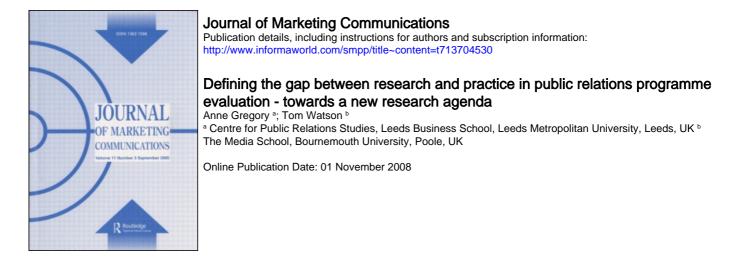
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Defining the gap between research and practice in public relations programme evaluation – towards a new research agenda

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The current situation in public relations programme evaluation is neatly summarized by McCoy who commented that 'probably the most common buzzwords in public relations in the last ten years have been evaluation and accountability' (McCoy 2005, 3). This paper examines the academic and practitioner-based literature and research on programme evaluation and it detects different priorities and approaches that may partly explain why the debate on acceptable and agreed evaluation methods continues. It analyses those differences and proposes a research agenda to bridge the gap and move the debate forward.

Keywords: evaluation; measurement; public relations; relationships; research; return on investment

Introduction

Evaluation has long been identified as a major issue by practitioners (Watson 1994; White and Blamphin 1994). It has often included the search for a single, universally applicable evaluation measure for public relations, colloquially known as the 'silver bullet' (Gregory and White 2008). Latterly the focus of evaluation has moved to the use of metrics that express the results of public relations activity using business language, such as Return on Investment. Business in general, recognizes that a simple, single financial measure does not give an accurate reflection of a company's true worth because other factors need to be taken into account to demonstrate overall value. The introduction of techniques such as Kaplan and Norton's (1996) Balanced Scorecard and triple-bottom-line reporting are evidence that major organizations worldwide consider that a range of accountabilities to a host of stakeholders define their ability to operate and prosper.

The practice of public relations evaluation, however, has been in statis with a widely reported emphasis on output measurement, especially focused on media relations (Watson and Simmons 2004). Although academic studies have moved to new areas of research such as measures of relationship value (Hon and Grunig 1999; Grunig 2002), a review of academic and practitioner literature and reports suggests that practitioners in general appear to be trailing behind both in knowledge and application of this research. In addition, the academic literature appears to be overlooking many industry studies and initiatives that indicate some changes in practitioners' attitudes to evaluation and the implementation of measurement and evaluation practices. For example, practitioners are using the tools of Internet discussion (blogs and wikis) to introduce new, more immediate evaluation techniques

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that are not yet widely recorded in the academic literature. This paper reviews recent academic literature and industry reports on measurement and evaluation, as well as current practices, with the aim of discussing the dissonances between the academy and practice in this area. It will also propose an agenda for future research.

Research questions

The research questions to be considered are:

- RQ1: What are the main directions of academic research and industry practice in the measurement and evaluation of public relations activity?
- RQ2: What are the differences between the academy and current practice?
- RQ3: What are the areas of current measurement and evaluation practice that should be researched at an academic level?

Research method

This research reviews secondary sources, specifically academic literature and industryinitiated (i.e. non-academic) studies of public relations evaluation practices. The contents of the publications are analysed in order to identify the themes and factors that link and separate the academy and practice. This approach will identify the main directions that shape academic research and industry practice (RQ1) and the differences between them (RQ2). As many of the industry-initiated studies are led by sector and business leaders and professional bodies, it is reasonable to assume that their views will be or have been influential in the practitioner community. Key factors, therefore, will be identified from the range of recent industry reports and initiatives in order to provide responses to RQ1 and RQ2. The professional literature has been mainly sourced from professional and industry bodies, such as national professional bodies in public relations and business communication. These are commonly used for data collection in public relations research (Watson and Simmons 2004) when practitioner views are sought. While they give access to self-identified practitioners, it is accepted that the data are more likely to represent those with defined attitudes to the topic rather than the broad spectrum of practice. However, these bodies offer significant industry access and the most reliable databases.

