay far from it, with some degrees between. Organizations that apply more value to strategic information usually have a communication practitioner who can freely talk with top decision makers or managers, or a corporate communication director integrated in to the management board. Free transit does not necessarily means an according position in the organization hierarchy. This distinction, however, apparently does not affect the gatekeeping process, because the person responsible for selecting or evaluating still have some power over the information she or he is working on.

Participants express involvement with this decision process, especially when they suggested that the access to top decision makers is part of the job characteristics. Still, such characteristic is not necessarily present in the organization's function chart, thus, it can be just a matter of culture. So bigger companies have the tendency to include a communication director inside the board of directors, but this might not be related to organizational size; rather, it is an outcome of internal values. For example, TotalCom and Aberje are smaller organizations than Unigel; despite that, the latter showed, based on the interview, less commitment with the strategic value of information handling. This insight is retrieved from the description of the role of communication in the top decision-making board, expressed by the interaction of this activity and such management level.

Decision Making

The sample shows the tendency to socially handle the decision-making cycle, so many arrangements flow after a group agreement, as suggested by Berkowitz (1990). The findings suggest that few decisions are made individually. As mentioned in several cases, communication practitioners discuss and share the decisions on strategic information, or move the discussion to upper managers. Thus, the findings might suggest that organization size can influence the decision-making procedure about critical information, because it would demand more people integrated in the process. Therefore, size might make a difference in two levels: The size of the operation, usually expressed by the number of employees, and the physical or geographical size, meaning an organization spread in many sites. The findings have pointed two distinct strategies to solve this concern: centralization and decentralization.

In addition, other two characteristics describe the way practitioners handle information: The degree of informality and fluency between top managers and middle managers, or among both and the operational workers, and how far evaluations and decisions are written or shared informally, by simple conversation. The findings suggest that written plans and reports become more important as the information is considered more strategic by the organization. Nevertheless, a diverse range of research could explore the dispute between formal and informal approaches. A single point looks clear: When the organization reaches a decision, through the evaluation made by practitioners responsible for this task, the information increases its value, evolving from being simply data to become knowledge.

Conclusion

This thesis infers from the research findings that gatekeeping is suitable for public relations practices, although the idea is not clear in non-news organizations. Still, the gatekeeping approach has been capable of raising sensitive testimonies about corporate communications, and opens a fresh route for future research involving other journalism routines and public relations practices. Gatekeeping is perhaps the most critical behavior of journalism and publishing. But policies, slanting, and periodicity are also important characteristics of newsrooms that could be investigated by anyone interested in any demand involving social communication.

Organizations need to be closely connected with society, and such labor is not addressed solely by huge investments, although budget does make a difference. Good relations arise, in fact, through the daily work of communication practitioners sensitive to the value of attention. Consciousness, discernment, and attitude grow by constant contact among practitioners who are qualified to listen to the demands of all stakeholders, and the gatekeeping concept embraced here acts all the time, although often in the background. We are all gatekeepers, and we will be better corporate gatekeepers the more organizations realize this fact. This thesis might contribute to clarifying this idea and, by doing so, help communication professionals improve their work.

By making clear the role of subjectivity in communication, this thesis points out that practitioners' awareness is relevant. Organizations value quantitative information when making decisions, but some share of the quality of these decisions still exists as simple judgment, so gatekeeping is part of the process. Organizations rely on quantitative input, but perhaps they rely on it too much. As Nassar argued, decisions about managing knowledge do not concern techniques only, but should also include ethics and aesthetics. Indeed, techniques are important, but they are not enough in a world demanding and complex. Organizations have to make decisions from broader perspectives, and gatekeeping helps achieve this purpose.

APPENDIX A
INTERVIEW REQUESTING

E-mail subject:

Requesting interview for thesis research conducted at the University of Florida

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Dear (Name of the potential participant),

Please consider the invitation below.

Best,
C.

==

Interview requested for the purpose of research about journalism routines and public relations

This is a request to contribute to the qualitative research for my master's thesis on public relations, conducted at the University of Florida.

My purpose is to interview 15 to 20 public relations professionals or their managers.

Topic and format

This thesis is about strategic knowledge management in public relations.

The interview is a 3o- to 40-minute talk on simple daily activities related to corporate communication.

My goal is to analyze procedures for handling non-administrative information, information with the potential to change the reputation of organizations of any size and kinds, whether public, private, or non-profit.
The interviews will be handled by phone. Before the call, I send a topic sheet to guide the conversation.

Each participants will receive a copy of the thesis.

This fieldwork has the potential to produce a variety of results. As a form of compensation for participating in the research, those involved in the study will receive an electronic copy of the final work after the University of Florida approves its publication, which might happen by May or June, 2011.

I am a Brazilian journalist, with a degree in marketing and communication from USP (University of São Paulo). Follow this link to check my current association with UF. My chair is Dr. Juan-Carlos Molleda.

Please let me know your decision by sending me a reply with one of the follow statements: "I agree to consider participating," or "I disagree to consider participating."

Best regards,

Cassiano

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Cassiano Polesi

- Public Relations Master's Student

- College of Journalism and Communications

- University of Florida

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(000) 000-0000 m.

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(000) 000-0000 h.

APPENDIX B
INTERVIEW OUTLINE

E-mail subject:

UFlorida: Interview outline [Name of participant/Company]

Hello (name of the participant),

Here is the outline, so you can have an idea of our conversation.

***

The thesis is about knowledge management in public relations, with emphasis in strategic values. The interview focuses on how you deal with information of any kind, given that it has the potential to affect the reputation of [name of the organization].

The interview addresses simple daily procedures, with no risk of involving confidential information.

It takes about 30 minutes, plus a short summary of your organization's business (description and size), your role inside the company, and your professional profile.

Our conversation will follow this outline and devote about 10 minutes to each topic.

- Module 1 focuses on how you identify or select information.
- Module 2 focuses on how you filter or evaluate it.
- Module 3 focuses on how you organize (or produce) this information, and share it within your organization.

***

Best regards,

Cassiano

APPENDIX C
RESEARCH INSTRUMENT

Qualitative Instrument

Interviewee profile

Before the interview, please provide the following information:

- Professional name:
- Job description:
- Academic background:
- Year of birth:
- Years of professional experience in the field:
- Years spent working in the organization:

Before we start, please give a brief description of:

- Your business purpose, market, and size (number of employees and estimated revenue);
- Your management role within the organization;
- The role of public relations in the organization (including a brief evaluation of its importance).

Each participant will be asked some but not all of the following questions. Which questions are asked will depend on the participant's context.

Q1: Identification and selection

1. What kind of information is relevant to you?
2. How do you supervise or monitor your team about it?
3. How do you identify and select it?
4. How do you know a piece of information is relevant to your business?
   - What does it bring to your attention?
   - Why is it important?
5. Who defines this importance, and how much do you participate in that defining process?
6. How is this definition shared or formalized (memos, formal meetings, informal talks)? - Are you responsible for that, or is someone else?
   - In case it does not belong to you, who is responsible, and how is it formalized or shared?
7. Lastly, what is the most important information you found last week? Last month?

Q2: Filtering and evaluation

8. How do you evaluate the information you've selected?
9. How free is your team to make its own evaluations?
10. Please explain your criteria or how you share or discuss your evaluation.
11. What information do you discard? What do you value, and pass along?
12. How did you set these criteria? Who defines them, and how far do you participate in that defining process?
13. Are you free to change these criteria? If so, how do you do so (memos, formal meetings, informal talks)?

Q3: Production and sharing

14. How do you formalize the information you possess?
15. How does your team present and share information with you?
16. How do you present and share information with your company's top managers?
17. In what form is this knowledge usually passed along (memos, speeches, meetings, letters, position papers, informal talks)?
18. Who is your "audience" (staff, middle managers, top managers, top directors).
19. How often do you produce such communications of information?
20. Lastly, what is the most relevant communication of information you produced last week? Last month?

