

Be Credible

Be Credible

**INFORMATION LITERACY FOR JOURNALISM, PUBLIC RELATIONS,
ADVERTISING AND MARKETING STUDENTS**

PETER BOBKOWSKI AND KARNA YOUNGER

Peter Bobkowski and Karna Younger
Lawrence, Kansas



Be Credible by Peter Bobkowski and Karna Younger is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](https://creativecommons.org/licenses/by-nc/4.0/), except where otherwise noted.

Contents

Introduction	1
Peter Bobkowski and Karna Younger	
PART I. INFORMATION WORKFLOW	
1. Be Credible	7
Peter Bobkowski	
2. Search and Re-Search and Re-Search	14
Peter Bobkowski	
3. Search More Effectively	21
Peter Bobkowski	
4. Keep Detailed Research Notes	31
Karna Younger	
5. Attribute All Sources	42
Kerry Benson	
PART II. EVALUATING INFORMATION	
6. Evaluate Information Vigorously	69
Callie Branstiter and Peter Bobkowski	
7. Go Lateral With Cues and Evidence	76
Peter Bobkowski	
8. Tap Into a Credibility Network	92
Karna Younger	
9. Contend With Bias	120
Karna Younger and Callie Branstiter	

PART III. INFORMATION SOURCES

10.	Google Carmen Orth-Alfie	134
11.	Wikipedia Paul Thomas	145
12.	Public Records Peter Bobkowski	163
13.	Freedom of Information Requests Jonathan Peters	175
14.	News Karna Younger and Callie Branstiter	189
15.	Nonprofits Peter Bobkowski	206
16.	Scholarly Research Karna Younger	232
17.	Data Karna Younger and Carmen Orth-Alfie	254
18.	Market Research Peter Bobkowski	268
19.	Public Companies Peter Bobkowski	275
20.	Archives Caitlin Donnelly Klepper	286
21.	Interviews: An Introduction Peter Bobkowski	306
22.	Interviews: Conversations with Risk Eric Thomas	323
	Author Bios	336

Introduction

PETER BOBKOWSKI AND KARNA YOUNGER

What Is This Book About?

This online textbook has two goals:

1. To help readers find information in places, mostly online, where they usually don't look;
2. To help readers evaluate the credibility of the information they find.

Who Is This Book For?

Although we wrote this textbook for a required college-level journalism course, anyone who navigates information on the Internet can benefit from the concepts and skills presented here.

The primary audience for this book starts with students in Journalism 302: Infomania, a course we teach at the [University of Kansas](#). When they take this class, these students usually are in their second or third semesters in the [William Allen White School of Journalism and Mass Communications](#). They have varied career aspirations. A few of them want to be “traditional” journalists, writing for online news sites, magazines, or newspapers. Some of them want to be broadcast journalists. Many of them want to work in strategic communications, which encompasses public relations, advertising, marketing, and related fields.

Why Did We Write This Book?

The Journalism 302 course was conceived originally as an introduction to journalistic research methods. It is also a companion to a media writing course in which students learn the conventions of presenting the information they gather. The initial goal of the course was to teach stu-

dents who do their research almost exclusively with Google and Wikipedia to become familiar with other information sources, like scholarly and business databases.

Journalism 302 also is designated by the university as a [critical thinking course](#). This means that students are expected to reflect on their own thinking, to question their assumptions, and to support their arguments with evidence. Students are challenged to identify their own information needs, and to examine the credibility of their sources within the context of their current and future work as professional communicators.

Over time, and in conversations with colleagues at the [University of Kansas Libraries](#), it became clear that Journalism 302 is an information literacy course. [Information literacy](#), according to the [Association of College and Research Libraries](#) (ACRL) definition, is about how individuals find information, understand its sources and structure, evaluate it critically, and use it responsibly (or don't use it). Information literacy has been a key concern for library and information scientists for several decades. In our case, ACRL's concept that the authority of information is constructed and contextual aligned well with the concept of credibility, which had become a unifying theme in the Journalism 302 course.

To teach information literacy and journalism practice, we needed a textbook that would deconstruct the process of judging the credibility or authority of sources, and that would align with the professional standards of journalism. As we searched for textbooks and other instructional materials, however, we concluded that there wasn't anything on the market that met our students' needs and the goals of this class.

This textbook, therefore, is the result of a collaboration between journalism and library faculty. It is an illustration of what happens when concepts developed in library science and instruction get applied to a specific field, in this case, journalism education. Our overarching intent in writing this book was to help undergraduate journalists develop the skills and a skeptical stance for accessing, evaluating, and using information, and in the process, to build their own authority as credible communication practitioners.

What Is in This Book?

The book is structured chronologically and topically, using the order in which concepts and skills are presented in the Journalism 302 course.

The first section focuses on the research process by breaking down the concepts and skills that are essential to assessing and contextualizing the authority of information. To begin, we define and explore [the concept of credibility](#) as it relates to practicing journalism. In the

next chapters, we walk readers through the fundamentals of [developing a topic](#), [using search strategies](#), [collecting evidence](#), and [attributing the sources of information](#) in writing.

Section 2 covers several approaches to evaluating the credibility of sources. We reinforce the link between evaluating sources and students' own credibility, by encouraging students to approach every source with the question, "If I use this source in my writing, will it contribute to or diminish my own credibility?" Over four chapters, and [a chapter on bias](#), we deconstruct and present several methods for engaging in the credibility assessment process. We provide step-by-step instructions and examples of identifying specific credibility cues, collecting evidence, conducting the assessment, and presenting a conclusion. Our methods are based on those presented in the 2017 online textbook, "[Web Literacy for Student Fact-Checkers](#)" by Mike Caulfield, and in the 2010 article, "[Using a Targeted Rubric to Deepen Direct Assessment of College Students' Abilities to Evaluate the Credibility of Sources](#)" by Erin Daniels, published in the journal *College & Undergraduate Libraries*.

Section 3 focuses on several sources of information with which journalism and strategic communication students need to be familiar, and about which they need to develop a critical attitude. We begin where most students begin their research: with Google and [Wikipedia](#). We discuss the limitations of Google and the dangers of its filter bubbles, in order to prompt students to advance their research beyond Google. In the Wikipedia chapter, students learn why an open-sourced encyclopedia is a good place to start but a bad place to stop, and how they can participate in improving Wikipedia. The remainder of the textbook covers news sources, public records, nonprofits as sources, information filed by public companies, research studies, data, historical sources, and interviews. In each of these chapters, we discuss how journalists and strategic communication practitioners use these information sources; we provide text and video instructions on how to access these sources and retrieve information from them; and we reinforce the process of assessing the credibility, or authority, of these sources.

Credibility is the thread that holds these sections together. As we argue in the first chapter, credibility is key to a journalist's ability to produce trustworthy news and to a strategic communicator's ability to represent and retain clients. Communicators establish their credibility by critically assessing their sources, and by using only the information that is credible enough to support their own credibility.

At the end of several chapters, testimonials from professionals who are alumni of our journalism school support the arguments presented. In suggested activities at the end to the chapters, we also invite students to apply their new knowledge, and to contribute to the textbook by developing tutorials about the book's content. In the spirit of open pedagogy, we hope that with time, we will integrate these tutorials into the textbook's chapters. By serving as contrib-

utors to this book, we hope that students will come to recognize themselves as credible creators and consumers of information.

Who Helped With This Book?

Several incredible colleagues helped us write this textbook. Our work began as a week-long [Research Sprint](#), in which we were joined by Carmen Orth-Alfie and Callie Branstiter. During that week and throughout this project, Carmen and Callie generated insightful ideas, wrote content, and edited our writing. Their expertise in undergraduate learning and information literacy helped shape this textbook from beginning to end.

Roseann Pluretti assisted us as a project manager. The textbook's production benefited from Roseann's organizational skills, and from her practical experience teaching Journalism 302 five times as a Graduate Teaching Assistant.

We were grateful to receive an Open Educational Resources Grant from the University of Kansas Libraries, which partially funded the production and promotion of this textbook. Josh Bolick and Ada Emmet in the [Schulenburger Office of Scholarly Communication & Copyright](#) helped to inspire this textbook's possibility and supported its creation.

Kerry Benson, Gerri Berendzen, Lisa McLendon, Eric Thomas, and Scott Reinardy from the [William Allen White School of Journalism and Mass Communications](#) contributed content, editing assistance, and administrative support for this project. Jonathan Peters from the [Grady College of Journalism and Mass Communication](#) at the University of Georgia also contributed a chapter.

In the [University of Kansas Libraries](#), Jamene Brooks-Kieffer, Caitlin Donnelly Klepper, Angie Rathmel, Marianne Reed, and Paul Thomas offered ideas for content, wrote chapters, provided feedback on drafts, and assisted with the distribution and promotion of the textbook.

Short [bios of all chapter authors](#) are located at the end of the book.

We thank all the students in Journalism 302 and in other classes we have taught, whose work informed and filled the pages of this text.

What's on the Cover?

The cover photo comes from a folder of historical photos at the [Kenneth Spencer Research](#)

[Library](#) that feature University of Kansas journalism students. It was taken in the early 1950s. An inscription on the back reads, "Students testing out the old Washington hand press in the typography lab, west end, 2nd floor, Flint Hall." The press itself is now archived at the Spencer Research Library.



Only two of the five students pictured in the photo have been identified. Furthest left is Shirley Piatt (later Shirley Frizzell), KU class of 1954. She was one of the first women to serve as editor-in-chief of the University Daily Kansan, and went on to a career in public relations at Cessna, The Wichita Eagle, and Wichita State University.

Furthest right is [Rich Clarkson](#), KU class of 1956, who became an award-winning sports photographer. The Clarkson Gallery, which is located in the west end of the first floor in Stauffer-Flint Hall at the University of Kansas, is named in his honor.

We hope that this book can help our students pursue fruitful careers as credible communications professionals, akin to their predecessors pictured in this photo.

PART I

INFORMATION WORKFLOW

Be Credible

PETER BOBKOWSKI

Learning Objectives

After reading this chapter, you will be able to:

- Demonstrate an understanding of professional licensing.
 - Explain the role of credibility in journalism and communications professions.
 - Link the professional credibility of communication professionals to the credibility of their sources.
-

Licensing and the Professions

To understand better the reasons for why you are reading this book, let's think about professional licenses.

In many fields, individuals are required to obtain licenses before they can begin employment in those fields. The way this works is that a license-granting entity like a state agency or a professional association sets a standard for what it takes to become a professional in a particular field. Through a licensing process, this entity then ensures that only people who meet this standard are allowed to practice in that profession. The standard often consists of specialized education and the successful completion of an exam.

For instance, when people want to become a lawyer, they go to law school and then take a

bar exam. If they pass it, they are admitted to the bar by a [bar association](#) (that is, the licensing entity for the legal profession), which means that they are licensed to practice law in a particular jurisdiction. Similarly, when people want to become a physician, they go to medical school and then take a series of licensing exams. If they pass these, they are certified as physicians [by a medical board](#). If people want to be a barber, they go to barber school and then take a [barber licensing exam](#). If they pass it, they are licensed to practice barbering. Pilots, architects, public school teachers, accountants, engineers, real estate agents, and many other professionals all need licenses before they can legally practice their chosen professions.

The license is an indicator of trust. By granting a license, the licensing entity vouches that the license holders are competent in their field, and that the public can trust these people to perform the skills they are trained to perform. A licensed attorney can be trusted to represent clients, a certified physician can be trusted to diagnose and treat patients, and a licensed barber can be trusted to cut clients' hair.

Conversely, when a professional does something that breaks this trust — when a lawyer acts in a way contrary to the accepted standards for lawyerly behavior, for example — the license can be taken away. The revoking or nonrenewal of a license can have very real consequences for an individual: They can no longer practice in the profession they trained for and may need to find a new way to support themselves and their family.

Licensing in Communications Professions

So what about getting a license to become a communications professional like a journalist, broadcaster, public relations practitioner, advertiser, or marketer? What are the license-granting organizations for individuals pursuing these professions? What specialized education and exams are required before one is certified to practice in one of these fields?

All of these are trick questions because in the United States, communications professionals do not get certified or licensed. There is no barrier to entering these professions. Nothing stops you from printing a bunch of business cards right now and identifying yourself as a public relations practitioner or as a broadcaster. If you do identify yourself as a member of these professions, you are not breaking any laws, nor are you usurping the power of any organizations that would designate you as a licensed professional through a licensing process.

That sounds pretty great, right? If you choose to continue pursuing a career in communications, you won't have to study for a fancy exam to get certified as a journalist or a PR practitioner. Is there a downside to this? Well, think about the public: a license signifies to the public (that is, potential clients), that they can trust a plumber, aesthetician, or pilot. In the case of

the communications professions, what signifies to the public that they can trust a journalist, PR practitioner, or advertising professional?

The answer is, credibility. Credibility is the license to practice communication.

Credible professional communicators will have an audience or clients who trust the information they convey, enabling them to make a living in this profession. Do you know anyone who only turns on the news only at a certain time because that's when a specific news anchor or weather forecaster is on TV? (If you grew up in Kansas City, you might be thinking of people who religiously tune in to see [Gary Lezak's](#) weather forecast.) TV audiences place deep trust in their favorite news personalities to present the news or weather to them. As you pursue a communications profession, it's that level of credibility — the credibility that favorite news anchors and weather forecasters exude — that you want to strive to achieve.

Guidance on Professional (and Credible) Conduct

Credible communicators demonstrate through their work that they meet the qualifications and standards of their profession. But how do they know what the professional standards are? Although the professional organizations for communicators do not issue licenses like bar associations and medical boards, these organizations do articulate the standards that professional communicators are expected to observe. So if you are looking for guidance on how to build your credibility, look up the professional organization that corresponds to your communications career.

If you are thinking about print or online journalism, magazine journalism, or broadcast journalism, the [Society of Professional Journalists](#) (SPJ) is your professional organization. In its Code of Ethics, SPJ charges professional journalists to “seek truth and report it,” and to “be accountable and transparent” in order to build trust with the public and establish a credible reputation. Are you leaning more toward strategic communications, like advertising? If so, then the [American Advertising Federation](#) (AAF) is your professional organization. Its [Institute for Advertising Ethics](#) follows the same logic on credibility as the SPJ. It prizes “a common objective of truth and high ethical standards” as one of its eight pillars of practice. If you plan to specialize in public relations, though, you will follow the code of ethics set by the [Public Relations Society of America](#) (PRSA). PRSA mandates that professionals “adhere to the highest standards of accuracy and truth in advancing the interests of those we represent and in communicating with the public.”

When Credible Professionals Behave Incredibly

Without licenses, how are communications professionals held accountable for their professional conduct? Communicators' professional organizations charge their members with being accountable to themselves and to one another in upholding their credibility. [SPJ](#), for example, dictates that journalists quickly correct their own inaccuracies and "expose unethical conduct in journalism, including within their organizations." As a result, a professional communicator who lacks credibility may have trouble keeping employed in her chosen field.

There are many examples of journalists and other professional communicators being, in effect, expelled from their fields after losing credibility in the eyes of their peers and the public. Stephen Glass's peers, for instance, ousted him from journalism after they discovered that Glass falsified an article, "[Hack Heaven](#)," for the magazine *The New Republic* (TNR). As [The New York Times](#) reported, Glass's peers at TNR trusted him in part because he was a hard-working former fact-checker for the magazine. But since his fall from grace 20 years ago, he has been unable to work as a journalist [or a lawyer](#) (he got a law degree after leaving TNR). All told, Glass had completely fabricated not only "Hack Heaven" but 27 of the 41 articles he wrote for TNR, as well as articles published in *Harper's*, *Rolling Stone*, *The New York Times Magazine*, and *Mother Jones*, as [Vanity Fair reported](#). Glass's lost credibility was the subject of countless news articles, a movie ("[Shattered Glass](#)"), and [his own book](#).

Stephen Glass broke his colleagues' and his readers' trust when he fabricated information. The codes of conduct of all professional organizations for communicators agree that making stuff up violates professional standards. But telling the truth and not fabricating information is a bare minimum as far as professional standards go. This book focuses on a more nuanced set of professional standards, that is, the standards relating to the sources that professional communicators use.

You Are Only as Credible as Your Sources

The credibility of communications practitioners are only as solid as the sources they use. Much of the work that journalists, public relations practitioners, advertisers, and marketers do consists of taking information from sources, packaging it, and presenting it to an audience. In order to produce credible work, communications professionals must be experts at finding and using credible sources.

Adam Penenberg is the journalist who first uncovered Glass's fabrications in "Hack Heaven." The research process that led Penenberg to determine that Glass was making up stuff illus-

trates the importance of examining and questioning sources in journalism and in other communication professions. At the time, Penenberg was an editor for [Forbes Digital Tool \(Forbes.com\)](#), and considered himself to be pretty knowledgeable about the emerging field of digital business. When he read Glass's article about a 15-year-old computer hacker successfully extorting "money, porn magazines and a sports car" from an Internet company called Jukt Micronics, Penenberg seriously doubted his own research and reporting skills.

Glass's article seemed like a story Penenberg should have found and written about. He set out to find more information about it and began by pursuing the sources that Glass included in his article. However, after conducting several internet searches, reviewing government records, and interviewing several hackers, Penenberg could not verify any of the information that Glass wrote about.

Penenberg eventually forced Glass to admit that [the article was complete fiction](#). By detailing his research methodology in posts for [Forbes Digital Tool](#), Penenberg illustrated his own credibility and adherence to professional standards, while cementing Glass's reputation as a hack journalist.

The process that Penenberg used to uncover Glass's lies is the same process that this book and your coursework will teach you. To become proficient in this process, you will learn where and how to access sources of information, and how to evaluate whether the sources you are looking at are credible enough for you to use in your work. You are reading this book because communication professionals must be, first and foremost, experts at using information sources because their credibility — their license to practice communication — depends on it.

A Practitioner's View



Andy Hyland

KU Journalism, B.S. 2005, M.S. 2017

Assistant Director of Strategic Communications, Office of Public Affairs, University of Kansas

I have worked both as a news reporter and as a public relations professional at a large research university. In both professions, I've always felt that credibility was the most important element to maintain.

If your audiences don't trust you as a source, you've lost everything you're trying to do.

As a news reporter, I used to ask people if they'd ever had a news article written about them. For those that had, they could usually identify one element that was flat incorrect or missed the mark somehow. People will think, "If they miss these details about me, then how can I know the rest of this stuff is accurate?"

As a public relations professional, I work on many messages that are tailored to present the organization in its best possible light. However, if we were to simply invent facts from thin air, it would quickly be discovered and reporters (and the general public) would look elsewhere to get the information they want.

In many ways, the work of a public relations professional is similar to that of a journalist. Statements need to be vetted and verified before disseminated publicly. The wrong information at the wrong time can cause real reputational damage to an institution and its bottom line. This is particularly true in a crisis, where information is flowing fast and furious.

The ability to sort good and useful information from the bad is a critical skill.

Activity 1: This Is How Credibility Crashes and Burns

Recent history is littered with examples of journalists who have undermined their own credibility. Here's a partial list:

- Jayson Blair
- Monica Crowley
- Kevin Deutsch
- Sabrina Erdely
- Jonah Lehrer
- Brian Williams

Public relations practitioners, advertisers, and marketers also regularly lose their credibility, but those individuals or agencies usually are not named. What we see instead are brands and companies losing their credibility because the communications profes-

sionals who work for them were not producing credible work. Here's a partial list of companies whose credibility took a hit recently:

- Pepsi-Kendall Jenner "tone deaf" advertisement
- Red Bull will "give you wings" lawsuit
- Volkswagen sued for cheating emissions tests

Research the actions and circumstances that led to these individuals' and companies' loss of credibility. What have been the professional implications of these actions? What was the role of sources in these individuals' and companies' problems with credibility?

Activity 2: Can I Get a License?

Do professional organizations for communications professionals engage in licensing? Examine the website of one of the professional communications organizations listed below, and determine whether this organization engages in the licensing or certification of its members. If it does issue licenses or certifications, how do these credentials differ from the licenses issued by organizations such as the bar association or the barber licensing board?

- [Society of Professional Journalists](#)
 - [Public Relations Society of America](#)
 - [Institute for Advertising Ethics \(part of American Advertising Federation\)](#)
 - [Online News Association](#)
 - [Radio Television Digital News Association](#)
-

Search and Re-Search and Re-Search

PETER BOBKOWSKI

Learning Objectives

After reading this chapter, you will be able to:

- Know how to start the research process.
 - Develop search phrases and keywords.
 - Understand the circular nature of research.
-

Where to Start With a Research Topic

No matter what you end up doing in the field of communications, many of your daily tasks will require you to search and re-search information about topics. Common topic categories that journalists and strategic communicators research include:

- events,
- issues,
- individuals or groups of people,
- businesses and other organizations,
- products,
- behaviors or attitudes.

Finding information about topics will be fundamental to what you do, whether you work for a television news station, a public relations agency, or a corporate marketing office. Over time, you may become an expert on some topics that you research regularly. You also may be called upon to learn about topics in which you have little background. Our goal in this chapter is to help you think about research topics and how to begin figuring out what a topic is about, regardless of what the topic is.

There are two ways to enter the search and re-search process: with a topic that someone has assigned to you or with a topic that you identify for yourself. In the workplace, it may be more likely that you will have topics assigned to you by news directors, editors, or managers. While you're in school, in some classes you will have more leeway to identify research topics, while in other classes you will have topics assigned to you.

It may seem easier to research topics that you identify yourself, ones that aren't imposed on you. This is because your motivation may be higher to find information in which you are intrinsically interested than information that others ask you to research and understand. Regardless of how motivated you are initially to research a specific topic, keep in mind that your credibility as a communications professional depends on the quality of the information you find and communicate. The credibility of the information you find, in turn, is shaped by the quality of your research process, so it's important to begin with sound research.

In this chapter, we discuss a number of expectations to keep in mind as you initially explore a research topic. It may be worthwhile for you to have a preliminary research topic in mind as you work your way through these expectations.

Reasonable Expectations

In the following paragraphs, we discuss several expectations about the research process that novice researchers sometimes miss. Having these expectations at the forefront of your mind will help you navigate and persevere in the research process.

