Public Media Integrity Project
Roundtable Discussion on Emerging Recommendations
Madison, WI / October 24-25, 2011
A Summary by Michael V. Marcotte, Rapporteur

Background: In October 2011, two dozen invited participants – leaders in public radio and television, scholars in journalism, and experts in nonprofit organizations -- convened a roundtable discussion to review the results of a two year project entitled Editorial Integrity for Public Media funded by the Corporation for Public Broadcasting. The project is to yield revised "Principles, Policies and Practices" for public broadcasters -- offering fresh guidance to local stations in establishing their own editorial integrity standards.

This is a summary of the meeting proceedings. The round table was hosted in Madison by the Center for Journalism Ethics at the University of Wisconsin and by Wisconsin Public Radio and Television.

The project thus far, organized by a steering committee and managed by project co-directors Byron Knight and Tom Thomas, asked public broadcasters and public media experts to identify and rank issues of editorial integrity which needed attention in the changing digital media environment. Six main topics were agreed upon by the steering committee. The project co-directors then suggested and solicited volunteers – experts or leaders in public media -- to comprise six working groups which researched and discussed the assigned issues. Each working group had a paid facilitator to guide the discussions and write a final paper.

The six "Big Issues:"
Guideposts in a Time of Change -- the principles that define the essential value of Public Media to U.S. society.
Funders, Agendas and Firewalls -- the policies needed to ensure that while funding is provided, it is not harming content.
Editorial Transparency -- the policies meant to bolster trust and understanding by media users toward station editorial processes.
Editorial Partnerships – the policies that guide emerging forms of collaboration in the public media "ecosystem."
Fundraising transparency – (not published as of the roundtable)
Personal Activities of Public Media Employees (not published as of the roundtable)

The two-day roundtable was structured in multiple sessions – three to review the first three issue papers above and an afternoon to assess the overall process.

This summary is structured according to that agenda but takes liberties to highlight and paraphrase the main points and reorganize them for ease of review.

Session One: Guideposts in a Time of Change

In getting the proceedings underway, Wisconsin Public Broadcasting Director Malcolm Brett reminded the assembled guests that the roots of public service media run deep in his state – grounded in university technology (radio) experiments, spread by the "extension" concept of higher education, and nourished by a 117-year tradition of academic freedom, which, he said, gave birth to our editorial integrity. Brett said a big part of "getting it right," is to question our own practices, which is what the group has gathered to do.

Dr. Stephen Ward, director of the Center for Journalism Ethics at the University of Wisconsin, underscored the historical context of the project, saying "we are in the midst of a gigantic media revolution and we don't know where this is going." And from within this revolution, we must "try to look forward." Ethics developed for an earlier era are "deservedly questioned" and "need to be reformulated," he said.

Ted Krichels, GM of Penn State Public Broadcasting and chairman of the Editorial Integrity Project steering committee said the project expected to "reaffirm some basic truths but also not be afraid to change them as necessary." Moreover, he said, the project founders intentionally wished to translate those truths "down to the ground of the basic practitioner."

Krichels added some urgency to the gathering saying "public media in this country is vulnerable – some say 'its time is past' -- yet there may never have been a time when *trusted media* is more needed." So, he said, we, as practitioners, have a responsibility to articulate "what the elements of that trust are… and at its core, what public media stands for."

With that, the session was turned over to moderator Quentin Hope who asked that the feedback of the group consider two perspectives: inside and outside. That is, it consider the norms <u>inside</u> the industry and also the needs of stakeholders <u>outside</u> the industry.

Hope asked, if the reviewers of the "Guideposts in a Time of Change" document took away a "clear, distinct, value proposition"?

<u>The Centrality of Journalism Question</u>

Jack Mitchell, who directed Wisconsin Public Radio for two decades and now teaches at UW-Madison, said the glaring omission, in his view, is the lack of any direct reference to journalism as a distinct element in the public media guidepost document.

Steven Ward was quick to agree. "I was actually going to do a search in here for words like 'truth-telling, truth-seeking, verification, accuracy,' and I don't think they would come up very often," he said. The document, he said, seemed to stress the "forum function" of journalism – getting people together – but that the core of building trust involves naming the values by which you actually gather and verify your news.

Oregon Public Broadcasting's Vice-President for News, Morgan Holm said it would be empowering for his staff if there was sharper focus on news in the principles. "This is a time to be aspirational," he said, "where we're going… on top of where we've been."

Rick Edmonds of the Poynter Institute for Journalism Studies said "I don't think the word 'journalism' appears in here at all." Calling that a "major flaw," he said it also raises the question of whether public media aspires to do more than it does now. And if so, more what?

Amy Coates Madsen, Director of the Standards for Excellence Institute (promoting standards of accountability in nonprofit organizations), called for more clarity on who the end-users of the "guideposts" might be and to include mention of that.

Building on that acknowledgment of the end-users, Lee Wilkins, a University of Missouri journalism professor (and associate editor of The Journal of Mass Media Ethics), said the document could do much more to give the various audiences of public media "a greater ownership of the product." It's one thing to want audience to listen and to want audiences to pay, but "in a more profound way, we want their help in creating the news agenda, in thinking through community problems."

"The other thing I missed," Wilkins added, was a nod to innovation: "we're going to try stuff, it may not always work, but we're going to try to come to a new understanding" of what our media is about.

