

A RESOURCE GUIDE FOR EDITORS

# MANAGING *for* EXCELLENCE

MEASUREMENT TOOLS FOR QUALITY JOURNALISM



Media  
Management  
Center

KELLOGG SCHOOL OF MANAGEMENT • MEDILL SCHOOL OF JOURNALISM

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# Table of Contents

## INTRODUCTION

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## SECTION 1

---

### 4 EDITORIAL EXCELLENCE INVENTORY

*By the Media Management Center*

### 11 USING THE INVENTORY

*By Terry Greenberg*

*Managing Editor, Elkhart Truth*

### 13 KEYS TO 'A'-LEVEL TRAINING

*By Steven S. Duke*

*Project Manager, Media Management Center*

### 21 USING INFORMATION FOR DECISIONS

*By Michael P. Smith*

*Managing Director, Media Management Center*

## SECTION 2

---

### 26 EXAMINING OUR CREDIBILITY

*Executive summary from a study*

*for the American Society of Newspaper Editors*

### 28 CREDIBILITY INVENTORY

*By the Media Management Center*

## SECTION 3

---

### 32 MEASUREMENT IN NEWSROOMS

*By Tracy A. Thompson*

*Assistant Professor, University of Washington, Tacoma*

### 46 EXAMING AN ERROR POLICY

*Editorial Department*

*Chicago Tribune*

# Introduction

There are few topics that more quickly put editors on the defensive than discussions of measuring newsroom performance.

It's not surprising. Too often conversations about measuring the newsroom devolve into unproductive arguments about story and photo counts. There are other, more valuable approaches to measuring newsroom performance, however, that can help editors manage for excellence.

Editors always are asking themselves, "how well are we serving our readers; how can we improve." And as newspapers struggle to attract and keep readers, publishers increasingly are asking editors to quantify the newsroom contribution to the readership effort.

The Media Management Center's research indicates that quality is a distinguishing feature that attracts and keeps audiences. The Center's framework for thinking about quality is built around five telescoping ideas.

- The first is mastery of the basics.
- Second is developing consistency.
- Third is learning from mistakes.
- Fourth is developing self-corrective actions.
- The fifth idea is developing a value proposition, what the Center calls *unique, relevant value*.

## SECTION 1

# Editorial Excellence Inventory

**H**ow do you build quality in your newsroom? A very strong case can be made that quality begins with paying attention to the details.

This assessment tool was designed in that spirit. The Media Management Center's analysis of successful newsrooms shows that they have a spirit of ascendancy — they are constantly learning and building for a better future. We call this reaching for another level of excellence.

The Center chose 14 universal characteristics of editorial quality. Newspaper industry initiatives around diversity and credibility show how interconnected these characteristics are. You may want to use the blank spaces to add local characteristics that contribute to the success of your newspaper.

### **How to use this form**

Read through each description. Think about your newspaper the way a reader sees it — as a whole, not as a collection of departments or sections. Be a tough grader. Rewrite the descriptions, if needed. Some of our test sites have given this form to readers and asked them to grade the newspapers. Even if their samples were not scientific, the readers showed how tough they are as graders. Share the information widely. Brainstorm on how you can move from one level to the next.

### **LIST OF DRIVERS**

ACCURACY  
SOURCING  
AWARENESS OF READERS  
COMMUNITY FOCUS  
TECHNICAL  
COMPETENCE/SAVVY  
PERFORMANCE MANAGEMENT  
TRAINING  
INTEGRATING INFORMATION  
INNOVATION  
TIMELINESS  
QUALITY ASSESSMENT  
STAFF DEVELOPMENT  
HIRING  
STRATEGIC PLANNING  
& AWARENESS

## EDITORIAL EXCELLENCE INVENTORY

<b>C</b>	<b>B</b>	<b>A</b>	<b>GRADE</b>
<p><b>ACCURACY</b> Stories are accurate most of the time; corrections are printed promptly.</p> <p><b>Comments</b></p>	<p>Editors regularly double check facts prior to publication; inaccuracies that have been published are thoroughly investigated; records are kept and regularly reviewed for newsroom-wide longitudinal assessment and annual performance reviews.</p>	<p>Emphasis by reporters, editors and copyeditors alike is on correctly telling the whole story, completely with subtleties and nuance; there is regular newsroom-wide discussion, pointing out stories that were successful and ones that miss the mark; sources are randomly contacted after publication for their assessment of the accuracy of the presentation.</p>	
<p><b>SOURCING</b> Appropriate sources are generally used.</p> <p><b>Comments</b></p>	<p>Sources are always appropriate; there is not over-reliance on tried-and-true sources; editors sometimes question reporters about their sources.</p>	<p>Editors and reporters often discuss interesting potential sources before reporting begins; sources' biases and pertinent personal details are included in the story; multiple sources with diverse points of view are included.</p>	
<p><b>AWARENESS OF READERS</b> Newspaper has conducted reader research which is available to the newsroom.</p> <p><b>Comments</b></p>	<p>Newsroom frequently discusses what reader research has found and regularly applies those findings to story selection and approach.</p>	<p>Knowledge of readers is frequently updated with newspaper's and others' research and projects to keep up with shifts in the local population, readership and national mood; stories are written to meet what is known to be the education and sophistication level of readers; newsroom has periodic formal meetings and focus groups to ask readers about themselves, the coverage and their desires for coverage.</p>	

## EDITORIAL EXCELLENCE INVENTORY

<b>C</b>	<b>B</b>	<b>A</b>	<b>GRADE</b>
<p><b>COMMUNITY FOCUS</b> Many of the stories are local.</p> <p><b>Comments</b></p>	<p>Local news is not only local, but relevant and interesting to readers; zoned editions are crafted to meet the interest and needs of readers in those areas.</p>	<p>Intensely local and relevant coverage is augmented with various outreach programs that allow for interaction between the community and the newspaper; the newspaper and its employees are involved in this community.</p>	
<p><b>TECHNICAL COMPETENCE/SAVVY</b> Newsroom staff is familiar with and uses only the most rudimentary computer equipment and programs.</p> <p><b>Comments</b></p>	<p>Newsroom has a systematic program to regular update equipment; periodic staff training is conducted to ensure staff maximizes the capabilities of all equipment.</p>	<p>Newsroom culture regards technical advances as key to the newspaper's future; the expertise and recommendations of the most technologically savvy staffers are tapped in a systematic way; key decision-makers monitor the technology industry and the media for hints about the future advances and applications; training in cutting-edge use of technology is sought and offered.</p>	
<p><b>PERFORMANCE MANAGEMENT</b> Newsroom has an uneven approach to performance management. Performance reviews are done sporadically if at all; performance-related rewards and sanctions are given irregularly.</p> <p><b>Comments</b></p>	<p>Newsroom is aware of the benefits of performance management and has a performance measurement system but performance review forms are not job specific; reviews are not always sufficiently direct; managers are not trained in the basics of coaching and performance management.</p>	<p>Newsroom has a job-category-specific performance review system, and some of the headings are linked to the goals of the company; reviews are done in a timely and forthright fashion; managers have received performance management training; immediate daily feedback is part of the culture; performance review forms are examined and revised annually to coincide with emerging newsroom or company needs and goals.</p>	

## EDITORIAL EXCELLENCE INVENTORY

C	B	A	GRADE
<p><b>TRAINING</b> Training is available sporadically to a limited number of employees.</p> <p><b>Comments</b></p>	<p>Training is seen primarily as an off-site phenomenon and is offered to enhance a limited number of employees' performance in their current positions.</p>	<p>Training budget is adequate; training is regarded as a performance-enhancing growth opportunity for all employees and is presented not only to improve current performance, but to prepare employees for future jobs or responsibilities; regular training is conducted on-site and augmented by off-site opportunities; training needs are continually reassessed and programs, content and methods are adapted accordingly; job swaps and reassignments are routine as skill-building opportunities.</p>	
<p><b>INTEGRATING INFORMATION</b> Newspaper functions as separated units with managers and editors making decisions in isolation; information is infrequently passed to other departments or lower echelons.</p> <p><b>Comments</b></p>	<p>Newspaper has developed ways to disseminate some information throughout the organization; some key decisions are still not adequately communicated in a timely fashion.</p>	<p>All departments are committed to gathering input from other departments before making final decisions and informing the entire organization once all decisions are made; a formal network for transporting information has resulted in all levels of the organization being knowledgeable about company issues, initiatives and decisions; all employees are committed to receiving and passing on information from readers and customers, and formal lines exist for doing so.</p>	

## EDITORIAL EXCELLENCE INVENTORY

C	B	A	GRADE
<p><b>INNOVATION</b> Innovation comes almost exclusively from top managers.</p> <p><b>Comments</b></p>	<p>Top management encourages all levels to innovate, but the route is unclear or cumbersome, and good ideas often get bound up in the system; innovation efforts are regarded as department-specific, and useful ideas are generally not passed on or accepted inter-department.</p>	<p>Innovation is regarded as a key responsibility of all employees; solid new ideas, styles or approaches are assessed and implemented with great speed; systems are in place to not only encourage innovation but to reward and celebrate it; regular sessions are held to seek solutions to newspaper-wide problems or issues.</p>	
<p><b>TIMELINESS</b> Stories that are relevant or important to the community are presented as soon as possible.</p> <p><b>Comments</b></p>	<p>A formal futures budget and an emphasis on running stories before meetings and events rather than after the fact ensures that readers learn about things while they can still participate or have an impact; some stories are over-covered, given prominent space long after readers have lost interest.</p>	<p>A formal futures budget is available for viewing by the entire staff for their input; artists and designers are brought into the process early to ensure the best possible packaging; the timing of publishing all aspects of the new product, including special sections, is regularly examined to determine whether modifications would better serve readers.</p>	

## EDITORIAL EXCELLENCE INVENTORY

<b>C</b>	<b>B</b>	<b>A</b>	<b>GRADE</b>
<p><b>QUALITY ASSESSMENT</b> News managers do periodic content audits to pinpoint problem areas.</p> <p><b>Comments</b></p>	<p>News managers periodically assess the relative effectiveness of the beat structure, story approach and content.</p>	<p>Regular newsroom-wide discussions are conducted to discuss content issues, pinpoint problems and arrive at solutions; the definition of quality extends to depth and breadth of story presentation; daily critiques provide immediate feedback; performance improvement plans are developed for teams, departments or individuals who are not consistently providing quality work.</p>	
<p><b>STAFF DEVELOPMENT</b> News staffers are usually given new jobs or roles when they become bored or their performance lags.</p> <p><b>Comments</b></p>	<p>Managers and employees talk regularly about current performance and future interests, and some effort is made to provide training or coaching to prepare employees for the next step.</p>	<p>For each employee there is a written development plan — agreed upon by each employee and his or her managers — which includes future training options, job shifts or reassignments and other strategies seen as beneficial to professional growth; managers regard growth of their employees as a key function of their jobs; inexperienced staffers are given extra attention and mentoring.</p>	

## EDITORIAL EXCELLENCE INVENTORY

<b>C</b>	<b>B</b>	<b>A</b>	<b>GRADE</b>
<p><b>HIRING</b> Interviewing and hiring is the exclusive domain of the department head and managing editor; the emphasis is on getting the best candidate for a specific job.</p> <p><b>Comments</b></p>	<p>The interviewing process involves employees from all levels to gain their input on prospective employees; effectiveness-enhancing approaches such as behavioral interviews, candidate testing or tryouts are employed.</p>	<p>Multi-employee input is sought; effectiveness-enhancing approaches are employed; emphasis is on hiring from appropriate applicant pools the person who will competently fill the existing position but who also demonstrated long-term potential and adaptability for other positions; effective attraction and retention schemes are presented.</p>	
<p><b>STRATEGIC PLANNING &amp; AWARENESS</b> News staff reacts as promptly as possible to changes in the community.</p> <p><b>Comments</b></p>	<p>News staff annually receives information about the newspaper's upcoming initiatives and often comes up with methods of facilitating those efforts; news staff regularly sets yearly goals.</p>	<p>Newsroom participates in defining and contributing to the paper's goals; newsroom has annual strategic plan based on what it sees as the upcoming opportunities and challenges, as does each department within the newsroom; news managers and reporters are constantly seeking data from outside sources that will foretell changes in the demographics, economics and sociology of the community, and recasts coverage immediately based on that data.</p>	
<p><b>ADDITIONAL DRIVERS</b></p>			
<p><b>ADDITIONAL DRIVERS</b></p>			
<p><b>ADDITIONAL DRIVERS</b></p>			

# Using the Inventory

**By Terry Greenberg**

*Managing Editor, The Elkhart Truth\**

The Editorial Excellence Inventory is a great tool to measure where you are and where you want to be. But I found an additional benefit and hope to expand on this in the future.