This is the wheel. Don't reinvent it.

Whenever we are struck by a good idea, including when we come up with an interesting research topic, it feels like we are inventing something new. Most of the time, however, our ideas are only original to us. Chances are that there already is information out there on whatever topic we come up with or whatever topic is handed to us. This means that we don't have

to start from scratch: Don't invent information that already exists. Instead, every researcher's first goal is to figure out what information on the topic is out there already.

Come up with an initial search phrase. Refine it. Refine it again.

To know what has been written already about a topic, a researcher first needs to identify the most precise search phrase, that is, the words others have used to write about this topic. You probably have noticed that sometimes when you Google something, you get results that are on point to what you're looking for, while at other times it takes a few tries to get the most appropriate results. The difference is the search phrase you used in Google. Sometimes the search phrase is straightforward because everyone uses the same vocabulary to name the thing that interests us. At other times, this is not the case.

For example, several years ago one of our students was interested in researching why some college basketball players only played with their college teams for one season before declaring for the NBA draft. The student called this the "one-and-done rule," and used this expression as his initial search phrase. He wanted to learn about why this phenomenon existed but was frustrated with his search results. All he kept coming up with were news reports and speculative articles about which players were going to be one-and-done players in any given year.

It wasn't until he changed his search phrase to "NBA draft eligibility," that he was able to find more informative documents about this "rule." Through these results he learned, in fact, that this wasn't so much a rule, but the result of eligibility requirements for the NBA draft. The one-and-done phenomenon developed because players only can declare for the draft a year after finishing high school. He also learned that these requirements were governed by the [collective bargaining agreement](#) between the NBA players' union and the NBA. The second search phrase led the student to the primary document on his topic, and commentary on the appropriateness and implications of the eligibility requirements. The refined search resulted in credible sources that helped this student understand his topic in a deeper way than from the information he initially found.

This example illustrates that the words you use in a search matter. Any search engine or database will try to exactly match your search terms to terms that appear in documents or websites. It is important to be open to new search terms and phrases, and to keep track of them as they evolve throughout the research process.

The circle of research

The following video reinforces the practice of refining a search term, while also putting this practice in the context of a circular process that all research entails.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=36>

What are this video's key takeaway points?

One takeaway is that the research process is not linear. Good research rarely proceeds from beginning to end the way we initially imagine it will go. As researchers, we need to be open to our research results leading us in directions we do not initially plan on going.

Another takeaway is that research sometimes can feel like we are running in a hamster wheel. The circular process this video outlines, of doing exploratory research, refining the initial idea, and then doing more research, can appear like it could go around and around without

end. Student researchers sometimes are tempted to short-circuit this process by writing their research reports or papers before they explore fully where the search and re-search process leads them. Again, it's important to be open to the unexpected directions in which research takes us.

Based on these takeaways, an important expectation to have about any research is that it will take longer than we initially anticipate it to take. This has implications for how you plan your research in this class and beyond.

If the one source doesn't exist, stitch together a bunch of sources.

The next video addresses another set of expectations that novice researchers often have: that there exists an information source that perfectly fits their topics.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=36>

What are this video's key takeaway points?

The video's main point is that an information topic may be too specific for there to be good sources that discuss it exactly. Even if this is the case, however, there likely are good sources that address parts of a topic. The strategy that this video discusses consists of breaking down the original topic into subtopics and searching for combinations of these subtopics.

The video also suggests finding a variety of sources on these subtopics, including news articles and academic articles. We will discuss the different types of sources available, and where to find them, in later chapters.

Activity 1: Topics and Topic Categories

Identify a research topic for each of the topic categories listed at the beginning of the chapter. For each topic, identify questions you would want to answer about that topic.

Activity 2: Search Phrases

Using your topic or developing one of the proposed topic areas above, develop a list of search phrases.

- Your goal in this exercise will be to develop as many search phrases as possible, including broad terms (basketball) and more narrow terms (NBA) and more casual (one-and-done rule) or more specialized language (NBA draft eligibility).
 - You could look at a [thesaurus](#), Google a couple of news articles about your topic, or draw from your own well of knowledge.
 - Make certain to keep track of your search terms, whether you jot them down on a sheet of paper, in a Google or Word document, or in a mind map you create.
-

Activity 3: Researcher Commandments

Summarize the reasonable expectations discussed in this chapter. Re-state each expectation in the form of researcher commandments (i.e., “I shall ...”, “I shall not ...”).

Activity 4: Open Pedagogy

In a video or slideshow, illustrate how your research process takes you places you didn't initially anticipate going.

Search More Effectively

PETER BOBKOWSKI

Learning Objectives

After reading this chapter, you will be able to:

- Use search operators to conduct effective and efficient searches.
-

Search Operators

As we set off on our research process, let's cover some strategies that can make our information searching more efficient.

We all have had the experience of typing some search phrase into Google and being overwhelmed by the millions of search results that come up. The following strategies, also known as operators, can streamline our searching so that we waste less time sifting through links and sources that don't address our topics.

These operators all work in Google, and some also work in specialized databases that you access through a library or another website.

Use quotation marks

Watch this video on [phrase searching](#).



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=44>

The key takeaway from this video is that multi-word search terms enclosed by quotation marks return more specific results than the same search terms without quotation marks.

For instance, the search phrase

`unicorns in Kansas`

returns approximately 1,420,000 Google results as of the date of publication that contain the words unicorns, or Kansas, or both (but not necessarily both).

The search phrase

`"unicorns in Kansas"`

returns seven Google results as of the date of publication, both of which contain the exact phrase “unicorns in Kansas.”

An additional important point made in the video is that it may be worthwhile to use different versions of a phrase when using quotation marks. For example, the search term

```
unicorn in Kansas
```

returns 8,360,000 search results as of the date of publication. Apparently writing about one unicorn is more popular than writing about a unicorn herd.

Remember that using this operator only makes sense for two or more words. Putting quotation marks around one word will not alter the search results

Use AND and/or OR

Watch this KU video on [combining search terms](#).



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=44>

These operators are useful for exploring the search results of combining two or more search terms. To see how the results differ after using these operators, open two browser tabs to Google and type two unrelated words in the search bar. In one, place AND between the two words, and in the other, place OR. Click between the two windows and explain the differences in the order of the search results.

Use the minus sign

Sometimes when we search for a topic that's similar to a very popular search topic, it's hard to find the search result in which we are interested because of the overwhelming popularity of the other topic that's not-quite our topic. Inserting a minus sign in the search string, followed by the search term we don't want to see, will eliminate results with that search term from our results list.

For example, let's say that we are interested in researching the sources of whale mortality, and we want to use the colloquial search phrase "whale killer." If we type

```
whale killer
```

with or without quotations, Google will return for us a ton of results on killer whales.

But if we use the search string

```
"whale killer" -"killer whale"
```

we will get results that contain the exact phrase "whale killer," and no results about killer whales.

We can use the minus sign as many times as we want in one search string. For example, if we want to scrub our results of all possible mentions of killer whales and anything else that may be related to them, we might use the search term

```
"whale killer" -"killer whale" -orca -blackfish
```

because orca is another term for the killer whale, and Blackfish is a popular 2013 documentary about these whales.

Note that there is no space between the minus sign and the word or phrase you want to leave out. Adding the space confuses Google.

In the Libraries' subscription and other databases, instead of using the minus sign you can perform the same feat by using the operator NOT.

Specify the domain or website

A top-level domain is a group of websites whose URLs end in the same letters. We know them as .edu, .gov, .org, and .com websites. Top-level domains also can designate a website's home country, like .ca for Canada, .mx for Mexico, and .dj for Djibouti. (Here is a list of [all the possible top-level domain endings](#), most of which we never see used.)

Can you think of research topics that would make it useful to narrow down our search results to a specific top-level domain?

We may be looking for official government sources on a specific topic. If so, we would type our search term, followed by `site:gov`.

For example, our search string might look like this:

```
"killer whale" site:gov
```

Or we may want to look only for nonprofit sources on a topic. Our search string might look like this:

```
"killer whale" site:org
```

We can further narrow down a search to a more specific domain or website. For instance, if we want to find experts at the University of Kansas who specialize in killer whales, we might use this search term:

```
"killer whale" site:ku.edu
```

because `ku.edu` is the top level domain for all web pages at the University of Kansas.

Or, if we want to read an article published by a specific publication, we can narrow down our search to that publication's website.

Let's say that we want to search the website of the Lawrence, Kansas, newspaper, the [Lawrence Journal-World](#), for the address 803 Massachusetts. This is where the popular [The Burger Stand](#) restaurant is located, and we want to learn what other businesses operated in this building before The Burger Stand. To do this, we might use the search term:

```
"803 Massachusetts" site:ljworld.com
```

for articles published on this newspaper's website.

Note that there are no spaces between the word "site," the colon, and the domain name or extension. Spaces make operators inoperable.

Specify the document type

The names of computer documents have specific filetype endings, like `.doc` or `.docx` for Word documents, `.ppt` or `.pptx` for PowerPoint presentations, and `.pdf` for PDFs (which stands for

“portable document format,” by the way). You might guess where this is going: we can narrow down our searches to a specific filetype.

Can you think of research topics that would make it useful to narrow down our search results to a filetype?

Official documents, research reports, and forms often are saved as PDFs. Specifying

```
filetype:pdf
```

after our search term will turn up only PDF files in our search results.

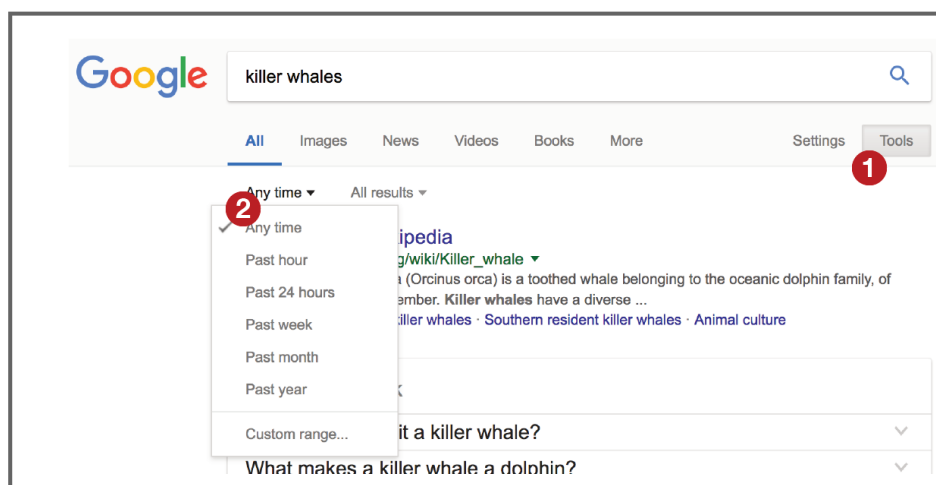
Teaching and professional presentations, meanwhile, are often saved as PowerPoint documents. Specifying

```
filetype:ppt
```

will result only in those files showing up in our search results.

Specify a date range

Sometimes we may want to access the most recent information on a topic, while at other times, we may be searching for the oldest information out there. Most search engines and databases provide the option of organizing results by date. Some databases organize results from newest to oldest by default, while in other databases, we have to specify our preference for this ordering or another. It is usually also possible to designate a date range for our results.



To specify the date range in Google, after typing a search term and getting initial results, click “Tools” below the search bar, and use the drop-down menu next to the “Any time” tab.

Combine the operators

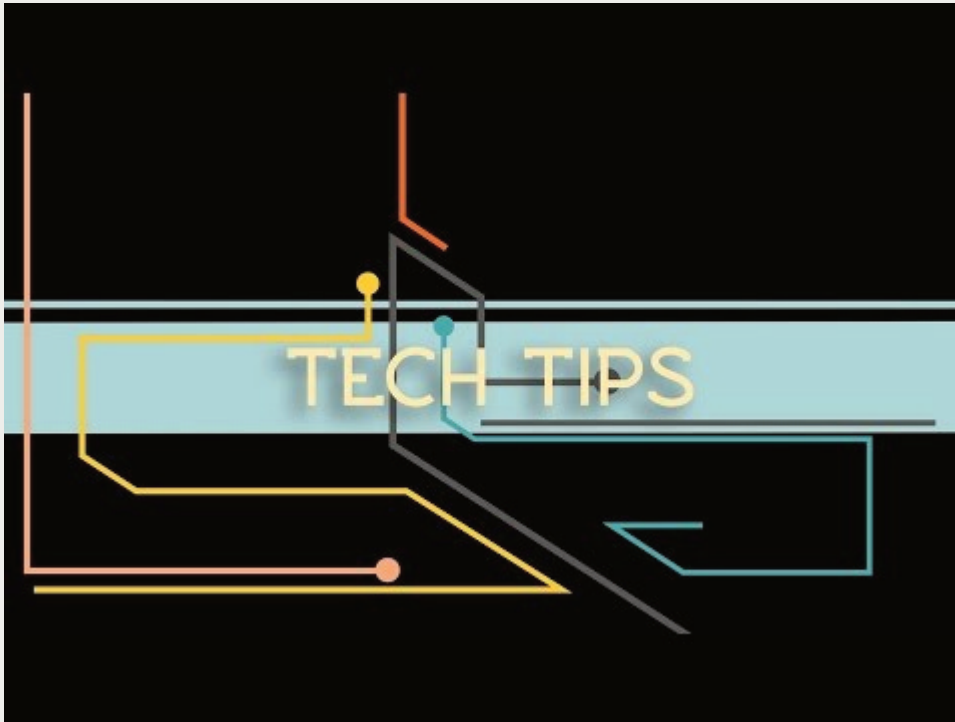
We can make our search strings as elaborate as we need them to be, so feel free to combine any number of these operators in the searches you perform.

In Google, you can also access an [Advanced Search form](#) in which you can specify a number of these and other operators without using the shortcuts we discussed here.

Reverse image search

This last Google search trick we discuss in this chapter may not be useful when researching a regular topic, but it may be handy when verifying the authenticity of a photo. It also is used by people who suspect that images belonging to them are being posted around the Internet without their permission.

Here’s a [short video about reverse image searching](#).



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=44>

A Practitioner's View



Kayla Schartz

B.S., KU Journalism, 2016

News Producer, KMBC-TV, Kansas City, Mo.

As a TV news producer, I work under tight deadlines every day. Part of my responsibility is to make sure I have the most up-to-date and accurate information in my newscasts. To deliver on that, I have to fact-check my content.

I often rely on Google searches for fact-checking, but I don't have time to sort through

the millions of search results. That's why I use search operators to make my job a little easier.

For example, during the election season, I have to fact-check claims made by candidates, on issues or voting records. I often combine the use of quotation marks as well as AND to search a candidate's name and the claim I'm looking to verify to cut down on the number of results.

The reverse image search also has been a good tool for me when it comes to making sure weather photos are authentic. Pictures from past weather events often start circulating on social media during storms, so a reverse image search is a good way to make sure a photo is from the storm I'm looking to cover on any given day.

Activity 1: Search Term Practice

Practice combining different search operators by coming up with increasingly complex search terms.

Activity 2: Open Pedagogy

In a video or a slideshow of screenshots, illustrate how a Google search using one of the search operators discussed in this chapter is more efficient than the conventional way of conducting a Google search.

Keep Detailed Research Notes

KARNA YOUNGER

Learning Objectives

After reading this chapter, you will be able to:

- Understand the professional need for collecting and documenting evidence.
 - Design and maintain a research collection system that is usable for you and your research collaborators.
-

Research Notes Back Up Your Credibility

Think back to the Stephen Glass scandal discussed in [the first chapter](#). Glass's notebook was at the center of the investigation into his fabrications. This eventual scrutiny showed that Glass got away with publishing made-up information because he falsified his reporting notes before submitting them to the magazine's fact-checkers, and convinced the fact-checkers not to interrogate these notes. For instance, he requested that his ["very nervous" sources](#) not be contacted, and created fake websites to make it appear as though he properly researched his articles. Glass cracked after [Forbes Digital Tool](#) questioned his article about a teen hacker. Glass [forfeited his career](#) because he forged his research, including the notes that supported it.

In this chapter, we discuss how your research notes will factor into the workflow, particularly the fact-checking process, of increasingly transparent news and marketing organizations. By

the end, you will understand why tracking your research is important for your professional reputation and for your personal sanity.

The Problem: Credibility and Public Opinion

In the years since the Stephen Glass scandal broke, we've witnessed the [rebirth](#) of and [politicization](#) of "fake news," misinformation, disinformation, and other [communications problems](#). In this environment, some members of the general public have developed a negative opinion of journalists and communications professionals. This may be due to [negative personal interactions](#) with the press or to a belief that communications professionals lack credibility. Even though large majorities of surveyed Americans have "at least some trust" in the reporting of professional news outlets, [Pew Research Center found](#) that 74 percent believe the media's reporting is biased.

Moreover, people across generations trust about "four-in-ten of the sources they are familiar with" and distrust "about two-in-ten," [Pew found](#). If you read between the lines, even when folks are familiar with a news outlet, they are likely not to trust the information it presents because they believe it may be [biased](#) or otherwise faulty. Such lack of trust is causing 38 percent of surveyed Americans to avoid the news altogether, according to the [Reuters Institute for the Study of Journalism](#). To combat audience drop, the media must garner the [skeptical reader's](#) trust and maintain its credibility.

News consumers [take a number of factors into account](#) when judging the credibility of news sources, according to Pew. Readers consider the credibility of the sources that are cited, credibility of the news brand, and their "gut instinct." If someone sends them a news article, they also factor into their decision-making process the trustworthiness of the person who shared the news with them.

As a communications professional, you only have so much control over "gut instincts" and your readers' Facebook friends. But you can strengthen people's faith in your sources and brand by elevating the quality and transparency of your research.

Solution: Fact-Checking Your Research and Notes

Having well-organized notes to submit to fact-checkers is key to establishing your and your employer's credibility.

Fact-checking has been used to [stifle deliberate fakers](#), like Glass, for about a century. [Time](#)

magazine instituted one of the nation's first fact-checking processes and, later, fact-checking departments to support muckraking journalists who used facts to take down corrupt politicians and institutions.

Today, there is a growing public demand for more fact-checking, particularly of political news, and a whole lot of studies on its importance. In turn, news outlets seeking to regain the public's trust are striving to be more transparent by publicizing their fact-checking and research processes. In fact, the International Fact-Checking Network explicitly states in its code of ethics that transparency of sources and research methodology are vital to combating the public's distrust of the media.

Peter Canby, senior editor and head of The New Yorker's fact-checking department, provides a good overview of the fact-checking process he oversees. This process starts with the writer, who must submit the notes, tapes, transcripts, phone numbers, web addresses, books, magazines, and anything else that he or she consulted during the writing of an article. Recreating the research process can be tedious because fact-checkers assume that they know nothing at all.

Fact-checkers then cross-reference the writer's facts, notes, and sources with other authoritative sources, such as scientists and other really smart people. They either verify that the writer's research is accurate, or challenge the writer to re-write or provide better support. Checkers also call (not email) everyone who was interviewed. They do not read quotes verbatim but will give interviewees the jist of what was reported.

Fact-checkers are particularly vocal about their penchant for grilling reporters about their notes. For instance, Canaby once spent months digging through one writer's 25 file cabinets of notes to fact-check a piece that took 16 years to write. As the number of file cabinets indicates, this writer was particularly detail-oriented, but that didn't mean Canaby could take it easy on his facts.

Similarly, a This American Life researcher and fact-checker, who made it a practice to "interrogate the living hell out of every single utterance of fact," for months before the seven-hour podcast S-Town was released and downloaded more than 40 million times. In one instance, the researcher cross-examined the host's script against interview notes, transcripts, photos, interviewees, and independent expert testimony, just to find out what kind of glue an interviewee mentioned off-hand. Was it a shellac or was it an epoxy? The host couldn't remember what the interviewee said and the interview audio was patchy.

This American Life couldn't say someone schellaced something if they used an epoxy, even if the interviewee was cool with it. The podcast staff felt that they could have been easily chal-

lenged by a knowing listener, so they had to get it right to avoid [publishing a correction](#). The host's scrupulous research methods eventually paid off when the fact-checker found a picture of the interviewee standing next to a particular can of glue.

At publications such as Time, the involvement of lawyers in the fact-checking process is a [preventive measure against libel lawsuits](#) and embarrassments. In the mid-1990s, Time and Newsweek asked their fact-checkers to take on additional reporting and writing duties. Almost immediately [Newsweek was hit with a scandal](#), as Craig Silverman reported for the Poynter Institute. Without full-time fact-checkers, the weekly mistakenly told its readers that it was OK for 5-month-old infants to chomp on chunks of carrots and zwieback (sweet, bite-sized crackers). Hoping to avoid instigating choking incidents and accompanying lawsuits, Newsweek recalled and reprinted its issues, and published a retraction advising that infants to stick to pureed solids.

To avoid such awkward moments, most publications hold their reporters' facts to high standards. In 2012 The Atlantic's [Ta-Nehisi Coates reflected](#) that it is rare for a media outlet not to have someone who serves as "a dam against you embarrassing yourself" or "being so arrogant that [you] don't even realize you've embarrassed yourself." To build and sustain Coates's culture of honesty, [someone acting as a copy editor](#) will double-check each individual fact, but also calculate whether or not the writer's argument is [true on a whole](#). In other words, they ask, do all the facts add up?

From start to finish, your research and writing may take longer than your memory can hold this information. You will have to keep track of everything you find so that you can complete your work and then, weeks, months, or maybe even years later, delineate the minutia of your research process to a fact-checker. Where did you find this piece of information? How did you search for it? Who told you about this fact? Did you use your source's words accurately? Your research notes need to hold these answers.

Practice: Transparency in Reporting

If news consumers were more aware of the in-depth fact-checking that goes on at news outlets, would they put more trust in journalists and the news? Maybe journalism's credibility crisis can be solved by having more transparency about journalistic research and fact-checking practices?

There seems to be a growing agreement that news organizations should be more open about their research and fact-checking. At the 2017 Poynter Ethics Summit, a number of the nation's

leading journalists, including The Washington Post's executive editor Martin Baron, [pledged to be more transparent](#) with readers regarding their research processes.