Academic research

The measurement of public relations and information programmes has a long history that is separate from more recent trends in marketing metrics. The discussion of the evaluation of public relations and communication activity and the application of methodologies is long-standing. It commenced in the 1920s with psychological research that was concerned with the measurement of attitudes (Thurstone and Chave 1929). Much of the North American heritage of public relations is based on psychological studies into attitude and public opinion. This was followed through strongly after the Second World War with a prominent example being Hyman and Sheatsley's (1947) article on 'Some reasons why public information campaigns fail' exemplifying the evaluative trend which emphasized psychological barriers to campaign effectiveness. McCoy and Hargie (2003) have tracked the linkage between mass communication theory, with its psychology antecedents and influences, and the evaluation of public relations activity and linked it to prominent public relations

researchers and theorists such as Grunig and Hunt (1984), Dozier and Ehling (1992) and Pavlik (1987).

Lindenmann (1993) made an important contribution to the codification of evaluation practice by proposing a vertical progression of three levels of evaluation in his Effectiveness Yardstick – Output, Out-growth (later renamed as Out-take) and Outcome. Output measures 'the ways in which the programme or campaign is presented'; Out-growth judges 'whether or not the target audience actually received the messages and so evaluates retention, comprehension and awareness' and Outcome 'measures opinion, attitudes and behavioural changes' (Watson 1997, 293–4).

Gregory (2001) noted that many of the extant models and concepts were related to single programmes or elements within them. She proposed a context/objectivesdriven evaluation model (2001, 178) that brought together aspects of the existing models and refined them for inter-programme analysis. Noble and Watson (2000) also proposed a unified model of evaluation that brought together step-by-step models, exemplified by Cutlip, Center, and Broom (1994) and Watson's (1997) 'Continuing' process model.

By the end of the 1990s, academic discussion of public relations evaluation had set out a range of models (Cutlip, Center, and Broom 1994; Macnamara 1992; Watson 1997) that were widely taught. These methodologies had evolved from the earlier psychological research and focused on attitudinal measurement and market research (Broom and Dozier 1990) and case studies, often derived from industry award schemes. However, there was still practitioner resistance to evaluative methods other than for outputs of media relations activity. At the same time the importation of operational management concepts into public relations continued, as did adaptations of personal relationship concepts.

To bring the discussion on evaluation up to date and to set the context for this paper, the current situation in public relations practice can be summarized quite briefly. McCoy commented that 'probably the most common buzzwords in public relations in the last ten years have been evaluation and accountability' (2005, 3). She pointed to trade media and industry bodies' educational and promotional initiatives to support best practice in measurement and evaluation. She also commented on academic activity in developing evaluation models citing examples such as Cutlip, Center, and Broom (1994); Lindenmann (1993); Macnamara (1992) and Watson (1997). Public relations programme evaluation plays a significant role in demonstrating accountability and effectiveness (Dozier 1990; Fairchild 2002) and organizational impact (Radford and Goldstein 2002). Yet, the evidence is that evaluation is more talked about than done (Gregory 2001; Judd 1990; Watson 1994) and several studies have established that evaluation is restricted to programme output (Gregory 2001; Pohl and Vanderventer 2001; Walker 1994; Watson 1994; Xavier et al. 2005).

Communication scorecards

Although foreshadowed by Fleisher and Mahaffy in 1997 with a balanced scorecard for public affairs, it was some years before 'communications balanced scorecards' or 'communication scorecards' began to be discussed in the academic literature. These imports from business operations and strategic management, in imitation of Kaplan and Norton's (1996) book of the same name, use several factors to plan and assess

communication performance in a diagnostic and summative manner. The advantage claimed (by Putt and van der Waldt 2005; Zerfass 2005) is that these scorecards can be used to plan and monitor the whole of an organization's communications and relationships. Thus, they can be adapted to each organization's operations and objectives and they place communication at the centre of the organization's strategy.

Since the turn of the century, the model of public relations as the management of organizational relationships as proposed by Ledingham and Bruning (2000) has become widely accepted. The monitoring and measurement of relationships is well established in the literature (Hon and Grunig 1999; Grunig 2002). It has also been tested in a university situation by Jo, Hon, and Brunner (2004) and in an organization-media relationship by Hibbert and Simmons (2006). Research, however, shows that these methods of relationship evaluations are not being widely used by practitioners (Watson and Simmons 2004).