When I came to Elkhart in 1996, I inherited a newsroom that was ready to change. Many of them had felt stifled. We changed the sections, anchored pages, redesigned, went to mornings seven days a week — and those were just the major changes.

About the time our pace slowed following all that, I was itching to tackle some new issues. The paper was better, but still had a long way to go.

But I got a sense many people in the newsroom were concerned about doing another round of changes. We took a little survey and found people felt we'd done enough — they needed a break. They were not against the ideas as much as the number of them. We had made more changes in a little more than a year than they had made in a decade — maybe even longer.

So I backed off for a few months.

During that time, though, it became obvious the problem was deeper. One of our editors came to see me and asked, "Am I good enough to stay here?" I was surprised with the question, because she was a solid member of the newsroom. So I asked her why she asked that question. She said if we had to make so many changes, she was beginning to feel as if the paper was not as good as the staff had originally felt and, along with that, she was not good at her job. I asked her if others felt that way and she said, "yes."

*Using the inventory depersonalizes criticism. It's not threatening. It's a dispassionate, independent source telling the newsroom where it is and where it needs to go.*

So the more I pushed change, a message was going out to some people that I didn't think they were so hot. Who the hell is this guy to tell us all of this? Not my intention.

Yes, the paper did have a ways to go and a few people could do better — but most of the folks in our newsroom were good or very good at what they do.

Meanwhile, I still needed to move us forward.

It was around that time I saw the inventory. I filled it out and gave us mostly Cs and Bs. We'd see more Bs and As if we could push through more changes. So I gave it to a handful of key editors. Bingo. The lights went on. They were not threatened by the form. And now, here was a dispassionate, independent source telling them what I'd been telling them: We still have a ways to go.

But it was easier reading it on the inventory than hearing it from someone. It wasn't personal. No matter how nice I would phrase things, it was still coming from a person.

Most editors agreed we were Cs and Bs. It opened up our minds and we started to move forward again. We have since been caught up in strategic planning, but once we get that done, I want to use the inventory through most of the newsroom to help kick start our future efforts.

*\*Greenberg later became editor of The Pantagraph in Bloomington, Ill.*

# Keys to ‘A’-Level Training

**By Steven S. Duke**

*Media Management Center*

The descriptions of “A”-level performance on the Editorial Excellence Inventory are written in broad strokes, but what are the details? How do you actually build an “A”-level program? Let’s take one category — training — for a close look at how it might be done.

The inventory describes “A”-level training this way: Training budget is adequate; training is regarded as a performance-enhancing growth opportunity for all employees and is presented not only to improve current performance, but to prepare employees for future jobs or responsibilities; regular training is conducted on-site and augmented by off-site opportunities; training needs are continually reassessed and programs, content and methods are adapted accordingly; job swaps and reassignments are routine as skill-building opportunities.

To design a program, the first question has to be: What skills are you going to teach? Research and experience has led the Media Management Center to believe there are four areas in which newspapers can train; for all the others, you have to hire. You can teach:

- Technical skills,
- Basic management skills,
- Product knowledge, and
- Market knowledge.

You have to hire for creativity, flexibility, analytical ability, motivation, ambition and other attributes. Focus on what’s teachable and the rewards will be higher.

Don’t let that opening clause from the inventory

*Training doesn’t  
have to be  
expensive to be  
effective. But it  
must be part of the  
newsroom culture.*

description put you off. “A”-level training does not have to be expensive, nor is it something to which only big papers can aspire. The Center has looked at training in newsrooms large and small, and found that small papers sometimes do a better job than big ones, and they do it on a budget. To succeed, training has to be consistent, supported by top management, a fixed part of the budget (not an option that gets trimmed in tight times). In short, it has to be a part of the newspaper’s culture.

“A”-level programs emphasize “*regular training conducted on-site.*” This is not about spending lots of tuition and travel dollars to send a select handful to off-site training. The best newsroom training programs are heavily weighted toward regularly scheduled in-house classes that are selectively *augmented by off-site opportunities.* They are also available to everyone, not just a few stars or high-potential individuals.

Here’s a look at training programs at two newspapers, a medium-size one and a large one, to see how their programs match with the inventory’s description of “A”-level performance.

### COLUMBUS LEDGER-ENQUIRER

The *Columbus Ledger-Enquirer*, is a 48,000 (65,000 Sunday) circulation paper in west-central Georgia. It gains some benefits from being part of the Knight Ridder chain, but much of the paper’s training program could be adopted by non-chain papers of similar size.

At the *Ledger-Enquirer* “training is a way of life,” said Managing Editor Susan Catron, and goes beyond the newsroom. There is a paper-wide commitment that *every employee will get 40 hours of training each year.* The paper exceeded the 40-hour commitment in 1998 and was on track to exceed 40 hours again as 1999 wound down, Catron said. And the commitment is

## **FOUR REQUIREMENTS OF SUCCESSFUL PROGRAMS**

Successful programs have four basic requirements, according to the Newspaper Training Editors Guide, published by The Freedom Forum Pacific Coast Center:

- **Target:** They advance the goals and mission of the newspaper.
- **Support:** They have the support of the top editors and they have budgets. They are built into the structure and culture of the newsroom.
- **Transactions:** They focus on creating new training transactions (such as one-on-one; coaching; workshops; newsletters; etc.)
- **Success:** They improve the people, the process and the product. A good program, like a good journalist, constantly grows and learns.

deep. “When budgets have to be cut, training is the last item to face trims,” Catron said. *Ledger-Enquirer* training takes several forms; collectively they cover the four areas that the Media Management Center believes are trainable: technical skills, basic management skills, product knowledge and market knowledge. The program includes:

- *Ledger-Enquirer* Learning Academy; publisher’s Strategy Updates;
- in-house trainers and critiques; cross-training in-house and at other papers; Knight-Ridder Talent Bank;
- outside trainers;
- Georgia Press Association workshops;
- occasional use of Poynter and API classes.

### **Basic management training**

The *Ledger-Enquirer* Learning Academy is run by the paper’s Human Resources department and focuses on basic management training using the Zenger-Miller “Frontline Leadership” program. The department distributes a quarterly syllabus of classes on subjects such as managing, leadership, team roles and responsibilities, giving critiques, and recognizing positive results.

### **Product and market knowledge**

Once or twice a year, Publisher John Greenman gives his “Strategy Update.” It’s a 90-minute status report on where the paper stands, where it’s going and what the plans are for the next year. Everyone in the building attends, from the mailroom on up. After the update, Greenman breaks up the session into small cross-functional groups and gives each group a business project to brainstorm.

“Good ideas come out of these and we see the results during the next year,” says Catron. “One recent idea, for example: We were asked

### **FINDING TRAINERS ON A BUDGET**

Here’s a pecking order for finding trainers that works for newspapers with tight budgets from The Newspaper Training Editors Guide, published by The Freedom Forum Pacific Coast Center:

- national figures who happen to be in town;
- regional experts from outside the paper;
- retired former greats;
- professors who recently have worked in newsrooms; and
- in-house experts.

Don’t discount that last one. There is a lot of collected wisdom in even the smallest newsroom. Don’t be shy about having your own experts take on a formal training role.

to re-examine our zoned editions to see if they are effective. We wound up killing all but one,” Catron said.

These strategy updates, combined with the group work on the business projects, teach employees both knowledge about the *Ledger-Enquirer's* market and the paper as a product in that market.

The newsroom gains valuable market knowledge and connects with the community in an innovative program devised by Executive Editor Mike Burbach. Burbach periodically rents a van and takes newsroom staff for an afternoon visit to a part of the community to learn about it.

For one visit, Burbach skipped the van and led a walking tour from the *Ledger-Enquirer's* office. Columbus was designed with its churches in a central area, Catron said. “So we walked from our office to the churches and took the pastors from each church with us. It’s a great way to learn about the history and culture of the community. It helps keep and build institutional knowledge about the community,” particularly important at a smaller paper where staff is young and turnover is the norm.

### **Technical skills**

The *Ledger-Enquirer* teaches technical skills through several programs, some of them quite simple and inexpensive.

Catron says the news desk manager frequently sends the entire staff an e-mail critique of a week’s worth of papers. She also requires copy editors to critique both the *Ledger-Enquirer* and other papers as part of their annual performance evaluation. “I want them looking for cool ideas, I want them looking at other papers. After this trial with the copy desk, I’ll expand it to others later.”

“We do as much in-house as we can,” Catron says. “For example, we’ve got a copy editor who is only about a year and a half out of college. She doesn’t have a lot of design training, so we set her up with our artist for formal training times.”

Catron also looks for opportunities to cross-train in the newsroom. “We’ve got one of our copy editors cross-training on the city desk right now for a few weeks.” She takes advantage of the paper’s membership in the Knight Ridder chain to exchange staffers with other papers to deepen their skills. “For example, Bradenton needed help on their city desk, so we sent one of our assistant city editors to Bradenton for a few weeks. It helps Bradenton, it will help [the assistant city editor] and it will help us.”

### **K-R Talent Bank**

There is one training program available to the *Ledger-Enquirer* as a result of its ownership: the Knight Ridder Talent Bank. This program puts the expertise of the entire chain at the disposal of each paper in the chain, and provides budget dollars to help make it work.

Here’s how the program works, according to Marty Claus, Knight Ridder vice

president for news.

The director of the program surveys every editor, asking what their top training needs are, then asks every editor which of their employees could teach those skills. Priorities are set and a list of teachers is compiled and posted on the chain's intranet. These experts are available to travel to any Knight Ridder paper that wants them to teach.

The paper inviting a trainer pays his or her travel expenses, but Knight Ridder gives each paper \$2,000 annually to spend toward this, Claus says. "If you need to bring one person from across the country, so be it," Claus said. "But most are smart about getting the most out of their money. For example, Columbus and Macon may share the cost of bringing someone in from Detroit to work with both their newsrooms.

"The idea is to expose the whole staff to the training, not send one person off to be trained who then comes back and speaks a language the rest don't understand," Claus said.

"We've brought in designers, photo editors, others," Catron said.

The *Ledger-Enquirer* also brings in non-Knight Ridder trainers from outside, usually when they are in town for some other reason, Catron said.

The paper turns to off-site training when the value is high. "The Georgia Press Association has good classes and they are cheap. Atlanta is only 90 miles away, so it doesn't involve an overnight stay, and the classes cost only \$35," Catron said.

The entire copy desk signed up for API's online copy editing course, serving as guinea pigs for Knight Ridder's use of API online training.