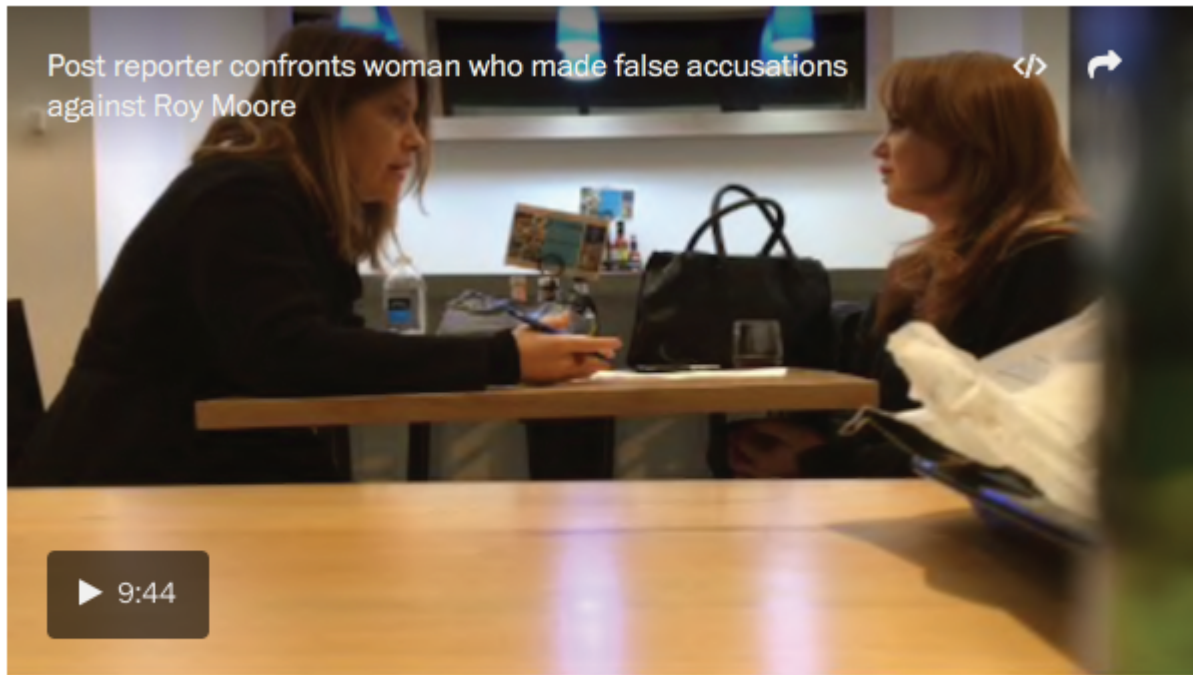
Baron made this public vow shortly after his newspaper [published evidence](#) of its reporters' research process. This particular research was prompted by a woman approaching the newspaper with the false allegation that, as a teenager, she had a sexual relationship with a much older Roy Moore, a 2017 Republican U.S. Senate candidate in Alabama. The Post's transparency in this instance serves as a useful example of how organizations can use a reporter's notes to nurture credibility among the public.

The Post's tale began in November 2017 when the paper [reported allegations](#) that a 32-year-old Moore engaged in a relationship with a 14-year-old. Accusations of sexual misconduct [dogged Moore](#) until his loss in the December special election. Shortly after the publication of the November article, a woman contacted the Post to share her own story, off the record. This means that she was not ready for the Post to make her story public.

As detailed in [the Post's expose](#), the paper immediately started its customary practice of investigating the woman's identity and her story. The Post's fact-checking process typically begins with the original reporter, who holds "primary" responsibility for fact-checking his or her stories, according to [the newspaper's policy](#). Once a reporter submits a complete story, one or more editors review the piece.

Shortly after the woman's first point of contact with the Post, alarms bells sounded. The Post's reporters and researchers came up with more questions than answers about the woman's story. Based on their research evidence, the Post's editors decided that "this so-called off-the-record conversation was the essence of a scheme to deceive and embarrass us."

The Post's reporter Stephanie McCrummen arranged a meeting with the purported accuser in a public place. The [following video](#) was recorded during this meeting. It illustrates the research process that McCrummen and her colleagues undertook to confirm the woman's backstory and allegations, before and during McCrummen's meeting with the accuser.



Reporter Stephanie McCrummen of The Washington Post, left, interviews Jaime Phillips at a Greek restaurant in Alexandria, Va., on Wednesday. (Dalton Bennett, Thomas LeGro/The Washington Post)

First, as McCrummen repeatedly tells the interviewee and as we can see, the Post recorded the interaction between the reporter and her informant. Additionally, McCrummen seems to make a show of taking notes in the videoed interaction. McCrummen positions her notepad so that the interviewee can see it and read it. Then the reporter stops and asks the woman to repeat herself several times, drawing attention to the fact that she is taking diligent notes. Because the Post staff believed the woman was trying to trick them, McCrummen clearly wanted to be as transparent as possible and stressed her note-taking process to avoid being accused of being unethical.

McCrummen is also transparent about the Post's background research. After offering a print-out of the interviewee's Go Fund Me webpage to her companion, the reporter explains why the Post was interested in the information, and asked the informant to confirm and comment on the webpage. Having a physical copy of the webpage allowed the Post to retain a record of the page's existence if it were deleted. This all happened while the cameras and recorder are capturing a conversation that later can be transcribed and consulted.

In all, the Post's expose on the purported Roy Moore accuser illustrates the importance of a thorough, well-documented, and transparent journalistic research process.

Practice: Advertising Substantiation

The need to document research extends to the advertising industry. Advertisers adhere to self-imposed standards about researching and validating facts that appear in the advertisements they publish and air. Advertising companies are held to the [Federal Trade Commission's \(FTC\) Policy Statement on Deception](#). This FTC policy demands that [advertisers substantiate all claims](#) made explicitly or implicitly in their advertisements. This is meant to ensure that advertisers do not mislead the public in a way that could cause harm. For instance, advertisers can't promise that [orange juice is a healing elixir](#) unless they document research from scientists and health professionals that substantiates this claim.

This means that if you are planning a career in advertising, you too will need to [substantiate your claims](#) by keeping track of and being transparent about your research. Your manager and the [FTC](#) will hold you accountable for every element of your advertisement, from the name of the product to the fine print, and for how the whole package adds up to a consumer's "net impression" of a product.

In all, regardless of the profession you pursue after college, getting in the habit of keeping track of your research will pay off in the long run.

Application: How to Create a Note-Taking System

To make sure that your research eventually can be verified, you should get in the habit of keeping all of your research ideas, from new ideas to project drafts. Doing so will allow you to retrace your steps and allow others, like fact-checkers or managers, to follow your tracks. You can think of your notebook as the tool that will help you transition from interviewing and researching to actually writing or creating, to getting published. There are three ways you could document your work:

Reporter's notebook

A notebook doesn't have to be a pad of paper, but you should track all elements of your research and sources from start to finish in a central location. This is key to being able to recall and recount what you did. Some suggested content for your notes:

- Ideas. Write them down so that you can develop them. For example, "What tools are journalists using to make their work more transparent to news consumers?"
- Keywords. Turn your ideas into keywords to use when searching. Make lists or mind

maps of broader and more specific terms. Keep track of when and where you use the keywords or phrases to replicate your successful searches. For example, “journalism, transparency, and ‘digital tools.’”

- Source notes. Once you have found, read, or talked to a source, you should document it.
 - Write a summary (2-3 sentences) of the source to give yourself a quick glance at why the source is important to your research.
 - Make careful notes of important statements. Be certain “direct quotes” are “properly marked” to make it clear when you are, or are not, paraphrasing your source.
 - Multimedia formats. Don’t forget that your notebook may include pictures, screen captures, videos, or audio of sources and information. (Remember: Always get someone’s consent before recording them, as The Washington Post did in the above example.)
- Tools
 - Pad and paper
 - Google Drive
 - Evernote
 - Trello
 - Mind map tool
 - Word processing tools provided through your university, such as KU’s Microsoft myCommunity (Students have access to KU’s myCommunity as long as they are affiliated with KU. They lose access to these files once they graduate.)

Scrapbook

While you are backgrounding your topic, you should save the sources you discover so that you can locate and properly cite them while you are writing. The tools listed below will allow you to bookmark and save websites and other sources in one location.

- Tools
 - Zotero

- Google Keep
- Evernote
- Pocket

Data Management

Data management sounds like it might involve lots of numbers. But in reality it just means that you need to know how to consistently and properly name and store your stuff so that you and those pesky fact-checkers can easily find it. Jamene Brooks-Kiefer, KU's data librarian, recommends the following to ensure that you are kind to your future self.

- File naming conventions
 - Rules
 - Keep it short (fewer than 25 characters)
 - No spaces. Use_underscore_or-dashes-orNoSpaces_instead
 - Don't use special characters (bad = [\$pecia|F!le\})
 - Put the date at the beginning or end of the file name, if the date is important.
 - YYYYMMDD or YYYY-MM-DD
 - Use leading 0s for numbers (ex. SpecialFile01, SpecialFile02). This is useful if you are saving different versions of a draft.
- Example file naming structure:
 - Transparency_Journalism (folder)
 - Transparency_Interviews
 - GumpForrest20171208
 - Transparency_Research
 - TaylorDan_Benefits201512
 - Transparency_Writing

- Wa_Post_Feature201801
- Back it up. Follow the maxim, “Lots of Copies Keep Stuff Safe” (LOCKSS). This means that you shouldn’t rely on your hard drive to be around forever. Keep three copies of your work: one on site (like on your hard drive), and two on different storage sites (like on a couple of different clouds). Here are some free cloud storage sites:
 - Google Drive
 - DropBox
 - Box
 - Amazon Drive (5G free)
 - KU’s myCommunity (One terabit of storage. Students have access to KU’s myCommunity as long as they are affiliated with KU. They lose access to these files once they graduate.)

Here is Jamene’s [handy handout of tips](#) on data management.

Activity 1: Fact-Checking Disclosures

Investigate whether or not your favorite news source posts any information about its fact-checking process online.

- If so, how accessible is the information about its fact-checking process?
 - Is it easy to find, read, and understand?
 - If not, is there information about it elsewhere? How do your findings impact your opinion of this news source?
-

Activity 2: File-Naming Conventions

Using the information about file naming conventions from the chapter, draft some

sample rules for how you will name and save files related to your research projects and coursework.

Activity 3: Open Pedagogy

Explore the recording and storage tools listed in this chapter, and select tools to use for your notebook, scrapbook, and cloud storage.

- Create a tutorial of one of the tools you will use throughout the semester.
 - In your tutorial discuss such aspects as its ease of use and why it integrates into your workflow.
 - You may create a voice-over PowerPoint slideshow, [video](#), or some other presentation format.
-

Attribute All Sources

KERRY BENSON

Learning Objectives

After reading this chapter, you will be able to:

- Distinguish between primary and secondary, and human and nonhuman sources.
 - Explain why and when attribution is necessary.
 - Use proper mechanics of attribution.
 - Embed links to online sources in digital text.
-

Ladybug Rock, by Mark Caton

My father, a Presbyterian minister, rarely used the King James Version of the Bible, so I remember vividly when he referenced the Apostle Paul's letter to the Romans from the KJV.

Romans 13:7 reads: "Render therefore to all their dues: tribute to whom tribute is due; custom to whom custom; fear to whom fear; honour to whom honour."

Because I was a child, the language of the passage confused me, and I asked my dad what it meant. He laughed before briefly summing up Paul's message.

"It pretty much means you give people recognition for what they've done," my dad said. "Like when your mom and I really liked the ladybug rock you brought home from school and you

told us Mark Caton was the one who painted it. You gave Mark what was due to him, the credit for being the painter, instead of telling us you'd done it."

Not everyone needs a biblical lesson on giving credit where it's due. And credit isn't necessarily an acknowledgment of excellence, as Mark Caton could have done a poor job of painting a ladybug on stone, but in journalism and strategic communications attribution is like that ladybug: a rock. It's one of the ethical (and often lawful) foundations of a news or feature story, a documentary, a company news release, a digital ad, or a marketing PowerPoint.

This chapter will help illuminate the concept of attribution, why it matters, who uses it, who benefits from its use, when it's used, and why professionals may disagree on its use. This chapter also will address how to journalistically cite sources, how attribution can go wrong, and where to find more on the topic.

What is Attribution?

Reputable and engrossing writing, whether it's journalism or strategic communication, starts with responsible and principled research and reporting. Attribution is vital to all ethical reporting because it identifies information sources.

The [Accrediting Council on Education in Journalism and Mass Communications](#) (ACEJMC), which accredits journalism schools, lists core values and competencies all graduates should be able to meet. Among those competencies is the ability to "demonstrate an understanding of professional ethical principles and work ethically in pursuit of truth, accuracy, fairness and diversity." Attribution is key to the quest for veracity and transparency. Attribution's job in journalism is to answer the "who" of a quotation, the "where" and "what" of background information, and -- sometimes -- the "how."

Who said what? Where did reporters or editors get their data? What research was used to support an opinion? How did a human source provide those statistics?

Understanding attribution requires understanding sources.

Primary Sources

If a human contributes information for a story, whether it's in-person, on the phone, or via email or text, that person is a source. The most credible human source is a primary one, a person with a direct connection to the information or situation pertinent to the story.

This first-hand relationship provides for an accurate telling of that person's experience. Even though the source's personal viewpoint can be an opinion, it can also provide a reporter with facts. It's the reporter's responsibility to confirm the facts. An exception to this is if the journalist is the witness to events. Journalists can't name themselves as sources in articles.

Primary human sources also add what it sounds like -- humanness. They put a face to the facts and a person to the perspective. Often they can synthesize information in a way that makes it accessible and easy to understand for other people.

Any person who contributes any kind of information to a story is a human source, even if that material is never published or broadcast.

Primary human source examples:

Chadwick Boseman, star of the Disney and Marvel Studios film "Black Panther," says in a 2018 interview with [USA Today](#) how respectful he is of the cinematic history the movie was about to make.

Infections, like the kind caused by what the Centers for Disease Control and Prevention call "nightmare bacteria," are drug-resistant and "virtually untreatable with modern medicine," CDC Principal Deputy Director Dr. Anne Schuchat said in a [press briefing](#).

The reporter in each scenario above indicates to readers or viewers where the information originates. The importance of primary source credibility is clear. The main actor in a film will know about acting in that film. Schuchat, who served as acting director of the CDC twice, will know the agency's public health concerns and alerts.

A journalist could probably get the same information from a nonhuman source, but Boseman and Schuchat put a trustworthy human face to the communication they're sharing.

Primary sources also can be nonhuman. Government records, reports of original research studies, and polls are examples of primary sources because they are the original locations of the information they contain. A nonhuman source is primary if it provides original information that does not cite other sources.

Some sources, like research studies, often are both primary and secondary sources, because

they both re-state information found elsewhere, and are the original sources of other information.

Primary nonhuman source examples:

April is designated as Alcohol Awareness Month by the federal government. A journalist developing a story about drug and alcohol trends among seniors, or in a specific geographical region, might use data published by the National Council on Alcoholism and Drug Dependence (NCADD), a primary nonhuman source.

Marketers at a major health care organization choose similarly to highlight the importance of alcohol awareness, and they also provide NCADD data in a story in their monthly e-zine or quarterly newsletter. NCADD serves as a primary nonhuman source. The marketers supplement their story with human primary sources from within their organization, such as physicians and counselors.

Journalists and strategic communicators should not leave their audience to question information or sources' legitimacy. The exception is if something is a well-known -- or widely reported -- fact that's reasonably indisputable. For example, it would not be necessary to cite a source for "Abraham Lincoln, the 16th president of the United States, delivered what would come to be known as 'The Gettysburg Address' in November 1863."

Secondary Sources

Both human and nonhuman sources also can be secondary sources, or research material. A secondary source is information containing others' reporting and data gathering, and it's usually information used for other purposes as well as a journalist or strategic communicator's purposes.

Journalists must determine if the secondary source information is fact or opinion, or both, which they usually do by cross-referencing the information with other verifiable sources.

If a reporter looks to a website for background information, or reads other media reports on a story, it's the reporter's responsibility to go to the information's original, or primary, source.

Avoid quoting The New York Times or Fox News as a source from their stories on obesity in the United States. Go to the primary source those media reference. If they cite a study, or

data released by the Centers for Disease Control and Prevention (CDC), go to that study or to the CDC website. After verifying the information, cite the study or the CDC.

For example, a reporter working on an article about border crossings along the United States' southern border sees a CNN report on a similar story, using data about who is crossing and where. The reporter should look for the source of the data, not CNN's information. If the numbers are from U.S. Customs and Border Protection (CBP), the reporter should go to CBP for its facts and figures, and cite it as the source.

Often journalists use secondary sources as a springboard to develop a story idea, including a single exposé, an in-depth series of articles or podcasts, or a documentary. From these secondary sources, they look for the primary sources of information, and use those in their reports.

When To Attribute?

The late journalist Steve Buttry, whose résumé included editor, reporter, newsroom trainer, and teacher of digital journalism, wrote the following in a blog post, [“You can quote me on that: Advice on attribution for journalists”](#):

“Attribute any time that attribution strengthens the credibility of a story. Attribute any time you are using someone else’s words. Attribute when you are reporting information gathered by other journalists. Attribute when you are not certain of facts. Attribute statements of opinion. When you wonder whether you should attribute, you probably should attribute in some fashion.”

Buttry’s advice from the same post on when not to use attribution is shorter:

“Don’t attribute facts that the reporter observed first-hand: It was a sunny day. Don’t worry about attributing facts where the source is obvious and not particularly important and the fact is not in dispute.”

Journalists and strategic communicators who write or report factual information or opinions should attribute all those facts and opinions to a source. In some circumstances, attribution is particularly important. Attribute facts if controversy might surround them, such as when gun permit requests go up or down, or the number of middle-aged men addicted to opioids changes dramatically. Also, always attribute evaluative facts that depend on the rule of law, or facts that rely on an expert’s information.

In broadcast, reporters and podcasters should identify the source of any statement, particularly one of questionable accuracy. The source interviewed in a radio, podcast or videotaped segment must be identified at the start. The newscaster, reporter, or podcaster can identify with a sound bite before the source speaks.

With video, a source can be acknowledged verbally and with a lower third super, a graphic, usually the interviewee's name and location, superimposed along the bottom of the screen.

Why Attribute?

Both journalists and strategic communicators use attribution to signal to their audiences that they're reliable and sincere. It indicates that they've vetted the sources, which helps readers, listeners and viewers understand the information effortlessly, without having to stop and question the content's accuracy and authenticity.

Journalists and strategic communicators benefit from using attribution, because the trust that their audience places in the sources they cite extends to the journalists and strat comm practitioners themselves.

Good attribution says to the audience, "You can trust me because the sources I use are trustworthy."

Individual media companies underscore the importance of attribution in their values statements. [According to The Associated Press](#), the goal of attribution is "to provide a reader with enough information to have full confidence in the story's veracity."

Attribution also lets the journalist or strat comm practitioner share or shift the responsibility for any information in a story. If a reader disagrees with something he or she sees in an article or report, attribution can take the heat off the journalist or strategic communicator who wrote the piece, and direct it toward the source of the information.

When a reader or viewer questions the veracity of some information, attribution says, "Blame the message source, not the messenger."

Attribution also allows audience members to examine a topic further. By pointing to their sources, journalists and strat comm practitioners invite their readers and viewers to find those sources for themselves, and to take deeper dives into the topics they cover.

Attribution is like the entryway to Platform 9 3/4 in the Harry Potter books, from which readers can set off on their own journeys into the subjects that interest them.

Finally, attribution can be the antidote to journalism's biggest transgressions of fabrication and plagiarism. A journalist or strat comm practitioner who points to his or her sources is less likely to have made up something, or taken credit for someone else's words, than one whose sources are hidden.

There is sometimes a misguided perception that attribution is less important in strategic communication than it is in news and broadcast journalism.

The Public Relations Society of America, for one, opposes this view. It argues in its [Ethical Standards Advisories — Best Practices](#), that despite the pressures of time and shortage of resources that all content creators face, public relations practitioners have a duty to disclose their sources:

“Public relations professionals may be ... challenged when facing a deadline, an assignment in a new area or even the lack of a good idea and the easy solution may be to use someone else's words or ideas. However, an ethical practitioner respects and protects information that comes into his or her possession and makes an effort to preserve the integrity of that information.

“An ethical practitioner also uses the works of others appropriately, with proper author/creator attribution. There are many ways to do this ... including footnotes, parenthetical references to the original author or a reference to the original work within the text. When words are used verbatim, it is important that they be enclosed in quotation marks and the exact source of the quote be provided either within the text or in a reference section.”

These guidelines reflect the professional standards expected of all communications professionals.

How To Attribute?

How to select quotes is part of learning to build an article, newscast, or magazine story, but how to assign responsibility to quotes is part of understanding attribution.

Direct quotes

The following comes from guidelines used in the School of Journalism and Mass Communications at the University of Kansas.

A direct quote must be exactly what a source says. Direct quotes should add zest to the story. Don't use quotes to deliver boring-but-necessary facts or use quotes that don't drive the story forward.

Direct quotes are used also for precision. An accurate direct quote can add confirmation of controversial facts.

It can convey a person's information and attitude, which adds character and flavor to a story.

Examples of direct quotes:

"It's just a job. Grass grows, birds fly, waves pound the sand. I beat people up," boxer Muhammad Ali said.

"I've missed more than 9,000 shots in my career. I've lost almost 300 games. Twenty-six times, I've been trusted to take the game winning shot and missed," basketball legend Michael Jordan said. "I've failed over and over and over again in my life. And that is why I succeed."

"That's all I could ever hope for, to have a positive effect on women. 'Cos women are powerful, powerful beings," singer Rihanna said. "But they're also the most doubtful beings. They'll never know – we'll never know – how powerful we are."

