

**PRCA**

# CLIENT CONSULTANCY PARTNERSHIP CHARTER



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The PRCA believes that the best client-consultancy relationships are true partnerships, where both client and consultancy deliver against key commitments to achieve common goals, and where each partner understands and respects the commercial and operational imperatives of the other.

The PR industry is evolving rapidly and is comprised of many different professionals and organisations. The scope of this Charter covers all those working in the public relations industry – not just PR agencies and their clients, but also freelancers and others who may work through both formal and informal, virtual, and other structures. At the core of the Charter is a focus on optimising relationships and engendering clear and open communication between all parties.

This **11-Point Charter** is intended to help client organisations and their public relations consultants and consultancies work together as effectively and as productively as possible; and to ensure that consultancies, freelancers, and others are able to deliver their very best work to clients within agreed budgets, and that clients get the value and return on investment from their consultancies that they need and expect.

It is in no way intended to replace existing contractual arrangements between clients and their consultancies. Rather, it hopes to add to the legal standards and requirements some fundamental principles that can make relationships more effective and improve results.

This revision of the Charter in 2024 stems from a working group of the PRCA Public Relations and Communications Professional Board and reflects the Charter's revised content and scope. It fully updates and replaces the previous PRCA Client Consultancy Partnership Charter.

It is hoped that members of the PRCA will use the Charter with clients, freelancers, and others so that all parties will gain by carefully considering and signing up to it. A Charter Mark will be available to any PRCA Members who publicly commit to using the Charter.

The term "consultancy commitment" in the Charter covers any person or organisation providing advisory PR services. This may be a freelancer working with a client or it may be a freelancer working on contract with a PR agency. The principles of the Charter also cover multiple agencies or freelancers working together on client projects. The principal point of distinction in the Charter is between a client – an organisation or individual hiring consultancy services – and a consultancy or consultant, whether this be an agency, freelancer or other organisation which is working for a client.

The fundamental aim of the Charter is to establish shared principles that can guide the relationships for PRCA Members working together and with others. Where that is not possible, for whatever reason, parties supporting this Charter will commit to open and honest discussions to seek alternative agreements.

# THE 11-POINT CHARTER

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## 01 WORKING TOGETHER

### THE CLIENT COMMITMENT

Although we are the client, and are purchasing services from the consultancy, freelancer or other professional, we believe that working together in partnership can foster a rewarding and mutually respectful relationship which will help all parties deliver their business goals.

We will agree clear two-way working processes for key programme elements (e.g. approval on activities, reporting on work done, progress meetings, reviews) and strive to stick to them. Where unexpected challenges impact the delivery of planned activities we will seek to learn for the future.

We will agree at the commencement of work the way in which any urgent or unplanned work, particularly outside of agreed working hours, will be handled and how the consultancy will be appropriately recompensed.

We will ensure that mutually agreed, clearly articulated expectations are set and agreed at the start of the relationship and reviewed regularly.

We appreciate that the quality of a consultancy or freelancer's output will be in direct correlation to the quality of our input, so we will always aim to commit sufficient time for briefings and updates.

We will treat the individual members of the consultancy team with the same respect and integrity that we would show to our own employees. We appreciate that the PR and Communications industry is diverse, and we will respect the diversity of people with whom we work.

We will always have regard to the PRCA's Diversity and Inclusion Guidelines.

We will, at all times, work with consultancy professionals in line with the PRCA Professional Charter and Codes of Conduct.

### THE CONSULTANCY COMMITMENT

Although we understand that the client is the purchaser of our services, we believe that working together in partnership can foster a rewarding and mutually respectful relationship which will help both parties meet their business goals.

We will always aim to deliver consistently high results for the client, sharing learnings from across our wider business wherever relevant.

We appreciate the importance of working flexibly within the terms of our contract and aim to have systems and processes that meet the client's current and potential needs.

