



**Public Relations Consultants
Association (Ireland)**
Consultancy Management Standard
2019/2021



Public Relations Consultants Association (Ireland) Consultancy Management Standard 2019/2021

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Purpose and Benefit of the PRCA (Ireland) Consultancy Management Standard 2019/2021

The Public Relations Consultants Association (Ireland) represents the interests of the top PR consultancies operating in this country. Established in 1989, it provides a forum for members to communicate with each other, as well as with government and other public bodies and associations. It also aims to represent the Irish PR sector in the media and internationally.

The PRCA is committed both to the advancement of the profession in Ireland and to the nurturing of the professional goals of our members. Membership of the Association requires meeting strict entry requirements - demonstrating why the experience, skills and creativity of PRCA members rank them with many of the best consultancies in the world.

The achievement of the PRCA (Ireland) Consultancy Management Standard 2019/2021 is a requirement for all members of the PRCA. The Standard is independently assessed and awarded against the specific criteria detailed later in this document. Its purpose is to act as quality assurance to clients, employees and other stakeholders that the firm holding the Standard is operating to best practice in the areas of professional practice, corporate and financial governance, evaluation and client relationships as well as in people management.

KSi Faulkner Orr Accountants, Tax Advisers and Registered Auditors is the firm appointed by PRCA (Ireland) to carry out the audit. Emma Delaney ACA, Audit Partner, is the contact person for queries in relation to carrying out an audit. She can be contacted at 01-8044750 or by email emmadelaney@ksifo.ie. The audit should not take more than a day and the cost is €850 plus VAT.

How the standard is judged

Scoring system

1. The consultancy must be able to provide proof of two years operation.
2. The consultancy must score at least 50% in all five sections, and 75% or 360 points overall, to reach the Standard.
3. Management should not request an assessor to carry out the Standard audit until they are satisfied the firm can reach the standard.
4. You may call either your assessor or the PRCA for advice if you are unsure about the criteria or evidence required – it will be beneficial and perfectly normal to establish a relationship with your assessor.
5. The assessor will inform the PRCA that you have attained the Standard, while the assessment report will remain confidential between you and the assessor.
6. The assessor will share with the PRCA Board the overall performance of all consultancies (not an individual firm data) in each of the categories in order to inform future initiatives by the PRCA (Ireland).
7. The 2019/2021 Standard only applies until the 31st of December 2021 and does not need to be renewed during this time period. If more frequent audits are considered beneficial, then this should be the subject of an agreement with the assessor.

Section	Maximum Score
Section 1: Size and Scale of Operation	30
Section 2: Professional Charters	30
Section 3: Corporate and Financial Governance	165
Section 4: Evaluation and Client Relationships	165
Section 5: People Management	90
Total	480

Assessing your own company's compliance with the Standard

On the following pages, you'll find full details of Standard's requirements together with guidelines on how your organisation will be assessed and scored. By working through these, you'll be able to evaluate how your organisation performs against the standard and to identify which, if any, areas require development.

Certification of attainment of the Standard will be carried out in an assessment by a PRCA (Ireland) approved assessor.

How your score is assessed

Three different criteria are used to assess your score on each of the critical business areas:

- Is it happening?
- Is it being done systematically?
- Is it effective?

These are scored from one to five, using the following guidelines.

Assessment criterion: Is it happening?

Every activity in this area is covered	5
The majority of activities in this area are in evidence	4
Some of the normal activities in this area are in evidence	3
A few activities in this area are practised	2
Little or no evidence of activities in this area	1

Assessment criterion: Is it being done systematically?

Highly sustained and clear documentation	5
Good systems in place but may not be wholly documented	4
Systems in place in some areas	3
Some attempt has been made to establish systems	2
No real systematic approach in evidence	1

Assessment criterion: Is it effective?

Highly effective	5
Works well	4
Works quite well	3
Works slightly	2
Does not seem to work	1

Overview

Section 1: Size and Scale of Operation

Requirements

- A) The consultancy must be able to provide proof of two years operation.
- B) The company should employ a minimum of two full-time employees, with the principal consultant employed full-time in public relations work.
- C) The consultancy's minimum annual fee income should be €125,000.