In summary, this brief review of the academic literature has identified these factors:

- Knowledge of evaluating public relations and organizational programmes has been evolving for more than 85 years, although the widespread adoption of evaluation methodology by practitioners has been slower than its scholarly development.
- There is a wide range of research and publications by academics on theory and its application in practice. It emphasizes objectives informed by research and planning, whose progress and outcomes are measured, usually by several discrete evaluation methods.
- The hierarchy of evaluation proposed by Lindenmann (1993) is widely recognized for its structure and terminology. It may need to be reconsidered in the light of new evaluative models such as 'balanced scorecards' and more complex models of evaluation that emphasize the long-term nature of many communication programmes.
- The measurement of reputation and the desire of some practitioners to imply an ROI for public relations activity have increased the drive towards the use of business language and ironically, a single-method evaluation, in distinction to business itself, which is looking for a multiplicity of evaluative methods.

Industry/practitioner studies

Having considered academic studies of public relations measurement and evaluation, recent reports commissioned by industry professional bodies are now reviewed. These will be compared with the academic publications to identify the factors that are important to the public relations industry leadership and upon the practice of measuring and evaluating public relations activity. It is notable that there is little evidence that the academic models referred to earlier are being deployed by practitioners.

Value and return on investment

For more than two decades, the terminology of public relations evaluation has been under discussion across the world. Lately, the debate has been over the use of 'Return on Investment' or ROI in public relations. Is it a convenient shorthand in business language for reporting and negotiation with management or the inappropriate use of a financial measure that is out of place in the communication lexicon?

Watson has commented that 'there is considerable confusion as to what the term "evaluation" means. For budget-holders, whether employers or clients, judgments have a "bottom line" profit-related significance' (1997, 284). Lindenmann, in Hon and Grunig identifies 'value' as a key concept when he poses the question, 'How can PR practitioners begin to pinpoint and document for senior management the overall value of public relations to the organization as a whole?' (1999, 2).

The concept of demonstrating or proving 'value' or organizational benefit appears to have become embedded in the language of public relations practice. This emphasis has been confirmed recently in a Delphi study of research priorities for public relations in which the creation of value by public relations activity and the evaluation of public relation programmes were ranked second and third (Watson 2008). It is thus, a short step to the widespread use of business language, mainly drawn from the financial field, into in public relations. For example, another influence on terminology has been the emergence since the mid-1990s of paymentby-results (PBR) and performance-based fees (PBF) for public relations consultancy services. This has been driven by the introduction of procurement professionals into negotiations for the supply of professional services to major organizations, both governmental and commercial. PBR and PBF focus on achievement of Key Performance Indicators, negotiate 'value for money', and do not necessarily seek long-term relationships with professional advisers. The methodology for reporting value often emphasizes outputs, especially of media coverage (Watson 2005). As clients require a financial bias in reports, this has led to the re-emergence of Advertising Value Equivalence (AVE), which equates media coverage in terms of the cost of advertising space or airtime. This is also called Return on Earned Media.

The recent debate over ROI has been strong in the United Kingdom with a number of reports from the Institute of Public Relations (IPR) (now the Chartered Institute of Public Relations). The most recent in 2004 found that only 6% of respondents (following prompted questions) claimed to measure the contribution of PR in ROI related terms. Some 34% said they considered PR budgets in terms of ROI, but more than 50% of respondents thought the use of PR ROI might have a positive effect on the way PR performance could be reported, leading to bigger budgets and greater opportunities for PR development (Institute of Public Relations & Communication Directors' Forum 2004, 7). In discussing the survey data, the report's authors argued against a broad use of ROI or PR ROI:

The actual definition of ROI is a ratio of how much profit or cost saving is realized from an activity against its actual cost, which is often expressed as a percentage. In reality a few PR programmes can be measured in such a way because of the problems involved in putting a realistic and credible financial value to the results achieved. As a result the term PR ROI is often used very loosely. This is not only confusing but also misleading and helps explain why the PR industry has traditionally found it difficult to demonstrate meaningful success that links PR cause to PR effect. (15)

ROI and variations of it, however, are widely used by practitioners. In Sweden, a similar term, Return on Communication, was introduced in 1996 as a goal-oriented, step-by-step process where communication performance measurements were linked with business relevant success factors. This has been influential in the creation of the

Communication Value System developed by GPRA, the German PR consultancy body. In the UK, the Public Relations Consultants Association has introduced an online service, PR-Value.com that can help clients and consultancies plan and then evaluate the business value of PR. Trade press articles show that ROI is current terminology. An example comes from *PR Week*, US edition, which reviewed evaluation practice with the headline, 'The quest for ROI'. The first sentence of a 1650-word article read, 'Determining a return on investment for PR has never been easy' (Iacono 2005, 15). The terms 'ROI' or 'return' were used 20 times.