We will aim to ensure continuity in our account team to build shared expertise and stable points of contact. Where we need to make changes, we will communicate this to our client, setting out reasons why changes are taking place.

We will be cognisant of the priorities and culture of the client organisation so that our account team delivers seamlessly and without disruption.

We will commit time to understanding our client's brands, audiences and products so that we are mindful of the brand stretch and limitations and always suggest client-appropriate ideas.

We will respect and adhere to confidentiality requests from the client whether written or informally communicated to the consultant/consultancy.

We will always work with our clients in line with the PRCA Professional Charter and Codes of Conduct.

We will at all times have regard to the PRCA's Diversity and Inclusion Guidelines.

## THE CLIENT COMMITMENT

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# SETTING THE SCOPE OF WORK

We will supply comprehensive written briefs with clear objectives and success criteria, which include broader business objectives and information on other marcomms activity, where this is available.

In the event that a written brief cannot be supplied we will set aside time to meet with the consultant/consultancy to discuss our goals and enable them to construct their own brief. We will commit to reviewing and agreeing that brief with the consultant/consultancy.

We will set budgets with clear parameters including provision for planning, execution, evaluation, and contingencies. Where there are changes to budgets or the scope of work, we will seek to inform the consultant/consultancy in a timely manner.

When commissioning work we will not utilise ideas from consultants/consultancies where we do not award the work to those consultants/consultancies.

We will deliver timely responses to briefs based on best advice and insight (including a sound understanding of the client's business), strategic thinking, experience, and creative execution.

We will develop relevant (and, where appropriate, innovative) proposals with the potential to be executed through all appropriate communications channels, including digital.

We will always submit proposals that can be achieved within the client's budget, although we may also offer additional options should further budget be available.

03

# AGREEING TIMESCALES

Whenever possible we will give the consultancy 'reasonable' timescales (i.e. ideally weeks not days) for responding to briefs, to enable them to interrogate the brief, conduct insight programmes as necessary, develop overall strategy and present accurately costed programmes.

When unplanned work is needed from the consultant/consultancy we will be realistic in our expectations of what can reasonably be delivered – and accept that adjustments to planned work may need to be made to allow for unplanned work to be delivered.

We will review work programmes regularly with our consultant/consultancy to ensure there is a comprehensive picture of the total time committed by the consultant/consultancy.

We will deliver material, on or before agreed deadlines, which is concise, accessible and 'right first time', when submitting proposals or responding to briefs.

We will build in ample time for the client to respond ahead of the start of activity.

We will be open and honest if we believe that timescales cannot be met.

If a client requests unplanned work, we will make adjustments to the planned programme of work and communicate this with the client in a timely manner.

We will be transparent with the client on the total number of hours worked covering both planned and unplanned work.

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# MANAGING BUDGETS AND RESOURCES

We appreciate that consultancy time is a finite, measurable resource.

We accept that increases in demands on the consultancy over and above original briefs will need to be funded or other activities reduced in proportion.

We appreciate that the late cancellation of planned-for projects can impact the consultancy's ability to manage its resources. We will attempt to avoid late cancellation, but where it is unavoidable, we acknowledge that the consultancy should be recompensed for resources provided and work done but not utilised.

We will ensure the terms of our contract with the consultant/consultancy sets out an agreed approach to staff potentially moving from the client to the consultancy and vice versa.

As part of an annual review process, we will consider adjustments to consultancy fees and rates considering factors such as inflation.

We will strive to ensure that we pay UK consultants the Living Wage as set out by the Living Wage Foundation, as a minimum.

We commit to spend our client's budget responsibly. We will provide clear, regular, and timely information for the client on how their budget has been spent.

We acknowledge that client budgets are not infinitely elastic, and that we must work as closely as possible to the parameters set by the client.

We will be fully transparent in how we report back on budget spend and give early information to the client in a timely manner to highlight the risk of potential budget overspend.