APPENDIX D
INTERVIEW #1

Name, <u>Organization</u>: Renata Pinheiro, <u>Odebrecht US</u>
Date: Dec 2, 2010
Label: Organization 1
Type: Private/limited company
HQuarter: Miami - FL, USA
Country of origin: Brazil
Employers: ≈ 220 in the US; ≈ 80,000 worldwide.
Url: odebrecht.com
Main market: Construction and Engineering

Description: That is the U.S. arm of a worldwide engineering and heavy construction company based in Brazil. The Odebrecht holding includes other business: chemicals and petrochemicals, bio-energy, environmental engineering, real state, and gas & oil. Each engineering or heavy construction contract is considered a unit of business, and, thus, it is independent to work, so the communication is not centralized. This unit handles the U.S. market, and currently has projects in Florida, Louisiana, and Texas. It represents around 4% of the group global business. The gross revenue of the US operation in 2010 was around U$ 300 million.

<u>Summary of the interviewee:</u>

Gender: Female
Age: --
Years of experience: ≈ 10
Years in the company: ≈ 4,5

Managerial level: Top manager regarding the communication sector in this unit; function informed in her e-mail: Corporate communications & sustainable development.

Relation with the top decision-making board: Full informal access to discuss topics and issues.

Education: San Diego State University, California State University: BA, International Business & Marketing.

Details about relation with team work: She has five assistants working with her.

Details about public relations: The company does not use this label; the area is named as corporate communication.

Recruitment: Through personal network: Researcher › 1st level › <u>2nd level</u>

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

Relevant information is everything related to the image of the company, and, obviously, I mean the ways the company unfolds, or interferes with our projects, the assignments we are working on, or the projects we worked; information related several times to our clients, as well; information that, in one way or another, we know will interfere with the potential project we are studying or working; information related sometimes to policies that might interfere with public opinion, or policies that might interfere the schedule of some projects. (Pinheiro, Odebrecht US, in-depth phone interview, Dec. 2, 2010)

This question is a little difficult, because this evaluation . . . is very subjective. I'll answer in two parts: the first, is the process . . . the methodology we work is very informal. However, when something reach my attention, through external channels, monitoring, for instance, or through a contract director, who might suggest to address some subject, whatever, or even [when] Gilberto [the US director] brings a point . . . luckily we share the same space, so we have an open access to share ideas. I believe it is more about collaboration among the sides involved . . . our feeling about it . . . You measure the temperature of what is going on at the moment. Some topics we know will not reverberate, [it will not cause] any real impact on our business, so the evaluation is very subjective about what we are experimenting at that moment. (Pinheiro, Odebrecht US, in-depth phone interview, Dec. 2, 2010)

Hopefully, we never faced a crisis, [which demands] a much more formal protocol. All topics [we have been dealing with] are very commonplace, they reflect our kind of job. We do have a crisis management manual that we have developed, so, whether we face a crisis we understand within our organization that this is the case to document [actions], to formalize [procedures], even to learn [from the mistakes, and] to improve. I hope we never go through something like this, so, in daily basis, we do not document, we do no formalize the actions taken, everything is very informal. (Pinheiro, Odebrecht US, in-depth phone interview, Dec. 2, 2010)

APPENDIX E
INTERVIEW #2

Name, <u>Organization</u>: Susan Fuchs, <u>John C. Lincoln Hospital</u>
Date: Dec 6, 2010
Label: Organization 2
Type: Not-for-profit
HQuarter: Phoenix - AR, USA
Country of origin: United States
Employers: ≈ 3,000 in the JCL network
Url: jcl.com
Main market: Hospital & Health care

Description: That is a not-for-profit organization, with two hospital locations: North Mountain and Deer Valley (266 beds, and 204 beds, respectively). They offer two health center, about two dozen physician practices, primarily family care, few specialists, a trauma center (North Mountain), and a pediatric center (Deer Valley), the only one in the area where this unity is located. The oldest facility runs since 1954 (North Mountain). They are not "large" hospitals; they are "community" hospitals.

<u>Summary of the interviewee:</u>

Gender: Female
Age: ≈ 66
Years of experience: ≈ 40
Years in the company: ≈ 12

Managerial level: Media specialist; function informed in her e-mail: Strategic media relations specialist.

Relation with the top decision-making board: Full informal access to discuss topics and issues.

Education: BA in journalism - University of Florida.

Details about the responsibility and relation with team work: She is the media specialist, and deals with the entire health network. She works alone, although in connection with the public relations director at the hospital. Her job, for instance, is to inform the resources they make available for the community. She does a proactive approach to the media, because this have more impact and credibility than advertising. According to her, "people are very cynical about advertising."

Details about public relations: Fuchs works under the supervision of a public relation director. She used to be a public relations director herself for hospitals in the past, but now "I just do the things that I really, really like." She looks for what people want to know, and helps to provide information for the demands that reaches them: "If a reporter wants to do a history about a medical issue, wants to talk with a specialist, about a specific thing, wants to find a patient who has a certain experience, anything along those lines . . . I am very good in finding people who are very authoritative of about whatever the subject it may be."

Recruitment: Through personal network: Researcher › 1st level › <u>2nd level</u>

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

Relevance is really easy. It is the people, the programs, the services that John C. Lincoln health network provides to the community. It relates to the things we do that become relevant. The degree of importance depends on the strategic goals of the organization. Right now, for example, we have an emphasis on promoting some specific areas, like cardiac, trauma, pediatrics . . . [to show] how our services have a degree of excellence . . . [so] that would be a prioritizing. The relevance is specifically related to what we do and what we provide to the community. (Fuchs, John C. Lincoln Hospital, in-depth phone interview, Dec. 6, 2010)

It is such a hard question to answer, because it is a judgmental issue! I think . . . it is one of those things you just know. I've done this for 40 years, ok? And after 40 years you know what is important, [and] what is not important. (Fuchs, John C. Lincoln Hospital, in-depth phone interview, Dec. 6, 2010)

The vice president of marketing and communications [one level below the chief executive officer (CEO)] . . . has being here for about four years, and my boss, the director of public relations . . . has being here for [about] three years, so in my brain I've got organizational history that nobody else has. (Fuchs, John C. Lincoln Hospital, in-depth phone interview, Dec. 6, 2010)

APPENDIX F
INTERVIEW #3

Name, <u>Organization</u>: Luciana Peluso, <u>TotalCom</u>
Date: Dec. 17, 2010
Label: Organization 3
Type: Private/limited company
HQuarter: São Paulo - SP, Brazil
Country of origin: Brazil
Employers: ---
Url: totalcom.com.br
Main market: Marketing and advertising

Description: TotalCom is the biggest advertising group in Brazil holding a 100% of Brazilian investors and partners. The group is headed by Fischer America advertising, and nine other companies, toward different segments, such as direct marketing, business research, and promotion services. The advertising agency is the leading company financially and strategically. The agency has three operational offices in Brazil, and it is also based in Argentina, Portugal, and Angola. In addition, it operates worldwide through agreements with five other advertising agencies.

<u>Summary of the interviewee:</u>

Gender: Female
Age: ≈ 42
Years of experience: ≈ 13
Years in the company: ≈ 7

Managerial level: Top manager regarding the communication sector in this unit; function informed in her e-mail: Corporate communication.

Relation with the top decision-making board: Full informal access to discuss topics and issues.

Education: BA Journalism/PUC-São Paulo; several workshops and courses.

Details about relation with team work: She has one assistant; all press media relations is done with the support of a third part agency; other providers give support to other works, as internet coverage. She reports directly to the president of the group, Eduardo Fisher. She defines the communication of the group, and of each company inside the group: the strategy, how the group plans to be positioned.

Details about public relations: The company does not call the communication area as public relations. Internal public is held by human resources, but with her supervision. The company sees corporate communication as the umbrella to reach several publics, and Peluso works with all of them.