In North America, ROI or 'Return on ...' is used in several styles to express business-related outcomes. A US industry discussion paper (Likely, Rockland, and Weiner 2006) reviewed four methods of judging whether media publicity helped sales and business objectives, and how that effect could be demonstrated as a financial return. All of the methods had a prefix of 'Return on ...'. One of them, Return on Impressions, was described as a 'back of the envelope model' (Likely, Rockland, and Weiner 2006, 5), while the others used marketing mix models, surveys and the AVE calculation of value. Limiting their review to the use of media relations-based publicity within marketing campaigns, they described ROI as 'the relation between overall expenditure on a communication activity and the benefits to the organization or one of its business units derived from the activity. Benefits can be expressed in many ways such as revenue generation, cost reduction and cost avoidance through risk reduction' (Likely, Rockland, and Weiner 2006, 3). By this argument, they moved the discussion on from revenue generation being the sole type of communication ROI.

The term does not have widespread usage in academic literature. Watson (2005) studied a wide range of public relations academic articles and found that there was almost no use of the term ROI. What appears to be a convenient 'biz-speak' term could be another indication of the lack of confidence amongst PR practitioners to explain and promote their strategies and methods of operation and a route of ingratiation with purchasers of their services (Watson and Simmons 2004). The dissonance between academic research and industry practice in measurement and evaluation is probably at its most pronounced over ROI. The reasons for this divergence are a topic for further research.

UK industry policy developments

Recognizing that the evaluation debate had not developed from its media relations measurement origins and alert to the fact that practitioners were still seeking a single all-purpose evaluation metric or methodology, the CIPR made a policy statement on evaluation in 2005, which sought to close off this area of debate and encourage the implementation of existing methodologies that were robust in applied theory and used by well-informed practitioners. Its central case was made up of three elements: (a) that measurement in all organizations is problematic and it is difficult to separate one area of management such as public relations activity from other activities; (b) that by good planning practices and objective setting, outcomes can be measured with greater facility; (c) that public relations activity takes place in a complex arena and this should be recognized by considering relationships in greater detail rather than identifying single factor, usually monetary-based outputs. The CIPR said that public relations can be measured and evaluated in terms of its contribution in the

four areas: social and economic development; to management, leadership and organizational performance by aiding better decision making and avoiding mistakes; as a process and as part of programme development and implementation; and by the contribution and competence of individual practitioners. It concluded that:

Available methods, research based, provide information that is good enough for decisionmaking for planning public relations programmes. Existing research methods and approaches are adequate for measuring the contribution of public relations. The evidence from the case studies shows clearly that public relations is creating value. ROI may play a part in demonstrating public relations can build market share, social research can demonstrate value in other areas. (Chartered Institute of Public Relations 2005, 2)

In effect, the CIPR was attempting to move the discussion of measurement and evaluation from seeking alternative methodology to implementation, which as academic research had found, was still lacking amongst practitioners. CIPR was also endorsing methodology that was robust in the social sciences and market research arenas and advising against unreliable and invalid measures such as Advertising Value Equivalence and the presentation of simplistic output measurements as outcome/results.

Industry reports, largely, have reflected the status quo of practice although the CIPR's report of 2004 and its policy statement in the following year have addressed the issues of expressing 'value' and Return on Investment. It has done so in language that attempts to bridge the gap between robust methodology from market research and social sciences and the pervasive practitioner desire, exemplified in Likely, Rockland, and Weiner (2006); for a language of evaluation and practice that is related to the business operations and management jargon. A topic for future research may be to investigate the impact of the CIPR's policy, a world leader amongst public relations professional bodies, upon its own 9000 members and other influential voices in the industry.

Practitioner research

This section of the paper reviews research into evaluation practices undertaken by practitioners or for practitioners. Two studies (Gregory and Edwards 2004; Gregory, Morgan, and Kelly 2005) analysed the evaluation practices of major UK business organizations and another (Gaunt and Wright 2004) sought the views of more than 1000 practitioners on current practices. As stated earlier, practitioners are leading the way on investigation of Internet tools for evaluation. A case study by O'Neil (2006) is also reviewed.