## THE ATLANTA JOURNAL-CONSTITUTION

The main difference between bigger and smaller papers that have "A"-level training is that large papers often can afford a full-time training editor to coordinate programs. Mike Schwartz has that role at *The Atlanta Journal-Constitution* (409,000 daily, 669,000 Sunday).

Schwartz is responsible for all newsroom training, including developing two semesters of classes each year, arranging for teachers from inside and outside the paper, producing a clever and attractive syllabus each semester and publishing an in-house newsletter. He also takes the program on the road to the Washington bureau, suburban bureaus and other Cox papers.

### **Basic management skills**

Like the *Ledger-Enquirer*, *The Atlanta Journal-Constitution* has a program of basic management training, called Navigator, aimed at new managers. The goal is to get employees into the training program within six months of being named a manager, Schwartz said.

In seven one-week units it covers basic management skills, such as performance management, how to motivate, conducting job interviews, and human resources and labor law issues, Schwartz said. The training is designed specifically for newspaper managers, and the key component of each unit is a case study set in a newspaper department.

*The Journal-Constitution* also conducts a three-day session on managing diversity. A broad-based class, it goes beyond the benefits of diversity to cover discrimination law and workforce history, the effects of stereotyping, handling intercultural conflict, and challenges facing managers.

In the newsroom, Editor Ron Martin created the AJC Newsroom Leaders program to identify, develop and track high-potential staff members. "As we train and develop them, they become better contributors when we need them," Schwartz said.

This new program is project-based. In addition to specific training on management issues, reading material and one-on-one mentoring, the group is asked to study a business issue and develop recommendations on it. The latter helps develop product and market knowledge.

### **Technical skills, market knowledge, product knowledge**

*The Journal-Constitution* provides training in the other three areas through an in-house operation called Cox Academy. The academy offers two semesters of classes each year. A typical syllabus offers 16 classes, including technical skills, such as writing, editing, and Internet research techniques, and market and product training. In spring 2000 *The Journal-Constitution* plans to launch department-focused training. The trial will be in the business department, where the entire staff will be trained together in a program tailored to its needs.

Classes are taught both by in-house experts and outside lecturers from Cox, non-Cox newspapers, and Poynter, among other places. The AJC marketing department has taught workshops on "who are your readers" and the AJC ad department has taught "Advertising 101" to non-advertising staff.

A member of the Georgia Bureau of Investigation conducted a seminar on firearms to familiarize reporters, editors, photographers and graphic artists with guns and firearms terminology. (Other newspapers have brought in officers from the Bureau of Alcohol, Tobacco and Firearms for similar presentations.)

"Many of our own staff have turned into popular and successful presenters," Schwartz said. Staff members have given workshops on organizing stories, the craft of writing, leads, how to rid a story of journalese, and eliminating unnecessary adjectives and adverbs.

Staff from the copy desk have given seminars on copy editing for reporters and editors. A respected senior copy editor does a session on accuracy and fairness.

*The Journal-Constitution* publishes an in-house newsletter, *Inside Scoop*, which it

uses “to extend the life and reach of the Cox Academy training sessions by having staffers write about the classes,” Schwartz said.

Like many big papers, *The Journal-Constitution* has an ample budget to send staffers to off-site training, but the core of the training program is in-house.

### **Measuring success**

The first question many editors and publishers ask is: How do we measure the success of training efforts? Even the most frugal programs involve cost in both money and time.

Some measures are basic. Each year ask people how they have used the information from last year’s seminars. Be aware of subtle changes in quality, morale, leadership and self-confidence. Take an active approach: let the staff know how the seminars helped them succeed. Look at the paper: Are the results of training showing up in the paper?

*The Journal-Constitution* uses some of these techniques. Every class participant completes a feedback form that includes one litmus test question: What did you learn that you will apply on the job? Managers also monitor for improved performance. “For example, the focus of the writing class is to write with clarity, use shorter leads, and clearer, shorter sentences,” Schwartz says. “We can see a transformation in the way people write.”

The paper also sees the effects of its program in retention. It’s harder for bigger papers to lure away top talent because the continuing training is a draw, Schwartz said. Susan Catron, managing editor at the *Ledger-Enquirer* sees success in her ability to recruit. “We know it’s hard to attract good people,” Catron says. “We can’t pay as much as bigger papers, and I know not everyone wants to live in west-central Georgia. So I’m happy when I can say ‘if you come with us, you’ll get training’ and I can prove it. It’s a great recruiting tool.”

If you want harder evidence of value for the dollars and time spent on training, Knight Ridder’s Marty Claus has it. Knight Ridder hires an outside research firm to conduct biennial surveys of each of its papers. When the last one was done, “Columbus shot up across the board, not just in reader satisfaction but the half-dozen or so other measures we look at,” she said. “There were two years between customer surveys ... one in 1996, then one in 1998. There was jaw-dropping improvement between the two.”

The change at the paper in that time? In 1996 Greenman joined as publisher and Burbach as executive editor and together they made the commitment to training as a way of life at the paper. Claus points out that it wasn’t just newsroom training, but a companywide commitment to training and teamwork that contributed to this turnaround, but she still emphasizes the importance of training. “Everyone got excellent training. All divisions are knowledgeable about the right things. They

were recruited to work as a team and trained on market, share of field, share of mind, those kinds of things,” she said.

### **Getting started**

If you want to improve training at your newspaper, the best way is to steal ideas, like those cited here. The *Newspaper Training Editors Guide* published by The Freedom Forum Pacific Coast Center is packed with ideas from successful training programs around the country. Beverly Kees, program director at the Pacific Coast Center convenes an annual meeting at which training editors swap their best ideas.

Above all, survey your staff to find out what their training interests are. You’ll get more commitment when employees are learning what they perceive to be important.

### **TRAINING INFORMATION ON THE WEB**

The Web offers a number of sites with training information. Here are a select few; more are listed in the Newspaper Training Editors Guide:

- [www.freep.com/jobspage/academy/hart.htm](http://www.freep.com/jobspage/academy/hart.htm)
- [www.copydesk.org](http://www.copydesk.org)
- <http://owl.english.purdue.edu/lab/services.html>



The Training Editors Guide from the Freedom Forum is full of ideas.

# Using Information for Decisions

**By Michael P. Smith**

*Managing Director, Media Management Center*

Every journalist is eager to find out the readers' reaction to what he writes: Was it any good? Did it hit the mark? Was the reader pleased? Deprived of precise measuring instruments, however, the journalist has few means of finding out how the story was appraised. He perceives the reaction of his peers: editors and reporters, both colleagues and rivals. He can also measure the repercussions of his work by the impression it caused on the media: If other newspapers and radio and TV news programs do follow-ups and commentary, this is a sure sign that his story was read and found relevant. But what did the end user of the information, the newspaper reader, think of it? Did he like it or not? Without proper measuring instruments, the question can never be answered."

With that background, Managing Editor Merval Pereira explained to a group of American editors how his newspaper, *O Globo*, set about using research methods to improve the content of the newspaper.

The results are impressive. When Pereira spoke to the editors in 1996, *O Globo* was the No. 2 circulation daily in Rio de Janeiro, Brazil. Then its circulation was 287,000 weekdays and 575,000 weekends. In 1999, *O Globo* had grown to 325,000 weekdays and 615,000 weekends — this in a market of 17 competing daily newspapers. More impressive was *O Globo's* 1999 launch of a new tabloid called Extra. Originally



## **ABOUT O GLOBO**

One of the pioneer newspapers in Rio de Janeiro, founded in 1825, *O Globo* is the most influential, largest circulation, print media in the region.

With an average circulation of 315,000 from Monday to Friday, *O Globo* is one of the major publications of the Globo group in Brazil, a multimedia empire with business interests in television, radio, printing operations and the Internet.

— LexisNexis

conceived as a 60,000-circulation weekday newspaper, six months after its launch it had grown to 200,000 daily — with no erosion to its core product, *O Globo*.

It's not the success as much as the process employed by *O Globo* that makes it an A-level performer in the areas of reader awareness and integration of information. Most newspapers are information black holes. There are constant inflows of data, but it doesn't always get into the right hands; or it is not always useful to the decision-makers.

The A-level description of reader awareness is: *"Knowledge of readers is frequently updated with the newspaper's and others' research and projections to keep up with shifts in the local population, readership and national mood; stories are written to meet what is known to be the education level of readers; newsroom has periodic formal meetings and focus groups to ask readers about themselves, the coverage and their desire for coverage."*

The A-level description of integrating information is: *"All departments are committed to gathering input from other departments before making final decisions and informing the entire organization once all decisions are made; a formal network of transporting information has resulted in all levels of the organization being knowledgeable about company issues, initiatives and decisions; all employees are committed to receiving and passing along information from readers and customers, and formal lines exist for doing so."*

The process that led *O Globo* to A-level reader awareness was originally rejected as too costly, but because the newspaper used a cross-functional team, members of the team began to refine the idea and develop it so that it was not only cost-effective but also profitable.

*O Globo* decided that it wanted instant reactions



— scientifically measured — of each day's newspaper. Pereira said that the newspaper wanted an instrument that "would inform editors, as accurately as possible, of the daily reaction of the readers, and whether they liked that day's newspaper." They sought information that would act as a compass rather than a roadmap — they wanted to know directions but the editors would choose the route.

The multi-departmental group included representatives from editorial, marketing, advertising, circulation, human resources and finance. Pereira believes that the successes of the efforts are imbedded in the fact that each represented department saw personal benefit in surveying readers each day. When the idea of daily polling was rejected as too costly, the circulation representative suggested that they do the poll in-house by training customer service representatives to use unoccupied telemarketing lines in the morning hours. Others suggested an integrated computer system that would allow computer users in one department to talk with users in another. The marketing department suggested that questions about ads, ad placement and consumer habits would benefit advertisers who would be willing to pay extra for proprietary information. Soon the cross-functional group had conceived of a new business, which would come to be called InfoGlobo. All departments make use of InfoGlobo.

The first step for InfoGlobo was to classify existing readers by demographics, socio-economic status, education levels and geography. Based on those criteria, *O Globo* registered readers who were invited to participate in the daily poll, offering their suggestions (free of charge).

The research method chosen is called panel research. This method is gaining wider acceptance among consumer product and lifestyle

## **O GLOBO'S TOP EIGHT QUESTIONS**

Eight questions asked of every reader panelist (translated to English):

- 1.** Taking into consideration the subject's relative importance, how would you grade (from 1 to 5) the front page (lead) headline?
- 2.** Did the front page teaser induce you to read further on the subject, looking for the indicated page?
- 3.** Did the front page news exaggerate the detailed news presented on other pages? How?
- 4.** Do you think that a certain subject deserved a front page teaser and did not get it? Which subject?
- 5.** Please grade (from 1 to 5) the front page cartoon.
- 6.** Did you consider any story, photo or cartoon to be improper, according to your principles, or distasteful? Which ones?
- 7.** Which photo pleased you the most of all those contained in the newspaper?
- 8.** Considering the whole newspaper, which story or subject really called your attention?

researchers in the United States. The panel method uses a statistically valid fixed group of people who are surveyed about a set of variables over time. In *O Globo's* case, 5,000 readers were registered for the panel. The 5,000 readers were divided into groups of 1,000 for each weekday. From the day's 1,000 readers a sample of 200 is called each day. "Thus," says Pereira, "each 200-reader panel statistically represents the universe of our newspaper readers. ... It is statistically improbable that the same group of 200 readers will ever be repeated." A new panel is assembled every six months.

The surveyed readers are asked 18 questions about each day's newspaper — eight of the questions are general in nature (see sidebar), while 10 probe for specific questions about sections or supplements. The 10 special questions are proposed each month by a variety of departments. Advertising may want to know, for example, what the readers think about the spacing and distribution of ads, or if a specific ad drew the most attention and why, or if the reader used the newspaper to make a purchase decision. Marketing may wish to know the effectiveness of a promotion.