<u>Who is "Public Media" Anyway?</u>

Steven Ward challenged the authors of the "guideposts" document to explain the difference between public media and public broadcasting – or for that matter, between public media and commercial media -- as that may be a source of misunderstanding by people outside the industry.

Ward said he got "lost in the document" looking for what was promised as public media's "unique role." That, he said, should be right at the top, and should make clear how you differentiate yourselves.

Syracuse University Professor of Journalism Joel Kaplan serves as ombudsman for the Corporation for Public Broadcasting (CPB). He said the document fails to lay down specific principles when it comes to objectivity and balance. "Objectivity and balance is the major differentiator between public media and commercial media – and that's not in here at all."

Kaplan also challenged use of the term "public media" as vague. Kaplan suggested "public funded media" may be a more precise phrase.

Even so, CPB Senior Vice President for Radio Bruce Theriault explained that "public media" is common jargon resulting from broadcasters wishing to acknowledge that they use new distribution platforms beyond radio and television. "I agree we have a problem saying we are all of public media – because the Center for Investigative Reporting doesn't have a broadcast transmitter but they'd say we're also public media."

(For the record, there was more detailed discussion about the legal terminology describing the set of stations assumed to be covered under the principles and guidelines. Technically, they are *the non-commercial educational broadcasters funded by the Corporation for Public Broadcasting,* thus excluding all religious stations, many school stations, and other independent community licensees.)

Quentin Hope turned the question back to the group: are we trying to define principles for only these public broadcasters or do we acknowledge a role in defining principles for a larger group? WPB's Malcolm Brett answered by saying there may be plenty of hubris in our industry, but it ought not be in defining standards for those not bound to CPB.

A consensus generally prevailed around using the handle "public media." "Name it and claim it," said Coates Madsen. "It's an evolving understanding of who we are," Theriault agreed.

There was less consensus to what extent the document needs to draw contrast between public and commercial media. Some saw an opportunity to compare the underlying imperatives of the two systems, but Theriault said it's better not to define ourselves by what we are not, rather to focus on what we are.

One voice affirming the language of the document as it exists was that of University of Illinois Communications Professor Cliff Christians. He said the emphasis on public media as a facilitator of civil society is very different from how other media describe their purpose. "There's already a lot of distinctive and aspirational emphasis in there," he concluded.

<u>Starting in the "Big Tent"</u>

Tom Thomas, CEO of the Station Resource Group and co-director of the Ethics in Integrity Project, said it's important to remember that public broadcasting is comprised of some 500 local organizations with various missions and purposes. So, the challenge in a document like this, he said, is allowing for all the variances out there. Some do news. Some don't. "The conundrum is how to speak to one station that's up in the morning with Vivaldi and the other station that starts with Khadafy."

Dave Iverson, an independent journalist and facilitator of two of the Integrity Project panels, questioned the prospect of arriving at a broad enough statement of principles -- given the divergence of local stations – that still retains enough precision and value to guide station efforts.

Morgan Holm said it seems possible to bind all stations under some meaningful principles and values. He said, "I want to know it's not stenography, it's not repetition, it's not influenced by money or power, that there's independent intelligent thought behind it, and I'm going to learn something out of it."

Amy Coates Madsen agreed that after an umbrella statement of principles, the document could provide "tools" that speak to various constituencies more directly.

CPB's Theriault didn't dispute that but reminded the group that the "original problem" we set out to solve had to do with our journalism. "If we do not address serious journalism in here, we will not fix the problem we went out to solve." (Note: This "original problem" was not made explicit here – but this observer believes it refers to a broad set of complaints, including charges of "liberal bias," by critics who used such charges recently to call for defunding public broadcasting in congress. In that context, it mustn't be assumed that Theriault is admitting shoddy journalistic practices, rather that he saw the need [perhaps more acutely than most, given his role at CPB] to assert clear and strong standards by which public media journalists abide.)

Lee Wilkins conceded the need for some "big tent" language but urged strong wording – "meat on the bones" – high in the principles that hold "entertainment" programmers to high standards too. Morgan Holm seconded the notion wishing to "provoke a discussion" whether "our arts hosts work to the same standards as our journalists."

Tom Thomas advised a modification to the document structure that would add a section after the "big tent" opening principles. The new section would introduce the programmatic output – journalism, for example – as the means to enacting those principles.

Skip Hinton, the Executive Director of NETA, a trade association for public television stations, counseled that the language must resonate with all concerned but can only get so specific… because the real test is how they translate into differing courses of action at the local stations.

Setting a High Bar

Quentin Hope brought the conversation around to the question of whether the principles and policies should somehow reflect broadly what is now evident in public media (however defined) or if it advisable to press for a tighter set of principles and policies that define a high bar of service which, presumably, would challenge some stations to do better by those standards.

Marita Rivero of WGBH, who served on the "guideposts" committee, said one example of that would be through an insistence on diversity in staffing and outreach. Rivero emphasized that the language of the "guideposts" be infused with a respect for the entire "American mosaic," – ethnic, geographic and otherwise – but especially racial – to "get people excited, while providing a set of marching orders for stations" (and go above and beyond a mere salute to diversity). This responsibility to embrace whole communities, she said, was an essential ingredient to building public trust.

Malcolm Brett said, "being provocative is good, but setting eligibility criteria is not."