Recruitment: Through personal network: Researcher › <u>1st level.</u>

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

In our function, we always need to think about what is relevant to the market where we are. Some information is important to the client, and we need to promote it. Some information about the group is important to the market, and we need to disclose it. For example, the group has grown, it is opening a new unit of business, it has acquired a new company, it is entering a new segment. A company has to build a transparent channel with the market, [and spread] information that affects the market directly. Since we are a service provider, everything we can promote about our services, or institutional information that allows the market to understand where the group is heading, is considered relevant. (Peluso, TotalCom, in-depth phone interview, Dec. 17, 2010)

We exchange ideas very informally, [the president of the company] has his office side by side, there is few hierarchy levels, we are more horizontal than vertical, we talk like eye to eye, in person, very quickly. (Peluso, TotalCom, in-depth phone interview, Dec. 17, 2010)

We have an intranet, where the information about the group is shared with all collaborators, where we have an area [to archive] the memory of the group. [This archive exists] because our asset is intangible, it is [our] intelligence: we don't have factories, products, we sell ideas and communication solutions, so the main asset of the company is information. Thus, we have this area about the corporate memory, accessible by everyone, so any collaborator can search what this group has already worked on, which solutions it has created, which [important] campaigns it has developed, what strategies it has already done for big clients. So all this learning of everything done by the group over its 30 years is [archived] in this memory area. [In addition, we add] everything that deserves to be shared with the other units, for example, a new practice, or a big action that ended up with a good result and visibility. Human resources manages this, but the person responsible for that works in my office, with me. And it is on purpose, so she can access the information faster, and align with my area the tone of each message, what goes in, what stays out. We help her to define the criteria of what [kind of information] needs to be shared with everybody . . . Since we promote what happens inside to outside, we align with her what [goes to external publics] that needs to be shared internally, as well. (Peluso, TotalCom, in-depth phone interview, Dec. 17, 2010)

APPENDIX G
INTERVIEW #4

Name, Organization: Márcio Polidoro, Odebrecht BR
Date: Jan 7, 2011
Label: Organization 4
Type: Private/limited company
HQuarter: São Paulo, SP - Brazil
Country of origin: Brazil
Employers: ≈ 80,000 worldwide (with ≈ 44,000 in Brazil)
Url: odebrecht.com
Main market: Construction and Engineering
Description: The group operates several markets. Besides construction and engineering, the holding Odebrecht S/A controls business in the following areas: chemicals and petrochemicals, bio-energy, environmental engineering, real state, and gas & oil. Brasken, one of the group, is a public company. Each company repeats the same model regarding communications: a director dealing with internal communication, media relations, and documentation and memory. There is no management hierarchy between the directors of each company and the director of the holding, they are all equal in terms of responsibilities, and in the organizational chart. The director of the holding defines the macro politics of the holding, and the strategies for the CEO.
Summary of the interviewee:
Gender: Male
Age: ≈ 58
Years of experience: ≈ 37
Years in the company: ≈ 23
Managerial level: Top director regarding the communication sector in this unit; function defined as: Corporate Communication Director
Relation with the top decision-making board: Full informal access to discuss topics and issues.
Education: BA in linguistics; graduate degrees in people development.
Details about relation with team work: He manages 20 people directly; in addition, he interacts with around 150 communication people in the whole group. Today there are 185 contracts in 20 countries.
Details about public relations: Public relations does not exist as a functional term, but the "classical" practice exists. He describes public relations as someone in charge of events, and other social meetings.
Recruitment: Through personal network: Researcher › 1rt level

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

We receive a daily report with tendencies, and recommendations toward an alert, or an opportunity. This report arrives everyday to me and my press manager, who handles external communication. He analyzes this with his team, and decides what to address. We don't belong to all the engineering business, because we are in a kind of holding of these business, so we look for the leaders of these areas and we make a challenge. Last year we realize that [we could explore positively] the hydroelectric of Santo Antonio [Rio Madeira, Amazon area], due to its environmental care, and its social receptivity. . . . We did a huge work toward the Brazilian and the international press, it was on the cover of Wall Street Journal, and Financial Times. We looked for these newspapers also to oppose environmental organizations that usually talk about Amazon in the US and in Europe. So it was important to address. We invited many people to know the project, [as a result] over the last year there was 40, 50 long articles [worldwide] about Rio Madeira . . . So we have a structured action to sell journalistic topics, in order to enhance these elements that contribute to the image [of the organization]. This is a concrete action, and this decision is mine. . . . However, none action is developed without the decision of the business leader [the director responsible for a project contract], because I don't have the knowledge of the circumstances related to several business at diverse times, this dynamic is very intense. In the example of Santo Antonio, our big showcase last year . . . maybe because of political local concern it would not be interesting to highlight something related to that project. Who is sensitive [about a local problem] is the project leader, so the [project director] can decide not do it. (Polidoro, Odebrecht BR, in-depth phone interview, Jan. 15, 2011)

APPENDIX G (PART II)

Communication is the medium through we protect the intangible. The businesses go by, we have being involved in several businesses, mining, agriculture, cellulose, then we had only engineering and petrochemicals, now we are involved in other businesses, in 20 years we don't know what we'll have. But the intangible is symbolized by the image of the word Odebrecht, and the attributes it carries. Communication [is necessary] whether you want to take care of the intangible . . . So this action also needs to be directed to people inside [the organization], because the best builder of the corporate image is always the ones who work for it, or at least have this as the main activity. . . . The communication toward a teamwork is a responsibility of the leader [the director of a site, a plant or a unit], we cannot see internal communication as something pertaining to a department located in the 32nd floor of a headquarter in São Paulo. It does not have any efficacy, it does not solve the problem of our construction site in New Orleans [USA]. . . . [The action of people] does not impact the image of the organization [as much as] the risk inherent to the business activity, it is not the individual action that might damage the image, the brand, it is the act of serving the client that embed natural risks. We know the risks involved in a project . . . Regarding people, mood, relationship, dialogue basis, how communications flows, I understand this is not communication [strictness], this is related to people, human resources, it is related to the leadership of the leaders, and in the dialogue with their teams. (Polidoro, Odebrecht BR, in-depth phone interview, Jan. 15, 2011)

APPENDIX H
INTERVIEW #5

Name, Organization: Ricardo Madureira, Organization 5
Date: Jan 17, 2011
Label: Organization 5
Type: Public company
HQuarter: Saint Louis - MS, USA
Country of origin: United States
Employers: ≈ 21,000 in 66 countries.
Url: ---
Main market: Agricultural, biotechnology, protection chemicals
Description: It is a Fortune 500 company, with three main lines of products: Agricultural and vegetable seeds, plant biotechnology traits, and crop protection chemicals. The company essentially sells its products to farmers, and help them to improve their agricultural results. Net sales in the fiscal year of 2010: $10.50 billion of dollars.

Summary of the interviewee:

Gender: Male
Age: ≈ 40
Years of experience: ≈ 15 in business management
Years in the company: ≈ 1,5
Managerial level: Top manager with focus on crop protection, related to chemistry; function defined as: Global Strategy and Product Management Director.
Relation with the top decision-making board in the United States: Indirect access: he reports and has full access to a manager, who in turn has full presence in the board.
Education: Chemistry engineer
Details about relation with team work: The company has a corporate communication team of specialists, so his division does not have someone focused on that. The executive in charge of business and marketing also handles communication and the relations with their publics, a network of representatives that goes up to farms engineers and technicians. The communication they handle in this unit is related to the business products.
Details about public relations: The company has a corporate communication team of specialists, so the public relations is handled by the organization itself.
Recruitment: Through personal network: Researcher › 1rt level

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Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

Our business is about technology. Therefore, it is fundamental for us to have our clients well informed about the usage of technology. I believe it is different with companies that handle well-known and established processes. For example, I came from a beer company, so in that case there is not a demand for a communication specifically about the product. Since I am in the strategic and product area, since we have been launching new technologies, since we have the life cycle of each technology, the communication to our clients and our team is about updates, about technology, about the ways our products can be better used, and the ways to maximize them for our clients. So communication is very attached to the business. Our goal is to communicate to our clients the value of technology and how much it can aggregate to their business. At the end of the day, what drives the grower to buy our product is the perspective, is the understanding that [the investment] will return, so the grower will extract value from that, otherwise he will not buy it. (Madureira, Organization 5, in-depth phone interview, Jan. 17, 2011)