Each day the information is input into the computer so that when editors begin to make content decisions about the next day's paper, they have their readers' evaluation before them. Says Pereira: "They are computed and put at the disposal of the editors before 1 p.m., with ample time to exert a strong influence on the layout and its contents." The daily results are sent to all reporters and editors by e-mail. In addition, they get a monthly analysis of the data in print.

The results have been impressive — continuous growth in circulation. The introduction of reader panels had other positive effects:

- Readers were honored and pleased to be

## THE QUESTION AMERICAN EDITORS ASK FIRST

*(From an e-mail interview  
with Merval Pereira.)*

**Q.** Do you mean that you let readers tell you what to put into your newspaper?

**A.** The readers' panel never changes our editorial line. We are a newspaper with serious obligations to our country's interests. We will not please our readers at just any cost. I repeat, we will never headline the marital troubles of two actors.

On the other hand, the panel tells us that stories related to politics and economics are not well accepted by our readers. ... That does not preclude us from giving maximum exposure, including headlines, to subjects that are of importance to our country.

The panel itself supports this idea if we cross-reference two of the daily questions: a) Taking into consideration the subject's relative importance, how would you grade (from 1 to 5) the front page (lead) headline? And b) Considering the whole newspaper, which story or subject really called your attention?

When politics or economics are headlined, they are graded at four or better, although they are not chosen as the most interesting subject. It is like the reader is saying: "I know that the headline subject is important, but I prefer such and such subjects."

That is exactly what the panel allows us to do: Maintain our editorial line while offering a larger mix of front page subjects, making for more interesting reading.

chosen — they had a voice in shaping their newspaper. Loyalty to the newspaper skyrocketed.

■ *O Globo* tried to conceive of other ways that readers could be involved in shaping the newspaper. A vox populi instant poll was added to the *O Globo* Web site <http://oglobo.globo.com>.

■ Many newspapers have copied and, some say, perfected InfoGlobo, although none in the United States has attempted a daily survey. Those that are doing it include *O Globo*'s competitors in Brazil and newspapers from Spain and Africa.

What about the readers who aren't asked? *O Globo* recognized that there were many calls into the newsroom that indicated interest and habits — or opinions — about stories. In 1998, *O Globo* launched a call center called Reader Answering System (abbreviated SAL in Portuguese). Any call to the newsroom is recorded. Data is tracked and when trends or problems are indicated, the newsroom can react.

The editors use information to help guide decisions — not make the decisions. So there were some things that readers seemed interested in that would never be covered extensively by *O Globo*, described by Pereira as “*The New York Times* of Brazil.” That, combined with research from InfoGlobo showing an emerging middle class, caused *O Globo* to launch *Extra*. *Extra* was born as a downmarket tabloid with heavy focus on entertainment, popular culture and sports. The original business plan called for a 60,000-circulation newspaper. By the end of the summer, it was selling more than 200,000 on weekdays and 300,000 Sundays.

Said Pereira: “The information that our readers had given us said that the time is right to start a new newspaper. We did it with existing staff. And it hasn't hurt the circulation of our core product.” He added that the success of InfoGlobo eliminated a lot of doubters. *Extra* is promoted with flashy, colorful television commercials. Pereira believes that the promotion campaign for *Extra* was an essential part of the cross-functional relationships and successes from the startup of InfoGlobo.

# Examining our Credibility

*A preliminary report for the  
American Society of Newspaper Editors*

## **Executive Summary**

A central component of the three-year-long Journalism Credibility Project of the American Society of Newspaper Editors was a comprehensive study of public attitudes about media credibility. The research was specifically designed not to replicate the numerous surveys that have measured the extent of declines in public confidence in the media over the past 10 years, but to probe more deeply into the *underlying causes* of the “disconnect” between journalists and their audiences.

With special attention given to newspapers, this research identified six fundamental reasons why the public’s perceptions of media credibility are so low:

1. The public sees too many factual errors and spelling or grammar mistakes in newspapers.
2. The public perceives that newspapers don’t consistently demonstrate respect for, and knowledge of, their readers and their communities.
3. The public suspects that the points of view and biases of journalists influence what stories are covered and how they are covered.
4. The public believes that newspapers chase and over-cover sensational stories because they’re exciting and they sell papers. They don’t believe these stories deserve the attention and play they get.
5. The public feels that newsroom values and practices are sometimes in conflict with their own priorities for their newspapers.
6. Members of the public that have had actual experience with the news process are the most critical of media credibility.

*This research  
identified six  
fundamental reasons  
why the public’s  
perceptions of media  
credibility are so low.*

The research that supports these findings included three major components:

1. a national survey of 3,000 telephone interviews (23 minutes on average, and completed in April and May, 1998) stratified to provide a random, representative sample of not only the five major census regions of the U.S., but of the four county-size designations within each, with the complete database weighted against Census statistics to be projectable to 197,344,000 U.S. adults,
2. a series of 16 “validation” focus groups (completed in August, 1998) in which initial findings drawn from the quantitative survey were discussed and commented upon by groups of loyal, occasional and Sunday-only readers of newspapers, and
3. a self-administered 12-page questionnaire (completed in May and June, 1998) by a random, stratified sample of 1,714 journalists working at U.S. newspapers with daily circulation of 5,000 or more.

This report summarizes the major findings of the national data (qualitative and quantitative), with the results of the newsroom survey to be released in April 1999 at the ASNE’s national convention. The issues raised in this report will help editors review their practices and standards, and the data will provide a baseline against which the effectiveness of new approaches to build journalism credibility can be evaluated.

Currently, these data are being used to shape the work of eight “test-site” newspapers across the U.S., including *The Philadelphia Inquirer*, *The Oregonian*, Portland; *The Austin (Texas) American-Statesman*; *The San Jose (Calif.) Mercury News*; *The Sarasota (Fla.) Herald-Tribune*; *The Gazette*, Colorado Springs, Colo.; *Daily Press*, Newport News, Va.; and *Florida Today*, Melbourne. These newspapers will experiment with ways to correct credibility problems and build reader trust in four major areas: accuracy, eliminating sensationalism, reducing bias, and “connecting” with readers. Each test-site newspaper will develop concrete, actionable initiatives that can be applied in a wide variety of newspapers and markets.

The ASNE Journalism Credibility Project is funded by the Robert R. McCormick Tribune Foundation and the eight test-site newspapers.

*For more on ASNE’s credibility studies, see <http://asne.org/index.cfm?id=2477>.*

# Credibility Inventory

Ground-breaking research on the public's perception of the press reveals that readers believe newspapers don't consistently demonstrate respect for, and knowledge of, their communities.

In addition, readers suspect that the points of view and biases of journalists influence what stories are covered and how. The survey of more than 3,000 Americans released in December 1998 was sponsored by the American Society of News Editors.

Other key findings:

- Readers are critical of factual, grammatical and spelling errors, and believe errors undermine credibility. But they appreciate it when newspapers admit to errors and run corrections.

- More than one-quarter of people responding expressed concern about the credibility of news stories that use anonymous sources, and 45 percent said the story shouldn't run at all if no one will go on the record.

So how can your newspaper best identify the most sensitive credibility issues in your community?

Fill out the following self-assessment, and give it to at least five people in your own newsroom and five readers. It will be interesting to compare differences in responses. You also may consider discussing the questions with small focus groups of readers.

## **CREDIBILITY DRIVERS**

FACTUAL ACCURACY  
GRAMMAR AND SPELLING  
FAIRNESS/BALANCE  
TIMELINESS  
CORRECTIONS  
ACCURATE HEADLINES  
REPRESENTING THE  
WHOLENESS OF THE STORY  
DIVERSITY  
DEPTH AND SERIOUSNESS  
FAIR REPORTING PROCEDURES  
SENSITIVITY TO COMMUNITY

## CREDIBILITY SCORECARD

Rate performance on a scale of 1-10; 10 is excellent

CREDIBILITY DRIVER	RATING	
<b>FACTUAL ACCURACY</b> Gets the story right the first time with true and complete details.		
<b>GRAMMAR AND SPELLING</b> Text is free from grammatical errors and has all names spelled correctly.		
<b>FAIRNESS/BALANCE</b> Offers fair and complete stories that accurately depict multiple sides of an issue.		
<b>TIMELINESS</b> Gets the story first.		
<b>CORRECTIONS</b> Acknowledges mistakes in a timely manner and prints the correct information the next day.		
<b>ACCURATE HEADLINES</b> Headlines reflect the content of the story in tone and factual content.		
<b>REPRESENTS THE WHOLENESS OF THE STORY</b> Accurately reflects both the factual details and the larger context surrounding a story.		
<b>DIVERSITY</b> Reflects different perspectives within the community in story selection, sources used and story framing.		
<b>DEPTH AND SERIOUSNESS</b> Covers stories that matter to readers and helps them to understand the complexity of the issue and how it affects their lives.		
<b>FAIR REPORTING PROCEDURES</b> Does not use unnamed sources or engage in unethical or illegal information gathering practices.		

## CREDIBILITY PERFORMANCE WORKSHEET

	HOW WOULD YOU IMPROVE PERFORMANCE?	WHAT INDICATES THAT YOU'RE DOING A GOOD JOB?
<p><b>FACTUAL ACCURACY</b> Gets the story right the first time with true and complete details.</p>		
<p><b>GRAMMAR AND SPELLING</b> Text is free from grammatical errors and has all names spelled correctly.</p>		
<p><b>FAIRNESS/BALANCE</b> Offers fair and complete stories that accurately depict multiple sides of an issue.</p>		
<p><b>CORRECTIONS</b> Acknowledges mistakes in a timely manner and prints the correct information the next day.</p>		
<p><b>ACCURATE HEADLINES</b> Headlines reflect the content of the story in tone and factual content.</p>		
<p><b>DIVERSITY</b> Reflects different perspectives within the community in story selection, sources used and story framing.</p>		

## CREDIBILITY PERFORMANCE WORKSHEET

	HOW WOULD YOU IMPROVE PERFORMANCE?	WHAT INDICATES THAT YOU'RE DOING A GOOD JOB?
<p><b>REPRESENTS THE WHOLENESS OF THE STORY</b> Accurately reflects both the factual details and the larger context surrounding a story.</p>		
<p><b>DEPTH AND SERIOUSNESS</b> Cover stories that matter to readers and help them to understand the complexity of the issue and how it affects their lives.</p>		
<p><b>FAIR REPORTING PROCEDURES</b> Does not use unnamed sources or engage in unethical or illegal information gathering practices.</p>		
<p><b>SENSITIVITY TO COMMUNITY</b> Recognizes the impact of stories on the community and demonstrates compassion for story subjects and sensitivity to community standards.</p>		

**In your opinion, what are the chief credibility issues affecting your newspaper? Do you believe the right steps are being taken to address them? What more should be done?**

## SECTION 3

# Measurement in Newsrooms

### Summary

The ability to learn and improve performance depends on having relevant and timely information and feedback. This report explores how newsrooms measure performance in order to assess progress and to improve performance.

Interviews with editors from several newspapers across the United States reveal that a variety of measurement tools are being used in newsrooms, but that substantial opportunities exist for managerial training and education in how to develop and implement measurement systems in the newsroom.

Measurement systems play an important role in helping organizations improve their performance. First, they help managers track progress toward stated strategic objectives. Second, and perhaps more importantly, they help managers identify, diagnose and solve problems.

Measurement systems provide actionable feedback and information that are critical to the learning process.