Bruce Theriault emphasized that because it is the CPB qualified stations that are in the tent – "we want to be aspirational but we also want to be clear about accountability." He said the standards for funding criteria, in his estimation, are quite low and are under review. "So there may be standards that come out of this."

Joel Kaplan added, a good statement of principles may still serve as a model for others.

SESSION TWO: Transparency in Content Creation

Dave Iverson, who led the transparency in content workgroup and wrote its proposed guidelines, walked the assembly through his committee's underlying thinking about transparency and through his group's resulting "code of transparency."

Key to the thinking was that transparency is consistent with a public service mission, that it encourages trust of public media, and that it brings about greater accountability on the part of practitioners.

The creation of a "model code" was an effort to "make it real". The code was envisioned as a published section prominent on a station's website (and internalized by station staff). The code speaks to how coverage decisions get made, the roles of staff, and how various exigencies of mission, resources, funding and programmatic constraints may play into content provided.

Complete Transparency or Occasional Opacity?

Joel Kaplan commended the proposed code but he added that transparency is one of those concepts everyone salutes but is tricky in practice. His example from the code was where it was suggested the station hold a webcast of station story meetings twice a year. "Why twice a year? Why not every day? You can't be half transparent." Kaplan said you don't want to tell people you are transparent if in fact there is still restricted access to your editorial processes.

Professor Lee Wilkins also emphasized that good journalism often requires some opacity. "It may look like I'm hiding stuff, but in fact I'm not. I'm protecting (sources) because all things ought not be public."

Kaplan said "you can have transparency and you can have confidential sources, it's not an either-or situation." Editorial meetings are not where you reveal sources. Moreover, the public has a legitimate interest in knowing *the nature of your confidential sources.* When we talk about secret sources, we want *more* transparency, because their motive for anonymity has bearing on their inclusion. So, transparency complements your journalism ethics, Kaplan emphasized, it isn't a replacement. "If you believe in journalistic ethics, transparency is your best friend because you want people to know that."

Iverson conceded this might be a "half transparent approach" because there are legitimate concerns on the part of producers to protect sources, to manage sensitive topics, to maintain competitive advantages in the media marketplace, and so forth. Nor does the code somehow replace journalistic practices, Iverson agreed, rather it explains what those practices are and how and why they happen.

Mike Marcotte, a former news manager who served on the transparency committee, said another form of back pressure against wide-open transparency may be the extent to which station newsrooms can show rigor in their news processes. It's one thing to invite scrutiny if you've invested mightily in the content you make, but for many small newsrooms that scrutiny may invite attacks that would only add to their challenges.

Wilkins put it another way—saying the code seemed to make transparency a goal, an end in itself, when the goal should be good journalism. “You can be as transparent as all get out and still produce terrible journalism.” She said, transparency should be a tool through which good journalism results.

Ombudsmen as Go-Betweens

Marcotte explained that one of the implementation strategies the group advanced was local station use of an ombudsman to help mediate the conversation engendered by transparency (and perhaps help justify partial transparency). He said this made it “someone’s job” to attend to transparency.

Kaplan, an ombudsman for CPB, emphasized that ombudsmen deal with content “only after the fact.” Not before hand. Yet transparency can often lead to discussions about what to do ahead of time, before publication.

Kaplan added support for the idea of ombudsmen in public broadcasting at the local level – perhaps relying on journalism professors from nearby or parent universities.

A Solution Looking for a Problem?

OPB news manager Morgan Holm asked why a code on transparency is needed in the first place and how it came about. “To me, the answer to transparency is accessibility,” said Holm, describing his efforts to field calls or appear in public to give the public opportunities to discuss his news efforts. In questioning the code’s necessity, Holm was also conveying concern about the work time that might be required to uphold it and whether the audience would actually use much of what is done to provide it.

Wick Rowland, CEO of Colorado Public TV, agreed that the code seemed to be “an answer looking for a problem.” I’m not clear, he said, on what’s wrong. The worry, he said, is this may become the bureaucratic requirement for (CPB) community service grants, which don’t necessarily advance good journalism. Rowland thought small, lean-staffed stations like his may simply lack the resources to devote to it. “Are we imposing a code here, rather than making it voluntary?”

Michael Levy, CPB’s Executive VP for Corporate and Public Affairs, responded saying trust in government, in media and in most institutions is at an all-time low. And that has implications for public media. Levy said we need to shore up that trust. “This helps us with congress… with funders.”

Wilkins said the best “tool for trust is doing a good job and getting it right.” Let’s assume for a minute that congressional funding does not happen, she challenged, how does this help going forward? Does it raise more dollars in a different way? Does it attract journalists in a new way? “I’m sorry but if this becomes a way to say we’re going to shore up our congressional funding base, I think that’s a little shortsighted.”

Levy said it “helps us make a stronger case for the support that we need to continue doing what we’re doing.”

Kaplan joined in that line of argument saying having a code is needed *especially* if federal support is cut, “because then people really want to know where your money comes from.”

Specific Practices for All of Public Media?

Ted Krichels of WPSU said it is clear there is a need for transparency as a principle – even if it is somewhat of a defensive response to critics who accuse NPR and public media of “political slant” – however finding the “overt ways” to address it seems elusive. We can *say* we are transparent, but how do we *show* that?