[We don't have] a criteria, a list of things that could happen, a pattern, [something] written . . . My division of products deals with a system, meaning not only the product . . . but all the techniques involved with its application. So this is very practical and clear, thus, any deviance regarding the understanding of these proceedings is considered an issue, and we need to take some action. This action goes from simple explanations to something bigger. For example, [in the case] a consultant from a farmer association exposes in their seminars, or trainings, [affirms] that our product has features A, B, and C, and [the consultant] disagrees, and proposes instead features C, D, and E, then we'll have a clear problem, in fact, an institutional problem. It passes through that initial filter, and [in a case like that] we try to address the topic in a level that we can discuss technically, and, eventually, develop lectures, or some action [regarding] this. (Madureira, Organization 5, in-depth phone interview, Jan. 17, 2011)

It is part of our culture, not only in my area, that transparency and ability to communicate quickly is essential. Since we work with chemicals and genetic modified organisms, the company is very sensitive regarding all kinds of communication, especially external, so it has to be shared. . . . [but] I don't know any written rule about it. (Madureira, Organization 5, in-depth phone interview, Jan. 17, 2011)

APPENDIX I
INTERVIEW #6

Name, Organization: Geraldo Magella, Monsanto BR | **Date:** Jan 18, 2011
Label: Organization 6 | **Type:** Public company
HQuarter: São Paulo - SP, Brazil | **Country of origin:** United States
Employers: ≈ 2,300 in Brazil | **Url:** monsanto.com.br
Main market: Agricultural, biotechnology, protection chemicals
Description: It is a Fortune 500 company, with three main lines of products: Agricultural and vegetable seeds, plant biotechnology traits, and crop protection chemicals. The company essentially sells its products to farmers, and help them to improve their agricultural results. Net sales in the fiscal year of 2010: $10.50 billion of dollars; R$2.1 billion (Reais). Brazil represents the second biggest operation worldwide.

Summary of the interviewee:

Gender: Male | **Age:** ≈ 42
Years of experience: ≈ 13 in journalism; ≈ 5 in corporate comm. | **Years in the company:** ≈ 1
Managerial level: Top manager regarding the communication sector in this unit; function informed in his e-mail: Communication Manager; function is also defined as Public Affairs manager in the social network LinkedIn.
Relation with the top decision-making board in Brazil: Full informal access to discuss topics and issues.
Education: BA in journalism (UF Minas Gerais/Brazil); MBA in finance, communications and investor relations (USP/Brazil); Reuters Foundation (Writing International News).
Details about relation with team work: He reports to a member of the Brazilian board; he supervises six people, three of them based in São Paulo (Monsanto BR headquarter), and the others in three different cities: Camaçari (Bahia), Uberlândia (Minas Gerais), and São José dos Campos (São Paulo state).
Details about public relations: He deals with the area of public affair, known in the country as corporate communication, responding for any communication regarding media and all other publics. Relations with industry and government are handled by other areas. These different areas, however, are held by the corporate communication sector.
Recruitment: Snowball: Researcher › 1rt level › 2nd level

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

Everything related to agriculture and biotechnology is relevant information for us… mainly studies. The source of information [is important because it] already informs the bias driving that information: scientific studies with the endorsement of consultants, public institutions, research institutes, information provided by leading reputation vehicles, either local, national, or international (because they will be replicated by the local press, [and] through the blogosphere, blogs, tweets, social networks), [and the] utterance of opinion leaders. (Magella, Monsanto BR, in-depth phone interview, Jan. 18, 2011)

[The perception about a potential topic] comes from day-to-day, chats with other leaders in Monsanto, journalist feeling, daily news, any topic that has emerged in the newsletters I receive, from the clipping [service], something written by a columnist, the subject of an article. A subject that has emerged in an important market, in the United States, in Europe, in Asia, something I haven't yet perceived here in Brazil, but I believe it can show up here also. [Investing in a topic] is my decision. (Magella, Monsanto BR, in-depth phone interview, Jan. 18, 2011)

APPENDIX J
INTERVIEW #7

Name, <u>Organization</u>: Regina Pitoschia, Carrefour BR	**Date:** Jan 17, 2011
Label: Carrefour	**Type:** Public company
Headquarter: São Paulo - SP, Brazil	**Country of origin:** France
Employers: ---	**Url:** www.carrefour.com.br

Main market: Supermarkets and other grocery store formats

Description: With about 170 stores, the organization works in Brazil since 1975, through several brands related to grocery stores and supermarkets. The group also handles two other brands to the commercial segment, and discount stores.

<u>Summary of the interviewee:</u>

Gender: Female	**Age:** ≈ 52
Years of experience: ≈ 20 in journalism; ≈ 10 in corporate comm.	**Years in the company:** ≈ 2,5

Managerial level: Top manager regarding the communication sector in this unit; function informed through e-mail: Corporate Communication manager.

Relation with the top decision-making board in Brazil: Full informal access to discuss topics and issues.

Education: BA in journalism (USP); three extensions in economy (FEA, Fundação Getúlio Vargas, and Ibimec). Her background in journalism was always economy and personal finances.

Details about relation with team work: One internal person, an external agency with seven people in São Paulo, and other four regional partners: one in the Northeast area of Brazil, one in charge of Minas Gerais and Espírito Santo states (central area of the country), one in Rio de Janeiro, and one in the South area of the country (São Paulo is Southeast).

Details about public relations: She handles corporate communication, but mainly press; the job is done with third party services. In addition, she centralizes the corporate communication, through a matrix of communication: internal, governments, and social entities. She reports to the vice-president of corporate issues. Her work includes planning and developing of communication strategies. Her area gets involved in all major communication planning.

Recruitment: Through personal network: Researcher › 1st level › <u>2nd level</u>

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

Basically, I will divide it into two fronts. One proactive front, where it is important [to promote] the balance sheets [or financial statements] of the company, any new launching, such as the e-commerce last year, which has complemented our commercial platform, so in this regard, giving a bigger dimension to the strategic and commercial information that the organization needs. Another relevant part is the defense of our image and reputation. We are a retail company, with over one million people passing through our stores in Brazil, so given that exposure, we need to be very careful about any issue inside stores, because it reverberates quickly and widely, since we are a multinational, with presence almost everywhere in the country. So relevance applies to the defense or the promotion of the brand. (Regina Pitoschia, Carrefour BR, in-depth phone interview, Jan. 19, 2011)

The topic defines itself. Whether the topic is important, whether it has stuff to work with. It doesn't matter if one comes with a very good idea, but not well tied . . . No, we cannot do it. [Or] yes, this is good! You know you can [offer this] to a news budgeter, we can invite the journalist to check it in the store, so we are safe to work. It depends on the topic, and on what the organization is proposing to address, so we can develop it . . . Sometimes the company has something hidden here, and nobody has discovered it is news. (Regina Pitoschia, Carrefour BR, in-depth phone interview, Jan. 19, 2011)

APPENDIX K
INTERVIEW #8

Name, Organization: Márcia Neves, Unigel
Date: Jan 19, 2011
Label: Organization 8
Type: Private/limited company
HQuarter: São Paulo - SP, Brazil
Country of origin: Brazil
Employers: ≈ 1,200 Brazil; ≈ 500 Mexico.
Url: unigel.com.br
Main market: Chemicals, fertilizers, plastics, and packaging
Description: The holding has several unities in Brazil, and one in Mexico. They are the second biggest petrochemical company in the country, and a global player as well. The gross revenue was R$ 2.6 billion in 2010.