Effective management practice dictates that a newsroom should have a clear vision or mission, strategy and set of guiding objectives that fit within the larger organization's mission, strategy and objectives. In addition, effective management practice suggests that a newsroom should have a performance measurement system that tracks progress in achieving those objectives and generates information useful for learning and improving performance.

Can relatively simple, cost-effective measures that accurately and reliably tap into a newsroom's

### By Tracy A. Thompson

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This chapter is excerpted from a research report by Tracy A. Thompson. The entire report can be obtained by writing:

#### Media Management Center

1845 Sheridan Road

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Evanston, IL 60208

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E-mail: [mediamanagementcenter.org](mailto:mediamanagementcenter.org)

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product-market strategy be developed? Can the work processes of journalists and other newsroom personnel be articulated and tracked in order to learn how they can be improved? How can newsrooms tap people's creative potential and energy to develop a learning culture, one that actively seeks feedback on performance in order to improve it?

In an effort to provide preliminary insight on these issues, this study investigates the use of measurement in newsrooms by interviewing 16 senior newsroom managers in 14 newspapers across the country. (See Appendix I for a description of the research methods.) Using data from these interviews along with management literature on measurement, this paper:

- Briefly describes the characteristics of an effective measurement and feedback system,
- Assesses the measures commonly used in newsrooms and describes some of the processes managers have used to develop those measures, and
- Develops conclusions and suggestions for how measurement and feedback systems might be employed more effectively in the newspaper industry.

### **Effective measurement and feedback systems**

A measurement system consists of a set of carefully chosen measures and a clear method for tracking and communicating them to a wide range of people. To facilitate communication, the total number of measures should be limited in order to avoid overwhelming people with too much information. However, the desire for simplicity is obviously counterbalanced by the challenges associated with capturing complex and intangible concepts or ideas. In some cases, using a family of imperfect measures is better than spending excessive time and energy developing the one perfect indicator. In addition, because much organizational work lies in processes residing beyond any one individual's control, a measurement system should include group or team-oriented measures, not just measures of individual employee performance.

Once the measurement system is implemented, it will need to be adjusted over time. As performance improves, the standards should be raised. Eventually, some measures may no longer be useful, for example, when problems get solved or objectives are reached. As the strategic objectives and goals change, so should the measurement system.

Recall that the main purpose of a measurement system is to generate the feedback that is critical to the learning process. Only with such feedback can operations be improved. Therefore measures need to be tracked systematically, made frequently and shared widely. If no one has access to the information generated by the measures, then no one will act upon it to improve the processes and activities that improve performance.

### **Assessment of the measures used in newsrooms**

This project identifies and describes the typical measures seen in the newsroom and explores how they are used. The research findings reveal that the use of systematic measurement systems in newsrooms is in its infancy.

Virtually no newsrooms had a systematic and comprehensive measurement system that was clearly tied to departmental strategic goals.

Newsroom managers reported using a wide variety of measures in their day-to-day activities.

The interview data reveal substantial cultural resistance against the idea of measurement in many newsrooms. A few editors shared the processes they used to implement some notable measurement tools.

### **Strategic goals, measurement systems and communication**

First, the research revealed very few examples of measurement systems that comprehensively assessed the strategic performance of the newsroom.

When asked about the newsroom's strategic goals, many editors referred to the newsroom's mission statement. Others referred to how the strategic plan had been translated into their own personal objectives in terms of activities they planned to accomplish for the year (e.g., launch a new edition or redesign the newspaper). Very few editors described a systematic strategic framework that was documented on paper, shared and publicized across the newsroom, other than the overall newsroom mission statement.

Several stated that knowledge about the mission and strategy was shared and agreed upon through a more informal dialogue throughout the newsroom. Although several acknowledged that not everyone might agree or buy into the strategic plan, most believed the newsroom at least knew the strategy. None were willing to provide documentation of their newsroom's strategic goals other than to articulate the general mission statement.

When asked about the links between measures and specific strategic objectives, many editors were able to articulate such connections. Some were able to articulate general business models that made connections between variables such as editorial quality or credibility or response to readers' needs and effects on circulation. These models reflected an intuitive understanding of the newsroom's operation, rather than an explicit model that was documented, discussed and/or shared widely.

To the extent that an editor relied on certain types of measures, for example, customer survey data in response to a new edition or section, such measures were typically not tracked systematically over time. Most editors described one-time, short-term or episodic measures as opposed to long-term, systematic, continuous measures that tracked strategic performance over time.

Some of these findings may have stemmed from concerns about sharing information

that was deemed to be competitively sensitive. At least one newspaper editor had a very comprehensive organizational strategic plan along with a set of objectives that represented what that editor planned to do in the coming year. Others mentioned performance objectives. However none were willing to share these sensitive documents. Despite these issues regarding the existence of a clearly articulated set of objectives, the main conclusion is that very few, if any, newsrooms had a measurement feedback system that was widely shared, understood and used at all levels of the newsroom.

### **Types of measures**

Rather than using an existing framework for categorizing measures at the corporate level, this study developed its own categorization scheme that fit the newsroom. Measures described in the study clustered around three main categories:

- Measures that tap into ultimate outcomes, such as customer satisfaction, circulation, financial measures such as profitability, and rewards from peers in the industry.
- Measures that assess output of the newsroom. Examples include productivity, coverage, accuracy, quality (as assessed internally), photo counts, diversity in terms of inputs (staff) as well as the editorial product, and internal peer rewards.
- Measures that pertain to activities that create value. These are workplace practices that serve to enhance the newsroom's capacity for future performance. Examples include training, encouraging reporters to be active in the community, running seminars, brown bags and informal workshops, and tracking employee satisfaction.

*(A complete description of the specific measures within each of these three categories is presented in Appendix II.)*

### **Going beyond the individual**

Very few newspapers had measures at the group or team level. Instead, the majority of measures resided at the newspaper level (e.g., readership studies) or at the individual level (e.g., productivity). One notable newspaper did track measures at the team level. The editor interviewed claimed that each team assesses three things:

- Its own accuracy, as measured by published corrections,
- Reader satisfaction,
- Quality.

### **Measures used to learn and improve**

Overall, the editors reported a great deal of activity related to using measures (readership data) as a way to design or improve the editorial product. However, relatively few editors reported using measures as a way of improving newsroom processes and performance. Two notable cases involved electronic databases that had been developed in the newsroom. One was used to track coverage, and the other was used to track accuracy.

It is important to note that in both cases the work did not stop once the data

reports were compiled. In both cases, the editors explained that the real value of these measurement systems lay in their ability to identify problems (vs. just track performance). These systems help identify trends and deviations from the key performance objectives. The data identify a potential problem, for example, a high number of inaccurate phone numbers being reported in the newspaper.

Additional research is conducted to diagnose why the problem occurred. In the example above, additional diagnosis revealed the errors were made primarily by freelance journalists who were not tightly tied into the newsroom. In the process of diagnosis, solutions are then developed and implemented, for example additional guidelines on accuracy were developed for the freelance reporters. And over time, the original indicator is examined to see if the solution worked.

These editors provided examples of measurement tools that yielded useful feedback. The measurement system not only flagged a problem, it stimulated additional diagnosis, supported the identification of a solution, and enabled a final check on whether the fix actually worked. These examples embodied the principles behind measurement tools — that they can stimulate improvement and learning.

Many newspapers were actively engaged in staff training and development. A significant portion of that training was to improve the basic skill level of individual employees, however there were some examples of newsrooms attempting to leverage human intellect in the newsroom. Questions about how they might be measuring and encouraging innovation didn't yield any explicit measures.

### **Cultural resistance to measurement**

Many managers interviewed expressed the desire to be able to develop more useful measures. However, some mentioned that their newsroom was simply not ready, due to the lack of managerial talent, the lack of time and resources, or the existence of an inhibiting culture in the newsroom. Size and the amount of resources available in the newsroom appeared to make a difference. For example, some larger papers were able to either allocate staff inside the newsroom to specific measurement projects and/or use an outside research department.

Cultural resistance to the idea of measurement came not only from below (i.e., journalists who resist) but also from the editors themselves.

Some editors stated their explicit desire to keep the newsroom free from being held accountable in the same way that other departments like marketing are. Others believed that the newsroom is already sufficiently critical of what it does.

### **Developing and implementing measurement systems**

Two managers described how they implemented a specific measurement system. The descriptions of the implementation process share several elements in common.

First, in both cases, top management either initiated or strongly supported the idea of the measurement tool from the very beginning. In one case, the impetus came

from the top editor, who indicated the project's importance by allocating an individual to lead the task. In the other example, a middle manager in the newsroom initiated the idea for a measurement system (it was part of a master's thesis project) and secured support from the top editor.

Second, in both cases, the purposes of the measurement tool were clear. One was to investigate accuracy and the other was to track coverage.

At this point, each of the measurement tool "champions" initiated discussions across the newsroom. The champion consulted everyone who might be involved to gather ideas and opinions. As they began to develop ideas for what to measure and how to track it, they continued to share the design of the system (both were electronic databases) and the process of how to track the data with as many people as possible. In one case, the final design of the system was introduced and substantially re-worked several times based on user feedback.

### **Challenges facing the newsroom**

This research suggests that although there are many fine examples of newsrooms effectively using measurement, there are also many challenges associated with introducing measurement systems and the notion of continuous improvement to the newsroom. Findings from this research point to three areas of readiness for managers interested in implementing measurement and feedback systems into their newsroom.

The first area to look at involves the concept of organizational readiness. Before a measurement system can be designed and implemented, the newsroom must have a clear vision, strategy and set of objectives. It also must be ready to identify the factors that lead to success. A second area to examine relates to cultural readiness. Substantial cultural resistance towards the logic of measurement can thwart the best of efforts.

The third necessary ingredient is leadership readiness. Newsrooms need to have talented managers and leaders who can effectively implement a measurement and feedback system.

### **Organizational readiness: Strategy, objectives and success indicators**

One important challenge for newsroom managers is the difficulty of identifying the newsroom's goals and identifying the intermediate indicators of success. First, before discussions about measurement can take place, the newsroom must know what the goals are. Strategic consensus exists when everyone understands and commits to the strategic objectives (Floyd & Wooldridge, 1992). Disagreement in the newsroom can stem from communication problems or from a fundamental difference in values and beliefs.

Strategic consensus may not exist because there is no clear statement of the product market strategy that is shared throughout the newsroom.

When asked to describe the strategy, several editors either referred to the mission

statement or described the newsroom's strategy as consisting of meeting the needs of the local reader. None referred to a document that all in the newsroom possessed. Some editors stated that they believed most of their newsroom staff knew and understood the strategic goals of the newsroom and that such knowledge was transmitted in an informal way. Although strategic goals can and should be communicated often and in multiple ways, including informal ones, it stands to reason that a clear document that communicates the strategic plan can increase the chance that strategic consensus will be achieved.

Another reason why strategic consensus might not exist stems from conflicting beliefs about the newsroom's vision (the ends) and the strategic objectives (the means). Some may believe that the ultimate goal of journalism is to produce social change whereas others might believe it is to produce a better product. Should the newspaper reach only certain readers, attract more loyal readers, or produce more informed readers? What are the core functions of the newsroom or key activities that lead to the chosen outcomes? What is the competitive advantage of the newsroom's product? Until these different conceptions and beliefs are explored and resolved, a newsroom will have a difficult time developing a clear conception of its product-market strategy, its strategic objectives and a measurement system that helps to track progress.

Interestingly, the language typically used to discuss newsrooms' visions and objectives are often conceptually unconnected to journalists' internal perceptions of the core function of journalism. Research shows that orientations towards the journalist's core functions fall along four clusters, interpretive/investigative, disseminator, adversarial and populist mobilizer, and that most journalists endorse two or more potentially conflicting beliefs simultaneously (Weaver & Wilhoit, 1996, p. 141). Discussions that focus on the areas of commonality between these journalistic goals and the newsroom's vision and strategy might lead to a greater understanding on all sides.