We will share details of the costs of specialist tools and other services so that the client understands the cost of using these systems.

05

# COMMUNICATING OPENLY

We will give the consultancy clear, frank, and timely feedback on proposals, continuing campaign recommendations or other ideas or materials submitted for approval.

We will also contribute frankly to enquiries from the consultancy as to our satisfaction with the consultancy's team and work. We will strive to give constructive, honest, and open feedback on consultancy performance and, where relevant, provide tangible examples of improvement opportunities for the consultant/consultancy.

We will (if necessary) challenge client thinking, briefs and the client's response to our proposals, with opinions based on sound insight, strategic thinking, and honesty.

We will ensure that the client's business objectives are paramount in everything we do and the feedback and advice that we provide will be based on our understanding of the client's business objectives.

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# TAKING AN INTEGRATED APPROACH

If an integrated programme of communications is required, we will aim, where possible, to brief all agencies at the same time.

We recognise that there are multiple communication channels which could be utilised, and we will seek to evaluate all options from all consultants/consultancies in a fair way and in line with our business objectives.

We will seek to gather input from all consultants/consultancies so that we can make a decision based on business objectives and resources available across the channel options.

When integrated programmes of communications are required, we will work as constructive and co-operative partners with the client's other agencies, consultants and others to respond to the client brief with a joined-up strategy and programme of execution.

Where there are differences of opinion on strategic direction or channel use, we will identify these in a fair and reasonable manner to the client, providing appropriate evidence and rationale for the options that a client could use.

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# ARTIFICIAL INTELLIGENCE

We recognise that the use of new technology and in particular generative AI tools is commonplace but practices are not yet standard. We will be open with our consultant/consultancy about our expectations and any concerns we have about their use of AI, bearing in mind that over time these tools will be increasingly built into standard computer programs and also business workflows.

We will be clear when information provided to our consultant/consultancy is confidential and must be kept separate from generative AI tools. As copyright issues around the use of AI have not yet been clearly settled, we will tell our consultant/consultancy when we don't hold copyright in any materials we may provide to them. Anything created by generative AI will be subject to rigorous checks before sharing with the consultancy.

We will never ask for the generation of materials that spread misinformation or disinformation, such as deepfakes.

We may use AI tools, including generative AI tools, when undertaking planning, research or creative concepts. We will be open with our client where these tools are used.

Anything created by generative AI will be subject to rigorous checks before sharing with the client.

We will protect the confidentiality of client information by refraining from using generative AI tools to create confidential content. This includes client business plans, PPTs or documents, paid analyst reports, market insights, confidential research data, and text related to sensitive internal employee communications. We will not use AI in a way that is likely to undermine the rights of individuals, such as regarding the use of their personal data.

We will use proxy and anonymous company and personal details to maintain privacy. Additionally, we won't use generative AI images as final creative for a client campaign without full discussion with our client about the specific artwork produced and why the use of generative AI tools is appropriate. These guidelines also apply to confidential internal agency information.

We will not use generative AI to create or spread deepfakes, misinformation, or disinformation, and we will honour the role of PR agencies in society.

We commit to accuracy by checking and sourcing data that generative AI tools provide, validating claims with a search of the source, checking for inadvertent plagiarism, copyright infringement, or trademark infringement in AI-generated output.

We will ask vendors to explain how they use AI in their tools and work to eliminate biases and improve accuracy. Also, we will require vendors to provide transparency about the prompts and inputs they used to generate the desired output.

We will ensure transparency by disclosing the use of generative AI tools in any part of the creative, reporting and decision making process to clients and influencers, including individual pieces of work in which it played a substantive role. Disclosures can be in writing or verbal, depending on the circumstances. Employees should also disclose the use of generative AI tools as part of the drafting or creation process.

We recognise that there is a serious risk that the use of AI tools can further embed historic biases. We will counter this by being aware of biases incorporated in AI-generated prompts and output, using diverse perspectives within the agency to review prompts and content created by generative AI tools to ensure no bias is overlooked or shared externally.