Section 2: Professional Charters

Requirements

- A) The company must provide evidence that it accepts and abides by the ICCO Stockholm Charter and the ICCO Helsinki Declaration

Section 3: Corporate and Financial Governance

Requirements

- A) The company should have effective and operational financial systems.
- B) The company must be able to provide two year's financial statements certified by an independent accountant.
- C) The company must provide either a report from their accountants that their tax affairs are up to date or a tax clearance certificate.
- D) The company should have a clear and operating corporate governance structure.
- E) The consultancy must have a written business plan that clearly sets out business and financial goals and objectives.

Section 4: Evaluation and Client Relationships

Requirement

- A) The company must demonstrate the ability to plan, manage and evaluate campaigns.
- B) The consultancy should have defined procedures for measuring client satisfaction.
- C) The company should be able to demonstrate that it has defined systems and procedures to monitor the management of advice and output.

Section 5: People Management

Requirements

- A) The consultancy must have clearly defined training and development plans for all staff, as well as having grievance, disciplinary and internship policies in place.

Section 1: Size and Scale of Operation

Requirement 1. A: The consultancy must be able to provide proof of two years operation.

A pass/fail mark is given for this requirement.

Guidelines: The assessor will determine the start date of the operation from the certificate of incorporation for a limited company, a partnership agreement or the commencement of trading for an unlimited company. Consultancies that have been created as the result of a merger shall be required to demonstrate continuity from the previous organisations.

Assessment Criteria: Firms are awarded a Pass/Fail mark for this criteria.

Requirement 1. B: The company should employ a minimum of two full-time employees, with the principal consultant employed full-time in public relations work.

A maximum score of 15 is given under this requirement.

Guidelines: The assessor will ask to see a list of all staff, indicating their status as consultant or support staff.

Assessment Criteria:

<u>The company should employ a minimum of two full-time employees, with the principal consultant employed full time in public relations.</u>					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Requirement 1. C: The consultancy's minimum annual fee income should be €125,000.

A maximum score of 15 is given under this requirement.

Guidelines: This requirement is to ensure that the consultancy is viable as an ongoing business and that it has built up the minimum revenue level necessary to support the provision of a suitable range of services. The assessor will seek evidence from the most recent signed and approved annual audited or management accounts from the company's auditors.

Assessment Criteria:

<u>The consultancy's minimum annual fee income should be €125,000.</u>					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Note: To pass this section, consultancies at a minimum must meet the requirements set out in Requirement 1.B OR Requirement 1.C in addition to passing Requirement 1.A.

Section 2: Professional Charters

Requirement 2.A: The company must provide evidence that it accepts and abides by ICCO's Stockholm Charter and the ICCO Helsinki Declaration

A maximum score of 30 is given under this requirement.

Guidelines: Upon acceptance by the PRCA of the potential member's application, the ICCO's Stockholm Charter and the ICCO Helsinki Declaration are to be signed by the chairman, managing director, managing partner or senior representative of the company. The consultancy must be able to demonstrate that efforts have been made to ensure that staff are aware of the Charter and Declaration and compliance is promoted within the consultancy.

Assessment Criteria:

<u>The ICCO Stockholm Charter and Helsinki Declaration have been signed by a senior representative of the consultancy.</u>					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

<u>The Charter and Declaration are promoted internally within the consultancy and compliance is encouraged.</u>					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Section 3: Corporate and Financial Governance

Requirement 3. A: The consultancy should have effective and operational financial systems.

A maximum score of 45 is given under this requirement.

Guidelines: The consultancy should have effective financial management systems demonstrating that it is financially stable on an ongoing basis.

The assessor will ask to see sample management accounts, profit and loss account, balance sheet as well as key ratios such as growth of fee income, income per head, % fee income to payroll costs and other indicators. You should be ready to offer evidence from a single month or quarter as requested, but will not need to provide information for a full 12-month or longer period.