Poynter columnist Rick Edmonds complimented the committee's work but thought it might press more firmly into the area of revealing the interests of funders, such as foundations, perhaps by showing what their other causes are and linking to more information.

Amy Coates Madsen said she likened transparency to what good non-profit organizations do in their annual reports with details on mission, funding sources, staff, board members, etc. However, she took issue with Edmonds' suggestion that a report include detailed funder agendas because, she said, "they change like the wind" and one can't be expected to account for them at all times.

Jack Mitchell said the primary element of a transparency code should certainly be the disclosure of funding sources. Other things, like webcasting story meetings, may prove problematic for open access. But when it comes to funding sources, there's no argument for secrecy.

As for the overall structure of the transparency code, Mitchell observed that transparency may be such a key principle that it might be elevated to the "guideposts" section discussed earlier. From there, Mitchell said, the tactics of editorial transparency can be positioned in a document like this (code) and the transparency in fundraising tactics can be gathered in a similar document (which is planned).

Marita Rivero, executive at WGBH, said the code as written may be applicable to a daily newsroom but may not translate well to producers of documentaries, cultural programs, special projects, etc. This made it difficult to share widely as it now exists.

John van Hoesen, VP of News for Vermont Public Radio, said the code is on the right track but perhaps needs to position some elements as suggestions of ways to let the public see what happens in the editorial process. By presenting "options" – such as webcasts of meetings – recommendations for openness can be imparted without implying that complete openness is the goal.

Van Hoesen also warned that webcasts amount to publication and so one would want to be careful about what is presented, particularly something construed as libelous or an unvetted rumor.

Bruce Theriault of CPB asked where the line forms between what everyone agrees is likeable about transparency and where specific acts of transparency become expensive or onerous is some way. He suggested there's a long list of things we can do, from easy to hard. In "looking for the line where it gets tough," he asked if it wasn't easy enough, for example, to post entire interviews online (rather than only excerpts used on-air).

Rivera agreed that more openness about station organization, staffing and finances is a place to start. It gets harder "in the editorial space" but suggested there could be a graduated list that "we might say yes, yes, yes to" without producing webcasts – and certainly not webcasts every day. Likewise posting all interviews in full may prove overly expensive, but there are clearly things on this list we can do easily and others that begin as aspirational goals.

Levy said it seemed reasonable to do the "bibliography and footnotes" approach to transparency -- providing links to source materials as a way for people to find more information and context and check it themselves if they want.

Holm said that's consistent with best practices in journalism now to provide links and transcripts and so called "web extras." Likewise, Holm mentioned taking online comments so as to be responsive to audience reaction and feedback.

Levy wondered how many stations were doing what Holm suggested – if indeed it is considered best practice -- and whether that should be a staple of a model code.

Reframing the Question: What Works Best?

Tom Thomas advised the attendees that while there are large organizational transparency measures local institutions could and should do to be more accountable and user-friendly, the tougher challenge is the content area -- in "showing our daily work." The question is, he said, "what will be better because we did it?"

Andy Hall, who directs the Wisconsin Center for Investigative Journalism, says what people most want to know is WHO decides? Then WHAT is the process? Hall says, fundamentally, that's what transparency can provide – a satisfying answer to those questions -- a more complete description of the editorial process for those who are curious or downright suspicious.

Rowland agreed that common audience criticisms of programming tend to be accusations of bias or questions about the agenda behind a program or its guests.

Edmonds said that suspicion is emblematic of the Internet age in which media users are now empowered with tools for fact-finding or crowd-sourcing . This "antidote to the establishment press" has prompted responses by large news organizations to adjust to user expectations. *The New York Times*, for example, invites people in, makes editors and reporters more accessible, established a public editor (ombudsman), and has even allowed video documentarians to have access to their newsroom.

Thomas said the tough work is in naming those things that take time and effort but which we welcome willingly because we're convinced (or we've proven) their effectiveness in delivering greater public service... and greater trust.

Marcotte said changing assumptions on the part of audiences are fundamentally shifting the relationship with stations such that "news is becoming a two-way conversation," not a one-way publishing act, all of which complicates the discussion of best practices.

"The best organizations in our field," Thomas said, "welcome in (new user expectations) and channel it."

Theriault said the worst thing that can happen is if stations implemented transparency measures only to have them fail – that is, raise expectations only to somehow disappoint people and end up appearing deceptive or less trustworthy. For example, Theriault indicated that trying to webcast daily editorial processes might run this risk because editorial processes are fraught with situational decisions not readily captured by webcams.

On the other hand, Theriault said, holding brown bag lunches with community leaders or issue experts are the kinds of things that can be quite powerful albeit not entirely simple or cheap. He also mentioned the Public Insight Network as an engagement tool.

Rivero made the point that reflecting the community means reflecting its diversity… and that transparency practices should make note of this. The implication is that if stations wish to engender the trust of minority communities through greater access and transparency, they will need to reveal minority representation on staff or attention to minority issues in programming.

Kaplan said the other major complaint from news consumers, aside from complaints of bias, is that "you've taken what I've said out of context." Kaplan said that now, with our websites, we have the ability to provide the complete context – “that’s why you post the complete interview, so they can test your accuracy and fairness. That’s what I think we mean by transparency.”

Malcolm Brett of Wisconsin Public Broadcasting said another layer of transparency is how well employees reflect the values of the organization – through their work and their behavior. And to fail to reflect the values of the organization can be a source of distrust or criticism.