We will not use generative AI as a replacement for diverse experiences, insights or engagement. And we will not use generative AI tools to create images, likenesses or avatars that create discriminatory content. We will avoid relying on generative AI tools to translate or create documents into other languages.

Where we have signed up to principles and codes on the use of AI (such as the Global Principles on Artificial Intelligence) we will notify our client accordingly.

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# RAISING BUSINESS AWARENESS

We will ensure that awareness of the consultant/consultancy's brief and progress extends across our business to appropriate personnel including senior management.

We will provide clarity on how the client will interact with the consultancy, the scope of the consultants' work and their priorities and deliverables.

We will provide a clear governance structure so that relations between client and consultant are managed in an organised fashion.

We will invest time in ensuring that all consultants gain an appropriate understanding of the client's business, its wider industry sector, and key competitors.

We will always be cognisant of the client's wider business objectives when developing PR plans, and ensure that the business case for all activities is fully developed.

We will help the client communicate the value of PR activity to an internal audience.

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# CONTINUOUS IMPROVEMENT

We will ensure that the consultant/consultancy has a wide perspective on our business, by sharing insights and knowledge.

We will ensure the consultant/consultancy is informed promptly when things change within the business, especially when the change could have a material impact on communication objectives and outputs.

We will ensure that we keep fully abreast of business developments within the client's organisation and within the client's wider market sector.

We will maintain a strategic focus on the future of the client's business, whilst delivering on current activities.

We will ensure that we commit to high professional standards, undertaking appropriate training and staying fully abreast of the latest developments and techniques within the PR/Communications industry.

We will strive to innovate and challenge convention to add value to the work we deliver for the client.

09

# BUILDING STAKEHOLDER RELATIONSHIPS

We will help the consultancy work effectively by making introductions to key internal and external stakeholders to the benefit of the business.

We will support the work of our consultants to engage with appropriate staff in a timely manner.

We will build an appropriate set of contacts within the client's organisation, guided by the client, in order to maximise the effectiveness of our work by widening our knowledge of the client's business.

We recognise that in dealing with colleagues in your organisation we are ambassadors for the PR/Communications industry and will always act courteously and professionally.

11

# EVALUATING SUCCESS

We appreciate that meaningful evaluation of PR activity is essential, and that budget needs to be allocated to this. We commit to agreeing the measures to be used before a programme of work commences and that we will review progress using these measures and adjusting them as appropriate to take account of new technology and methods. We will strive to ensure that objectives for work commissioned from consultants are SMART (Specific, Measurable, Attainable, Relevant, and Time-Bound).

In line with the PRCA's ambition to improve measurement in the PR industry, we will not use Advertising Value Equivalents (AVEs) in our measurement. We will use measurement standards which align with the International Association for Measurement and Evaluation of Communication (AMEC) Integrated Evaluation Framework.

Our focus will always be on maximising the value of the client's investment in PR and delivering meaningful and measurable outcomes.

We will ensure that all outcomes map to client business objectives and agreed priorities. We will seek to measure the quality of our service to the client by seeking regular formal and informal feedback to ensure that standards are maintained to the highest level.

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The Public Relations and Communications Association (PRCA) is the trade association for the public relations, public affairs and communications industry. We provide the space in which our members, from all corners of the world, come together to forge a dynamic, forward-thinking, and influential community. We deliver exceptional training, authoritative industry insight, global networking and development opportunities. We are committed to advancing the field of PR and championing the vital role it plays in our rapidly evolving world.

We are the heartbeat of an industry that shapes perceptions, drives narratives, and fuels communication on a global scale.

**PRCA**

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Published in March 2024 by the Public Relations and Communications Association, 7 Stratford Place, London W1C 1AY.

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Thank you to the members of the PRCA Public Relations and Communications Professional Board who contributed to this Charter.