Summary of the interviewee:

Gender: Female
Age: ≈ 47
Years of experience: ≈ 10 in human res., ≈ 6 in internal comm.
Years in the company: ≈ 20 years
Managerial level: She is linked to Human Resources. Function is defined in the social network LinkedIn as: Human Resources Coordinator.
Relation with the top decision-making board: Full informal access to discuss topics and issues.
Education: BA in administration
Details about relation with team work: One person helps with this task. She reports to the financial director, who reports to the presidency.
Details about public relations: The area is related to Human Resources. There is no external contact, handled by a third part consultancy, linked to the presidency. This service handles external communication, including press. Her job is focused in communication to the company's employees.
Recruitment: Through personal network: Researcher › 1st level › 2nd level

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

Relevance is complicated . . . Our communication is usually elaborated by request, top-down. When exists a communication demand, the board of directors call us to elaborate some news, some mural information. We use some pieces [named Human Resources News or HR Announces]. So, it is done by request or based on our needs, whether something is going on, any change inside the organization . . . we advertise it to our collaborators, our employees. Our communication sticks to that. Information about the market, linked to management or strategic areas is not done. Any information comes from the managers or directors, there is no interface between human resources, or the communication subsystem, and the departments, unless we receive an input from this division or director requesting us to produce any article about a subject they decide to disclose. We do not search information. (Neves, Unigel, in-depth phone interview, Jan. 19, 2011)

When you don't have a communication area inside the company, the employees feel somehow cheated or betrayed about information. When you start to communicate events, changes, rearrangements, hires, [or when you] give motivation, space to the employers promote their [own] articles, you realize that the organizational mood improves a lot, specially for the human resources area, because they feel they are part of the process. (Neves, Unigel, in-depth phone interview, Jan. 19, 2011)

APPENDIX L
INTERVIEW #9

Name, <u>Organization</u>: Fábio Auricchio, <u>Oracle BR</u> **Date:** Jan 19, 2011
Label: Organization 9 **Type:** Public company
HQuarter: São Paulo - SP, Brazil **Country of origin:** United States
Employers: ≈ 1,200 in Brazil; more than 104,000 worldwide **Url:** oracle.com.br
Main market: Information technology and services
Description: Oracle Brazil is the first operation in the Latin America. In the fiscal year of 2010, the total revenue was around U$ 27 billion. In the last two years, the company has acquired around 60 companies, including PeopleSoft, and recently, Sum, a process that ended in January 2010. According to Auricchio, in July the companies were working totally integrated. Thus, now, Oracle is also a software and hardware company. "We offer a complete solution, from software to hard disks." Oracle BR has five units in the country: São Paulo, Rio de Janeiro, Porto Alegre, Brasília and Belo Horizonte.
<u>Summary of the interviewee:</u>
Gender: Male **Age:** ≈ 45
Years of experience: ≈ 20 in public relations **Years in the company:** ≈ 4
Managerial level: Top director. Corporate Communication director; function informed in his e-mail: Director, Corporate Communications - Brazil.
Relation with the top decision-making board: Full presence in the Brazilian board of directors.
Education: BA in public relations, by Casper Líbero. Auricchio is an exception among the interviewees: his background is public relations only, with experience essentially in public relations agencies, where he developed a close relation with the technology markets in the last six years.
Details about relation with team work: Auricchio reports to the Latin America communication director. He has five assistants: two focused in corporate citizenship and internal communication; and three people to handle communication with journalists, although they belong to a service provider, an agency. "We have an in-house agency, with total access, so this helps a lot."
Details about public relations: He integrates the board of directors, with the president and the top managers, and share decisions concerning to communication. The work is mainly to take care about the reputation, plus press, and several publics. The recent acquisitions indicate new challenges, like the public related to Java, made of developers, so the company is investing in social networks. The company works in three blocks worldwide: Americas, Europe, and Asia/Pacific. There is a corporate guideline, however it is adapted to local needs, and Java is an example of that.
Recruitment: Through personal network: Researcher › 1st level › <u>2nd level</u>

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

For me at the moment, relevant information is the actual positioning of the company, because it has changed completely. In about one year it has moved from the status of a software company to that of a hardware company [, as well]. This [has both] external and internal [effects], because it is a paradigm change to my internal public, which has to talk about Oracle externally as a complete company, and my mission of translating it in a way that the market understands it, and seeks to know us better, of promoting it as a company with integrated solutions for any kind of business. (Auricchio, Oracle BR, in-depth phone interview, Jan. 19, 2011)

I have a constant interaction with the communication director for Latin America, her office is next door, we keep ourselves very aligned, even because she has developed a lot of what we have here today, and also with the [LA] region. We have weekly calls with the region under her command, and we are always aligned. Whatever any others do is shared with her. I can tell you that I decide about 50%. (Auricchio, Oracle BR, in-depth phone interview, Jan. 19, 2011)

APPENDIX M
INTERVIEW #10

Name, Organization: Ivana Garcia, CB Richard Ellis BR
Date: Jan 21, 2011
Label: Organization 10
Type: Public company
HQuarter: São Paulo - SP, Brazil
Country of origin: United States
Employers: 33,600 in 65 countries; 300 in Brazil
Url: cbre.com.br
Main market: Real state, consulting and services
Description: CBRE is a global leading company in the real estate market, where they act only with top level commercial business. Their division of facilities (corporate infrastructure management) deals with the top 500 companies ranked by Business Week. The company has offices in 65 countries. The Brazilian office runs since 1973. Their performance in Brazil, in 2009, achieved the following results: R$ 8,6 billion in corporate leases (rental value X 5 years), R$ 122,1 billion in asset valuations.
Summary of the interviewee:
Gender: Female
Age: ≈ 48
Years of experience: ≈ 25
Years in the company: ≈ 8
Managerial level: She is a consultant on marketing and communication for CBRE, and gives support to the top managers. Strategic decisions are shared with the board of directors. She handles the brand in segment of services; other divisions handle other segments. The function is described in her e-mail as: Communication and Marketing.
Relation with the top decision-making board in Brazil: Full informal access to discuss topics and issues.
Education: BA in Portuguese language; other post-graduate courses in corporate communication, merchandising, marketing, among others.
Details about relation with team work: She works alone, and use third party services when necessary.
Details about public relations: ---
Recruitment: Through personal network: Researcher › 1st level › 2nd level

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

Relevance to us is all our achievements, our successes with our clients, the success cases we can disclose to the market, since several cases we cannot disclose because we work with confidentiality agreements, which belong to the organizations' strategies of our clients. (Garcia, CB Richard Ellis, in-depth phone interview, Jan. 21, 2011)

I believe it is important to know the organization's business, as I am here for eight years, I know the company very well. We need to have good sense to filter, and whether I find something relevant I discuss with the top managers to use it or not, to get an agreement (from them). (Garcia, CB Richard Ellis, in-depth phone interview, Jan. 21, 2011)

APPENDIX N
INTERVIEW #11

Name, Organization: Marcelo Mendonça, TAM BR
Date: Jan 28, 2011
Label: Organization 11
Type: Public company
HQuarter: São Paulo - SP, Brazil
Country of origin: Brazil
Employers: ≈ 26,280
Url: tam.com.br
Main market: Air company
Description: TAM is the actual biggest airline company in Brazil. It operates 850 rotes, and 63 destinations, and attend around 100 thousand travelers in South America, North, and Europe. Annual revenue in 2009: U$ 4.89 billion. Recently, the company merged with LAN, the biggest airline operating in Chile, to develop an airline operation focused in Latin America. This new company is named LaTam.
Summary of the interviewee:
Gender: Male
Age: ≈ 53
Years of experience: ≈ 11 in journalism; ≈ 8 in corporate comm.
Years in the company: ≈ 3
Managerial level: Top director regarding the corporate communication sector in this unit; the function is described in his e-mail as: Corporate Affairs Director.
Relation with the top decision-making board: Presence in the board of directors as needed. Full informal access to discuss topics and issues.
Education: BA in journalism by ECA/USP, in 1976; specialization in Michigan, in 1991/92; MBA in management at Fundação Getúlio Vargas (SP).
Details about relation with team work: Mendonça supervises three areas. One area handles the press (it has one manager and 12 people involved). Internal communication is handled by three people, all journalists, although one is a communication analyst; the area is currently without a specific manager, as it use to have: due to the crisis, this work was assumed by the following manager, to attend a downsizing proposed by the administrative area. The third area supervised by Mendonça deals with government related issues (it has 2 people, and one manager, who also manages currently the internal communication area).
Details about public relations: Three areas: Press, internal communication, and government and institutional managers. This last area is very specific to the business, and their reality. Usually, this is an area close to the legislators. The company has a consultancy in Brasilia, related to legislations and air market legislative projects.
Recruitment: Through personal network: Researcher › 1st level › 2nd level