Having a clearly identified newsroom strategy is an organizational prerequisite for developing a measurement system. This is not an easy task, but without a clear set of strategic objectives, attempts to develop a measurement system will be useless, and even destructive.

A second aspect of organizational readiness is the ability to identify the key criteria that indicate success, the processes they involve, and the ways they can be measured systematically. What are the connections between newsroom processes and strategic goals and how can these processes be measured and assessed? For example, identifying what satisfies customers' needs (either latent or manifest) and how those are reflected in the news product might be of particular interest to newsrooms. The main objective is to develop key criteria that point to important internal processes that generate the desired outcomes. For example, analyses might determine that improving accuracy, diversity, depth of reporting or some other measure of product

quality, as determined by the strategic plan, are key objectives to pursue because they lead to competitive advantage. Once elements such as these are determined to be the key activities leading to customer satisfaction, then processes within the newsroom can be geared to improve the newsroom's performance in those areas.

### **Cultural readiness: Overcoming resistance**

Identifying the strategy, objectives and the causal connections between success indicators and objectives is not only an intellectual challenge, it is also a cultural challenge. Getting those in the newsroom to accept this highly linear, strategic thinking along with the logic of quantifying intangible activities and outcomes might involve substantial cultural change. Many editors acknowledged that they didn't even have buy-in to the current strategy much less to the idea that newsroom activities and outputs could be quantified in any meaningful and useful way. Others claimed that the output of a newsroom simply could not be measured or quantified due to its subjective nature. The effort to increase the performance of the newsroom is associated with a logic that threatens the craft of journalism, which some might argue is more of an art than a business. The more that tacit work can be made explicit, the less control individuals will have over their craft. And measurement is associated with making work explicit.

However, the case can be made that the point of measurement is not to more closely monitor and control individuals, rather it is to help them to refine their craft. Instituting measurement systems doesn't mean that judgment in news coverage and the writing become reduced to some marketing metric. Instead, what gets measured and managed depends on the strategic goals of the newsroom. If the strategic goals are meaningful in a journalistic sense, then the measures can only help.

Adopting good processes may help to overcome some of these cultural blockers. There is a clear need for managers to encourage reporters and others in the newsroom to put their collective brainpower to use. Placing responsibility among those affected will encourage them to develop creative and accurate ways of knowing, ways that can be captured and quantified. They may be reluctant to do so if they are not given resources and training, and in particular if they can't see the benefits. Whether rightly or wrongly, there may be a shared perception that the measures will be used against them, rather than as a means for stimulating thinking about how things can be better.

### **Leadership readiness: Technical knowledge and people skills**

In addition to organizational readiness in the form of a clear strategy and cultural readiness in the form of a newsroom that is ready to take on the task of measurement, this study suggests one final ingredient needed for implementing measurement systems. The ability of newsroom leadership is critical. None of the above activities can take place without a top management that has the knowledge and skills necessary

to help guide their newsrooms. In terms of knowledge, managers need to not only understand measurement and its goals but also have a clear sense of the strategy and how newsroom activities contribute to it. As leaders of cultural change, managers also need to have people skills. They will need to understand how to educate and influence other newsroom employees so that they too will understand the fundamentals of the newsroom's strategy and the value of tracking progress in order to learn and improve.

Implementing measurement and feedback systems involves overcoming a significant number of challenges inside the newsroom. But the benefits of such systems in terms of the learning and innovation that can be expected to result outweigh the costs. The increasing pressures for performance faced by the newspaper industry is similar to that of other industries, such as law, higher education and medicine. And like the employees housed in those organizations, journalists will continue to confront the inexorable invasion of the logic of accountability and all that comes with it.

Management practices, in this case measurement systems, are not inherently in conflict with the field of journalism. Rather by understanding them and using them, journalism can actually be strengthened and improved.

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## **ABOUT THE AUTHOR**

Tracy Thompson is an assistant professor in the Business Administration Program at the University of Washington, Tacoma. Her research focuses on strategic management, organization change and corporate governance. With support from the Media Management Center, Thompson's research has examined how newspaper companies have responded to economic and social changes over time, in part through altering the content and appearance of the newspaper product. She also has investigated the processes and outcomes of moving to a team-based production model in the newsroom, and she is currently assessing the use of strategic measurements in the newsroom.

Her research has appeared in journals such as *Administrative Science Quarterly* and *Corporate Governance*. She is an active member of the Business Policy and Strategy Division of the Academy of Management, and has presented her research on the newspaper industry at several national and international conferences. She received her Ph.D. in Organization Behavior from Northwestern University.

## APPENDIX I - STUDY METHODOLOGY

A snowball sampling technique was used to identify individuals in newspapers who would be able to discuss the use of measurement in the newsroom. A broad range of people was interviewed, including human resource professionals, executive editors, assistant executive editors, public editors, newsroom development personnel, individuals charged with creating and using measurement systems in newsrooms, and analysts from research departments outside the newsroom. A total of 27 individuals representing 22 organizations were contacted. Of those, 17 responded. Individuals were contacted by telephone to see if they would be willing to discuss measurement in their newsroom. Whenever possible, an e-mail message was sent to describe the project and the questions that would be asked. The text of the e-mail read in part as follows:

The general query I hope to talk to you about is: “How do you know your newsroom is doing a good job?” The more specific questions we can discuss include:

1. Does your newsroom use any types of measures to track performance? If so, what are they? These could be at the individual level — where measures might be tied to individual performance evaluations — or at a higher level (group/team/newsroom) to track broader performance.
2. What are the objectives or purposes of these measures? For example, are they tied to strategic objectives that might be seen in some sort of strategic plan?
3. What do you think the measures capture?
4. Do you know of any other newspapers that are doing anything especially noteworthy with respect to measurement (other than the *Virginian-Pilot* and the *Arizona Republic*)?

The telephone interviews followed the general question format above. The findings in this report represent a mixture of information gathered from the individuals interviewed, research on performance measurement, and observations and insights made by the researcher.

## APPENDIX II - TYPES OF MEASURES

### **OUTCOME-BASED MEASURES**

#### **Customer satisfaction**

This category was mentioned most often. Measures relating to reader satisfaction include reader reactions to the general newspaper content or to specific changes in content or design as well as reader outcomes, for example complaints to the newsroom or stops. Almost every editor interviewed mentioned one or more ways that they gather data from readers. The methods included focus groups, surveys, reader panels and more informal discussions with readers. Although some newspapers track

readership survey data over time (most newspapers did them every three years and a few did them quarterly), it was not clear if these measures were connected to overall strategic goals in any meaningful way.

Many newsrooms solicited reader feedback that fed forward into new products or redesigns and/or were used to adjust once something had been launched. However relatively few used a pre- and post-change design, which would yield information on whether the paper was better off overall resulting from the redesign.

A final type of reader satisfaction data mentioned by several editors related to customer complaints and stops. Some had mechanisms for responding to readers who had complained about content. One newspaper in particular had received complaints from minorities in the community that the coverage was biased. Upon hearing this, the editor created a measurement system that looked at the frequency and the nature of the coverage (e.g., having newsroom personnel evaluate the articles and rate whether they were positive or negative, track the type of minorities mentioned, etc.) After collecting such data, he was able to go back to those who had complained and show them that the newspaper's coverage was not biased. The measurement system was dropped after the editor satisfied himself that there wasn't a problem. Such a measurement system might plausibly be developed to assess diversity content. Many newsrooms also received information from circulation when a reader dropped the newspaper for an editorial reason.

None of the measures on complaints or stops were described as being related to overall newsroom strategic goals. This may be because the goals of a newsroom aren't necessarily to do things that always agree with readers. However, that assumption can be challenged. One editor gave an example of when his paper ran an enterprise piece on the military health care system. He feared that it might have offended their market, given its high military presence. However, he reported that readers really appreciated the story, and that the paper got many positive response calls from readers.

### **Circulation**

Some newsrooms mentioned an increase in circulation as a specific newsroom goal. One mentioned overall circulation increases and a few others mentioned circulation increases in a particular market segment (e.g., women or a new suburb). A couple of editors mentioned looking at weekly or monthly street sales.

One editor in particular noted the difficulty in measuring the effects of content changes on circulation. Many things other than content affect circulation (e.g., subscription price). Also, the expected time frame for when one would expect to see the effects on circulation is hard to determine. However, the same editor noted, a newspaper's content has to grow. Improvements in editorial content do not necessarily lead to a clear and immediate response; rather they contribute to the building of a

franchise, a brand identity. Over time, this affects circulation. Readership studies are an intermediate stage in her implicit model. One can get a response to how people react to changes in coverage, and over time, that will eventually strengthen the brand identity of the paper and help circulation.

### **Other financial measures**

Some managers tracked financial or budget-based measures related to the newsroom. Such measures include, but are not limited to, total revenue per labor hour, overtime, and advertising revenue associated with a new product.

### **Peer rewards**

One newsroom's strategy was to be the best regional newspaper, and its managing editor stated that one way they knew they were achieving that goal was by entering and winning regional awards. The assumption underlying this measure is that peers are an important stakeholder to this newspaper. It's not clear that peers evaluate newspapers on the same dimensions as customers.

## **OUTPUT-BASED MEASURES**

### **Productivity**

Most managers said they regularly tracked newshole, inches by section, bylines, where stories ran or other productivity measures. But most said that they didn't use these actively. They would only use such measures if they suspected a problem with someone in the newsroom. This is a classic set of measures that is fraught with controversy due to the quantity vs. quality debate it raises. It is not completely irrelevant; however these can't be the only measures used.

### **Accuracy/credibility**

Many editors interviewed said this was a critical thing to measure in newsrooms, but that it was also very difficult. A few of the editors contacted described ways they tried to actively measure accuracy and quality. Three methods were used.

Perhaps the most notable method used was to develop an internal database system that assessed the source and nature of errors. A quarterly report is distributed to editors. The process for developing this system took months, and it involved long hours of discussion in the trenches to sell people on the idea and to incorporate their input. The system relies on people inside the newsroom to report the error rather than using published correction data. Although the newsroom goal is to increase accuracy, the real benefits of this system lie in how it is used to identify and then fix root causes that lead to mistakes. For example, they discovered that many errors were due to freelancers reporting inaccurate phone numbers. So they developed guidelines on accuracy for the freelancers.

Other newspapers also counted corrections and tracked them over time. But they

tended to rely on a more passive method by using a count of published corrections. It is likely that the majority of these corrections came from sources outside of the newsroom. They didn't have the same sort of internal error-fixing culture built up that encouraged people to actively seek out the errors and figure out how to fix them.

A second method to look at accuracy involved the use of a consultant who prepared an "Error Survey" that tracked grammar and punctuation errors. The frequency of these reports and the extent to which this information was shared throughout the newsroom varied with the editor interviewed.

A third, less systematic method to assess accuracy and credibility was to distribute a questionnaire to article sources, asking them about the accuracy and fairness of the coverage. This typically wasn't tracked on an aggregate basis; rather if and when a problem emerged, the supervisor to the reporter in question was given the information.

### **Quality**

One newspaper editor stated that after re-vamping his newspaper's strategic objectives, he was going to have senior editors take one objective a month, measure it and present it to the other senior editors in their monthly meeting. He also mentioned that from time to time, he provides "measures" in his bi-weekly memos to staff. He emphasized the importance of constant communication about strategic objectives, and he stated that he preferred a more organic mode of managing. Thus he didn't necessarily want to develop more systematic measures.