Say "no" to quotes that add nothing, such as "we're so excited," and "we went out there and did our best." Obvious. Goofy. This may be difficult for strategic communicators whose bosses or supervisors may press for hyperbole. Resist. It damages credibility.

But journalists and strategic communicators often include direct quotes from public officials or company executives, even if what's said doesn't push the story forward or add flavor, because readers and viewers see those figures as authorities who should know what's going on.

Paraphrasing

A paraphrase, or indirect quote, is a re-wording of what a source says. It must reflect the source accurately, even though it's not relayed word for word. An indirect quote must not alter the meaning of what someone said.

In incorporating quotes into their writing, journalists often mix direct and indirect quotes.

This is the direct quote:

"When I first started teaching J101, I like, was happy to have – wow, like, 450 students, but then I had doubts," Benson said. "But I wanted to teach many students at once. I thought I could teach that many. But, wow, managing a huge class is like turning a cruise ship in a hurricane."

This is the paraphrase, or indirect quote:

Benson said she is happy to teach J101, a course with 450 students, but initially had doubts.

The writer could then use a partial quote to support the paraphrase:

"Managing a huge class is like turning a cruise ship in a hurricane," Benson said.

Handling human quotes

When referring to information given by specific human sources, the verb in print is "said," even if a writer isn't directly quoting a source. "Said" is best because it can't be wrong. If a source said something, the source spoke and said it. "Said" doesn't stop thought when a reader sees it.

Verbs such as "explained" or "disclosed" or "exclaimed" require a reader to process differently. Such verbs draw attention to themselves and away from the content that matters. Readers have to think about each verb because those have connotations that "said" does not.

Weird verbs of attribution, such as argued, claimed, concluded, warned, urged and remarked,

are just that, weird. Writers don't want to imply meaning that might alter the larger article's credibility. "Said" as a verb is neutral. It doesn't hint at any meaning beyond its action.

Handling nonhuman quotes

"According to" is used to attribute information to nonhuman sources. Journalists and strategic communicators should use "according to" for documents, news releases, studies, statistical abstracts, infographics, or secondary sources in general.

In journalism and strategic communication, writers do not use in-text citations. That is, in journalism, there is no MLA, APA, or Chicago citation style. Save that for English, history, and political science research papers. In journalism, for in-text source identification, if it's not "said," it is usually "according to."

As with "said," there is no need to come up with different terms.

Examples of nonhuman attributions:

Teachers in the district make at least three times as much per year as teachers in other area school districts, according to state employment records.

According to a World Health Organization report, this season's flu strain may infect millions worldwide.

Student athletes are graduating at rates twice as high as they were a decade ago, according to NCAA findings.

But that's so repetitive

Journalists and strategic communicators, particularly if they hear their English composition teachers in their heads, may resist "said" or "according to" for every attribution in a story. They fear the repetitive use will make their writing dull and unvaried. But readers appreciate the ease of reading, so they're not usually troubled by "said" or "according to."

Attribution terms may vary by news organization or publication. Some journalists have the option to use alternatives, such as "stated" for human sources. Magazine writers often have the editorial leeway to use "says" – using present tense even if they're attributing content a

source provided in an interview a day, a week, or a month prior to publication. But writers can't be wrong with "said" when attributing a human source.

Order matters

Attribution can work at the beginning of a sentence, but often is even better at the end of the sentence. This places the emphasis on the information first, then on the source.

Starting with the quote or paraphrase, and then providing attribution, is more interesting for readers than the other way around. Presumably, what a person is saying is more interesting than who's saying it. If it's a well-chosen quote, the information is what's important or relevant, and the attribution is just for context and credibility.

Grammar notes

In English, writers usually put the verb after the subject in declarative sentences. Not always, but it keeps the emphasis on the subject. Remember, "Jesus wept."

The order of name and verb is, when possible, name, then verb.

Correct example:

"The scientist examining the evidence couldn't conclude the origin of the DNA," Fontaine said.

Incorrect example:

"The scientist examining the evidence couldn't conclude the origin of the DNA," said Fontaine.

Exception example: When there's a title or description that makes it awkward:

"The scientist examining the evidence couldn't conclude the origin of the DNA," said Elliot Fontaine, Colorado Springs police spokesman in charge of the investigation.

Incorrect exception example:

“The scientist examining the evidence couldn’t conclude the origin of the DNA,” Elliot Fontaine, Colorado Springs police spokesman in charge of the investigation, said.

Broadcast specifics

Broadcast attribution differs from print in several ways. Direct quotations are rare. Radio, television and podcast writers prefer indirect quotes or statement summaries.

Direct quotes, if used, should be preceded by a phrase such as “in his words” or “what she called.” Quotation marks should also be shown. They give broadcasters a clue, or signpost, to change their vocal pattern.

Broadcast example:

President Donald Trump says he will roll back all policies and laws from what he called “Obama’s clown car of a presidency.”

If it’s critical that a source be quoted directly, a broadcaster or writer may use sound bites, or actualities, in the audio. Attribution is always given before sources speak. It must be clear from the start that the quote is not the broadcaster’s thoughts or opinions.

With radio or podcasts, because listeners use only their ears to absorb the information, they need to know right away who’s responsible for what’s being said. It’s too cumbersome to inject “quote and unquote” into broadcast to indicate to listeners what is and isn’t a direct quote.

An identifier, such as a title, always goes before the name in broadcast.

Broadcast identifier example:

New York City Mayor Bill DeBlasio says he will support the new NYPD policy change on overtime pay.

With TV or video, the visual shows who’s making the statement, and a character generator

super (or lower third) identifies the person after three or four seconds of video. The anchor or reporter may or may not identify the source by name in the introduction, but usually provides an identifier for context.

Broadcast lead-in example:

If the KU chancellor says,

“The number of both undergraduate and graduate students suffering from food insecurity rose 48 percent between 2015 and today.”

The broadcaster might lead into the sound bite with a synopsis: Chancellor Doug Girod says food insecurity is on the increase among students at KU.

In broadcast, source attribution and identification should be written conversationally. Think of it as the difference between a formal, engraved invitation delivered by the postal service and an e-vite via email or social media.

Be careful with pronouns. Again, because listeners and viewers can't refer back easily in a video or audio story, they may not remember, “She? Who is she?” It's better to repeat a name, office or title to prevent confusion.

Use “says” and not said, as if it's happening now. “Says” is present tense and describes an ongoing action. But when broadcasters are speaking to something a source said in the past, “said” makes more sense.

Broadcast says/said example:

Chancellor Doug Girod says food insecurity is on the rise among KU students. Before he became chancellor, Girod said he would address food scarcity across campus.

Broadcast style also may allow for “according to” when using human sources. It may be a matter of news organization policy.

Embedding Links: Digital Attribution

The Internet allows journalists and strat comm practitioners to elevate their attribution game by embedding links in their work to the sources that are available online.

If you are producing content for digital distribution, link, link, link. Linking goes hand in hand with attributing online content, whether it's news or strategic communication. Readers can -- even if they don't -- click on links that provide background and full context to the cited information.

Linking is about transparency and trust with readers. Linking to sources in articles and reports increases the transparency of the journalists' and strategic communicators' work. It brings readers closer to the sources, encouraging them to verify the veracity of the information they are reading.

If attribution is like giving your friend an address to a restaurant, embedding a source's link is like holding the restaurant's door open for your friend when they arrive.

Any source that can be linked in an online article, should be linked. Not doing so can raise questions in an audience's mind about why the source isn't linked.

What Embedded Sources Look Like

Here are two examples of what embedding looks like in professional publications.

The following screenshot shows a paragraph in a Lawrence Journal-World, July 13, 2018, article titled "[New Kansas AD Jeff Long addresses still-defunct KU-MU Border War.](#)"

Last fall, just before the start of the 2017-18 college basketball season, KU and MU played an exhibition basketball game at Sprint Center to benefit hurricane relief charities, *but even then there was no serious talk of renewing the rivalry* that has been defunct since MU left the Big 12 for the SEC in July 2012.

The link in the paragraph takes readers to an Oct. 22, 2017, article titled "[Bill Self on playing Mizzou: 'I don't think there's been any change in our position.'](#)"

The next screenshot shows two paragraphs from a July 14, 2018, article, "[IceCube: Unlocking the Secrets of Cosmic Rays](#)," published on the website [Space.com](#).

Spotting neutrinos requires the use of very clear material such as water or ice. When a single neutrino crashes into a proton or neutron inside an atom, the resulting nuclear reaction produces secondary particles that give off a blue light known as Cherenkov radiation.

"The neutrinos that we detect are like fingerprints that help us understand the objects and phenomena where the neutrinos are produced," according to [the IceCube team](#).

The link in the second paragraph leads to a [FAQ page](#) on the website of the University of Wisconsin's [South Pole Neutrino Observatory](#).

The URLs for the articles presented above are:

<http://www2.ljworld.com/weblogs/tale-tait/2018/jul/13/new-kansas-ad-jeff-long-addresses-still/>, <http://www2.kusports.com/news/2017/oct/22/bill-self-playing-miz-zou-i-dont-think-theres-been-/>

<https://www.space.com/41170-icecube-neutrino-observatory.html>,
<https://www.space.com/>, <https://icecube.wisc.edu/about/faq>

<https://icecube.wisc.edu/>.

But the professional examples do not show their readers these strips of URL code.

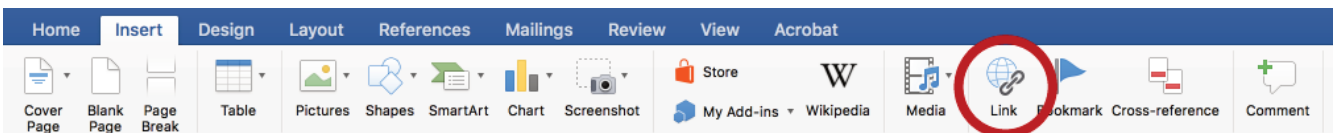
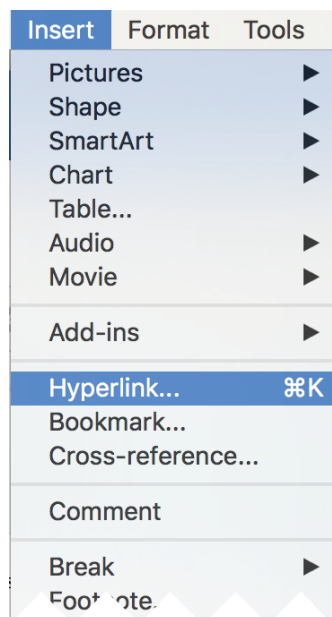
This is because a name or description that identifies exactly where readers are going when they click on the link is more welcoming than an incomprehensible string of code. A linked snippet of text gives readers the ability to choose their web source with confidence, and it looks much more professional than raw URL.

How to Embed Links to Online Sources

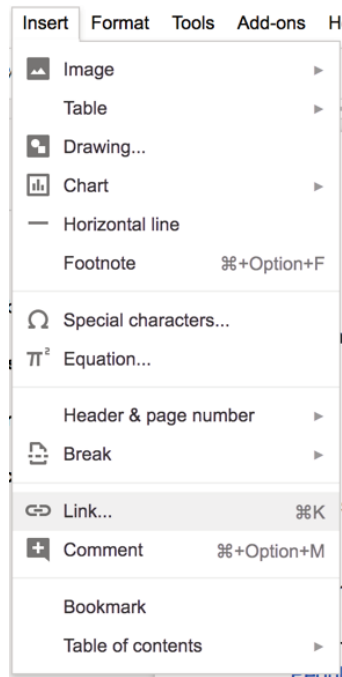
You probably already are familiar with inserting source links into documents, emails, social media posts, or presentations by copying and pasting the URLs of the sources. It takes eight steps to embed a link (also called a hyperlink) in text.

1. Browse to the source’s webpage.
2. At the top of the browser, locate the URL field (URL stands for “uniform resource locator”).
3. Highlight the entire URL and copy it (Command+C, or Control+C, or Edit > Copy).
4. In the document you are writing, write a statement that will serve as the link. It could be a descriptor, such as KU J-School Technology, or it could be more directive and fun, such as Start here to learn how best to use your technology.
5. Highlight the text you just typed.
6. Use the “insert hyperlink” tool in the platform you are using. Here are some visual examples of where to find these tools. The link tool often is represented graphically with two links of a little chain.

Word:



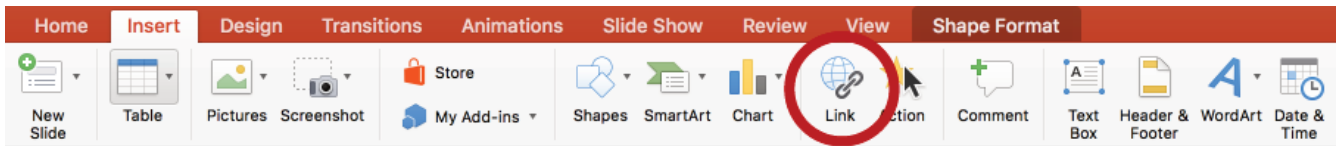
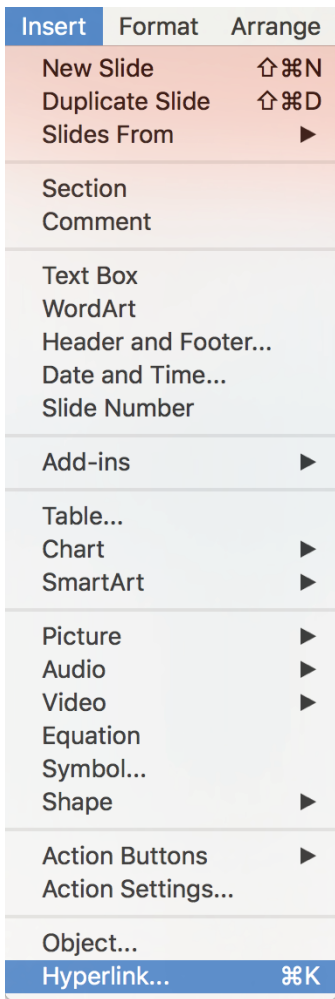
Google Doc:



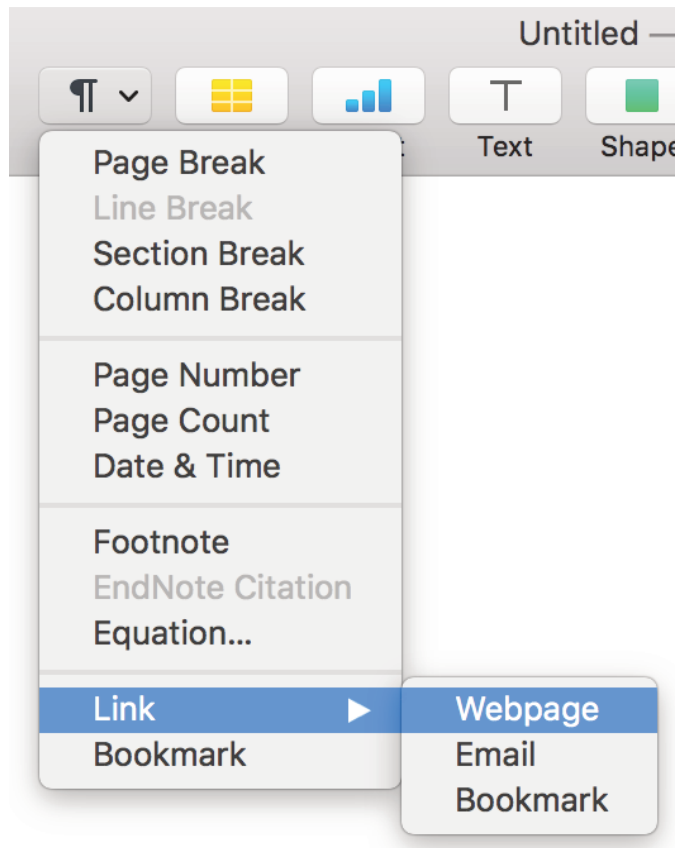
Blackboard:



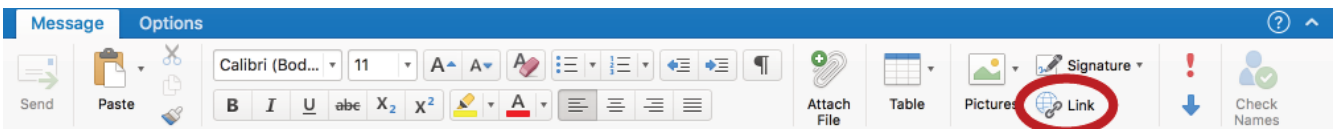
PowerPoint:



Pages:



Outlook:



7. In the dialog box that appears, paste the source URL into the appropriate field. Oftentimes, you will see the text you highlighted in this box as well.
8. Test the link using a different browser or computer than you used originally. This is especially important for links that originate behind paywalls.

What If a Source Wants To Remain Anonymous?

Avoid using unidentified sources for news or strategic communication documents. But this

might depend on newsroom or organization policy. It's usually not acceptable, as trust and transparency are the agreement readers, viewers, and listeners have with media content providers.

Exceptions are sometimes made when the only way to get a story is to offer a source anonymity. It shouldn't be given lightly and without understanding that the information must still be reliable and accurate.

Reasons to offer anonymity could include a situation where by providing a name, the source would suffer public humiliation, lose a job or position, or go to jail.

If an anonymous source must be used, offer as much detail as possible about the source and explain the reason for anonymity.

For example, name a source as "a university official with ties to the administration who requested anonymity because his superiors had ordered him not to speak publicly or he would lose his position."

When a source requests anonymity, get the source's name and contact information, just in case an editor needs it.

The following are examples of ethical codes and policies journalists follow when deciding to use anonymous sources or pseudonyms.

Under [Associated Press rules](#), material from anonymous sources may be used only if:

- The material is information and not opinion or speculation, and is vital to the news report.
- The information is not available except under the conditions of anonymity imposed by the source.
- The source is reliable, and in a position to have accurate information.

The Society of Professional Journalists published [a position paper](#) on anonymous sources:

- Identify sources whenever feasible. The public is entitled to as much information as possible on sources' reliability.
- The most important professional possession of journalists is credibility. If the news consumers don't have faith that the stories they are reading or watching are accurate and fair, if they suspect information attributed to an anonymous source has been made up, then the journalists are as useful as a parka at the equator.

- To protect their credibility and the credibility of their stories, reporters should use every possible avenue to confirm and attribute information before relying on unnamed sources. If the only way to publish a story that is of importance to the audience is to use anonymous sources, the reporter owes it to the readers to identify the source as clearly as possible without pointing a finger at the person who has been granted anonymity. If the investigating police officer confirms John Doe has been arrested, the officer is a “source in the police department” and not even a pronoun should point to the gender.

The Washington Post Standards and Ethics: Policy on Sources and Confidential Sources

- The Washington Post is committed to disclosing to its readers the sources of the information in its stories to the maximum possible extent. We want to make our reporting as transparent to the readers as possible so they may know how and where we got our information. Transparency is honest and fair, two values we cherish.
- Sources often insist that we agree not to name them before they agree to talk with us. We must be reluctant to grant their wish. When we use an unnamed source, we are asking our readers to take an extra step to trust the credibility of the information we are providing. We must be certain in our own minds that the benefit to readers is worth the cost in credibility.
- In some circumstances, we will have no choice but to grant confidentiality to sources. We recognize that there are situations in which we can give our readers better, fuller information by allowing sources to remain unnamed than if we insist on naming them. We realize that in many circumstances, sources will be unwilling to reveal to us information about corruption in their own organizations, or high-level policy disagreements, for example, if disclosing their identities could cost them their jobs or expose them to harm. Nevertheless, granting anonymity to a source should not be done casually or automatically.
- Named sources are vastly to be preferred to unnamed sources. Reporters should press to have sources go on the record. We have learned over the years that persistently pushing sources to identify themselves actually works—not always, of course, but more often than many reporters initially expect. If a particular source refuses to allow us to identify him or her, the reporter should consider seeking the information elsewhere.
- Editors have an obligation to know the identity of unnamed sources used in a story, so that editors and reporters can jointly assess the appropriateness of using them. Some sources may insist that a reporter not reveal their identity to her editors; we should resist this. When it happens, the reporter should make clear that information so obtained cannot be published. The source of anything that is published will be known

to at least one editor.

- We prefer at least two sources for factual information in Post stories that depends on confidential informants, and those sources should be independent of each other. We prefer sources with firsthand or direct knowledge of the information. A relevant document can sometimes serve as a second source. There are situations in which we will publish information from a single source, but we should only do so after deliberations involving the executive editor, the managing editor and the appropriate department head. The judgment to use a single source depends on the source's reliability and the basis for the source's information.
- We must strive to tell our readers as much as we can about why our unnamed sources deserve our confidence. Our obligation is to serve readers, not sources. This means avoiding attributions to "sources" or "informed sources." Instead we should try to give the reader something more, such as "sources familiar with the thinking of defense lawyers in the case," or "sources whose work brings them into contact with the county executive," or "sources on the governor's staff who disagree with his policy."

How To Attribute Information From an Email, a Text, or a Social Media Post?

If a credible source responds to an interview in an email, attribution should indicate this.

Email attribution example:

The CEO of Momette Healthcare Group, Lana Dunham, wrote in an email that she plans to merge the group with St. Catherine's Health Systems.

Social media posts are tricky and should serve primarily as story ideas to pursue.

According to National Public Radio's ethics handbook, social platforms can serve as good newsgathering tools, but NPR said that it:

"requires the same diligence we exercise when reporting in other environments. When NPR bloggers post about breaking news, they do not cite anonymous posts on social media sites — though they may use information they find there to

guide their reporting. They carefully attribute the information they cite and are clear about what NPR has and has not been able to confirm.”

Also, social media users aren’t always who they say they are, which poses a verification problem. If it’s reasonably possible to identify an account and the posts or tweets coming from it, use something like this to attribute:

Social media example

[Illinois Senator Tammy Duckworth](#), who gave birth to her second child on April 9, tweeted on April 19: “May have to vote today. Maile’s outfit is prepped. Made sure she has a jacket so she doesn’t violate the Senate floor dress code requiring blazers. Not sure what the policy is on duckling onesies but I think we’re ready”

Tweeted, posted, shared. Use the appropriate attribution verbs for their social platforms.