Levy concluded that a “model uniform code” would be very useful – a way for public media to “stick a flag in the ground and stand beneath it.” He said different stations may abide somewhat differently but hopefully there would be consensus on key elements. Reflective practitioners will find the proper balance, he said. “And we need to aim forward” anticipating “expectations of new audiences.”

Transparency vs Objectivity

Marcotte noted the conversation has proceeded on the assumption that the traditional norm of journalistic objectivity is conducive to audience trust, yet that assumption is under considerable attack these days, perceived by some as dishonest or a charade. Transparency, it is argued, encourages journalists to be more open and honest with their personal perspectives partly because journalism is becoming a multi-perspectival process and partly because the casual opinions of journalists ought not to penalize their credibility when it comes to providing accuracy and fairness in their reporting.

Mitchell says the goal of journalism is unchanged by that argument – that objectivity is still a standard by which to judge the work of journalism.

Holm cautioned that adopting transparency in that sense is to invite doubt about our journalistic neutrality. His concern is that public media’s distinctiveness would be compromised if it were to be judged as other media of the day -- overtly liberal or overtly conservative.

Wilkins took issue with the phrase (coined by new media scholar David Weinberger) that “transparency is the new objectivity.” It fails to define either term, she said. “Objectivity of process” is what we’re after, according to Wilkins, so as to honor facts and let them lead where they may. Transparency doesn’t replace objectivity but enhances it. “I don’t know if (objectivity and transparency) should get married,” she quipped, “but they should at least go steady.”

However, Wilkins also agreed that there is rising interest in journalism “with a point of view” and this may continue to change our understanding of objectivity as a goal. She implied that not all audiences will want or value objectivity.

Levy asked if transparency isn’t a path to objectivity. That by covering a story well, and giving an audience meaningful access to the process, and giving them tools to add to their own understanding, the total conversation amounts to an objective treatment of a topic – or at least more full and honest treatment.

Brett said if we weren’t driven “by the aspiration of getting stories right, objective, fair and honest, we wouldn’t deserve the opportunity to do it.” Transparency, he said, is a way to demonstrate the character of the people and the organization as they strive for objectivity… and it is a tool by which to evaluate their practices and results.

Thomas underscored the importance of transparency as a characteristic of healthy institutions, but said transparency does not itself make them healthy.

Thomas capped the discussion saying work remains to turn recommendations back to stations where they can be applied… according to “the size, scale and fit of each community. “

SESSION THREE: Funders, Agendas and Firewalls

Dave Iverson provided an overview of the working group report, “Funding and Firewalls,” saying the essence of the matter is protecting program content from undue influence. The approach taken was to articulate primary principles and then provide a structured process of questions for station personnel to ask in various situations.

Quentin Hope invited discussion beginning with whether that approach worked well.

Bruce Theriault said the report seemed heavily oriented toward the internal processes of stations – and might have done more to address the external perception issues that arise. “The biggest problem is not that we’re not honest, but people don’t trust that we’re honest.”

(That assertion by Theriault was not immediately contested but over the course of the discussion it would become apparent that members of the group feared certain internal practices do traverse a slippery slope.)

Easing Barriers to Funding

Theriault also said the report did not seem to clarify the sequence in which money and programming decisions get made. “Which comes first? The money or the idea?” He said the practice he liked at PRI, where he worked previously, was that producers articulated their long-range editorial plans and then money was raised to do them.

Malcolm Brett said good public service ideas can come from anywhere -- “a good idea is a good idea… and a good idea from outside the shop and comes with money may be the right thing to do, even if the idea didn’t originate internally.”

Ted Krichels suggested the need for a common sense standard and perhaps outside review – “to get a reality check” -- so that money is not unduly restricted by well-intentioned guidelines.

Rick Edmonds said that over the years he’s come to accept the case for outside funding of editorial efforts – because there’s a growing problem in “not having enough resources to cover things that should be covered.”

Does Money = Agenda?

Edmonds raised the concern, though, that foundations have agendas and public media need to be aware of those.

Krichels agreed that foundation funding is an area of uncertainty because there are buried agendas and you have to deal with those. He cited several examples where an end user might be getting good and necessary coverage but the funding raises legitimate concerns – be it money from George Soros who is seen as having a political agenda or support from Penn State University which is seen as being aligned with corporate interests.

Lee Wilkins said her faculty has debated these concerns. On the one hand, she said, you can assume all money is somehow corrosive and prejudge it that way. Or, she said, “on the other hand, we need to let the work speak for itself. And only after we see what is produced can we make some solid judgment (on it).”

It was suggested that certain processes can enable foundation funding while explicitly “walling off influence” of the funder – such as denying review of content.

But, as Michael Levy put it, some funders like Soros have such considerable baggage they require a higher level of due diligence before accepting any funding. And perhaps a higher level of walling off if money is accepted.

Krichels pushed back a bit, saying too much focus on perceptions of others can make us “paranoid about every dollar coming in the door,”when, in all honesty, we are trustworthy and sound in our editorial practices.

Brett said both character *and* reputation must be sound. He said, “it may be true that ‘no money=no mission,’ but it is also true that ‘no mission=no money.’” There’s “a calculus that goes into that” – meaning we may be attacked for accepting money from certain sources but that we’re prepared and able to overcome those particular attacks.