You should also be able to provide time sheets or information about another time management system, and of disbursement methodology, and it is essential that the consultancy be able to demonstrate client profitability to some degree.

Assessment Criteria:

The consultancy has an effective and operational financial management system					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy has an effective credit control system					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy has an accurate and effective system for recording chargeable time and billing clients					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Requirement 3. B: The consultancy must be able to provide two year's financial statements certified by an independent accountant.

A maximum score of 15 is given under this requirement.

Guidelines: Financial statements covering the most recent two years must be provided to the assessors and those statements must be certified by an independent accountant.

Assessment Criteria:

The consultancy has two years' financial statement certified by an independent accountant					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Requirement 3. C: The consultancy must provide either a report from their accountants that their tax affairs are up to date or a tax clearance certificate.

A maximum score of 15 is given under this requirement.

Guidelines: The assessor will need to be presented with an up to date tax clearance certificate or a report from the consultancy's auditors that the consultancy's tax affairs are in order.

Assessment Criteria:

The consultancy has an up to date tax clearance certificate or a report from their auditors that the consultancy's tax affairs are in order					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Requirement 3.D: The consultancy should have a clear and operating corporate governance structure.

A maximum score of 45 is given under this requirement.

Guidelines: The company should be able to demonstrate that a clear and transparent corporate governance structure is in place. Such a structure should include the following:

- that the roles of Directors and Management are clearly defined within the consultancy;
- that Directors are aware of their responsibilities;
- that there are clear internal controls on finances within the consultancy;
- that there are clear structures in place to monitor risk (this could for example be done through a risk register).

Assessment Criteria:

The consultancy should have a clear and operating corporate governance structure covering internal controls on finance.					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Assessment Criteria:

The consultancy should have a clear and operating structures in place whereby the Directors monitor risks to the consultancy.					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Assessment Criteria:

The consultancy should have systems in place whereby that directors and management are aware of their roles and responsibilities.					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Requirement 3. E: The consultancy must have a written business plan that clearly sets out business and financial goals and objectives.

A maximum score of 45 is given under this requirement.

Guidelines: The consultancy must be able to provide a written business plan and evidence that it is being regularly reviewed and updated by the management team.

The business planning process would include clear business objective, a SWOT analysis, an implementation plan and financial targets and projections amongst other matters.

Assessment Criteria:

The consultancy has a documented business plan that includes clear goals and objectives					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy has a process to review its achievements against business goals					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy adapts its business plan to meet changing market circumstances					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Section 4: Evaluation and Client Relationships

Requirement 4. A: The consultancy must demonstrate the ability to plan, manage and evaluate campaigns.

A maximum score of 30 is given under this requirement.

Guidelines: To show that the organisation meets this requirement, you should be able to provide samples of consultancy documentation, such as contracts, programmes and contact reports. The assessor may also interview various staff members to review the company’s services for a representative selection of three clients.

Because there is no one prescribed method of evaluating campaigns, the assessor will seek to discuss how your organisation carries out this process and to ensure that planning and evaluation is a continuous process embedded in the organisation’s culture.

Assessment Criteria:

The consultancy has defined procedures for planning, managing and evaluating client campaigns					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy can provide written samples from three clients to demonstrate campaign evaluation					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Requirement 4. B: The consultancy should have defined procedures for measuring client satisfaction.

A maximum score of 30 is given under this requirement.

Guidelines: While there is no one way to measure client satisfaction, you should be able to provide evidence that the consultancy measures or judges customer satisfaction consistently and on an ongoing basis. The assessor may look for evidence relating to a cross-section of clients, such as:

- client satisfaction questionnaires or other methods of obtaining objective feedback;
- client retention; or
- periodic account reviews undertaken by the consultancy.

Assessment Criteria:

The consultancy has defined procedures for measuring client satisfaction					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy has defined procedures for corrective actions on client comments					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Requirement 4. C: The consultancy should be able to demonstrate that it has defined systems and procedures to monitor the management of advice and output.