How To Attribute a File, Archive or Stock Photo or Video?

It must be attributed to its original source. Include the title, author, source and date it was accessed.

Example:



The Miriam and Ira D. Wallach Division of Art, Prints and Photographs: Photography Collection, The New York Public Library. "Farmhouse and family of resettlement client. Waldo County, Maine." New York Public Library Digital Collections. Accessed April 19, 2018. [NYPL Digital Collections](#)

Attribute any Creative Commons photos or video by identifying the title of the work, the author or creator, the source (where it's found) and license type. All Creative Commons work has a license type, which must be acknowledged.

Find specifics about CC attribution best practices here: [Creative Commons attribution guidelines](#)

To identify the digital rights of an image, use a search, such as the one developed by the Visual Resources Association: [Image search resource](#)

News Releases

Reproducing news releases – either sent or gathered from a website – has been a lively topic in nearly all news centers that use releases and among all organizations and businesses that send or post them.

Raymond James attorney and KU alum Ellyn Angelotti Kamke [wrote about attribution](#) and its squishy spots for The Poynter Institute. In a 2013 article, Kamke addressed the sometimes-disputed issue of plagiarism-without-attribution in which some journalists view verbatim news release use.

In her article, Kamke raised the question many in the industry ask frequently, “How should journalists use and attribute information that comes from an official source via press release, a prepared statement an official social-media account or some other widely distributed avenue?”

Attribute. Attribute. Attribute. For transparency and credibility. Attributed material, Kamke wrote, “even when it comes from an official source, gives the audience more context about that information and how it was acquired by the writer.”

Strategic communicators, such as those specializing in public relations, want their material used and more often than not put the research and good writing into a news release so it’s fit for immediate publication with minimal editing. But even PR professionals see the value of readers knowing the sources and making their own decisions about their veracity.

A Practitioner's View



Mike Miller

B.S., KU Journalism, 2000

Senior Director, Editorial, NBC Sports Digital

NBC Sports Digital, including flagship sites NBCSports.com, Rotoworld and ProFootballTalk, serves a sports audience that craves sports news and analysis. How do we do that? We do some original reporting and we rely on extensive story aggregation.

Any story that isn't reported by our writers is explicitly credited and linked to high up in the story, sometimes in the initial graf. Our editorial standard is that we don't do lengthy excerpts or extensive quoting (why reproduce what the original story already has?), because we don't want any confusion as to where the original story originates.

Excerpts are italicized, set off with quotes, or both. It should clearly be separated from the rest of the story.

For us, this places the onus on our writers to extend that aggregated story with a specific editorial take or analysis that drives the story forward. If we can't break the story, we tell our audience why it's important, which helps the original story's credibility (we create awareness) and gives us some authority through analysis.

PART II

EVALUATING INFORMATION

Evaluate Information Vigorously

CALLIE BRANSTITER AND PETER BOBKOWSKI

Learning Objectives

After reading this chapter, you will be able to:

- Appreciate the need to vigorously evaluate the credibility of information.
 - Differentiate between primary and secondary sources.
 - Trace the primary source of information.
 - Identify clickbait articles and content farms.
-

What You Know About Evaluating Information Isn't Enough

You have been taught how to evaluate online information. This may have started all the way back in elementary or middle school, and it definitely happened in high school and college.

English or social studies teachers, or a librarian, cautioned you to be careful about what websites your research came from. You learned to confirm facts using two or more sources. You learned to consider who was the author of the information you were quoting, about checking what sources this author used, and whether there was bias in the author's writing. Somewhere along the way, you also learned that Wikipedia is a terrible, horrible, not good, very bad source of information.

So far, these evaluation standards have served you well. But now that you're in journalism school, you need to raise your information evaluation game.

Psychologists say that there are two ways in which we process information. The first way we process information is quickly and with little thinking, using tried-and-true heuristics. They call this type of processing System 1. A heuristic here means a simplistic signal that we use to form an opinion, or to make a decision. The second way we process information, System 2, is by being deliberate, carefully considering the varying dimensions of the matter that's in front of us.

To understand this distinction better, think about the information processing we do while shopping. Sometimes a simple sign, like a banner screaming "20% off!" or a cute salesperson saying that some garment looks good on us, convinces us to make a purchase. That's what System 1-based shopping decisions are like.

At other times we wrack our brains about whether it's the right time or circumstance to spend our money, whether the quality or price is quite right, what others will think of us, and whether we will regret our decision after we walk out of the store. Such deliberations suggest System 2 decision-making.

When it comes to evaluating the credibility of information, we have found that most of our students start this class using System 1 processing. This means that they pick up on simplistic signals in the information they are evaluating — heuristics — and use these to make their credibility judgments.

Some of our students' favorite heuristics are a website's top-level domain (e.g., Does the information come from a .com website?), an author's credentials (e.g., Does the author have a Ph.D.?), and whether an article shows its sources (e.g., Does it have a bibliography or a Works Cited page?). Our students also often invoke the "I checked the information in two sources" heuristic. And all of our students assert that Wikipedia is not a good source of information, even though all of them regularly use Wikipedia as a source of information.

As a result of using the heuristics they have relied on for years, and System 1 processing, our students tend to start this class with credibility evaluations that are pretty shallow and not well thought out.

Your credibility is too valuable to rest on heuristics. Before using a source in your writing or in other media you produce, you need to consider carefully whether the source will add to or diminish your credibility.

In this and in the next three chapters, we present and practice evaluation tools that will help you consider the credibility of information at the systematic, deliberate, System 2 processing level. These strategies are organized in order of intensity, from least to most intense. We start in this chapter by discussing the CRAAP model and its shortcomings, and the importance of distinguishing between primary and secondary sources, including how to rabbit-hole toward primary sources. We end this chapter with a discussion of clickbait and content farms. We hope that you will become proficient in all of these strategies, and use elements of all of them whenever you have to consider the credibility of an information source.

Oh, CRAAP

CRAAP stands for currency, relevance, authority, accuracy, and purpose. It is a method for evaluating information that has been taught to many students, in many schools, for many years. You may have been taught CRAAP, or elements of it, in your prior schooling.

CRAAP may be a good place to start with credibility evaluations, but we believe that this method also leads students to rely too much on simple evaluation heuristics like the ones we mentioned above.

As librarian [Kevin Seeber](#) has argued, a simple checklist for evaluating information does not make sense in the face of the misinformation and disinformation that infiltrates our society today. Seeber suggests that we spend more time mulling over CRAAP's five concepts.

If you have used CRAAP before, the evaluation tools we present in this book are like CRAAP on steroids. If it's worked for you before, there is no reason to stop using CRAAP's framework. Our goal is to help you think much harder about each of CRAAP's elements.

Primary and Secondary Sources

A key question that information experts must ask when coming across a new piece of information is: Is this a primary source, or not?

The [attribution chapter](#) introduces and provides examples of primary and secondary sources. Here, we consider what primary and secondary sources have to do with credibility.

A primary source generally is produced at the time of the event, according to a Society of American Archivists (SAA) [definition](#). Primary source documents contain first-hand and the most authoritative evidence of something being the case. Examples of primary sources

include diaries, interviews, photographs, letters, newspaper advertisements, news or audio footage, official records and some government documents.

Secondary sources cite information from primary sources, or provide interpretation or analysis of primary sources, according to the SAA [definition](#). Examples include most news articles, books and editorials.

(Note: Historical news articles are usually considered *primary* sources. By “historical,” we mean, like, 100 years old. For more on this, read the [Archives](#) chapter.)

Journalists and strategic communicators strive to be the secondary sources of the information they present to their audiences. They rarely are the originators of information, that is, the primary sources. So being the secondary source of information is the most credible position for journalists and strategic communicators to hold.

It’s like the game of telephone we played as kids: the closer we sat to the origin of the telephone message, the more accurately we communicated the message to the next person in the chain.

Establishing credibility by using credible sources lies in the ability to track down the primary sources of information. [Provenance](#), which means the origin of something, is particularly important in journalism and mass communications. Only by looking at the primary source of information can we be sure that a secondary source is accurate. As a future communication professional, you need to develop an instinct to find and cite primary sources.

[Rabbit-holing Bill Self’s words](#)

Let’s consider an example of how primary and secondary sources work in journalistic research.

Read [this Kansas City Star article](#) about KU men’s basketball facing off against Syracuse and consider this question: Is this a primary or a secondary source?

Answer: It is a secondary source because it quotes the head coach, Bill Self, extensively about the upcoming game and the status of his players.

Another question: If you also were writing an article or report about this game, or about the team at this point in the season, would it be acceptable for you to use this article as the source of Bill Self’s quotes?

Answer: No, because that would make you a tertiary (that means, third) source of Self's words. As a journalist, you want your work to be the secondary source, not further down the source chain.

So how can we trace Self's quotes to the primary source? The process of tracing back a primary source is sometimes called rabbit-holing. Like a rabbit, we need to enter a tunnel of sources that, ultimately, will lead to the primary source.

The caption of the primary image of the article states that Self spoke to reporters on Nov. 30, 2017. In other words, Self held a press conference on this date.

We know that there were plenty of other reporters at this event, so one of the local news stations might have recorded the press conference. But this would still be a secondary source, and we want to find the primary source.

We know that KU Athletics has its own public affairs team that handles media relations and communications for the team. So if we search for "KU Athletics press conference Syracuse," for instance, we might be able to track down first-hand evidence of this press conference.

Lucky us, on the KU Athletics website, there is [a transcript and video of this press conference](#). This is the primary source, the end of this rabbit hole. If you want to quote Bill Self in your article or report, this is the source you will read and listen to, and then cite.

Who cares the most, and can pay for, being primary?

When tracking down primary sources, you should try to think of who has a vested interest in preserving the information, and who might be able to afford to compile the information.

Think about it. KU Athletics would probably have the most interest in putting a recording of the press conference out there. Doing so would ensure that the press would be able to report on the upcoming game, even if they weren't able to send a reporter to the press conference. It also would ensure that reporters accurately relayed what Self said. By putting the press conference online, KU Athletics minimizes the chance of a news outlet misunderstanding and misquoting its star coach.

But all of this publicity and accuracy comes at a cost. To record and transcribe a press conference requires a lot of expensive video and audio equipment. You would likely also have to pay several people to set up the press conference, communicate its happening to the press, and record the whole thing. Then you need money for a person or program to transcribe what was said, before you fork over some money for people to double-check the transcrip-

tion, write a press release, create the web posting, and send a notice out to folks that it was all available. Did we mention that you would have to do this as quickly as possible so that the information was still timely and accessible to the press to publish on their deadlines?

Being a primary source, or being the custodian of a primary source, requires a vested interest and resources. Considering these two elements can help you efficiently identify and track down primary sources.

Clickbait and Content Farms

Two other initial questions that anyone who comes across new information on the Internet should ask are: Is this clickbait? and Am I on a content farm?

Clickbait is the intentional act of over-promising or otherwise misrepresenting — in a headline, on social media, in an image, or in some combination of those — what a reader is going to find in an online story, [according to Techcrunch](#). The [Washington Post](#) also described clickbait as a teaser headline without context to what a news story is really about.

Why is clickbait not credible? It's because the quality of a clickbait article is secondary to the article's ability to attract readers.

Clickbait is not about quality information, but about advertising rates and making money from advertisements. Online publishers charge advertisers based on how many people view (that is, click on) these publishers' content. The more traffic that a web page generates, the more money a publisher can charge for the advertising space on this web page. Clickbait drives up traffic, which drives up advertising rates, which drives up publisher revenue.

Online publishers that specialize in clickbait are sometimes referred to as operating content farms or content mills. A content farm is a website that exists solely for the purpose of generating advertising revenue from content that produces a lot of interest and web traffic. The more that a content farm can masquerade as a legitimate information source, the more likely it is to dupe readers into clicking on its content.

Examples of content farms abound. [Columbia Journalism Review](#) reported that [Slant](#) magazine incentivized their writers to generate clickbait. The magazine offered writers financial kickbacks for every 500 clicks per three pieces they wrote per week. [RealNewsRightNow](#) is a website that parodies media outlets by [posting information](#) that reads like legitimate news headlines. The website was created solely to generate advertising revenue. And in the months leading up to the 2016 presidential election, two men made thousands of dollars by [posting](#)

[fake news stories](#) about both the Democratic and Republican presidential nominees on their clickbait website [LibertyWriters](#).

The insidious problem with clickbait is that because this content is engineered to match what people search for, and because it generates a lot of web traffic, clickbait content tends to rank high in Google search results. Since we tend not to look very deep in search results, we often end up reading clickbait.

Activity: Get Primaried

Below are two secondary sources. Select one of these sources and locate the primary source from which the secondary source was created. You must provide the hyperlink to the primary source and explain how you found and evaluated its credibility.

- This is a [Lawrence Journal-World article](#) about Lawrence commissioners debating regulations on where and when food trucks can operate in the city. This is a secondary source.
 - This is a [KCUR radio story and its transcript](#) about a study on the potential cost-savings of using Uber in place of ambulances. This is a secondary source.
-

Go Lateral With Cues and Evidence

PETER BOBKOWSKI

Learning Objectives

After reading this chapter, you will be able to:

- Identify a series of credibility cues for any information source you come across.
 - Use lateral reading to organize the credibility evaluation process.
 - Identify evidence to support your assessment of every credibility cue.
 - Use credibility cues to decide whether an information source would contribute to or diminish your own credibility.
-

Fact-Checkers, Historians, and Stanford Undergrads

In this chapter, we introduce a strategy for evaluating the credibility of sources that's based, in part, on a process called [lateral reading](#), according to the online textbook [Web Literacy for Student Fact-Checkers](#) by information educator Mike Caulfield. We put our own twist on this process and call it the cue-and-evidence method, following a [journal article](#) by college librarian Erin Daniels.

The usefulness of lateral reading was illustrated recently in a study from the [Stanford History Education Group](#) (SHEG). In this [study](#), Stanford researchers pitted professional fact checkers

against Stanford undergraduates and historians with Ph.D.s. They gave each group the same article and a limited amount of time to figure out if the article was credible.

They found that fact checkers were always right when judging the validity of a piece. Surprisingly, though, the historians got it right about half the time, and undergraduates did not fare so well. Are you surprised that educated folks, undergraduates, like you, and professors, struggled? The Stanford researchers were a bit taken aback as well. But they figured out the difference in performance.

Fact-checkers all deployed a very similar technique for judging a news source, the Stanford group found. Historians and students spent a lot of time reading an article in order to assess its authority. Fact-checkers, on the other hand, spent as little as eight seconds looking at the article before moving on to researching it. Essentially, once fact-checkers identified a credibility cue, they immediately started researching it in other browser tabs.

The Stanford group called this “reading laterally.” Fact-checkers would see a name of an organization, for instance, and then pop open tabs in their browsers to find the organization’s website, Wikipedia entries and bibliographies about the organization, its staff, and its larger field. They also checked out what other news sources had to say about the topic.

After gathering and weighing the results of their research, the fact-checkers then would declare the source crap or not. In other words, the fact-checkers read, evaluated, and judged information against the greater network of information. This does not mean that you simply go with what the majority of other websites or people have to say about a topic. You use the network to reason a source’s credibility.

Add Cues and Evidence

Opening a tab for each new piece of information we want to search seems like good organizational practice. Our cue-and-evidence method, which we discuss in the remainder of this chapter, provides directions for what to search in all these tabs.

The cue-and-evidence method consists of four steps. They are:

- Identify credibility cues.
- Examine each cue and collect evidence about it.
- Articulate how each cue contributes to or detracts from the overall credibility of the piece of information. Support each point with the evidence collected previously.

- Provide an overall credibility assessment.

Let's walk through each of these steps, and see how they work with a piece of information we might come across in the results of a Google search.

Let's say that an assignment for your job requires you to learn and write about gluten and gluten-free eating. Gluten-free diets have received considerable attention in recent years. You may have friends or family members who have stopped eating gluten, or you may be following a gluten-free diet yourself. A Google search leads you to the article [The Truth Behind Gluten-Free: Is Gluten-Free a Fad](#) by August McLaughlin on the website [Livestrong.com](#).

The question before you is: Is this a credible enough article for you to cite in your own work? In other words, will citing this article make you look credible?

Please read this article now and keep it open as we work through the remainder of this section.

Identify All of the Cues

The first step in the cue-and-evidence method is to identify all of the cues that we can use to evaluate this article's credibility. Let's go from the article's top to its bottom and list these cues:

- [Livestrong.com](#)
- Article title
- Date
- Author
- Dominant image
- The article's substance, that is, the information the article provides
- The style in which the article is written
- The sources used in the article
- The ads that surround the article

This is not an exhaustive list; there may be other cues. But nine cues is a solid start.

To follow the lateral reading approach, we would open at least one new tab for each of these cues. In some cases, we would open two or more tabs per cue. We would use these tabs for

the second step in the cue-and-evidence method: examining each cue and collecting evidence about it.

Examine Each Cue and Collect Evidence

Publisher

Most of the information we come across has a publisher, that is, it is one of a collection of pieces of information published in the same place or on the same website. In this case, the publisher is Livestrong.com. What should we be asking about this publisher?

A key question for any publisher concerns the presence of quality control. As we discussed in the [note-keeping chapter](#), established media organizations like newspapers, magazines, academic journals, book publishers, and television stations, employ layers of fact-checkers and editors whose job it is to verify the accuracy of information before it is published in print or on a website, or broadcast on TV. “To seek truth and report it” is the first principle of the [Society of Professional Journalists’ Code of Ethics](#). Serious news media organizations want to get it right and having a staff that ensures the accuracy of the information contributes to a publisher’s credibility. The absence of a fact-checking staff and process, or the absence of information about such resources, can detract from the publisher’s credibility.

Another question that we can ask about a publisher is whether the publisher has a reputation for being a credible source of information. Some publishers are considered credible because of their long-standing record as reliable information sources. These organizations employ reporters who specialize in specific issues or geographic areas, and have long-standing relationships with key sources on the issues or places they cover. [The New York Times](#), the [Wall Street Journal](#), and [Time](#) magazine are just a few examples of established media organizations that generally are considered authoritative and credible on the basis of their reputations.

Smaller, more regional media outlets may have a similar level of authority about information concerning the geographic regions where they operate. The [Lawrence Journal-World](#), for example, is the authoritative information source about Lawrence, Kansas, and its surroundings. Non-news organizations, also, can be credible by virtue of their authority on an issue. The [Centers for Disease Control and Prevention](#), for example, is the health and medical authority in the United States. In the public records chapter, we look at documents and other information published by local, state, and federal governments. These governments and their agencies are the authoritative publishers of records and data over which they have jurisdiction.

But what about a site like Livestrong.com that doesn't have an established reputation as an information source? How to gather evidence about its credibility? And how do we answer the first question, about its editorial process?

It is tempting here to rely only on what we know about Livestrong to evaluate this publisher. Livestrong is a foundation established by the disgraced cyclist Lance Armstrong to raise funds for cancer treatment and research. Armstrong is no longer involved in the foundation so we shouldn't use Armstrong's lack of credibility as evidence against the credibility of the foundation. Collecting money for cancer treatment and research seems like a noble cause, but is that enough to judge Livestrong.com as a credible source of information?

Two places that we can use reliably to learn more about Livestrong.com is the website's About link, and the WHOIS directory. Most websites provide some information about themselves on an About or About Us page. Time for a new tab, to explore a link to Livestrong.com's About page in the footer of the article page. It displays the organization's mission statement, and a visual staff directory. Flipping through the staff positions, we see a few content editors, but we also note the absence of fact-checkers. Curiously, the staff also does not include any writers. Most of the staff seems to be managers and engineers. This should give us some pause.

Next we see a statement that says "We are a proud licensing partner of the LIVESTRONG Foundation." A licensing partner is not the foundation, so neither is this website the foundation's website (because Livestrong.org is). Adidas is a licensing partner of the University of Kansas but that doesn't make Adidas a credible source of information about anything that's being researched or taught at KU. If the Livestrong Foundation is like KU in this partnership, who is like Adidas? At the very bottom of the About page, in the right corner, there is a logo that we haven't seen before for something called Leaf Group. New tab. The WHOIS directory, which provides information about the owners of Internet domains, confirms that Livestrong.com is owned by a Santa Monica company called Leaf Group.

What is Leaf Group? This is a clue we need to resolve to understand fully the credibility of Livestrong.com. Clicking on the logo in the bottom right and opening a new tab brings us to the LeafGroup.com website, where we learn that this is a web publishing company that, in addition to Livestrong.com, also runs the websites Cuteness.com, DenyDesigns.com, eHow.com, Hunker.com, Leaf.tv, Sapling.com, and Techwalla.com. It seems like Leaf Group is a content creation company. But is it credible? Googling "Leaf Group" and browsing through the news reports that pop up gives us a clearer picture.

We can search for news about the Leaf Group in a new tab. Leaf Group, formerly called Demand Media, [has been referred to as a content farm](#), which we discussed in the [last chapter](#). [Demand Media has been criticized further](#) for creating content to match the questions

people search for most frequently. For example, if the company noticed in Google search data that people were searching for information about gluten-free diets, it would commission an article on gluten-free diets. Finally, the reason why we didn't see any writers among Livestrong.com's staff is that the company relies on freelance writers.

Using this evidence, we might collect evidence from all of our open tabs and write the following summary of whether Livestrong.com contributes to or detracts from this article's credibility:

Livestrong.com does not contribute to this article's credibility. [<- this is our conclusion; and here is our evidence ->] Livestrong.com relies solely on freelance writers, and employs only three content editors or managers, according to [its about page](#) and an [article about its parent company](#). Its quality control resources, therefore, do not seem to be extensive, which does not contribute to this website's credibility. Livestrong.com's [staff listing](#) does not show anyone who is a health or nutrition specialist, which further detracts from its credibility. Finally, Livestrong.com is part of Leaf Group, a large company whose purpose, judging from [its website](#), does not seem to be to inform, but to maximize its advertising revenue by producing highly desirable content.