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

As a leading company, with 100,000 passengers/day, flying to South America, North America, and Europe, . . . the demand is huge . . . we are bombarded daily by demands of all kinds, relating to the operation, problems, delays, it includes issues concerning the business, the aviation market, tendencies, expansions, retractions, fuel prices . . . it includes specific [issues] related to results. We are listed in [the stock exchanges of] São Paulo and New York, so, as an open company, we might face several surveillances, inspections, attention. Also, there is a high demand from marketing: campaigns, sponsorships, advertising, selling points . . . The risk we combat every day is to implement proactive topics, so we try to do something else than simply meet the press. (Mendonça, TAM, in-depth phone interview, Jan. 28, 2011)

Filtering depends a lot of the professional who is in the front, the sensibility to identify a topic that has to scale. Daily, you have operational things . . . usually some topics that have a wider image impact reaches me. (Mendonça, TAM, in-depth phone interview, Jan. 28, 2011)

APPENDIX O
INTERVIEW #12

Name, <u>Organization</u>: Paulo Nassar, <u>Aberje</u>
Date: Jan 28, 2011
Label: Organization 12
Type: Not-for-profit
HQuarter: São Paulo - SP, Brazil
Country of origin: Brazil
Employers: --
Url: aberje.com.br
Main market: Public relations professional association
Description: With about 44 years of existence, Aberje expresses the evolution of corporate communication in Brazil, according to Nassar. Today, the association works with a wide range of topics related to the field. It's a professional and scientific association, holding about 1,000 people representing companies, plus government institutions, private, nonprofits, and individuals. Nassar defines Aberje as a global association facing a global public. For example, the organization develops works with architecture, history, and other areas of knowledge. Following this global strategy, Aberje is organizing events in New York and Miami, to reward or promote the best communication campaigns developed in North and in Latin America.

<u>Summary of the interviewee:</u>

Gender: Male
Age: ≈ 59
Years of experience: --
Years in the institution: --
Managerial level: General director (equivalent to the presidency of the association).
Relation with the top decision-making board: Full presence.
Education: PhD in communication sciences; MA in interfaces; BA in journalism.
Details about relation with team work: He is the main director of Aberje.
Details about public relations: Nassar considers himself an "intruder" in the public relations area, given the actual complexity of this field. He lists questions regarding ethics, ethnicity, biodiversity, and genetics that public relations has to deal with. To address all these topics it's important to include other areas, such as anthropology, social sciences, law, philosophy, or even the hard sciences, like Math. He defines public relation as meta-system, because it depends on several interfaces with which someone is working on.
Recruitment: Through personal network: Researcher › 1st level › <u>2nd level</u>

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

Relevance to us is something inside a risk matrix, which is linked to the identity, mission, and vision of our members. For example, information today is a commodity, so we detect and select the information that generates value or destroys value for our members. We map information regarding risks, such as the risk of the country itself [Brazil, in this case], the risk of regulations, terrorism, issues concerning information technology, loss of talents, natural disasters, or disasters linked to production processes, or within the logistics chain of the organization, as well as false or apocryphal information within the social network environments. . . . We elect criteria for selecting [information], and it starts from this risk matrix; following that, we use some strategic planning tools, like the SWOT matrix, to evaluate whether that information is a threat or an opportunity, and if the organization has any strengths relevant to that analysis. (Nassar, Aberje, in-depth phone interview, Jan. 28, 2011)

The selected information is strategic, and we try to interpret this information. This interpretation drives to another level, a level of having an opinion about the information that has been well selected and well interpreted. This level of opinion is already the level of the decision made by the command of the organization. . . . But it is flexible: depending on the complexity of the information, you can have several meetings, while simpler topics might be dropped in a single one . . . Each meeting is guided by an informational strategic agenda . . . So these three occasions—strategic selection of information, strategic evaluation, and strategic opinion [about it], you cannot define which is more important. If you don't have a good selection, you start your process in a fragile manner. (Nassar, Aberje, in-depth phone interview, Jan. 28, 2011)

The [middle] managers own that information, this is the reason we consider that this manager has to be refined, because [this manager] will make decisions about issues not only within the technical range, but also including ethics and aesthetics. . . . Thus, a manager without culture cannot even integrate this strategic scope. We have a key director inside Aberje working to develop competence in this group, so a considerable number of people involved with strategic areas have a master's degree, or are pursuing a master or a doctoral degree, or have [some kind of] specialization. This group is acquiring competence in management, [since] most of them come from the communication field. . . . These decisions [include] a senior evaluation, [although] the decisions are usually shared, [because] the organization has only two hierarchical levels, and the managers have access to the directors. (Nassar, Aberje, in-depth phone interview, Jan. 28, 2011)

APPENDIX P
INTERVIEW #13

Name, <u>Organization</u>: Marco Simões, <u>Coca-Cola BR</u>
Date: Jan 31, 2011
Label: Organization 13
Type: Public company
HQuarter: Rio de Janeiro - RJ, Brazil
Country of origin: United States
Employers: 53,000 in 46 industrial units of independent bottlers
Url: coca-cola.com.br
Main market: Nonalcoholic beverages and syrups.

Description: This is the representative office of the Coca-Cola company, which is defined as a system, because the business is an alliance formed by several independent industries, with their own bottling facilities and capacity. The Brazilian operation is the third biggest global market of the company, almost together with Mexico. United States is the biggest market worldwide. Coca-Cola operates in Brazil since 1942. Currently, the Brazilian system is formed by 16 authorized bottlers, and other two companies, Leão Junior and Del Valle, a total of 46 industrial units that handle production, bottling and distribution in their area of operation.

<u>Summary of the interviewee:</u>

Gender: Male
Age: --
Years of experience: ≈ 20 in marketing communication
Years in the company: ≈ 7 (+4 before)
Managerial level: Vice-president of communication and sustainability, as stated through e-mail.
Relation with the top decision-making board: Full presence in the Brazilian and Latin America board of directors.
Education: BA in journalism, and uncompleted master by USP; MBA by Denver University.
Details about relation with team work: Simões supervises 20 people directly, plus around 120 people nationwide, working on his demands. Worldwide, Coca-Cola has 21 people working at his managerial level; four in South America (including him).
Details about public relations: Simões supervises three areas: corporate communication, institutional marketing, and sustainability. The first division relates to the usual communication area: press, stake holders, internal communications, crisis management, and health. Institutional marketing takes care of advertising, and the company's product portfolio in a broad view. Individually, Coca-Cola or DelValle product is another area, so Simões responsibility is to handle the whole branding approach. Sustainability is a responsibility held by everyone, but he works to improve this agenda.
Recruitment: Through personal network: Researcher › 1st level › <u>2nd level</u>

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

Our biggest concern is, on one side, to maintain a positive image of Coca-Cola Brazil, and its 150 products, and, on the other side, to understand the dynamics of our market. Thus, we can feed information internally so our products, our actions, would be correct, regarding what the society expects. . . . It relates to sustainability: We need to be a resonance box of the society, so the company will be sensitive to what is important to the society as a whole. Sustainability has acquired more importance to the organizations in the last years, [in the past] you did not think about it, it was not on our radar 15 years ago. I would say that our area has begun to raise the importance of this issue, first, under the view of social responsibility, which has evolved to the meaning of sustainability and social business over time. (Simões, Coca-Cola BR, in-depth phone interview, Jan. 31, 2011)

APPENDIX P (PART II)