'Most admired' companies

Gregory and Edwards' (2004) study of public relation practice in companies in the UK *Management Today* magazine's 'most admired' company list and Gregory, Morgan, and Kelly's (2005) further study of 'most admired' companies and public sector organizations, found that between four and eight different evaluation metrics were used. The most frequently used were informal and/or qualitative such as journalist feedback and discussions with stakeholders. It is as if the respondents were 'just checking' that everything was on track. The one consistent 'hard' quantitative measure for private (i.e. non-governmental) sector companies was the share price.

These UK findings can be compared with a wider international study (below) which indicates that the UK experience is typical.

International practice

Prepared for the 2004 Measurement Summit held in the United States, the Benchpoint online study (Gaunt and Wright 2004) gained emailed survey responses from 1040 practitioners in 25 countries. Respondents were drawn from members of public relations professional bodies in 25 countries, mainly in North America and the European Union. The key points from the study revealed that: (a) for external communication, more practitioners measure outputs than outcomes; with media evaluation, internal reviews and benchmarking were used most for measuring outcomes; (b) greater use of feedback tools was reported in internal communication, but 23% use instinct alone; (c) barriers to measurement were cost (77%), time (59%), lack of expertise and questionable value of results (58% each); and (d) 65% of respondents think it possible to apply ROI to public relations, although only 13% think this strongly. A large majority (88%) are interested in an ROI tool.

The conclusions from the Benchpoint report again showed a focus on output and the barriers to evaluation are similar to those gathered over more than a decade by Baerns (1993, 2005); Watson (1994, 1996); Watson and Simmons (2004) and Simmons and Watson (2005).

Internet-based tools for evaluation

It was noted earlier in the paper that academic research on public relations evaluation has not yet caught up with the introduction of Internet-based tools by practitioners and hence have not yet considered them. An exception from a practitioner-academic is O'Neil's (2006) case study on the use of these tools for the evaluation of events and conferences, a frequently used public relations strategy. In measuring the impact and outcomes of a conference, several methods of evaluation were used to gauge participants' engagement with the event and the issues discussed, as well as their intentions for future attendance. In line with multi-method evaluation practice (Gregory and Edwards 2004), five methodologies were applied that gave qualitative and quantitative data and reports. These included online participant (conference delegate) surveys, participant interviews, the organization of a 'wiki', a monitor of participants' web logs (blogs) that were published on the conference website and a post-event survey. The data gained from of this evaluation process were:

The analysis produced by this study indicates that the conference was successful in influencing what the majority of participants know, think and feel about emerging technology. In addition, the conference was responsible for limited and select behaviour change amongst participants: putting them in contact with new people and initiating new professional activities for some individuals. (O'Neil 2006, 7)

These studies – the 'most admired companies', the Benchpoint report and O'Neil's case study on the use of Internet tools – were not designed as academic research but they provide more robust information than many industry reports that have an element of promotional self-interest. Two show a different picture from the debate over value and ROI because the focus has changed to best practice examples of multiple methods of evaluation (in contrast to the single method 'silver bullet'

identified earlier) and to new methods of gathering information and data by harnessing Internet tools. The Benchpoint report, however, showed that output measurement was still a priority for its large international sample.

Discussion

The answers to the research questions show divergent paths between the academy and practice (RQ1) and discrete areas of difference because of this divergence (RQ2). These lead to a wide range of areas for investigation at theoretical, applied theory and knowledge transfer levels, which can form a research agenda (RQ3). In this discussion, RQ1 and RQ2 are discussed jointly. RQ3 will be proposed as a research agenda.

RQ1 and RQ2

As noted earlier in the summary of academic literature, the academic development of evaluation methodology derived initially from psychological assessment and later from mass communications theory. It emphasizes the use of many social sciences techniques to determine outcomes of public relations activity. The practitioner path largely ignores this and, based on an emphasis on media relations as a primary strategic and tactical tool, has introduced methods that seek to measure the output (that is, distribution of messages) of campaigns and programmes. There are examples of more sophisticated, multi-measurement techniques in larger organizations, but the vast range of research has found a continuing and almost singular focus on output measurements. The desire for simple measurements is indicated by the search for a single measurement metric that can be used in most public relations evaluation situations, as well as the increasing use of business language, as exemplified by the introduction of ROI into the public relations lexicon. ROI and variations of this term, have almost no recognition in academic publications. They are widely used, however, in practitioner and industry literature.