A maximum score of 105 is given under this requirement.

Guidelines: The organisation should have procedures in place to monitor the following areas.

Account management

Communicating with clients and team members on programme status, progress and responsibilities.

Consultancies should be able to provide evidence of:

- client-agreed programme and budgets;
- contact, status and activity reports;
- records of team meetings;
- budget reconciliations;
- programme evaluations and amendments; and
- records of all agreed changes.

Working with suppliers

Building relationships with suppliers who can help deliver the service.

Consultancies should be able to provide evidence of:

- a list of approved suppliers;
- purchase orders and briefing documents; and
- supplier evaluations.

Management reviews

Ensuring that senior management has all the information needed to improve performance.

Consultancies should be able to provide evidence of:

- meeting agendas;
- records of management meetings; and
- recommendations for improvement.

Internal records and controls

Ensuring that up-to-date information is in use throughout the organisation to support continuous improvement.

Consultancies should be able to provide evidence of:

- effective manual or electronic filing systems;
- internal records of complaints, deliveries, supplier performance; and
- an understanding within the organisation of its requirements in terms of data protection.

Social Media Guidelines

Consultancies should be able to provide evidence that there are clear social media guidelines in place within the consultancy and that the relevant staff are aware of those guidelines.

Dealing with problems and complaints

Procedures for dealing with problems, both internally and with clients

Consultancies should be able to provide evidence of:

- analysis to establish preventative action and records of corrective action; and
- management communication of preventive action and improvement systems.

New business:

Winning new business and agreeing the programme and budget.

Consultancies should be able to provide evidence of:

- processes in place for the management of new business enquiries;
- regular monitoring of progress on new business;
- management and control of proposal and pitch documentation;
- client-agreed programme and budgets;
- signed contract or letter of agreement; and
- lost pitch analysis.

Assessment Criteria:

The consultancy has defined systems and procedures for new business					
Is it happening?	5	4	3	2	1

Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The organisation has defined systems and procedures for account management					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy has defined systems and procedures for working with suppliers					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy has defined systems for management reviews					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy has defined systems and procedures to control internal records and to adhere to data protection requirements					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy has defined systems for dealing with problems and complaints					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

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The consultancy has a defined social media policy in place and this has been communicated to staff					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

Section 5: People Management

Requirement 5. A: The consultancy must have clearly defined training and development plans for staff, as well as having grievance, disciplinary and internship policies in place.

A maximum score of 90 is given under this requirement.

Guidelines: Consultancies must be able to show evidence of a continuing formal appraisal system for staff that:

- reviews performance;
- sets objectives; and
- results in the preparation of training and development plans.

The evidence can include records of:

- individual recruitment appraisals;
- induction;
- training development plans; and/or
- personal development plans.

Evidence provided should cover managerial, consultancy and support staff. Any records you produce may, of course, remain anonymous with names removed.

Consultancies should also be able to offer evidence that training in public relations and other relevant skills for staff at all levels is carried out on a consistent basis. Training may include external courses, in-house training or higher education, on-the-job training or mentoring and should reflect the goals of training development plans and personal development plans.

Consultancies must also be able to show evidence that a grievance policy and a disciplinary policy are in place within the consultancy.

If the consultancy offers internships, the company must be able to demonstrate compliance with the PRCA's Intern Guidelines.

The consultancy must also be able to demonstrate that an induction process is in place for new staff. Evidence of this can include specific training organised or the provision of a staff handbook detailing the consultancy's processes.

Assessment Criteria:

The consultancy has personal development plans for all staff					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy has a formal appraisal system					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy has training plans for personal development for all staff					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy has a grievance policy and a disciplinary policy in place					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy has an induction process in for new staff					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				

The consultancy adheres to the PRCA Guidelines on Internships					
Is it happening?	5	4	3	2	1
Is it being done systematically?	5	4	3	2	1
Is it effective?	5	4	3	2	1
Maximum Score	15				