Phew! That was a very long evaluation of a single cue. But it was a complicated case. The next few cues won't be as complex.

Article title and Date

Next on our list of cues is the article title, but evaluating this cue makes more sense after we read the entire article. So let's save this cue for later.

Evaluating credibility based on the publication date concerns the timeliness or timelessness of the topic. How important is it for information about this topic to be recent, or to come from another specific time period? If the topic is continually developing, with new information adding to our understanding of it, then we want the source to be as recent as possible. For instance, new developments in how a wildfire spreads, or how the search for a missing person unfolds, call for the most recent information sources. For other topics, especially historical ones or ones that have remained stable over time, the fact that a source is contemporaneous to some event or issue in the past may contribute to that source's credibility. For example, we may not need a source published yesterday to determine what [Frederick Douglass's](#) next venture is.

In the case of our gluten-free diet article, how important is it that it be recent? This is a good opportunity to open a new tab and look up gluten-free diets. Well, gluten-free diets have gained in popularity among non-celiacs [since 2009](#), and new research on these diets probably is being published continually. So it seems important for a source on gluten-free diets to be recent, but not necessarily published yesterday. The publication date of our article is Oct. 3, 2017. Depending on when you are reading this, that may or may not seem recent enough.

Based on this reasoning, here's what we might write about how the article's publication date contributes to its credibility:

This article's publication date of Oct. 3, 2017, contributes to its credibility. (<-this is our conclusion, and here's our evidence ->) This is because gluten-free diets [are a developing topic](#). A credible source of information about these diets needs to be recent, therefore, but not necessarily published yesterday.

Author

We turn next to considering the article's author. Most of our students recognize that this is an important cue to consider. In a recent exercise, more than two-thirds of our students wrote about an article's author as a way of evaluating the article's credibility. So let's make sure that we do this the right way.

An author contributes to the credibility of a source through authority over, expertise on, or experience with the source's topic. Let's first list the places where we can find information about the author's background. Some websites will link an author's byline (that is, the line that says By So-and-so) to a summary of the author's biography and/or to a list of the author's most recent articles. Alternately, the website's About page might provide a list of its writers, along with their bios and links to their prior work. Outside of the home website, [LinkedIn](#) can be a good source on an author's background. An efficient Google search strategy may be to enclose the author's name in quotation marks, and follow it with a word related to the topic of the source we are evaluating.

So how about August McLaughlin, the author of our gluten-free diet article? Where can we find information that will help us determine if this author has authority, expertise, or experience with gluten-free diets or nutrition? Clicking the byline at the top of the article brings up a pop-up window with the author's photo (which shows that August is a woman), and the following summary:

August McLaughlin is a health and sexuality writer with more than 10 years of experience as a nutritionist. Her work is featured in the Huffington Post, DAME Magazine, The Good Men Project and more. She specializes in eating disorders and loves connecting with readers and writers via her blog and social media.

This summary contributes to this author's credibility because it lists nutrition as one of her specialties. However, the summary provides no information to help us verify this expertise. There are no clues about this writer's educational background, and other than a list of publications in which her work has been featured, we know nothing about the quality or quantity of her expertise. It is curious that there are no links to this writer's other work. Anyone can be a nutrition writer on the Internet these days, so we need more information to gauge whether August McLaughlin is a credible one.

New tab and Google. Fortunately for us, "August McLaughlin" is not a common name, so finding [her LinkedIn page](#) is not challenging, and the page appears to be thorough and updated.

Let's consider first her education. There are two entries: "Edison Inst.: MA program, holistic nutrition," and "AFPA, IFA, St. Cloud State: CN, CPT, psychology, nutrition, fitness, communication." Since "Edison Inst." is not a household name, let's open up a new tab and Google it. It's hard to know for sure, but this probably refers to the [Edison Institute of Nutrition](#). Browsing through this organization's website, we learn that it is a Canadian online program that offers a one-year [Diploma in Holistic Nutrition](#). The prerequisite for this program is [a high school diploma or its equivalent](#). There is no indication on this website that the institute offers an MA degree (MA generally stands for Master of Arts), as the LinkedIn profile indicates. It is possible that there was an MA program in the past, and that it is no longer offered. A cursory Google search does not return any information about a former MA program at Edison Institute.

The other credential listed is even more difficult to decipher. In a new tab, Googling "AFPA, IFA, St. Cloud State" does not lead to information about any programs at [St. Cloud State University](#) in Minnesota. In fact, the search `afpa site:stcloudstate.edu` returns zero results. New tab, and Googling "AFPA" returns the organization [American Fitness Professionals and Associates](#), which offers a host of certification programs for personal trainers, nutrition consultants, and other fitness professionals.

Step back and think: When someone wants to use an educational credential to support his or her credibility, isn't it best to be transparent about this credential, to specify exactly what it is, and the institution that granted it? Professionals with solid and authentic educational qualifications have no need to hide behind educational acronyms that aren't easily verifiable.

One last education-related consideration: what does it take to be a nutritionist? New tab and Google. Standards vary by state, but in Kansas, an individual has to be licensed as a registered dietitian (RD) in order to legally practice in this profession (this should induce a flashback to our [licensing and credibility chapter](#)). KU Medical Center's [Department of Dietetics and Nutrition](#) lists these licensing requirements: a bachelor's degree in nutrition and dietetics from an accredited program, supervised clinical practice, a national exam, and continuing education. As far as we can tell from her LinkedIn, the article's author does not have the qualifications to practice as a nutritionist in Kansas.

But education isn't everything. There are plenty of business and technology leaders who did not complete college or who are not educated formally in the fields in which they excel. Does August McLaughlin's work experience tell us anything about her credibility? Back on her LinkedIn page, there are two nutrition-related entries in her experience. She has been a self-employed nutritionist since 2002, and she was a nutritional therapist at [Bridges to Recovery](#) for nine years. New tab and Google. This is a company that runs three upscale residential treatment homes for psychological conditions in southern California.

The author's LinkedIn also leads us to [Girl Boner](#) (new tab), a website and podcast she hosts about women's sexual empowerment. The website contains a longer narrative about the author's [biography and experience](#) and [a list of her articles](#). There is a lot of interesting reading on these pages, but none of it adds to the author's authority as a nutrition expert. It appears that the author's focus in her writing has been women's sexuality and, to a lesser extent, eating disorders.

So let's summarize what we have found about whether the author contributes or detracts from the article's credibility.

The author does not contribute to the article's credibility. (<- this is our conclusion; here is our evidence ->) The author does have some background in nutrition, having worked for nine years as a nutritional therapist for a psychological treatment company, according to [her LinkedIn](#). The author does not appear to have the educational qualifications to practice as a Registered Dietitian, as [outlined by KU Medical Center](#). The educational background she lists on LinkedIn is difficult to decipher. The author does seem to be a [prolific producer of online content](#), but most of her writing is focused on women's sexuality. The author does not appear to be an expert on nutrition or the gluten-free diet.

Dominant image

Next let's consider the article's dominant image. How can an image contribute to or detract from the credibility of an article? Let's start with the latter. An image can detract from the credibility of an article when it has nothing to do with the substance of the article. Images drive web traffic. Web publishers sometimes drive web traffic to their websites by enticing readers to click on links that feature compelling images. Then it turns out that the content of the website has little to do with the image.

An image can contribute to the credibility of a source when it deepens the information that the source presents, or provides additional evidence for this information.

The image that accompanies the gluten-free diets article shows a bunch of different grains, oats, breads, and crackers. The caption underneath this photo does not elucidate what's in the image. We can open up a tab and do a Google Image Search on the image (see the [effective search chapter](#) for instructions). As of the publication of this textbook, our search does not lead us to any other websites where this image has been used. How would our understanding of the article change if the image was absent? Probably not much. So the presence of the image may be neutral. Here's how we might summarize our evaluation of this cue:

The image that accompanies the article neither detracts from nor contributes to the article's credibility. Although it's unclear whether or not the food items pictured in the photo are gluten-free, the photo features grains and grain-based food, which are related directly to the article's topic. The photo illustrates the topic but does not add expand on the information discussed in the article.

Article content

Let's evaluate the article's substance, that is, the content or information this article presents. Some of the questions we might ask to assess the article's credibility based on substance are: Does the information seem factual? Is the information focused on a specific topic? Is the information thorough? Is the information unique?

The article discusses what appears to be factual information about gluten and about two reasons why people tend to follow a gluten-free diet, which are celiac disease and gluten intolerance. The article discusses symptoms of both these conditions. The article concludes with several paragraphs listing gluten-free foods. The information presented in this article is focused on gluten and gluten-free diets. But the information doesn't seem especially thorough or unique. If we open up a new tab and find the [Wikipedia article on gluten-free diets](#),

we note that it is about three times the length of the Livestrong.com article and appears to be more thorough than the article.

How to summarize the extent to which content contributes to the article's credibility?

The article's content does not contribute to its credibility. (<- this is our conclusion; here's our evidence ->) The article provides, what appears to be, factual, focused information about gluten and gluten-free diets. It does not appear to be an especially insightful or thorough treatment of the subject, as compared to a [Wikipedia article](#) on the same topic.

Article title

Now that we have a good grasp on the article's content, we can go back and consider whether the article's title — "The Truth Behind Gluten-Free: Is Gluten-Free A Fad?" — contributes or detracts from the article's credibility. The main criteria to consider is: Does the title accurately reflect the substance of the article? In this case, the answer seems to be "no."

The title's "truth behind" element suggests that the article reveals some sort of heretofore unknown or secret information. But this isn't the case. The article discusses what seem to be, basic facts and common-sense knowledge. The post-colon "Is Gluten-Free A Fad?" meanwhile, suggests that the article is focused on answering this question. While the answer is suggested in the article, answering this question does not shape this article's structure. In both cases, it seems like the title is designed to lure in readers for content that isn't there.

Comparing the title to the article's content suggests that this is a piece of clickbait. In sum:

The title detracts from the article's credibility. (<- this is our conclusion; here's our evidence ->) The title does not reflect accurately the substance of the article, but seems designed to lure in readers. It suggests that the article provides unknown information (i.e., "the truth behind"), and focuses on answering a specific question (i.e., "is gluten-free a fad"), but the article does neither of these. Instead, it discusses basic information about gluten and gluten-free diets, and focuses on a subject matter that's broader than the fad question.

Writing style

Our third-last cue is the style in which the article is written. The article's style concerns the

author's tone, bias, whether the author uses persuasive language, as well as the quality and organization of the writing.

Reading through the article, we might characterize the author's tone as neutral and informative. She does not use any emotion-charged language, there is no indication that she is attempting to persuade us of anything, and any bias she might have toward gluten-free diets is not evident. The writing is clear, it follows general standards of journalistic writing (i.e., short, informative, error-free paragraphs). The article is organized into four clear, distinctly focused sections.

A summary of this evidence is as follows:

The style in which the article is written contributes to its credibility. (<- this is our conclusion; here's our evidence ->) The writing style is informative and journalistically sound, and it does not contain any persuasive or biased language.

Sources

We come to sources, a credibility cue that our students in the past have used most frequently. In a recent exercise, 85 percent of our students used an article's sources as criteria for evaluating the article's credibility. There are several questions we should ask about sources.

First, should we expect the source we are evaluating to cite other sources? If we are looking at a primary source of information, such as a public record or a transcript of an interview, then no, we would not expect a primary source to include other sources. We would expect a secondary source, however, like most news sources, to indicate what their sources of information are.

Once we determine that the source we are evaluating should show its sources, the next question is: Does it? The standards for showing sources differ from one genre of writing to another. In research articles and college essays, and in some books, sources are cited in text and in a References or Works Cited page. Sometimes they're cited in footnotes or endnotes. As you might know from the [attribution chapter](#), this is not the standard for showing sources in journalistic writing. In journalism, sources are fully identified and cited in text. Strategic communication documents usually use a hybrid approach, identifying and citing sources in text, and also including a References section.

Another convention of online journalistic writing is that online sources are linked to from an article by way of embedded hyperlinks. This is a way for journalists to increase their trans-

parency. By providing links to their sources, journalists help their readers verify the accuracy of the information they report. So the question we should also ask about sources in online articles is: Are they linked?

The last and most significant question about sources is: Does the nature of the sources contribute to or detract from the article's credibility? While each cited source could be examined in as great a depth as the original source, a simple question may help us not get mired in an infinite evaluation of sources: Is the cited source more credible than the original source?

So let's answer these questions for the gluten-free diet article. Should it show its sources? Yes, it is a secondary source of information. Does it show sources? Yes. Since it is a piece of online journalism, we expect it to identify and cite its sources in text, and we also expect it to link out to its online sources. It cites and identifies its sources in text, but it does not link to them. This last point detracts from the article's credibility.

Here are the sources the article cites.

- Minh-Hai Tran, a registered dietitian and owner of Mindful Nutrition in Seattle,
- National Foundation of Celiac Awareness,
- A 2011 Forbes magazine report,
- Robyn Goldberg, a registered dietitian in Beverly Hills, California

The article also cites the following source: Dr. Alessio Fasano, medical director of the Center for Celiac Research and Treatment. If we look closely at how this source is cited, however, it's clear that the Forbes magazine article cited this physician, and our article simply re-cites him. This makes our article a tertiary source for Dr. Fasano, with the Forbes article being its secondary source. Remember what we said about primary and secondary sources: A piece of journalistic writing should be the secondary source of information, not a tertiary one. The way that our article's author cites Dr. Fasano also suggests that she did not access this physician's statement or research on her own. Had she done so, she would have been able to cite him directly as a secondary source.

Looking at the four sources cited in the article, do they contribute to the article's credibility by being more credible than the original article? Googling the websites of the two registered dietitians in new tabs brings us to [Minh-Hai Tran's website](#) and [Robyn Goldberg's website](#). Based on information in these websites, these two dietitians appear to be more qualified to speak on nutrition than the article's author.

Opening a new tab for the National Foundation for Celiac Awareness, we find that it is now

called [Beyond Celiac](#), and the statistics in our article that are attributed to it [are on its website](#). It does appear to be more credible than our article.

Finally, in a new tab, we Google and find that this is probably the [2011 Forbes magazine article](#) (found using a search term with the operator `site:forbes.com` and a date restriction). This article does cite Dr. Alessio Fasano, but it doesn't really say that "No hard statistics are available for non-celiac gluten intolerance," which is the statement for which our article cites it. Overall, the Forbes article seems only slightly more credible than our article. It is more thorough, it does use more sources, and it links to some of its sources, but Forbes is no more credible as a source of information on gluten-free diet than [Livestrong.com](#), and the Forbes article's author is not more qualified than our article's author to write about this topic. So on balance, the Forbes article does not contribute to the credibility of our article.

This is how we can sum up our examination of sources as a credibility cue:

The article's sources contribute marginally to the article's credibility. (<- this is our conclusion; here's our evidence ->) The article does cite four sources, and three of them — two registered dietitians ([Minh-Hai Tran](#) and [Robyn Goldberg](#)), and a [celiac awareness nonprofit](#) — contribute to its credibility. However, the article does not link to its online sources, which diminishes its credibility. The content of the fourth source, a [2011 Forbes article on gluten-free diets](#), does not match what this article cites it for, and it is not a more credible source of information than the [Livestrong.com](#) article. The article also re-cites a source from the Forbes article, and it doesn't appear that the author accessed this source before citing it.

Ads

Our last credibility cue to examine are the ads that surround the article. Like most websites run by for-profit media organizations, [Livestrong.com](#) content is encircled by advertising content. Advertisers purchase the ad space on these websites. Revenue from the ads is used to pay for the work that goes into generating content and maintaining the website. In addition to buying ad space, advertisers buy our (that is, the readers') eyes and our attention. In the transaction between content-providing websites and advertisers, we, the readers, are the commodity.

Does advertising featured next to an article detract from an article's credibility? In most cases, no. But neither does advertising contribute to an article's credibility. Unless you are a purist who believes that any profit motive ruins the credibility of an information source, advertising is a necessary element of the news media environment.

Undoubtedly, some ads are annoying, some ads are in bad taste, and some ads are designed to distract us with compelling (or weird) images and headlines. At established, credible information organizations, there is a clear differentiation between the editorial side of the business, that is, the people who produce the news or other content, and the ad side, that is, those who sell ad space. In many cases these days, the ads that are displayed on a website are not controlled by the organization that runs the website, but by an ad company such as [Google Ads](#), [TripleLift](#), or [Taboola](#). Increasingly, the ads you see are tailored to your prior search and browsing history, which are stored on your computer.

Our summary of this credibility cue is as follows:

The ads that surround the article neither contribute to nor diminish its credibility. (<- this is our conclusion; here's our evidence ->) Advertising is a necessary element of the news media system, generating revenue that supports news organizations and the work they produce. The ads displayed alongside this article are no more or less credible than other ads displayed across the Internet.

Provide an Overall Credibility Assessment

Finally, we are ready for the fourth step of the cue-and-evidence system: To provide an overall credibility assessment of [this article](#), based on the nine credibility cues we examined. Recall that the question we set out to answer is: If we used this article in our own writing about the gluten-free diet, would using this article contribute to our credibility?

A simple answer: No. This article would not contribute to our credibility. In fact, by citing this article in our work, we might jeopardize our credibility. It's best for us to find a more credible source of information about gluten-free diets. Let's list the conclusions of all our cue evaluations. If we were doing this for credit on an assignment, we would write each cue's full evaluation summary here.

- [Livestrong.com](#) is not a credible publisher of gluten-free diet information because its purpose is to create highly desirable content and maximize its ad revenue.
- The title diminishes the article's credibility because it is misleading.
- The recent publication date contributes to the article's credibility.
- The article's author does not contribute to the article's credibility because she is not qualified as a nutrition specialist.
- The dominant image neither contributes to nor detracts from the article's credibility. It

is relevant but does not enhance the article's content.

- The article's content does not contribute to its credibility. It appears factual but is not new or groundbreaking.
- The writing style contributes to the article's credibility because it appears unbiased, well-organized, and well written.
- The article's sources contribute marginally to its credibility. Sources are not linked from the article. Three of the sources are more credible than the article, but the fourth is not.
- The ads around the article neither contribute to nor detract from its credibility.

Activity: Publishers Weakly

Evaluate the "publisher" cue for each of the following websites. Based on your evaluations, can you organize these websites into two or more different categories?

- BuzzFeed
 - Cracked
 - Crave
 - Dibly
 - Odyssey
 - Upworthy
-

Tap Into a Credibility Network

KARNA YOUNGER

Learning Objectives

After reading this chapter, you will be able to:

- Use four fact-checking moves to research the credibility of information.
 - Identify critical questions to ask about the content of an information source.
 - Use context culled from other sources to contextualize the credibility of an information source.
-

Going Deeper With the Tabs

In the previous chapter we walked through identifying and evaluating credibility cues. We pinpointed these cues (e.g., publisher, article title, date, etc.), and started opening lots of tabs in our browsers to research the different elements. We pinpointed these cues, and started opening lots of tabs in our browsers to research the different elements. If you followed along, your browser probably looked something like this:



Looking at all those tabs is exhausting. But it's also what successful fact-checking looks like, so let's get used to it.

In the Stanford study we mentioned at the beginning of the previous chapter, the fact-checkers were more adept at evaluating the credibility of information than historians and Stanford undergrads. In addition to opening up a series of tabs, the fact-checkers read, evaluated, and judged information against the greater network of information they accessed. This does not mean that they simply went with what the majority of other websites or people had to say about a topic. They used the network to reason a source's credibility.

In this chapter, we focus on four moves that the fact-checkers in the Stanford study repeatedly made. Our goal is to practice the cue-evidence method some more, while also drilling down on some concepts that we didn't cover fully in the last chapter. The following list of these moves is adapted from the textbook [Web Literacy for Student Fact-Checkers](#) by [Mike Caulfield](#). Using these moves can help us dial into the greater network of knowledge and make an informed credibility call about an information source we are evaluating.

Check for previous work

Look around to see if someone else has already fact-checked the claim or provided a synthesis of research. Checking for previous work allows you to weigh what you are reading against other accounts, and determine what is fact and opinion. If you are researching an event that occurred in the past, you may also look at things that have been published since the event occurred. Also, "work" is not restricted to any information type or genre. You may look at primary or secondary sources or news articles, dictionary or encyclopedia entries, or scholarly information. This process and those below involve opening a lot of tabs to research our work.

Go upstream to the source of the claim

This is another way of saying that we should rabbit hole, as we did in the [chapter on primary and secondary sources](#). Going upstream to the source means that we need to find some primary source(s) that relates to an author's claim. This could mean finding a video of an event or an interview with someone who was directly involved. Comparing what a primary source says against what our original source (typically a secondary source) argues will help us better understand how the author of the secondary source is interpreting events or what bias the person holds.

Read laterally

You already know this move: Start opening those new tabs. Reading laterally also should push

us to further question what possible interpretations and biases are put forth by our original source and any primary sources we have found.

Circle back

Circling back helps us get our bearings in this maze of tabs. It reminds us to return to the source we were originally assessing to evaluate different components. Think of this as the repeat button. You can walk through this entire process for each credibility cue, for instance, and circle back to the original source after successfully evaluating each cue.

This is not necessarily an ordered process. And, as you can tell from your above experience, you will likely have to do this repeatedly. Not only for the cues in your original article, but also for cues you find in the resources you are using to fact-check your original source. This could get messy, which is why it is good to [take good notes](#) along the way.

Keep in mind, there can be some overlap between these steps. For instance, if you are evaluating an older claim or source, checking for previous work and reading laterally may yield some of the same results. This is fine. But you should gather some history on the topic (previous work) and more current things (reading laterally).

First cues: Publisher and author

Let's walk through this process together with an [article on Serena Williams](#) published by The New York Times.

Before we even begin reading the article, we ask ourselves if we trust the sources of information, newspaper and the author. The New York Times is one of the nation's largest newspapers and has been in business for a while. But we shouldn't just rely upon our knowledge but should **go upstream** to find some primary source material about the publication. If we scroll to the footer of websites, we will often find information about the company. If we do that now, we can click on [The New York Times Company link](#) to find out more about the Times through its parent company.