At the outset of this article, it was argued that the academic literature might be overlooking industry studies and initiatives. This was found in two areas of communication activity. The first was the introduction and use of scoreboards to plan, monitor and measure communication, with a strong emphasis on linkage between communication activities and the corporate or organizational imperatives. The second is the use of Internet tools, such as blogs and wikis, almost immediately to measure the impact of events and communication activity. In the first instance, there has been research by practitioner-academics who have observed these tools as they have been introduced from management theorists, but no robust research programme has been undertaken to determine the validity and reliability of the scorecard's performance as a measurement and evaluation tool. In the second instance, while there is research on measuring online public relations activity, little is evident in studying the use of blogs and wikis as evaluative tools, which because of their speed of response have the potential to succeed many conventional data collections methods. While these can accumulate comment and feedback, no research has been done on the validity and reliability of conclusions drawn from them. While, the broad trend of public relations theory has been directed towards the paradigm of public relations as relationship management (cf. theories of Ledingham and Bruning 2000) and its measurement (Hon and Grunig 1999; Grunig 2002), there

is much less emphasis on new methods of community formation and of online stakeholder relationships which have blossomed so rapidly since the late 1990s.

In 2005, CIPR made its policy statement that sought to close the debate on the evaluation of public relations (Chartered Institute of Public Relations 2005). The impact of this statement by one of the world's two major public relations professional bodies (the other being the Public Relations Society of America) has yet to be determined. It should have been profound because implicit in the statement was support for the academically led methods of evaluation and rejection of the single method, sought for so long by practitioners. It is probably too early for research to have been undertaken, but in order to understand more about the gap between academics and practitioners, it would be timely if the impact upon practitioner attitudes was investigated.

RQ3

Following from this discussion, five research actions are proposed:

- 1. The widespread adoption of robust evaluation methodology has been slower than its scholarly development. Why has such a gap developed between public relations scholars and practitioners? How wide is the gap, and what methods can narrow it?
- 2. There is a well-documented dissonance between academic research and industry practice over the concept of ROI in measuring and evaluating public relations activity. The reasons for the dissonance and the introduction of business language into the practitioner lexicon may be signs of a lack of confidence by the industry in the quality of its advice and its position in the dominant coalition in organizations. Study is needed into the reasons for this reliance on business language bearing in mind that, in many countries, there are two decades or more of academic teaching in public relations that has emphasized the use of social science and market research methodology for research, planning and evaluation of communication activity.
- 3. The replacement of hierarchic models of evaluation (Cutlip, Center, and Broom 1994; Lindenmann 1993; Macnamara 2005) may need to be considered in view of practitioner-developed 'dashboard' and 'communication scoreboard' models that use multiple formal and informal metrics and feedback. The two studies into 'most admired companies' that found multiple metrics were being used widely, which differs from the continuing practitioner search for a single solution. Is this a factor of more sophisticated practice in larger organizations or is it a reflection of the trend to scorecards in corporate public relations, which follows corporate reporting practice in general?
- 4. Are new evaluation theories and processes needed to measure public relations activities that can be monitored by almost immediate techniques and tools, such as blogs and wikis? The model of social marketing (McGuire 1984) that has long been followed (Coombs and Holloday 2006) implies there is a period of gestation in which the recipient of messages processes them before acting, but with immediate response and debate now available, do practices need to change?

5. The impact of the CIPR's policy statement on evaluation (Chartered Institute of Public Relations 2005) upon its members and other influential public relations bodies and influencers needs to be investigated. Since the CIPR's motive behind this statement was to declare an end to the search for a single method of evaluation, the outcome of this decision should be tested amongst those whom it sought to advise.

Conclusion

This paper is a call to action at two levels – the first is to investigate the gap between academics and practitioners in the field of public relations, which is large and may be diverging. The CIPR in the UK has made a noble attempt to close the debate on the key practitioner issue of evaluation, but its impact has yet to be measured.

The second call is for academic research to pursue areas in which practitioners are making progress, such as scorecards for communication management and alignment with organizational objectives, and in the use of Internet tools for data collection and evaluation of events and campaigns. While the academic development of theory is very important for the evolution of new practices, this paper argues that a greater effort to engage with practitioner initiatives will help bridge a large gap and pave a path for theory that is relevant to practice. It is for academics to change course and for the industry and practitioners to help support the research.

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