Our practical instrument of business is only one, as it is for everyone: research. It is the only way to do it [evaluations]. Of course, before we conduct a research, we need to be sensitive to whether the winds are blowing in a specific direction [or another], so when you go to the research you have some hypothesis to be proved or not. . . . Our area is the function with the most external contact, all other functions are basically toward internal publics, finances, for example, worry about the numbers, the systems, people handling marketing and product does not get in touch in the consumer "per se," there are millions of consumers, so the only way you do that is through market research, ok? Inside Coca-Cola the only two areas with the function [of building] external relationship is my area [communication] and public affairs, a specific area to handle governmental relations that does not report to me. . . . My area has the function of handle social connections. Every week, I have lunch, dinner, meetings with a lot of people, like health public—physicians, nutritionists, like people from educational areas, journalists . . . So these people with whom I have a daily contact help us to gather this social sensibility. Our function in these contacts is to hear: We need to hear what society is thinking. To formulate the hypothesis I mentioned previously, we need to pass through this first step, which is to listen. We listen to the press a lot, health groups, people linked to environment initiatives, for instance. We have two options with organizations that look for us, sometimes gently, sometime aggressively. One is the "ostrich strategy": you stick your head in the ground, and don't pay attention to what is going on around you. The other one is to listen actively, which means to look for it, and listen everything. Do you have a critic for us? What is that? I want to know everything you are thinking about. (Simões, Coca-Cola BR, in-depth phone interview, Jan. 31, 2011)
Our criteria are national relevance, since regional issues will be addressed locally, or something that endangers people's lives [or their safety], for example, the shedding of some [industrial] input, let's say [an accident] with a truck filled up with phosphoric acid, this is something with relevance that becomes a national issue. Also, some issues might be topic, but they are very relevant to us, [and they belong to our] seven sustainability areas, which we have direct focus: people, or human resources; our product portfolio, anything related to that is relevant; anything related to the benefits of our products, regarding health, positively or negatively; community, everything related to that we have interest at national level; and three areas related to the environment: everything related to water, recycling of our packaging, and everything related to carbon emission. (Simões, Coca-Cola BR, in-depth phone interview, Jan. 31, 2011)

APPENDIX Q
INTERVIEW #14 (WRITTEN)

Name, Organization: Larissa Aranha, JL LaSalle BR — **Date:** Feb 1, 2011
Label: Organization 14 — **Type:** Public company
HQuarter: São Paulo - SP, Brazil — **Country of origin:** United States
Employers: -- — **Url:** joneslanglasalle.com.br
Main market: Real estate services and investment management.
Description sent by e-mail: Jones Lang LaSalle is a company specialized in real estate consultancy and services. The company has special team and offers services to clients who aims to increase value through purchase, occupancy, and investment in the real estate market. . . . It achieved a global revenue in 2009 of US$2,5 billion. The company operates in 60 countries, involving 750 cities, and 180 corporate offices, offering solutions to investors and renters. The company is the worldwide leader in consultancy for hotel investments. In this segment, JL LaSalle has 200 specialists, in 19 countries, and 10 professionals in Brazil. The Brazilian operation offers the following services: rentals, sales and investments; renters representation, management of proprieties, facilities, industrial and shopping centers; project management, consultancy, evaluations and research.

Summary of the interviewee:

Gender: Female — **Age: --**
Years of experience: ≈ 20 — **Years in the company:** ≈ 14
Managerial level: Top manager regarding the communication sector in this unit. Function defined in her e-mail: Communication and Marketing Manager; in the social network LinkedIn it is defined as Senior Communication and Marketing Manager.
Relation with the top decision-making board: Full informal access to discuss topics and issues.
Education: BA in public relations (FAAP/Brazil - 1991); MBA (ESPM/Brazil - 1996); several trainings in the USA.
Details about relation with team work: Communication and marketing is teamwork with six people, all of them located at the company headquarter, in São Paulo. The strategies are defined with the company president, and aligned with the global orientation.
Details about public relations: Aranha is the marketing manager, and her main attribution is to develop marketing actions to promote positively the corporate image of the company. This is done through newsletters, corporate brochures, web, and press agencies. She also handles the internal communication, and area that she implemented by 2007.
Recruitment: Through personal network: Researcher › 1st level › 2nd level

APPENDIX R
INTERVIEW #15

Name, <u>Organization</u>: Ms. 15, <u>Organization 15</u> **Date:** Feb 2, 2011
Label: Organization 15 **Type:** Private/limited company
HQuarter: São Paulo - SP, Brazil **Country of origin:** Germany
Employers: 49,000 worldwide; 1,500 in the Brazilian division **Url:** --
Main market: Industry related to capital goods (turbines, energy generators, and other segments)
Description: Family company originally from Germany, with around 150 years of existence. The company has four main divisions: paper machines, hydroelectric equipment, drive systems machinery, and industrial services, which relates to the maintenance and modernization of old facilities. The interviewee works for the Brazilian hydroelectric division.

<u>Summary of the interviewee:</u>

Gender: Female **Age:** 32
Years of experience: ≈ 10 **Years in the company:** ≈ 2,5
Managerial level: Middle manager; her business card describes the function as: Communication Analyst, Corporate Communication.
Relation with the top decision-making board: No access; she reports to a manager.
Education: BA in technology; extension in marketing and communication USP, and Florida University.
Details about relation with team work: She has three junior assistants, and reports to a marketing supervisor. She works as communication analyst to marketing, sales, market promotion, sales promotion, and product development.
Details about public relations: Another professional handles public relations, which takes care of media and events. Each division of the company has its own communication and marketing teamwork.
Recruitment: Direct invitation

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

Our engineers and project managers . . . are our sources of information [regarding projects], so we know what we need to do and how we will handle it. [We have a meeting] usually every Monday [of around 2 hours, staring at 2pm, resulting in a two pages briefing], that's when we know what is planned for the month, what we're going to address. They pass the whole month in advance, then, we discuss and update the schedule weekly [because things change quickly due to delays and problems] . . . On Tuesday, at 9am, we have a meeting of our team, to discuss the actions [that we are planning], then we have Wednesday and Thursday to prepare the actions, elaborate estimates, the schedules, to prepare everything . . . This report is due usually by the end of Thursday, around 5pm. On the following Monday, at the same time, we have the headings meeting [so the top managers base their evaluations on the report of the previous week, while the strategic team is working on the next report] . . . The report includes several attachments, but the document itself has around 30 pages. (Ms. 15, Organization 15, in-depth phone interview, Feb. 2, 2011).

APPENDIX S
INTERVIEW #16

Name, <u>Organization</u>: Marco Antonio Lage, <u>Fiat BR</u>
Date: Feb 4, 2011
Label: Organization 16
Type: Public company
HQuarter: Betim - MG, Brazil
Country of origin: Italy
Employers: 15,000 in Betim(auto unit); 38,000 nationwide
Url: www.fiat.com.br
Main market: Automotive, trucks, and agriculture vehicles

Description: The Fiat Group, a holding of 19 companies, is ranked as the 11o. biggest business group in Brazil. Its main market is the automotive sector: cars, trucks, tractors, and other agricultural machines; it also operates with motors for several applications, industrial automation systems, and other segments. The company informs they have the biggest share in the Brazilian market of cars and light commercial vehicles, with 24.5% of dominance.

<u>Summary of the interviewee:</u>

Gender: Male
Age: ≈60
Years of experience: ≈ 11 in journalism; 20 in corporate comm.
Years in the company: ≈19
Managerial level: Top director; function is defined in his e-mail as: Director of Corporate Communication.
Relation with the top decision-making board: Full presence in the Brazilian board of directors.
Education: Journalist; master of strategic marketing (UF Santa Catarina)

Details about relation with team work: Lage leads the following internal teamwork: eight people handle press and content, seven handle events; four handle public relations, five handle social responsibility, and four handle administration of the area. This group works in the industrial facility (in the Minas Gerais state), and in the office located in São Paulo. They also have the support of several external agencies to handle activities such as community communication, promotion of social responsibility initiatives, marketing and media initiatives, and relationship with institutional publics. In addition, the area works with event producers.

Details about public relations: Corporate communication is divided in three sectors: internal communication is handled by the human resources area; another management unit handles communication related to marketing, and the unit under Lage's direct supervision handles all other publics. In the organizational chart, however, he is the responsible for all these three areas, and represents them in the board of directors. He also is the leading of the image group, a teamwork that defines the action plans for all these three areas, and conduct research about the brand. For instance, they recently defined the issue of reputation as the main keyword to address to the company's internal publics.