Tom Thomas observed that philanthropic giving today has changed radically and indeed funding officers are explicit in seeking alignment with their agenda and goals. And we shouldn’t kid ourselves about that.

“Selling Beats”

Edmonds also said a glitch comes up when funding is tied to content and comes up for renewal. The renewal aspect would seem to put the funder in a position of exercising influence based on performance and content which could also chill the independent decision-making of the media organization.

Edmonds also felt the guidelines should raise questions about how far to let funders “add on” to a project’s purpose to accomplish a funder’s purpose.

Tom Thomas said one of the greatest points of vulnerability at this time is the fast-growing way in which stations are expanding local journalism by “selling beats.” Thomas says the station decides the beat and its scope and then seeks funders to support it. The concern that follows is “what happens when the two year grant runs out?” Is the same funder asked to renew and how is that negotiated? “I’m deeply concerned about how we will manage our way through that… so anything we can do (in the guidelines)… will have immediate practical consequences.”

Joel Kaplan said that having a renewal option tied to funding is to have strings attached. It may be “conscious or unconscious, but you’re going to want to adjust your coverage to the position of your funder, otherwise you don’t get renewed.”

Brett viewed the “renewal issue” as a red herring and said “if you are willing to walk away from the money the first time, you should be willing to walk away from it a second time, or a third time… Our values don’t change.

Bundling multiple funders mitigates the influence of any sole funder, Theriault said -- which is a common method of protection.

Jack Mitchell amplified this idea of multiple funders, saying “it seems to me the worst thing we can have is one funder responsible for one activity or one program.” That creates a strong dependency and increases the temptation to please the funder – not to mention increasing the need to pick an exceedingly respectable funder – whereas having multiple sources lessens all of those concerns by pooling the risks.

Thomas said we may want to canvass stations to develop detailed tactics. He mentioned Capital Public Radio in Sacramento as articulating an anticipatory policy stating it would not launch any funded reporter beats until multiple funders were committed… and that no one funder provided a disproportionate share of the beat support. Assembling and sharing examples like that would be particularly timely, Thomas said.

Wilkins liked the idea of including more “best practices… pulled from around the country” to make the proposal on paper more useful.

Consistency in Saying Yes, or Saying No, and Why

Wilkins shifted the discussion asking if there “is anyone we would never take money from, no how, now way?”

Marita Rivera approached that question another way, saying there is wide variance in the system in deciding who to accept underwriting from… and that the system could benefit from some guidance in making those decisions more uniformly.

“We could use more ‘outside’ perspective on that,” Rivera said. The lack of uniformity, the inconsistency sends conflicting signals to funders.

UW Ethics Center Director Stephen Ward said there would be lots of groups one should put on “the creepy list” of whom you’d refuse funding. However, as you go down that list, he says, it becomes more gray – for example, groups with political ties.

Ward asked if the project had a policy on anonymous donors. “If you don’t, you should,” he said, calling it likely to come up.

Amy Coates Madsen asked if the gift acceptance policy would welcome “creepy” funders if they gave anonymously. Or if it would be okay to accept money from organizations with political baggage if they gave it completely unrestricted? A gift acceptance policy should spell that out, she said.

Wilkins probed with a similar question, “is it so bad if somebody has a political agenda, if you can discern it? Do we want it all neutered?” She said to be an American in 2011 is to be surrounded by agendas. “Nobody is neutral,” she said, “so is there something problematic about an agenda in and of itself that we are so worried about?”

Yes, came the answer. If a funder comes to us with a point of view for us to pursue we will be perceived as compromised.

Ward said that raises the question whether you’d accept support from a funder who does not reveal the source of *thei*r funding. As an academic, ”I would say no,” said Ward, but you may have more practical considerations.

Ward also chided some language in the committee proposal that said stations *should* reveal details of funding contracts. “Why is that ‘should’? Why not ‘must’?” he asked.

Dave Iverson turned to Tom Thomas at that point to ask if indeed it was widely accepted practice to reveal detailed contracts. “Some do. Most don’t,” said Thomas.

Rivera said variances in disclosure practices may come down to “the art of negotiating” in fundraising where the details of one funding package may differ from those of another, and those details are better kept private for valid reasons. Rivera said this need for flexibility in practice is balanced by the questions of “what people really need to know and why.”

Thomas said this brings up a notion mentioned earlier under transparency – "what's the disclosure that is actually useful to people?" Answering that from the end-user's perspective is key and will take some work to get right.

Keeping Ourselves Honest

Coates Madsen advised a review of one refrain used in the draft proposal: the phrase "we would do this program anyway." That may be the "crux of the matter," she said, but "it sounds so… casual… shaky." Better to use that phrase in your hallways but not in your public documents, she said.

Thomas said he thought "we're too soft on ourselves" in the guidelines. "I think we delude ourselves," he said, when we use phrases like "we'd do it anyway," and "we'd walk away from the money." That's how we justify decisions in awkward situations – but "I don't think we've constructed strong enough firewalls for ourselves. I think we can push ourselves harder. We have to be stronger and tougher… to withstand the tsunami of money and agenda right outside." Thomas said one of our strongest assets in that regard is the money that comes from individual subscribers.

Ward agreed that some language in the document was "wishy-washy" and should simply be more firm… as difficult as that may be.