T

WHO WE ARE
WHAT WE DO
PRESS
CAREERS
INVESTORS
CONNECT
CALENDAR

LEADERSHIP

- EXECUTIVES
- BOARD OF DIRECTORS


CULTURE

- OUR HISTORY
- STANDARDS AND ETHICS
- DIVERSITY
- PULITZER PRIZES

SOCIAL RESPONSIBILITY

- ENVIRONMENTAL STEWARDSHIP
- EDUCATIONAL INITIATIVES
- SCHOLARSHIP PROGRAM
- THE NEEDIEST CASES FUND

EARLY STAGE INVESTMENTS



Beginning in 1928, news bulletins flashed on an electric zipper in Times Square (The New York Times Photo Archives)

Because we're journalists, we're impatient. We want to gather the news as quickly as possible, using any technological resource available. And when we're as sure of the story as we can be, we want to share it immediately, in whatever way reaches the most people. The Internet didn't plant these ideas in our heads. We've always been this way.

This next page takes us down a rabbit hole. At a quick glance, we can see the paper has been in business for over 100 years and has garnered some Pulitzer Prizes, journalism's top prize for reporting. We can look at the leadership, but instead focus on standards and ethics to learn more about their credibility standards.

WHO WE ARE**WHAT WE DO****PRESS****CAREERS****INVESTORS****CONNECT****CALENDAR****Fairness**

The goal of The New York Times is to cover the news as impartially as possible — “without fear or favor,” in the words of Adolph Ochs, our patriarch — and to treat readers, news sources, advertisers and others fairly and openly, and to be seen to be doing so. The reputation of The Times rests upon such perceptions, and so do the professional reputations of its staff members. Thus The Times and members of its news department and editorial page staff share an interest in avoiding conflicts of interest or an appearance of a conflict.

Integrity

For more than a century, men and women of The Times have jealously guarded the paper’s integrity. Whatever else we contribute, our first duty is to make sure the integrity of The Times is not blemished during our stewardship. At a time of growing and even justified public suspicion about the impartiality, accuracy and integrity of some journalists and some journalism, it is imperative that The Times and its staff maintain the highest possible standards to insure that we do nothing that might erode readers’ faith and confidence in our news columns. This means that the journalism we practice daily must be beyond reproach.

Because our voice is loud and far-reaching, The Times recognizes an ethical responsibility to correct all its factual errors, large and small. The paper regrets every error, but it applauds the integrity of a writer who volunteers a correction of his or her own published story. We observe the Newsroom Integrity Statement, promulgated in 1999, which deals with such rudimentary professional practices as the importance of checking facts, the exactness of quotations, the integrity of photographs and our distaste for anonymous sourcing.

Truth

As journalists we treat our readers, viewers, listeners and online users as fairly and openly as possible. Whatever the medium, we tell our audiences the complete, unvarnished truth as best we can learn it. We correct our errors explicitly as soon as we become aware of them. We do not wait for someone to request a correction. We publish corrections in a prominent and consistent location or broadcast time slot. Staff members who plagiarize or who knowingly or recklessly provide false information for publication betray our fundamental pact with our readers. We do not tolerate such behavior.

Here we can see that the publication claims to adhere to fairness, integrity, and truth. Below this are explicit and lengthy explanations of their [Guidelines of Integrity](#), which include their fact-checking process, and a [Ethical Journalism Guidebook](#), or their code of conduct for staff members. We could cite these sources in our evaluation of the Times. For instance, we could say that we believe the Times is a credible source because it is transparent about listing its staff and policies, and that its policies carefully delineate the paper’s fact-checking processes and standards of ethics, which stipulate an adherence to reporting the truth.

We could also search laterally to see if other publications ever quote the Times. This search yields a [Wikipedia](#) entry and numerous stories quoting Times reporting and analyzing their business strategies, so we know that the Times is a well-known source of information that is critically evaluated and relied upon by its peers.

Next, we turn to the author. [Liz Robbins](#) was a sports reporter for the Times back in 2009 when she wrote about Serena Williams's loss to Kim Clijsters at the United States Open. The first thing we could do is search laterally and go upstream by clicking on her hyper-linked name to scroll through her other writings at the Times. This tells us that she has most recently been reporting on immigration. This is not too similar to the topic of professional tennis, so we might ask why she is the reporter in this situation.

Continuing to search laterally, we plug her name and "New York Times" into a search, to see what other sources say about her. This would yield her [Twitter page](#). Here we read that she currently covers immigration for the Times's metro section, but that she used to be a sports reporter, is a cyclist, and published a book about some race. If we search for her book title and her name, we find a listing on [Amazon](#) that tells us the book is about the New York City Marathon.

Based on all of this information, we might tell ourselves that Robbins seems to have some experience reporting on sports for one of the top newspapers in the nation, is an athlete herself, and has even published a book on a major sporting event, but that we are not certain about her authority as an expert in tennis.

Then we can start reading the actual article.

Next Cue: Content

TENNIS | Clijsters Wins on Penalty Assessed on Williams

Clijsters Wins on Penalty Assessed on Williams

By LIZ ROBBINS SEPT. 12, 2009



The article focuses on how Williams was forced to forfeit a match in the 2009 US Open after being assessed a point penalty for unsportsmanlike conduct. Williams garnered the penalty after she disagreed with a line judge's foot-fault call. Below you can read the reporter's summary of events in her lede, that is, in the first paragraph of the article.

[Serena Williams](#) became unhinged in a shocking display of vitriol and profanity toward a line judge at the most inopportune time Saturday night — right before match point for [Kim Clijsters](#) in the semifinals of the [United States Open](#).

In a matter of confusing minutes, Williams turned what had been a scintillating women's match into an ugly and improbable spectacle that gave Clijsters, an unseeded wild-card entry making a joyful return to Grand Slam tennis, a 6-4, 7-5 victory she could not even celebrate.

Clijsters, a 26-year-old from Belgium who is the mother of a toddler, had frustrated and dominated Williams all night. After Clijsters won the first set, Williams slammed her racket to the court twice, mangling the frame in disgust. She walked to her chair, whacking the net with her racket on the way, and earned a warning for racket abuse.

Clijsters stayed composed. She had a 6-5 lead in the second set, and Williams was serving to send the set into a tiebreaker. At 15-30, a lineswoman called Williams for a foot fault on her second serve. Williams argued angrily, then walked back to the baseline. But she could not let it rest. She approached the judge and appeared to threaten her, shaking a ball in her face, according to reporters courtside and television replays.

Reading over the lede and maybe skimming over the subsequent paragraphs, we can start to figure out the substance of the article. We know that Williams and Clijsters faced off in the semifinals, and that Williams lost her temper just when she was serving to break the tie. Robbins plays up how differently Williams and Clijsters acted from one another, positioning Clijsters as "composed" and Williams as a vitriolic. It isn't until the fourth paragraph that Robbins reveals what got under Williams's skin.

[Serena Williams](#) became unhinged in a shocking display of vitriol and profanity toward a line judge at the most inopportune time Saturday night — right before match point for [Kim Clijsters](#) in the semifinals of the [United States Open](#).

In a matter of confusing minutes, Williams turned what had been a scintillating women's match into an ugly and improbable spectacle that gave Clijsters, an unseeded wild-card entry making a joyful return to Grand Slam tennis, a 6-4, 7-5 victory she could not even celebrate.

Clijsters, a 26-year-old from Belgium who is the mother of a toddler, had frustrated and dominated Williams all night. After Clijsters won the first set, Williams slammed her racket to the court twice, mangling the frame in disgust. She walked to her chair, whacking the net with her racket on the way, and earned a warning for racket abuse.

Clijsters stayed composed. She had a 6-5 lead in the second set, and

Williams was serving to send the set into a tiebreaker. At 15-30, a lineswoman called Williams for a foot fault on her second serve. Williams argued angrily, then walked back to the baseline. But she could not let it rest. She approached the judge and appeared to threaten her, shaking a ball in her face, according to reporters courtside and television replays.

We discover that the upsetting incident occurred during the second set of the game while Williams was serving. At this point, a line judge foot faulted Williams, which caused Williams to approach the line judge and shake a ball in the judge's face. Robbins cites courtside reporters and television replays as her sources. The author could be citing other sources here because she may not have been in a position to directly see or hear what Williams might have said to the line judge.

Possible questions to answer

At this point, we have been reading and skimming for several seconds. While we are trying to understand the substance of the article, we probably have many questions that we can jot down. In parenthesis, we can note which of the four steps may help us answer our questions. Between each question, we will circle back.

- What is a foot fault and was it the correct call? (Check for previous work to fact check the author's claim that Williams' faulted before her reaction to the judge.)
- Why did Williams react like this? What really happened? (Go upstream to an original source to judge the author's style and sources)
- Was Williams's reaction really "shocking?" (Read laterally to determine if the article's substance and sources are supported by other resources)

This list is not exhaustive. Additionally, you could easily and correctly argue that different or all four of Caulfield's steps could answer our questions. These are just a few ideas to work through these steps together.

What is a foot fault?

First, let's check for previous work to see what a foot fault is and if someone else fact-checked the claim that Williams faulted. Maybe another author could verify what Williams said to the line judge. We open the next tab and Google "foot fault" in quotes. We might also add the term tennis to this.

Some of our top results are dictionary definitions, which can be useful. But then we spot a National Public Radio (NPR) [interview with a former line umpire](#) that was published at the same time as the Times article. We can listen to the audio or read the transcript of the radio interview.



The screenshot shows an NPR audio player interface. On the left is a blue square logo with the text "npr" in white and "ALL THINGS CONSIDERED" in white on a dark blue background. Below the logo is the text "NPR". To the right of the logo is the NPR logo (npr) and the word "interviews". Below that is the title "Former Line Umpire Explains Foot Faults In Tennis" in blue. There is a "share" button in the top right corner. Below the title is a play button icon and the word "listen". A progress bar is shown with a white circle indicating the current position. The total duration is "3:43". In the bottom right corner, it says "© 2009 npr".

This source tells us that a foot fault is when a player touches the baseline, or line at the back of the court, while serving the ball in tennis. However, the former umpire equivocates on whether or not Williams did commit a foot fault.

Mr. PONDER: Right.

BLOCK: Well, you've seen the footage of the match in question. Did Serena Williams commit a foot fault, do you think?

Mr. PONDER: You can't tell from the angle on the TV if it's - she's stepping on the line, you can possibly see it. But that angle that they shot, there was just no way to tell.

BLOCK: And from where the line judge is sitting, did she have a good view of it, do you think?

Mr. PONDER: Yes. And she would've known. Absolutely.

The umpire states that he has only seen footage of the match, and that he could not tell from the angle whether Williams touched the line. He does seem to support the line judge who made the call, explaining that she “absolutely” would have known if Williams committed a foot fault from her vantage point.

As we mapped out in the previous two chapters, we could then go down the rabbit hole, researching the NPR interview's primary sources. For instance, we could research the reliability of NPR as a source, the background of the NPR reporter, or the former line judge's career to verify his credibility as a source. We will not go down these rabbit holes for the sake of time and, instead, we will **circle back** to our larger question of whether or not Williams committed a foot fault, knowing what a foot fault is, but still questioning what actually happened.

Was it the correct call?

Back with the Times article, we can take a closer look at what sources Robbins cites when describing what happened. Robbins is pulling this information from “reporters courtside and television replays.”

[Serena Williams](#) became unhinged in a shocking display of vitriol and profanity toward a line judge at the most inopportune time Saturday night — right before match point for [Kim Clijsters](#) in the semifinals of the [United States Open](#).

In a matter of confusing minutes, Williams turned what had been a scintillating women's match into an ugly and improbable spectacle that gave Clijsters, an unseeded wild-card entry making a joyful return to Grand Slam tennis, a 6-4, 7-5 victory she could not even celebrate.

Clijsters, a 26-year-old from Belgium who is the mother of a toddler, had frustrated and dominated Williams all night. After Clijsters won the first set, Williams slammed her racket to the court twice, mangling the frame in disgust. She walked to her chair, whacking the net with her racket on the way, and earned a warning for racket abuse.

Clijsters stayed composed. She had a 6-5 lead in the second set, and Williams was serving to send the set into a tiebreaker. At 15-30, a lineswoman called Williams for a foot fault on her second serve. Williams argued angrily, then walked back to the baseline. But she could not let it rest. She approached the judge and appeared to threaten her, shaking a ball in her face, according to reporters courtside and television replays.

Later in the article, Robbins gets a bit more specific. She refers to audio from CBS's broadcast of the match and The Miami Herald.

After the match, Williams was eerily composed. She did not apologize for her actions, nor would she disclose what she had said to the lineswoman, whose name was not released by the United States Tennis Association.

“I don’t think it’s necessary for me to speak about that,” Williams said. “I’ve let it go.”

The line judge appeared to comment to the chair umpire on court that she felt threatened, although what she said was not audible. In a hastily called conference on the court with the chair umpire and Earley, Williams

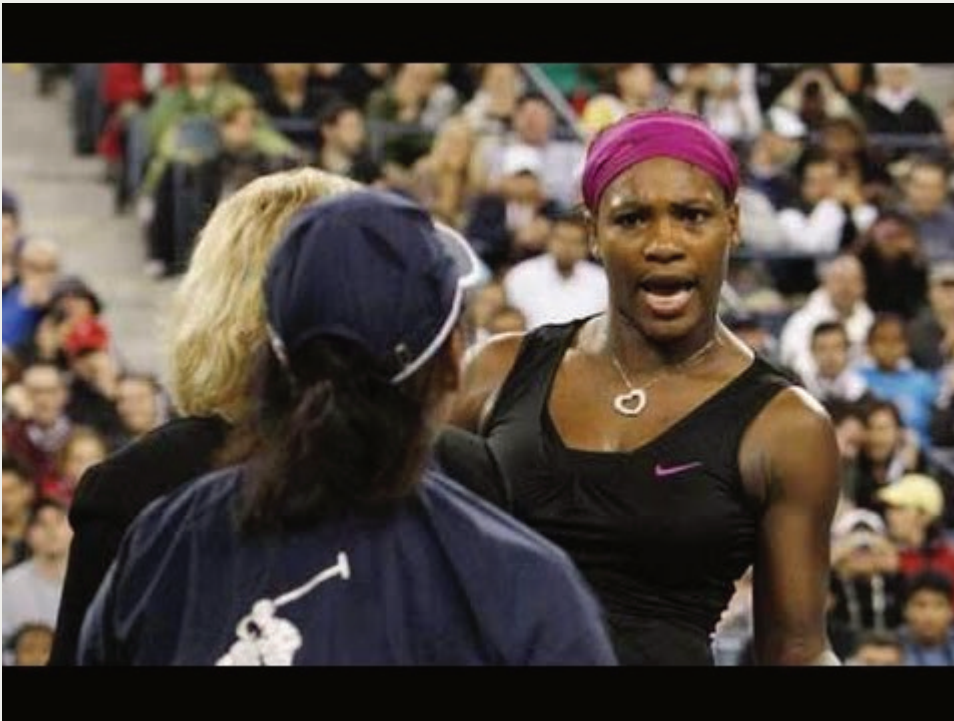
responded in an incredulous voice. “I didn’t say I would kill you,” she said, in audio that was picked up by CBS’s on-court microphone. “Are you serious? I didn’t say that.”

Later, Williams said: “I’ve never been in a fight in my whole life, so I don’t know why she would have felt threatened. No, I didn’t threaten. I don’t remember any more, to be honest. I was in the moment.”

Reporters who were courtside said that Williams approached the line judge and they heard Williams shout profanity at her. Holding a ball, Williams said to the lineswoman that “you don’t know me,” appearing to inject it with profanity. Then Williams added that the lineswoman was lucky that Williams was not, according to The Miami Herald, “shoving this ball down your throat.”

The author has given us two sources. First, the broadcast of the match would be a primary source that might yield more results. We know that the video might not give us exactly what we want. Robbins was able to listen to Williams on the CBS broadcast, but the umpire interviewed by NPR couldn’t quite see if the call was fair. We should search for similar coverage to evaluate the happening ourselves. Additionally, The Miami Herald and other “courtside reporters” covered the event, so we can be certain to find other accounts to play off Robbins’ account and our own interpretation of the video.

To get our bearings on the situation, we will swim **upstream to the source**. In this particular case, it is to a video of the match brought to us by [YouTube](#). Keep in mind, YouTube often has several different versions of a video, so you should take time to consider all of the possibilities. This version was the one that provides us with a decent view of Williams' serve and some snippets of the courtside conversation.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=64>

After reviewing the video, we could make some judgement calls. First, we might be willing to say whether or not we agree with the line judge's call. The umpire interviewed by NPR said he couldn't tell from the video he watched. Can you tell from this video if Williams faulted?

Additionally, we can notice other elements of the scene. We can witness Williams' interaction with the line judge and other tennis officials, deliberating whether she became "unhinged in a shocking display of vitriol and profanity," as Robbins described. Would you describe Williams' behavior with these words? Can you hear what she said to the line judge? What about her

verbal exchange with other tennis officials. What does this interaction tell you? What about Williams' exchange with Clijsters?

We also can notice the behavior of the crowd, the Williams family, camera-toting courtside press, and other tennis officials. Do they act shocked? As a primary source, the video provides us with greater context to judge the credibility of our Times article. It places us in the shoes of Robbins, and pushes us to understand and interpret what happened.

What do other sources say?

Now that we have witnessed the event as best as we could without actually being at the match, let's get some other reportings by reading laterally. We will focus on some of the claims and content of the article, and compare it to primary and secondary sources. This will enable us to weigh our own interpretation of events against the viewpoints of the Times' Robbins and even the umpire interviewed by NPR.

We can read the different opinions and interpretations to see what other evidence is out there and, based on the evidence, which argument we most agree with. Ultimately, even though these additional sources may not directly address the Times article, they will help us evaluate the Times article by reinforcing or contradicting Robbins's argument or by introducing new information.

A quick Google search yields an article from The Christian Science Monitor that promises to introduce new information. Robbins was not certain of what Williams said to the the line judge. The Monitor provides the missing evidence of [what Williams actually said](#). (If you are unfamiliar with the Monitor, you could skim the [about section](#) to learn more about its editorial policies and history to research its credibility or search for what other reputable publications have to say about [its bias](#).)



USA

Serena Williams foot fault: What did she say and why?

Meltdowns are a part of tennis, but foot-fault calls – especially on crucial points – seem to drive players over the edge.

By **Mark Sappenfield**, Staff writer of The Christian Science Monitor | SEPTEMBER 13, 2009

Mark Sappenfield's account does not contradict Robbins's reporting. He does offer more detailed first-hand accounts of the what happened though, including what Williams said to the judge.

Approaching the lineswoman who made the call, shaking her racket and pointing, Williams said: "I'm going to shove this [expletive] ball down your [expletive] throat," [according to CBSsports.com](#).

SI.com writer [S.L. Price](#), who was in the press tribune 15 rows away, [says he heard Williams say](#): "You better [expletive] be right."

(See a video of the entire incident [here](#).)

Having already received a conduct warning for throwing her racket in the first set, Williams was docked a point for her outburst. At 15-40, that was match point, and Serena lost the match – 6-4, 7-5 – without hitting another ball.

Tantrums are a part of tennis. But the foot-fault tantrum appears to have a special place in the tennis world.



TEST YOUR KNOWLEDGE | Could you pass a US citizenship test?



By citing other reporters who were at the scene, Sappenfield followed the same reporting techniques and sourcing that Robbins did for the Times. Unlike Robbins, Sappenfield named his sources, making it easier for readers to fact-check and judge the credibility of Sappenfield's account.

For instance, we can deduce that Sappenfield's quotation from a CBS outlet could be reliable because, as we know from Robbins's account and our video searches, CBS broadcast the match. Sappenfield even tells us how close one of his sources was to the court, enabling us to postulate if the source would be physically able to hear and see what happened on the court.

As a result of his research, Sappenfield provided quotes of what Williams said, filling in that piece of the puzzle for us.

Next, it is important to note how Sappenfield's approach to the story and style differs from Robbins' approach. As you recall, Robbins' coverage largely compared Williams' behavior to her competitor, Clijsters. Sappenfield places Williams' "spectacular meltdown" within the broader history of players being driven "over the edge" by foot-fault calls.

What's more, some players say there is an unwritten rule that – just as hockey referees call nothing but the most blatant penalties in overtime playoff games – tennis officials should ignore seemingly ticky-tack infractions like foot faults when stakes are high.

[Russian Marat Safin](#), no stranger to implosions on and off the court (see one about another foot fault [here](#)), [had this to say](#) in his post-match press conference about being called for a foot fault on a second serve at a crucial point of last year's [US](#) open.

"I think it was complete [expletive]."

He went on to give voice to what many fans – and perhaps Williams herself – were thinking Saturday night.

"It's difficult and it's almost impossible to make a foot fault on a second serve, and especially in the important moments you shouldn't call it."

In a qualifying round for the [Rogers Cup](#) in [Montreal](#) last month, a foot fault call on a set point caused [Michael Llodra](#) to stage a courtside sit-in ([here](#), with pictures). He sat in his chair and refused to continue playing

By focusing on similar behavior exhibited by other players, Sappenfield gives us more information about the culture of tennis. Perhaps the author's biggest insight is that there is an unspoken rule that foot-fault infractions are not called during pivotal match moments, such as Williams' serving match point (or being one point away from losing). Learning how other players have literally protested officials for making such calls at "important moments" helps us understand that Williams' behavior is maybe not as anomalous as we initially thought.

Sappenfield's placing of Serena Williams' reaction in this broader context of tennis culture and players' expectations and behaviors does not invalidate Robbins's coverage of the event. But if it is so common for players to get upset over untimely foot-fault calls, why was it such a big deal that Williams acted this way? It might make us wonder if Robbins treated Williams fairly in her coverage, or if she provided us with adequate context for the event.

What about a previous tennis match?

At this point, we should **circle back** to re-examine the tone in the Times article. We can see that Robbins did provide her readers some greater context, but focused on the history between Williams and Clijsters. This is something we have not garnered from other sources, so it can help us see the situation from this lens. Robbins details that Clijsters and Williams played against each other before at Indian Wells Masters in California. Despite the fact that Williams won the 2001 match, she has not played at Indian Wells since. Williams and her sister Venus have remained absent because the crowd hurled racial epithets toward them.