### **Diversity hiring**

Many editors mentioned that they tracked the number of ethnic minorities in their newsroom, and that they had specific objectives related to diversity. Some suggested an implicit belief that increases in the diversity of the newsroom would naturally lead to diversity in the newspaper content. This assumption bears more scrutiny. Minorities in the newsroom are likely to be small in number and therefore it's not clear that they would be able to significantly affect content. In fact, they may be less likely to do so, preferring to accommodate or assimilate to the majority values and opinions.

In one notable case, the newsroom developed a community initiative to encourage minority high schoolers in the area to go to college and into journalism. The newspaper has developed a program to advise the teens and offers scholarships for college. Once they are in college, the newspaper hires them as summer interns. The newsroom has been able to hire 11 of the 22 students as interns for this summer.

### **Peer rewards**

A few newspapers mentioned having internal news-writing contests that were

judged by people internal to the newspaper. However, it was unclear that the evaluation criteria or the awards were related to strategic goals. One newspaper had customers as judges every other month and at the end of the year in addition to staff as judges. The editor at this newspaper said that there was considerable agreement between customers and staff. When outside customers are used as judges, this measure then becomes more of an outcome-based measure. The fact that customer judges agreed with newspaper employee judges suggests that they also might agree with awards granted by outside journalistic peers.

### **Photo audits**

Several editors mentioned that one area where it was easy to create measures was in the photo department. They mentioned photo audits being used for coverage and for diversity, and one stated that photo had developed an internal customer measure, tracking their own volume (requests.)

## **VALUE CREATORS**

### **Training/seminars/brown bags/continuing education**

Several editors described training programs or initiatives in place at their newspaper. In particular, editors at two newspapers emphasized the importance placed on training and development. One described several in-house development workshops including an eight-week program (one half-day per week) on leadership, a two-day session on diversity and a mentoring program where mentors help their charges work on job skills, time management and conflict management. Another editor described the extensive monetary commitment his publisher had made toward training and development in order to nurture learning and development company-wide. A writing workshop that was a grass-roots initiative spawned several additional ideas for development in his newsroom, including a monthly speaker series, a writing coach and a mentor program. Solicited feedback on some of these initiatives, for example the speaker series, indicates that employees have been able to translate those experiences into their everyday work.

### **Reporters' activities in the community**

One newspaper was on the verge of tracking reporters' activities in the community. The goal was to encourage reporters to learn more about their community and to be good citizens. How exactly this was measured was not discovered.

### **Employee satisfaction**

Although it would appear to be a basic measure to use for informational purposes, not all newspapers tracked employee satisfaction. One had included it explicitly in its strategic objectives.

# Examining An Error Policy

## Errors, past and present

At the *Chicago Tribune*, we monitor clarifications and errors. In 1991, the public editor's office began a system of analyzing clarifications. An error survey, done by a company called Professional Proofreading Services, was added in 1992. Each of these reviews is done quarterly.

Published errors lead to clarifications printed on Page 3. If we agree that there are levels of concern about errors/accuracy, these are more serious. Some are identified by readers or sources, some by staffers. An error form will help us focus on problem areas and trends that produce significant mistakes.

We use a spreadsheet software program to summarize where errors ran and what types of errors are involved. For example, we often have a high percentage, perhaps 40 to 45 percent, of fact errors. Another big category: errors that involve time, date, place or a phone number.

A companion study is the error survey. Professional Proofreading is a niche business started by Barbara Henry, former proofreader supervisor for the *Miami Herald*. Knight Ridder, with its emphasis on quality, asked her to develop a system for all its newspapers.

Newspapers send her papers from designated sample periods. She reads each and applies her formula, errors per page, as a standard. She does our paper, Fort Lauderdale, the *Wall Street Journal*, the *Baltimore Sun*. And, all the Knight Ridder papers.

Ms. Henry cannot give us exact data about other papers. She guesses, however, that the lowest rate she has seen is about 2.4 errors per



## THE CHICAGO TRIBUNE

The *Chicago Tribune* has been systematically analyzing its published clarifications since 1991 and employing a third party to monitor the paper for errors since 1992.

In 1996 the *Tribune* formalized its error tracking with an electronic Error Form that editors and staffers complete when an error has occurred.

What follows is the *Tribune's* explanation of its error policy, the Accuracy Guidelines it distributes to its staff, some graphic representations of *Tribune* error tracking, and a 1999 update on progress made.

We thank the *Tribune* for permission to share this information widely.

page. Further, we consistently show that half to two-thirds of our errors are preventable, involving misspellings and typos, extra or missing words, and extra or missing spaces.

*Chicago Tribune*  
March 1998

### **Error policy**

The *Chicago Tribune* adopted an error policy effective Feb. 19, 1996. Copies of the Error Form are in Z.NEW, LCHAT and numerous public queues assigned by department.

It is a formalized version of the method we have been using to track errors. This form will help us identify patterns of mistakes, which can be useful in a number of ways, from how we use our resources to how we do our jobs. These forms need to be specific.

The public editor will continue to be the coordinating editor for being sure that corrections are published and tracked. Each supervising editor will be responsible for making sure that the electronic form is filled out. The emphasis is on determining if we can learn from this error, and prevent it from recurring.

An example of how this will work: An error appears in the paper. The section editor has conversations with people who handled the story or item. The person (or persons) responsible for the error explains in the electronic form how this happened. The supervising editor then sends it to a new queue, called Z.CLARI.

*Chicago Tribune*  
February 1996

### **Accuracy guidelines at the Chicago Tribune**

A newspaper's reputation rests on its accuracy. That means everyone who provides content for the paper not only by reporting and writing stories, but transferring statistics to tables, creating graphics, editing copy, writing headlines, collecting caption material, or researching facts must take responsibility for the accuracy of that work. If you gathered the item or keyboarded the item or edited or manipulated the item in a layout, you are also responsible for maintaining its accuracy throughout the process.

Once newspaper copyediting systems were full-service guardians of accuracy. They acted as fact-checker, arbiter of style and usage, smoother of wrinkled prose, fine tuner of nuance, and champion of good writing. Technological change splintered these editing duties into specialized functions (source editors and current desks) and removed some safety nets altogether.

Because pagination will be even more demanding, some basic accuracy checks and copyediting skills become requirements for everyone who works in the editorial department.

Desk editors begin by knowing the players. Who's a free-lancer? Who among the

staff has special problems or circumstances, e.g. bad speller, bad fact checker, behind on grammar, new to the subject or beat. Experience teaches them writers' strengths and weaknesses. When it's your own work, assess your own skills and work on your own weaknesses. If you're a bad speller, for example, look up everything you're unsure of if no good spellcheck is available — and do not rely entirely on the spellcheck, because it misses many errors of proper names and titles, homonyms, repetition, omission and grammar.

**Read the stylebook and memorize the parts you use regularly.** It is the first reference when you have a question of style or usage. Second is a good dictionary of recent vintage that will answer all the questions not addressed in the stylebook. You can save time and energy if you make your own cheatsheet of frequently misspelled words or grammatical rules you always have to look up.

Learn the department, the pace of work. We all like to take our time, but if we miss deadlines, it impacts on someone else. And on a desk, certain amounts of work must be done in a given shift, so a rim person or assistant editor must pace him or herself to finish the work allotted — 8 or 10 or whatever stories. That's why there is sometimes too little time for a desk editor to check someone else's facts or arithmetic.

Some time-tested techniques editors use are equally valuable tools for writers and other creators of content to check their own work for accuracy. Give every piece of information you create, manipulate, or otherwise change for the newspaper at least three reads whenever possible.

**A. FIRST READ: Content.** Listen to your instincts. If it isn't clear or doesn't sound right to you, it won't sound better to someone else. Read for transitions, structure, parts you stumble over and have to go back and reread, parts that make you doze off, parts you don't understand. Does the piece sound written for the reader or the sources (a problem with specialized material sometimes). Is it full of multisyllabic words and multiword verbs or clear and concise?

Is it full of jargon or an alphabet soup of acronyms, or is it written in standard English with unusual terms spelled out or defined?

In an ideal world, the source editor would back up the creator by the same process. The source editor's huge assignment ensures a piece has structural and logical order, that it meets an approximate designated length, in consultation with the writer. Source editors point out omissions of fact and reporting and problems of content that require major revision or fact checking by the writer.

Fact checking: If you don't know if something is true, find out. Consult a reliable source for the answer — stylebook, dictionary, encyclopedia, grammar book, reference work in area of coverage. Use, but be aware of the dangers of, the archive clips in the Save system, Internet sites and person at next desk. All can and will be wrong at some time, even if they bail you out most of the other times. Proceed with caution.

Arithmetic in a story: check it three times. Use a calculator if it's complicated. Dial

phone numbers whenever possible to check accuracy and double-check addresses in a street guide.

**B. SECOND READ. Style.** Does the item or story conform to rules of grammar, spelling, punctuation and usage as set out in the Tribune stylebook, dictionary and standard usage manuals? Do subjects and verbs agree, are addresses and dates in Tribune style? Are people's names spelled consistently throughout? Do all pronouns have clear antecedents, etc.

**C. THIRD READ. Proofing.** Spell out every word, look for doubled words, missing words, etc. Sadly, often these days there is no time for this one on the various desks, making it imperative that writers and content providers do the same process to their own work. Use spellcheck to back yourself up.

When should an editor call the writer? If there is time, whenever a fact is missing or a meaning unclear, when new leads need construction or a story is heavily in need of restructuring or a major trim of more than 5 or 10 percent.

If there is no time to call, ask someone on the desk who has knowledge of the subject, or write around it whenever possible.

It's still a good idea for writers et al. to CQ in notes odd names, facts, spellings or items you had to look up yourself. Saves angst and double effort by the next person down the line. Also, if you can't confirm a fact when you're writing something, don't put it in the story. If you can't confirm it, odds are the next person down the line can't either. Certainly if there is any doubt about a vital fact, describe the problem in a note. Never assume that anyone down the line will just catch something, fix something or check something unless you can call attention to it. And then it may be edited out if the desk runs out of time. Try not to leave unchecked facts in stories unless they are breaking stories, and even then be aware of the danger and clearly mark the fact in question.

**Trimming.** In general, don't trim from the end. Most stories and graphic packages have (or should have) beginnings, middles and ends. And don't trim all the quotes. Find a section, graf or sentence, depending on the length that must come out, that can disappear without hurting the main thought of the piece. Look for repetition of ideas or repetition between paraphrase and a real quote, anecdotes or quotes that may be interesting but aren't germane to the subject. Then, before you delete, read the transition to see if it makes sense. If it needs more than minor work to fix, you may not be trimming the right thing.

A good editor tries to keep the mood and the style of the writer intact. It's not a good idea to rewrite someone else extensively (except in deadline or group efforts), and it's not a good idea to shorten stories by taking *all* the color and writerly touches out. Writing and editing are art forms at heart.

Conversely, writers should not confuse the reader with overly complex descriptions and flourishes. As you work with writers, including yourselves, you will learn to act

as a reader. Ask yourself how a reader would react, not just could a reader struggle through it, but what could be done to make the process easier and more interesting. Just because we publish something doesn't mean anyone will actually wade through it.

Be careful not to trim first references when you shorten a story. Use your Find key to make sure first references remain if you have any doubt. Remember that columnists and critics are given much more freedom than other writers. One does not rewrite or significantly change their copy without a nod from a slot or those particular writers.

It's easy to trim writers who put everything they know into a story. It's hard to trim writers who have edited their research and chosen only the best quotes, examples, etc. and whose story is built on the strong backbone of a single theme.