Other Final Perspectives

Wick Rowland said this paper deals with one major aspect of fundraising but doesn't focus on the "slippery slope" of advertising (underwriting). He says more and more the messaging appears like commericals and that it would be "the death knell" of public service broadcasting if the system shifted to an advertising-based business.

Rowland said there is also a particular challenge that comes with many grants: the assessment of outcomes. It can be difficult to measure outcomes and there's a high opportunity cost to that work.

Rowland also points out that the paper assumes fundraising is being done by a station but, in fact, much of the fundraising in public television is done by independent producers.

Skip Hinton amplified that point. He said NETA staff spend many hours communicating with independent producers explaining to them the nuances of underwriting obligations and disclosure obligations… making the due diligence process difficult to handle.

Complicating matters even more, Hinton went on, was the question of whether the disclosure requirements of broadcast programming need to apply to video streaming?

Levy added another question to the mix – the degree to which a broadcaster has responsibilities for vetting and disclosing the funding behind a content partner?

Charles Meyer of the National Center for Media Engagement said in response that people expect consistencies in standards. "The standard is the standard," he said, and we owe people consistency in how they are applied.

Morgan Holm observed that the guidelines document did not explicitly extend to individual donors, especially major donors, but perhaps it should.

Ward also suggested policies advising how to deal with funders who become the subjects of news stories.

FINAL DISCUSSION: Making It Real

It was obvious that attendees saw the Public Media Integrity project as an effort worthy of continuance and wider scaling.

The assembly used the afternoon of the second day to discuss the process behind the integrity project and suggestions for moving the work forward – what it might look like and how it might get there.

In addition to discussing these ideas, attendees submitted written comments via notecards. Below is a synthesis of the discussion and the written comments.

Consolidate the PM Integrity Documents

Multiple comments advised that the six separate PM Integrity papers be consolidated in a clean, integrated “write-thru.”

The organization of the next iteration was clear to some: it should build on the logic already apparent in the project to date. “Create the taxonomy,” said one -- from principles, to policies, to practices.

This means opening with the “guideposts” as an umbrella set of principles. From there, individual sections would proceed to sculpt more targeted policies and practices – much as they do now – only they’d be more obviously tiered and they’d eliminate the redundancy that exists now (which is due to their distributed work group origins).

Rick Edmonds called for “rigorous and ruthless” editing to streamline the writing and make it easily readable to anyone. Another suggested a “one page version” for easy sharing.

Stephen Ward said it’s important the writing make a strong case statement for public media.

Lee Wilkins said it should be careful not to have a “defensive tone.”

Have a Home. Have a Champion.

It was suggested that a core group tackle the rewrite and have a deadline to do so.

It is important this effort “has a home,” Amy Coates Madsen said. Someone needs to be accountable for its progress. “It takes staff. It takes time.”

Widen the Conversation and Develop the Body of Work Further

At the heart of the afternoon session was the question of *how to evolve* the Public Media Integrity project.

Some saw further elaboration to the starting documents -- beyond the consolidation suggested above -- as necessary.

Stephen Ward and Lee Wilkins both called for the addition of specific case studies to illustrate ethics in practice. These examples, said Wilkins, should show both “best practices” and “worst practices.”

Jack Mitchell said the next version of the work should press deeper into a “future focus” and help sort how “the Internet changes what we do.”

Many comments, written and spoken, suggested widening the discussion among a more diverse group. Similarly, some thought the project thus far was "too top-down" and now needs frontline employees to provide input, including working journalists.

Ward counseled the organizers to take full advantage of ethics faculty and existing academic literature. No need to "reinvent the wheel or go it alone," he said.

Edmonds felt it also needed to address directly "the liberal slant question" – perhaps by addressing public media's role in a capitalist society.

Take it "On the Road"

The talk of widening and deepening the work naturally led to how it might involve more stakeholders and be put widely in use.

The common notion was one of making this "a living, changing thing" through sharing it, testing it, getting feedback, revising it, over and over.

Participant Katy Culver with the UW Journalism Department likened this method to the way medical schools attacked medical mistakes through a concentrated effort on honesty about mistakes and rewarding input from frontline workers. Culver said the push reduced the error rates in medicine by using incentives toward change, and punishment for lack of change, and targeting the implementation at all levels of the industry.

"Take it on the road," said Lee Wilkins. She urged organizers to bring the integrity project to college classrooms for testing among teachers and students. (She also suggested UM, UW and UI would all be happy to host student forums to debate or discuss the issues.)

She also suggested working in tandem with public access television.

It should definitely have an ongoing social media component, suggested John van Hoesen. "A 'pubmedia' Twitter feed," for example.

Imagine "the YouTube series," said another.

Others suggested published articles (in Current, for example) and presentations (at PRPD, PRNDI and other conferences).

All of this would be in addition to the http://pmintegrity.org website though there was some question of what the best long term online format might be.

The participants visualized various people helping to convey the messages of the project: spokespeople, "champions," trainers, a network of "mentors."

Working collaboratively through like-minded organizations was mentioned -- (including Berkman Center, Poynter, PRNDI, SPJ, PRPD, etc)

Coates Madsen said that the more the process involves in-person conversations or in-person trainings, the more real it becomes to those we are trying to reach.

She also reminded the group to think beyond the internal constituencies of public media and reach out to external stakeholders. Think of it as working to “avoid the revocation of public trust.”