Recruitment: Through personal network: Researcher › 1rt level › <u>2nd level</u>

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

Information is strategic to the extent that it is related to the business of the company, and it is weighed according to how it affects the sector, from the global to the local economy, with the consumer market, when it is analyzed under the economic view. Other strategic information is not directly linked to the business but is instead related to the environment where the company markets its products, where it develops its business. It may be political, social, or have as many as several possible natures, but the way to measure that is through the level of the impact on the business. (Lage, Fiat BR, in-depth phone interview, Feb. 4, 2011)

We had recent news about credit restriction, and this is important because our market expands based on the credit for the consumer. Last month the new government defined an action to reduce credit. This is the kind of news that is monitored, and it is immediately passed along, thus, the company can have an opinion about it, including giving speeches if necessary, and prepare the market, in special the sales system [of Fiat] and retail, so this information can be absorbed, to avoid a physiological affect on the consumer. This kind of information might look trivial, commonplace, but our area has a special attention to that. . . . We conduct a different reading of this information, we added a new bias, we subsidized the other directors, so they were able to deal with that. We need to view information with other eyes, so we can [evaluate] whether we can be more offensive or defensive about it. (Lage, Fiat BR, in-depth phone interview, Feb. 4, 2011)

APPENDIX S (PART II)

I believe it is important [to implement this as] culture. Information concerns [used to be] managed individually in the company, driven by the perception or the ability of each executive. In our case, what we did, what we have being doing—which is an evolution, in my opinion—is to systematize this process. Systematic information [is necessary], so the perception about it can be wider, more democratized, [thus,] all the areas can use it the best way possible, preventively or offensively. [Systematic information] helps the business of the company in any area, being it sales, manufacturing, environment [and others]. . . . Our weekly monitor is distributed to our executives with our reading [of the news]. When [we detect] something risky, we carry this to our board meeting scheduled every Monday. So systematize means we work the information, we interpret it, and contribute [to make possible for] the other agents of the company to get a benefit [out of it]. (Lage, Fiat BR, in-depth phone interview, Feb. 4, 2011)
Communication is a strategic activity, and it is not caught by surprises, [communication] helps and shares the decisions in 360 degrees, so we are able to work threats and opportunities. Communication does not go up to the board of directors, communication is inside this board. It is another focus, it is another approach. (Lage, Fiat BR, in-depth phone interview, Feb. 4, 2011)

APPENDIX T
INTERVIEW #17

Name, <u>Organization</u>: Anadege Freitas, <u>Paramount Pictures BR</u>
Date: Feb 11, 2011
Label: Organization 17
Type: Private/limited company
HQuarter: Rio de Janeiro - RJ, Brazil
Country of origin: United States
Employers: ≈ 50
Url: paramountpictures.com.br
Main market: Entertainment

Description: This is the Brazilian operation of Paramount Pictures, USA. It is a small operation, because Brazil represents only 3% of the worldwide market. This division handles the home entertainment markets: DVDs, and related products, also some rights over distribution to other media. Another division of the same company handles the marketing related to movie pictures.

<u>Summary of the interviewee:</u>

Gender: Female
Age: ≈ 31
Years of experience: ≈ 9 in marketing communication and PUR
Years in the company: ≈ 8
Managerial level: Marketing manager responsible for catalogs (films older than 6 month) and films to children.
Relation with the top decision-making board: No access; she reports to a manager.
Education: BA in journalism, with specialization in marketing (FIA, FGV, and USP).

Details about relation with team work: Freitas reports to a marketing director, and has two assistants. The division has another professional to handle public relations, press, and other media contact. Public relations is not at the same managerial level.

Details about public relations: Freitas does not handle public relations, which is handled by another professional; Freitas describes public relations through the actions they organize to the consumer, usually at the retail store. Relations to media is done internally, and Freitas share experiences and information with her colleague. In the organizational chart, the public relations professional is in a lower manager level than the marketing manager, but she reports to the marketing top manager, and to Los Angeles (where the central unit of the company is located).

Recruitment: Through personal network: Researcher › <u>1st level</u>

Summary of quotations selected for research questions 1, 2, and 3 (some of them mentioned in Chapter 4)

Marketing is a strategic function within the company. It is responsible for following communication actions, as well as financial information, [to figure out] whether [the result] is profitable or not. Our goal is to bring income and profitability to the company out of our films, which are our products. We control it through reports, including accounting and finances, even to understand whether the investments, or the costs [related to a product] were appropriate or not. We need to know information regarding other areas to be able to analyze it, in order to fix or improve [the performance of each product]. . . . Regarding the consumer, the measurement we have is the result [achieved by] the retail store. (Freitas, Paramount BR, in-depth phone interview, Feb. 10, 2011)

APPENDIX U
NUMERIC SUMMARY OF FINDINGS

Total

› **17** participants, **16** organizations

Organizations included, area of business, and respective headquarters (related to the interviewees)

Odebrecht, construction and engineering

› **1** site in Brazil (BR), São Paulo - SP

› **1** site in the United States (US), Miami - FL

John C. Lincoln Hospital, health services

› **1** site US, Phoenix - AR

TotalCom, advertising and communication solutions

› **1** site BR, São Paulo - SP

Organization 5, agricultural, biotechnology, and protection chemicals

› **1** site US, Saint Louis - MS

Monsanto BR, agricultural, biotechnology, and protection chemicals

› **1** site BR, São Paulo - SP

Carrefour BR, supermarkets and other grocery store formats

› **1** site BR, São Paulo - SP

Unigel, chemicals, fertilizers, plastics, and packaging

› **1** site BR, São Paulo - SP

Oracle BR, information technology and services

› **1** site BR, São Paulo - SP

CB Richard Ellis BR, real estate, consulting and services

› **1** site BR, São Paulo - SP

TAM, airlines, air transport and services

› **1** site BR, São Paulo - SP

Aberje, professional association

› **1** site BR, São Paulo - SP

Coca-Cola BR, beverage and food

› **1** site BR, Rio de Janeiro - RJ

Jones Lang LaSalle BR, real estate services and investment management

› **1** site BR, São Paulo - SP

Organization 15 BR, hydro power equipment and services

› **1** site BR, São Paulo - SP

Fiat BR, automotive industry

› **1** site BR, Belo Horizonte-MG

Paramount BR, home entertainment

› **1** site BR, Rio de Janeiro-RJ

APPENDIX U (PART II)

Organizations' country of origin

USA: **8**
- John C. Lincoln Hospital, Organization 5, Monsanto, Oracle, CB Richard Ellis, Coca-Cola, Jones Lang LaSalle, Paramount

Brazil: **5**
- Odebrecht, TotalCom, Unigel, TAM, Aberje

France: **1**
- Carrefour

Germany: **1**
- Organization 15

Italy: **1**
- Fiat

Organization type

Not-for-profit: **2**
- John C. Lincoln Hospital, Aberje

Private or limited companies: **6**
- Odebrecht, TotalCom, Unigel, Organization 15, Paramount, Fiat

Public companies: **8**
- Organization 5, Monsanto, Carrefour, Oracle, CB Richard Ellis, Coca-Cola, Jones Lang LaSalle, TAM

Interviewees

Total of interviews, by gender and format:
- **17** participants, **9** females and **8** males
- **16** interviews conducted by phone, **1** written response

Interviewees base of operation:

United States (US): **3**
- John C. Lincoln Hospital, Organization 5, Odebrecht US

Brazil (BR): **14**
- Odebrecht, TotalCom, Unigel, TAM, Aberje (all Brazilian companies)

  Monsanto BR, Oracle BR, CB Richard Ellis BR, Coca-Cola BR, Jones Lang LaSalle BR, Paramount BR, Carrefour BR, Organization 15 BR, Fiat BR (subsidiaries of foreign companies)

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BIOGRAPHICAL SKETCH

Cassiano Polesi is a journalist and editorial producer. He received a Master of Arts in Mass Communication degree from the University of Florida in May 2011, and wrote his thesis on the application of gatekeeping to public relations. His view of public relations focuses on the ways organizations manage information to build meaning and style, an approach that emerged from his writings about corporate communications and his working experience in business journalism, graphic design, art direction, photography, typography, and editorial production in online and printed formats.

Born in São Paulo, Brazil, in 1960, Cassiano Polesi received a Bachelor of Arts degree in journalism from University Metodista in São Bernardo do Campo, Brazil, in March 1984, and a certificate from the School of Communications of the University of São Paulo, with a specialization in communication and marketing management, completed in November 2006. He has also taken courses and workshops on art direction, typography, photography, and editorial systems.

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