**Keeping up with the job: Read the Tribune thoroughly every day.** That doesn't mean read every word, but read the section you work for more or less word for word and read at least the section fronts of the other sections, both news and features. Before starting a project, check the Save system for previous stories on the subject and consult the paper clips when appropriate for stories with longer histories. It will help you keep from repeating what has been done before and give you some background and context.

Read other papers whenever possible and read at least one specialized publication (preferably a primary source) in the field in which you work. In case that's a new term for you, a primary source is one aimed at the practitioners or experts in the field. A secondary source is a newspaper or other periodical that covers a subject for a lay audience.

Specialists and the editors they work with obviously read more than one primary source. And editors or writers who move into a new area should do as much as they can to develop expertise in that subject.

*Jim Haglund, Mary Knoblauch, Chris Rauser 2/97-6/97*

## EXAMPLES OF ERRORS

### **Getting it right**

■ People sometimes fail to confirm information, including names and basic facts, and rely on clips. The error gets perpetuated. We did a 20-inch story on a woman whose name we misspelled, because the reporter didn't ask the woman how to spell her name. The previous four stories in which the woman was mentioned all had the incorrect spelling; no one else asked, either.

■ Several times, we attributed quotes inaccurately. In most cases, the explanation was that the reporter confused the notes. But we also have attributed statements in pull-out quotes to a person different from the one quoted in the story.

■ Person A, active in, say, the garden club, sends in a press release on garden club stationery about a community event for a calendar item. We assumed that the event was to raise funds for the garden club. It was not.

■ A convent was listed as a source for obit information. Whoever answered the phone referred to the person as “Sister” such and such. Therefore, we assumed that the deceased person was a nun. She was not, but we didn’t ask. Her son was not amused.

■ In a story about a teenager who drowned, a reporter received two spellings of the name. The reporter made a choice, but did not double check. We were wrong.

■ We covered a speech but misidentified the civic club that sponsored the event, because it was held at a site other than the sponsor’s address.

### **Sources, assumptions**

■ We reported that a Chicago City Council measure was written by the corporation counsel’s office. In fact, that office wrote a resolution that took the opposite position of the actual council measure. The wrong information was from aldermanic sources. We didn’t check with the corporation counsel.

■ We misidentified a popular country singer at a concert. The photographer was told by the club manager that the headliner would be out right away. When a man stepped to the center microphone, the photographer thought it was the headliner. It wasn’t.

### **Editing**

■ In a story about a theater complex, we described the village president as president of the development company seeking to build the project. He was not. An editor inserted the company name before “president.” Then, we took out “village.” That is how “village president” became “company president.”

■ In a suburban listing, we gave a phone number with an area code of 312. That should have been a red flag. The event was in Oak Park, where the area code is 708. Only part of downtown Chicago uses 312.

### **Is it real, or is it ...**

■ A copy editor failed to read the caption information on a Xerox copy that came from a photo editor. Our caption referred to a building as a model of a planned theater complex. In fact, the building pictured was the actual theater.

### **Say what? Errors can have many fingerprints**

■ A story written on Monday for the Tuesday paper said that a court matter “continued Tuesday.” On deadline, the sentence was changed, to “continued Monday.” We should have said that the court matter was to continue Tuesday. The error was introduced in editing, but that would have been unnecessary if the original description

had been correct.

- We described a former alderman as a state senator. That person is a state representative. Another reporter had sent a message, and the writer did not double check. Nor did the desk catch this.

- A reporter misunderstood estimates about how many cars a residential housing development would bring to the community. We said the number of cars may be twice the number of residents. In fact, traffic officials say that the number of cars is expected to be double the number of residences.

- We spelled a name Streans, not Steams, as it should have been. The reporter didn't check; the copy editor didn't question the odd spelling.

- A graphics coordinator did a timeline on the athletic career of DePaul's Ray Meyer that correctly showed him as a guard at Notre Dame. The artist added a cutline that identified him as a forward. The sports copy desk didn't catch this.

- A sports graphic was to illustrate the miserable performance by (former) Bears starting quarterback Rick Mirer compared to that of New England's Drew Bledsoe, one of the league's hottest passers. We transposed the colors in the key for the color version. Perhaps wishful thinking?

### **Unavoidable errors**

- We reported that an elephant and tiger farm lost \$250,000 in a contract cancellation. The reporter challenged the owner, questioning that figure. The owner insisted that it was right. It was only \$25,000.

- Wedding information was incorrect. The couple kept changing plans.

- We met a Friday section deadline, but a program time was changed.

- The suburban high school's football roster was wrong. (This goes for theater cast notes, recording liners and pro sports, too.)

- A hotel gave us brunch prices, and we double checked. They were wrong anyway.

### **Comments (and sometimes acts of contrition)**

- "How did the error occur? I screwed up. Working in a buro, away from my files, I wrote the name from my faulty memory."

- "I do not mean to make excuses and am not trying to be funny, but insomnia caused me to get a mere 4 hours sleep the night before and my left eye felt like a hot needle sticking in it. I was really fading when I wrote this story."

- "How could this error have been avoided? Have programmable robots do this work instead of human beings."

*Chicago Tribune*

**Newsgathering process.** Incomplete or inaccurate information. It can apply to photo captions as well as stories. Example: single-source reporting job, when it turns out that a second, logical source should have been contacted. Or, we make assumptions and fail to double check, such as names spelled in clips or basic facts. “Visual” is for newsgathering errors related to caption or graphic information. “Text” is for reporting stories.

**Editing process.** When we edit in errors. Often, it is a lack of communication between editors and writers. We will have two sub-categories: source, or content, editing; and copy editing. Did the error happen at the assigning editor level? Or did the copy desk edit in an error (and fail, for example, to contact the source editor or reporter for clarification).

**Display process.** When things fall through the cracks on headlines, photos, graphics or general presentation. *Actual production* was the consensus. This is often a work flow issue. It can be a fast trim, either by a typesetter or on the production floor. It can be a caption problem in which photos were switched, and the person writing the caption information does not see the actual picture being used. Or, it can be related to a mistake that occurs because we may be switching data or info from one computer system (Ctext) to another (the Mac, for the graphics department). Headlines go in this category. The execution of captions (*not* the fact-gathering) can be display errors.

**Syndicate, outside suppliers.** This could be a problem with a crossword puzzle. It could be information about a distant news event that we would have no way of checking. However, if there were information that we should be checking and just miss, that might qualify instead as an editing error. Example: If AP happened to say

## TRACKING THE ERROR

- Newsgathering process
- Editing process
- Display process
- Syndicate, outside service
- Simple error (brainlock)
- Unavoidable
- Visual/text
- Source/desk



## ACCURACY GOALS

- Reduce errors per page  
20%, to 2.03
- Reduce news gathering errors  
20%, to, 316
- Reduce published corrections  
3.66%, to 711

in a story on deadline that Peoria was east of Champaign, we could be expected to correct that. For categorizing how we heard about errors, syndicated material is considered ext/source. *But*, there are some exceptions we will count as internal: Ann Landers, Clarence Page, for example.

**Simple error (brainlock).** Sometimes we just goof. We have a typo or we misread a press release. Staff consensus was to be strict on this, because in a way, almost all the errors we make are brainlock.

**Unavoidable errors.** We have very few. These are likely to be when information changes or the source was wrong. Or when we do what we should be doing, such as checking phone numbers, and an error still sneaks through.

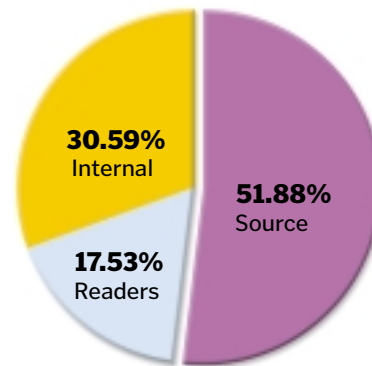
**How do we learn about errors?** We are tallying whether we learn about errors from readers or sources, which we define broadly as including parties immediately affected. From time to time, we will keep track separately of possible trouble areas that we need to monitor. For starters, here is the list:

- Free-lancers. This work can be a trouble spot for us. Perhaps we should have a gathering of editors to craft guidelines on standards for free-lancers.

- Phone numbers.

- Deadlines. Just how often do deadlines really cause errors?

*Chicago Tribune 1997*



### HOW WE LEARN ABOUT ERRORS\*

Readers — 17.53%  
Internal — 30.59%  
Source — 51.88%

\* This includes people directly affected by, or who have direct knowledge about, a story.

## 1998 ACCURACY UPDATE

### **Summary**

We made significant progress in all areas that we track, especially in reducing the number of mistakes in news gathering. We are awaiting the fourth-quarter accuracy report by our proofreading service; it likely will show continued progress, for the sixth straight year.

The key areas for 1998 were:

- Reduce display text errors — headlines, captions, graphics. We did that, showing an improvement of 17.28 percent over 1997. The actual number was 134, down from 162 in 1997. We highlighted this area because of impact; these errors are especially offensive to readers, something that we know both informally and through research.

- Increase the percentage of internal disclosure of errors. It was 31.95 percent in 1997. That improved to 36.59 percent. When we do make mistakes, we want to get them corrected quickly, and our staff members know how important it is to do that. We consider our openness about correcting mistakes to be a valuable part of our credibility with readers.

- Reduce the number of news gathering errors. This is identified through error forms for corrections. We had 356 errors, compared to 387 in 1997. About half of all errors occur in the first step of the news process, which is why we expanded editing and writing classes last year. About 250 writers and columnists participated in the classes on writing and media law.

In addition, we have monitored freelance errors for three years. Typically, 18 to 23 percent of our errors involve freelance work. In 1998, the percentage improved, to 13.03 percent, thanks to extra attention from assigning editors.

Here are the error form categories for 1998:

- News gathering — 356, or 50.42% of total
- Editing — 117, or 16.57%
- Production/display — 67, or 9.490%
- Syndicate or outside supplier, such as wires — 35, or 4.960%
- Simple error (brainlock) — 51, or 7.220%
- Unavoidable — 80, or 11.33%

*Margaret Holt  
January 1999*

(internal; news/visual)      big type

George,

Our NATO strike map had an incorrect number in it on Wednesday. Here's a clari:.

**Text for publication**

In Wednesday's paper, a map of NATO airstrikes in Yugoslavia incorrectly stated the day of bombing. It should have said it was day 49.

**How did error occur?**

The artist who worked on the graphic, Scott Holingue, updated an older graphic and didn't rewrite the text from it.

**How did error come to our attention?**

I noticed it the following day as did the copy editor.

**Did deadlines affect error?**

No.

**How could error have been avoided?**

Scott should have paid more attention to the text of the graphic, especially since the source information is dated in the same fashion.

(ext/source; news/text)

**CLARIFICATION/ERROR EXPLANATION**

Please include electronic copy of the error, with section, page and date noted.

**For publication Text of proposed correction for page 3:**

An editorial on Monday, May 3, said that a 13-year-old suspect had not been advised of his rights before being interrogated by police. In fact, police had read him his Miranda rights.

**Not for publication Describe error and show a corrected version:**

See above.

**How did the error occur?**

In a brief of the opinion, the appellate court judge said the boy was held without advice and counsel of an adult, and later I recalled that to mean that he had not been advised of his rights, which was my own misinterpretation.

**How did the error come to our attention:**

Bob Benjamin of the state's attorney's office called.

**Did deadlines affect this error?**

No.

**How could this error have been avoided?**

More diligence on my part; not relying on memory of what I had read earlier in the day.

**Comments:**

**Name of staff member filing this form:**

A RESOURCE GUIDE FOR EDITORS

# MANAGING *for* EXCELLENCE

MEASUREMENT TOOLS FOR QUALITY JOURNALISM



Media  
Management  
Center

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