A written comment underscored that there is a “vast audience” that is not being reached that deserves public service media and deserves a place in the discussion of its ethics.

Implement at Stations

The road to implementation ultimately leads to local public radio and television stations -- a primary target of the project all along.

Some veterans of the NPR and PBS systems pondered what it would take to have stations embrace the revised ethics guidelines. “Voluntary may not do it,” said Ted Krichels.

“Carrots and sticks,” was one suggestion.

Another was to have CPB require station adoption – as a condition for community service grants.

Bruce Theriault of CPB indicated it could come to that if the process drags. But his preference was for stations to “grab this and self-regulate.”

Another role CPB could play, thought Malcolm Brett, is by doing what it did for major-gifts training in the past when it provided for system-wide improvements via a best practices training program. Brett said instead of focusing on major gifts the program would “build a culture of journalism” at stations.

Mitchell said what “not to do” is to type something up and mail it to stations for filing. Rather, they need to be engaged in a process whereby each station comes up with “its own version.”

In terms of the implementation process, there were a number of suggestions that assumed some kind of workbook or training manual (online, most likely) that would fit into a model training program.

A variation on the workbook concept, suggested one participant, would be a set of templates that stations could adopt and adapt to their particular situation (with, presumably, no change to the core principles).

“Training,” was an oft-repeated word.

It was widely agreed that training needed to reach all personnel within stations, with some differentiation depending upon work roles. News personnel, for example, would receive training that is somewhat modified from what fundraising personnel would receive – though both groups would get the same core content.

Morgan Holm felt strongly that marketing personnel would benefit from training in the editorial matters that news personnel receive.

It was suggested that conferences and membership organizations could help deliver training opportunities. Perhaps in regional sessions.

Another goal would be the encouragement of stations to post their adopted principles public -- “front and center” on the websites. And they might also conduct community engagement opportunities around the topics.

One attendee recommended “swat teams” to work with licensees.

Another mentioned inclusion of a crisis management component, “when things go wrong.”

Skip Hinton urged the project to take into account the limitations of small stations. He suggested a “national clearing house” approach (similar to the templates idea above).

Work Toward an Adoptable Industry Standard

Extending throughout the Madison sessions, and into this last discussion, there was a thread of debate about establishing the Public Media Integrity guidelines as some kind of *official standard*.

Michael Levy had argued for the idea as a matter of setting the public media bar for content quality and audience trust. In this sense, the guidelines would help articulate “a minimum standard for the industry” if it was adopted by all stations and could be made consistent with all producers.

Someone pointed out that NPR and PBS need to be on board with similar guidelines so as to provide maximum congruity.

This is not to say there couldn’t be local diversification – but there would be a set of “unified core principles” that set a minimum bar.

Theriault’s preference for industry self-regulation around these standards might require what he called a system wide “constitutional convention” to adopt baseline standards.

Similar to the “carrots and sticks” suggestion above, the group felt that mere suggestion and encouragement may not be enough to drive the guidelines toward wide adoption

Leadership (and Urgency) Needed

Several speakers said there was “no time to waste” and “a sense of urgency” is called for.

Wilkins said to simply assume the impending loss of federal funding to inject real urgency.

There were nods of agreement to the suggestion that station managers must help lead the way and advise their staffs as well as their governing boards on the importance of ethics standards

Malcom Brett said to build momentum (and pursue voluntary commitment), we need a “coalition of the willing” – early adopters who help set the example and build momentum.

Theriault agreed that “CPB can’t be the only driver of this.”

Wick Rowland, resistive to new CPB requirements, urged a leadership strategy that caused collaboration with major philanthropies to significantly increase journalism funding for the system (so that high ethical standards can be better met by adequate professional staffing).

Again it was mentioned that NPR and PBS have stakes in the guidelines – and the arrival of new NPR CEO Gary Knell provides an opportunity to build a campaign or at least start a dialogue toward unified adoption.

Journalists would make excellent advocates for strong ethics guidelines, it was noted on one card. Though there was no single suggestion as to who or what group could best aggregate the voices of journalists.

Krichels and Brett traded a few comments on the practical role their controlling institutions (large universities) could play in pushing content standards higher. They could pose threats; they could provide solutions. “Our local relevance is key to future sustainability,” said Krichels.

Short-Term and Long-Term Goals

Levy advised short-term, medium-term and long-term strategies… but cautioned against getting “stumped on long-term if it blocks the short-term.”

Short-term strategies involve building upon a sense of urgency and moving the project into its next phase of revisions.

Lee Wilkins suggested some near term “demonstration projects” to “see how they work” – perhaps with special funding from the Knight Foundation.

Coates Madsen said you have to allow time for these efforts to take hold and evolve with experience and feedback. “I would look at a couple of years. One year is not enough time. Three, four, five years even… to see if things need to be overhauled,” she said.

Long term, Joel Kaplan urged the formation of a network of regional ombudsmen so all stations have that service.

One card noted that long-term involves building a public media “journalism culture” as a “unique enterprise.”

Cliff Christians said the long-term view includes bringing public media ethics to the classroom and teaching the next generations the values therein.

To be future oriented, several observers mentioned, will mean some experimentation and change over time. Have a system, they advised, where you continue to “check in over multiple years.”

And track your progress, another advised.