This was the second time in their careers that Williams and Clijsters had been involved in a controversial match. Williams met Clijsters in the 2001 final of a tournament in Indian Wells, Calif. The crowd booed Williams, apparently in response to what had transpired in the semifinal; Venus Williams had defaulted because of an injury right before the sisters were to go on court. Williams has said that she heard some fans yell racial epithets.

Williams won that match in three sets. But she and her sister Venus have not played in Indian Wells since.

Marc Stein's Newsletter

He's covered Jordan. He's covered Kobe. And LeBron vs. the Warriors. Go behind the N.B.A.'s curtain with the league's foremost expert.

[Sign Up](#)

[PRIVACY POLICY](#) | [OPT OUT OR CONTACT US ANYTIME](#)

Saturday night, Clijsters did not realize the connection until she was unwinding after the match. “You kind of wonder what is it with all our matches,” she said. “Then again, it’s a completely different situation.”

Even though Clijsters said the 2009 US Open was “a completely different situation” from Indian Wells, we can make a note that the crowd’s racist taunts left a lasting impression on Williams and influenced her playing decisions. To investigate Robbins’ reporting further, we can examine what other sources have to say about the Indian Wells match-up or the influence of race on Williams’ career in general.

To find other sources on Indian Wells Masters, we could **check for previous work** to learn more about the tournament or to see what was written at the time about the Williams-Clijsters match and related racial taunts. Or we could **go upstream** for a recording of the match to verify what happened. Finally, we would then **read laterally** to fact-check different cues.

For the sake of brevity, however, we will skip researching the Indian Wells tangent, and focus on reading laterally about the aspects of race and racism that Robbins touched upon. Again, we will take to Google.

Racism in tennis?

We could try searching for “Serena Williams racism.” This will give us a host of articles: another tennis player padded her shorts and chest in an [imitation of Williams](#) during a match, a former grand slam winner was once [banned from tennis and fined](#) for his racist comments about Williams’ unborn child, and Williams has argued for [equal wages for black women](#) in Fortune magazine. Anyone of these could be useful if we wanted evidence that Williams has encountered racism during her career.

We are specifically examining the 2009 U.S. Open, though. So we could add that to our search terms. Because we already have done one sweep of the 2009 US Open coverage when we retrieved The Christian Science Monitor article, we should strive to find a source that we wouldn’t ordinarily read. Scrolling through the results leads us to a post, [Referring Serena: Racism, Anger, and U.S. \(Women’s\) Tennis](#), on “The Crunk Feminist Collection” blog. According to the headline and first couple of paragraphs, the post promises to dissect the roles that race and racism have played in the press’s coverage of the Williams sisters and in their tennis careers.

Refereeing Serena: Racism, Anger, and U.S. (Women’s) Tennis

September 12, 2011 / [crunktastic](#) / [Uncategorized](#)

Yesterday, I tuned in, as I have done nearly every summer since I was nine or ten years old, to watch the finals of the U.S. Open. Serena Williams was vying for her 15th Grand Slam title against Australian player Sam Stosur.

As I tuned in, I steeled myself for the endless stream of racist commentary from the sportscasters, of whom Mary Carillo, Chris Evert, and Darren Cahill are the chief offenders.

All honest tennis players and stans will admit that the Williams Sisters have transformed the game of women’s tennis. They have brought power and speed to bear in ways that used to be relegated to the men’s game. With their power serves, speed, and willingness to chase down and make impossible shots, the Sisters also upped the physical fitness requirements for champions.

Before we dive into reading the article, we should first see if it is worth our while. Or if we think it might be credible. We will start **reading laterally** again, by checking out who wrote it and then the “About” section on the blog.

First, we can note that this post is filed under the anonymous name of “crunktastic.” To figure out who might be publishing under this name, we should hop over to the “People” section for a full list of staff and writers.

Brittney C. Cooper is co-founder of the Collective. She received her Ph.D. from Emory in 2009 and spends her days as Assistant Professor of Women’s and Gender Studies and Africana Studies at Rutgers University where she specializes in Black Feminist Thought, Black Women’s Intellectual History, Hip Hop Studies, and Digital Feminisms. Crunktastic is most well-known for calling folks on their racist and sexist B.S. in her impassioned posts about gender politics in and among the Hip Hop Generation, convergences of faith and feminism, dating while feminist, and contemporary feminist movements. She is also working on her first book, *Race Women: Gender and the Making of a Black Public Intellectual Tradition*. Dr. Cooper is also a 2012 Progressive Women’s Voices Fellow at the Women’s Media Center. She is a fan of T.I., Lil’ Wayne, Cee-Lo and OutKast and feels fortunate to have come of age in the Decade of the Female Emcee (1990s). Follow her on Twitter @ProfessorCrunk.



“Crunktastic”



“Crunkadelic”

Susana M. Morris is co-founder of the CFC and a contributing writer on the blog. She received her Ph.D. from Emory University and is currently an associate professor of English at Auburn University, where she teaches African American literature. Her book project, *Close Kin and Distant Relatives: The Paradox of Respectability in Black Women’s Literature*, is forthcoming on the University of Virginia Press in February 2014. Writing as Crunkadelic on the CFC blog, she covers a range of topics such as politics, self-care, sizeism, and reality TV, often irreverently. Her iPod has a mix of all types of soul music, with a smattering of Dolly Parton and Florida booty music, and her DVR is filled with episodes of *Parks and Rec* and the *Real Housewives of Atlanta*. Follow her on Twitter @iamcrunkadelic, where she shares random thoughts, feminist musings, and obnoxiously live tweets during *Scandal*.

Here, we see a full list of contributors to the blog. None of them are listed under the name “crunktastic,” so we might assume that this posting was an anonymous post that was approved by the administrators of the blog. Skimming through the authors’ biographies, we read that many of the people identify as feminists and scholars. Most of them hold their Ph.D.s and professorships at prominent American universities.

Then we notice one of the two co-founders, Brittney C. Cooper, refers to herself as “Crunktastic” in her biography. So we have found our author! We see she holds a Ph.D. from Emory University and is an assistant professor in Women’s and Gender Studies and Africana Studies at Rutgers, The State University of New Jersey, and that she focuses her research on black feminist thought and black women’s intellectual history.

We then **laterally search** for Cooper to verify her academic appointment and to see what

else she has written. This will help us confirm that she is a researcher and expert in the field of black feminism. We can confirm her [department affiliations](#) at Rutgers, take a peek at her [Twitter account](#), and read an [National Public Radio interview](#) she had about dealing with racism before **going upstream** and landing on a primary source, her [curriculum vitae](#) (CV or academic resume) posted on her personal website.

Brittney C. Cooper, Ph.D.

Education:

Emory University:

Doctor of Philosophy, Graduate Institute of Liberal Arts,
Program in American Studies, May 2009
Women's Studies Certificate, May 2009
Master of Arts, Graduate Institute of Liberal Arts, December 2007

Howard University:

Bachelor of Arts, English; *Bachelor of Arts*, Political Science
Summa Cum Laude, Phi Beta Kappa, Honors Program Graduate with Senior Thesis in English, May 2002

Academic Appointments:

Associate Professor — Rutgers University, Departments of Women's and Gender Studies and Africana Studies, 2017-present
Assistant Professor — Rutgers University, Departments of Women's and Gender Studies and Africana Studies, 2012-Present
Ford Foundation Postdoctoral Fellow—Rutgers University, Center for Race and Ethnicity, 2011-2012
Assistant Professor—University of Alabama, Department of Gender and Race Studies, 2009-2012

Publications:

Books

Cooper, Brittney. *Beyond Respectability: The Intellectual Thought of Race Women* (University of Illinois Press, 2017)
Cooper, Brittney C., Susana M. Morris and Robin M. Boylorn. *The Crunk Feminist Collection* (The Feminist Press, 2017)
Cooper, Brittney. *Eloquent Rage: A Black Feminist Discovers Her Superpower* (St. Martin's Press, 2018, forthcoming).

Refereed Journal Articles:

"Maybe I'll Be a Poet, Rapper": Hip-Hop Feminism and Literary Aesthetics in Sapphire's *Push* — *African American Review* (Spring 2014)
"The Stage Hip Hop Feminism Built: A New Directions Essay," *Signs: Journal of Women in Culture and Society*. Vol. 38, No. 3 (Spring 2013): 721-737 [co-authored with Aisha Durham and Susana Morris]

Culling information from these sources, we can deduce that she has published a fair amount in her field. Though there is no evidence that she is an expert in tennis, she has written books and several articles on race, racism, and women, and even about how these areas relate to popular culture. NPR views her as a reliable source of information on these topics, and Rutgers recently gave her an award as well. Cooper has been promoted to associate professor at Rutgers as a result of her scholarship. We could use all of this as evidence that Cooper is an educated and reliable authority to address the ways race may have impacted Williams's tennis career and performance.

Why did Williams react like this: The alternative perspective

Let's jump back to the blog post and read what "Crunktastic" Cooper has to say. Writing two years after the 2009 US Open, Cooper is responding to an incident at the 2011 US Open that reminded her of the match we are studying. During the 2011 tournament, Williams disagreed with a referee's ruling. "Serena gave the ref the business for the next three games," Cooper writes, because Williams mistakenly believed the referee was the same referee who "screwed me over last time." Williams' incorrect identification of the referee is beside the point, Cooper implicitly contends. The point of the situation is how Williams' anger is depicted and interpreted by the press.

Yes, I'm aware of all the ways in which her acts in this moment reinforce stereotypes of the Angry Black Woman. However, we cannot use our investment in a respectability politic which demands that Black women never show anger or emotion in the face of injustice to demand Serena's silence. Resistance is often impolite, and frequently it demands that we skirt the rules.

Even so, when asked about her loss yesterday, Serena, while not remorseful about her exchange with the ref, was nothing but gracious to Sam Stosur on her win.

Moreover, the USTA loves angry heckling players—as long as they are white men. Early in the tournament, there was a video and interview tribute to Jimmy Connors, a player legendary for his angry outbursts on the court. In the tribute they devoted extended time to showing one of the more famous of these outbursts, in a celebratory manner. White anger is entertaining; Black anger must be contained.

Cooper lays out how the press and US Tennis Association are much harder on Williams than on her white male peers, such as [John McEnroe](#) or [Jimmy Connors](#), who also were guilty of having their own emotional outbursts on the court. To begin, Cooper summarizes that the press has a long history of labeling the Williams sisters as "hypermasculine, unattractive women overpowering dainty white female tennis players."

Citing specific sports announcer and analysts, Cooper provides numerous quotes about the Williams sisters that focus on their physical strength while failing to acknowledge their intellect, but emphasizing that of white players. Drawing on her academic training, Cooper determines that Williams's outbursts in 2009 and 2011 and the press's portrayal of them could "reinforce stereotypes of the [Angry Black Woman](#)."

Such misrepresentation of Williams, Cooper explains, feeds a narrative of white supremacy that is played out through officials and the press policing Williams' behavior. To prove her point, Cooper cites the fact that Williams was levied [the largest fine in U.S. Tennis Association history](#), \$82,500, for the 2009 incident. This is a much larger fine than any of Williams' white male predecessors and colleagues have received.

Cooper reminds her readers that in 2011, the tennis association seemingly celebrated one of Connors' outbursts in a highlight reel at that year's tournament. The author contended that the association wishes to curb and control Williams' anger but essentially encourages white men to express theirs by celebrating them with highlight reels.

Cooper has a different take on Williams's behavior. She argues that rather than an angry black woman who cannot control her emotions, the player should be understood as resisting the prejudices she has encountered as a black woman playing in a historically white sport.

In this sense, the press and the association are the ones who should be punished for furthering negative stereotypes of black players, specifically women. Williams's arguments with referees should be understood as her striking out against such racial injustices.

This is a lot to digest, but Cooper gives us a perspective that has not been covered by any of the other reports we have read.

Cooper also leads us to **circle back** to Robbins' New York Times article. With Cooper's criticism in mind, we can take a second look at the language Robbins used to describe Williams and Clijsters, and begin to question her writing style.

The original article's tone in context

Serena Williams became unhinged in a shocking display of vitriol and profanity toward a line judge at the most inopportune time Saturday night — right before match point for Kim Clijsters in the semifinals of the United States Open.

In a matter of confusing minutes, Williams turned what had been a scintillating women's match into an ugly and improbable spectacle that gave Clijsters, an unseeded wild-card entry making a joyful return to Grand Slam tennis, a 6-4, 7-5 victory she could not even celebrate.

Clijsters, a 26-year-old from Belgium who is the mother of a toddler, had frustrated and dominated Williams all night. After Clijsters won the first set, Williams slammed her racket to the court twice, mangling the frame in disgust. She walked to her chair, whacking the net with her racket on the way, and earned a warning for racket abuse.

Clijsters stayed composed. She had a 6-5 lead in the second set, and Williams was serving to send the set into a tiebreaker. At 15-30, a lineswoman called Williams for a foot fault on her second serve. Williams argued angrily, then walked back to the baseline. But she could not let it rest. She approached the judge and appeared to threaten her, shaking a ball in her face, according to reporters courtside and television replays.

In the opening passage above, we can see that Robbins used the adjectives “ugly and improbable spectacle” to describe Williams’ actions. She depicts Williams as “frustrated” and behaving “angrily” throughout the match as she whacked the net with her racket before appearing to “threaten” the judge.

Clijsters, meanwhile, is drawn as the “composed” player who “dominated Williams all night.” In the middle of describing the ways in which Clijsters remained calm and in control, Robbins

lets it drop that Clijsters “is the mother of a toddler.” Why would Robbins mention this? Toddlers, going through a [major development stage](#), are known for their tantrums.

The author’s description of Williams’ behavior focuses on the player’s anger, physical displays of frustration, and seemingly lack of control throughout the match. Is Robbins paralleling Williams’ behavior to that of a two-year-old having a tantrum? Clijsters, it is implied, was able to remain calm because she likely was used to such behavior from her toddler. Williams’ behavior, Robbins concludes, prevented Clijsters from celebrating her “joyful” return to tennis and her skilled play.

Notice some things? Thinking back to Cooper’s blog post about the portrayal of Williams as an “angry black woman,” we might have a new string of questions and ideas about the credibility of this Times article. Did Robbins unfairly portray Williams as an angry black woman? What does Clijsters’ motherhood and toddler really have to do with the match? Who did Robbins view as the skilled player in this match? Did Robbins appear to favor one player over the other? Why?

We found that Robbins provides us plenty of verifiable facts about the match. Williams did say something to the line judge, which resulted in her being assessed a penalty and losing the match. We had to seek out other sources to know what was said and to determine for ourselves if Williams did commit a foot fault.

But the author’s language may have us second-guessing if she treats Williams fairly in the article. She does focus a great deal on Williams’s anger and singularized it as unusual behavior. Sappenfield and Cooper maintain that white men have a long history of getting angry on the court with far fewer negative consequences from the tennis association and the media. Finally, Robbins does seem to emphasize Clijsters’ ability to control her anger and her skillful play, which might imply that Clijsters had some sort of mental and emotional superiority to Williams. This, we know, Cooper would fault as a plotline in a false narrative of white superiority.

Is This Article Credible Enough To Cite?

In the end, we very well could use the Robbins article in our writing, but note that it is not a perfect source. We could say that the substance of the article, or the fact that Williams lost the match after being assessed a penalty, is credible.

But we also discovered that other reporters were able to uncover more information by using different sources than Robbins. So we would need to supplement the article with other

sources that provide greater detail about what Williams said, and, perhaps, our own reading of the call based on the recording of the game.

We might, moreover, question the tone of the article. To do this, we, again, would need to use different sources than Robbins. We could cite Cooper's blog posting, or maybe dig deeper to read academic sources written by Cooper or other scholars about black feminism, the angry black woman stereotype, or race and racism in tennis. Based on this evidence, we might question whether Robbins was unfairly hard on Williams. Following Sappenfield and Cooper, we might even compare Williams' actions to McEnroe, Connors, or other players who have lost their cool over a foot-fault call. All of this would provide our readers with greater context and understanding of the 2009 match between Williams and Clijsters.

Contend With Bias

KARNA YOUNGER AND CALLIE BRANSTITER

Learning Objectives

After reading this chapter, you will be able to:

- Distinguish between explicit and implicit bias.
 - Define a number of bias categories.
 - Identify bias in an information source.
 - Discuss biases in search engine results.
 - Include diverse perspectives when considering the credibility of information sources.
-

What Is Bias?

When evaluating the credibility of information, it is important to consider its bias. Bias is the “inclination or prejudice for or against one person or group, especially in a way considered to be unfair,” according to [Oxford Living Dictionaries](#). Think back to our discussion in a [previous chapter](#) of Liz Robbins’ coverage of Serena Williams for The New York Times, and how bias factored into our evaluation. Though somewhat subtle, there were hints that Robbins seemed to favor and maternalize the white Kim Clijsters while alternatively infantilizing or portraying Williams as an “angry black woman.”

You may also remember that one time [Pepsi partnered with Kendall Jenner](#) to appropriate the Black Lives Matter movement to sell some soda. Audiences were quick to call foul, and Pepsi pulled the “tone deaf” ad. Roxanne Gay, a bestselling author and associate professor of English at Purdue University, for one, called out Pepsi for its bias and not including black people in the creation of the video. She argued on Twitter that if creators had sought more perspectives beforehand, the commercial likely would not have made it to air.



In this chapter, we will define several categories of bias, and discuss how they may manifest in the information we evaluate or in information we produce.

Implicit and explicit bias

At the outset, it is important to acknowledge that **all information is biased** in some way. There are two primary types of bias: explicit and implicit. The [Office of Diversity and Outreach at the University of California, San Francisco \(UCSF\)](#) offers an easy way to distinguish between the two. *Explicit bias* is a conscious bias, meaning that we are aware of it. *Implicit bias* is a bias we are unconscious of, or that we don't even realize we hold.

Implicit bias starts taking root during our early childhood, so that by the time we are in middle school we already hold prejudices against certain groups, even if this runs against our conscious morals or ethics. The good news, though, is that our implicit biases can change and are often more of a product of our environment than anything else, [researchers find](#).

Implicit and explicit bias become problems because of the way our brain processes information. In the [first chapter on evaluating sources](#), we discussed how [psychologists](#) say that we either process information quickly based on our prior knowledge, or that we are very deliberate and think critically about information. We rely upon our biases when we make quick decisions but can override such preconditions when we think deliberately and critically. There

really isn't a clear cut way to "teach" ourselves how to become better critical thinkers, [cognitive psychologist Daniel T. Willingham](#) says, but it is possible, and anyone can do it. Among his suggestions, Willingham has found that learning deeply about a subject, drawing from and challenging our life experiences, and developing critical thinking strategies to follow when evaluating information help us avoid cognitive biases.

In this chapter we identify some of the biases you may encounter while evaluating and creating information. There are over 170 identified cognitive biases, and we will cover only a small number of these. Learning about and improving our own biases is a lifelong process that cannot be summarized in a short chapter. In order to help you down this path, though, we will conclude our discussions of biases with some strategies communications professionals use in their work to overcome bias.

Categories of Bias

Cognitive bias

[Cognitive bias](#) is an error in judgment as the result of our own implicit or explicit bias. Many biases stem from cognitive bias, and these biases have lasting effects on how we choose to consume information and news.

As information specialist [Lane Wilkinson](#) explains, the [Telecommunications Act of 1996](#) loosened federal restrictions of media ownership. This legislation allowed mass communication companies, such as cable news companies, to compete with one another. The result was that for these companies, increasing shareholder value became much more important than maintaining their journalistic integrity. This, in turn, segmented the news media and the general public, with some people gravitating to some news outlets and completely avoiding others.

The filter bubble phenomenon, which we discuss more in a later chapter, has been fueled by this segmentation. Filter bubbles refer to our tendency to consume news and other information that support our preconceived notions, and to reject information that challenges these notions. Three categories of cognitive bias seem to sustain these filter bubbles:

- The Hostile Media Effect is one such cognitive bias with roots in mass communication theory. It is the tendency of those with strong opinions or beliefs to assume that the mass media is against them, in favor of the counter point of view.
- The Dunning Kruger Effect is another form of cognitive bias about overconfidence. It is the tendency of those with low ability or knowledge of a topic to overestimate their competency in that topic.

- Confirmation bias occurs when we only seek out and trust sources of information that confirm our own opinions. Have you ever chosen a topic for a research paper and sought out sources that only confirmed your thesis of that topic? That is an example of confirmation bias. Biases shape filter bubbles in which we consume information and, as you will read below, play into cultural biases as well.

Gender

In November 2017, NBC News anchor Savannah Guthrie [announced](#) live on the Today show that her co-host, Matt Lauer, had been terminated due to revelations of sexual misconduct. While he was officially terminated as the result of one specific incident involving an anonymous NBC News colleague, there was reason to believe that this was not an isolated incident, but rather an ongoing cycle of [systemic sexual harassment](#) involving Lauer at NBC News.

In light of his termination, USA Today published a [video compilation](#) of moments in which Lauer exhibited sexist or crude behavior during interviews of prominent celebrities and politicians, including a moderated discussion between Hillary Clinton and then-Presidential candidate Donald Trump. While Lauer grilled Clinton on her use of a private email server, he breezed through his conversation with Trump. It can be argued that, based on the totality of these instances, Lauer exhibited gender bias.

Race

The [United Nations Educational, Scientific, and Cultural Organization](#) (UNESCO), which has taken a programmatic response to defeating racism and other forms of discrimination globally, defines racism as follows:

“Racism is a theory of races hierarchy which argues that the superior race should be preserved and should dominate the others. Racism can also be an unfair attitude towards another ethnic group. Finally racism can also be defined as a violent hostility against a social group.”

UNESCO’s definition is incredibly broad for a reason. Racism can take many forms, and may be encountered through a number of overt racial macro-aggressions, such as [the time people marched down Lawrence’s Massachusetts Street](#) with versions of the Confederate battle flag, and more subtle [micro-aggressions](#).

Such racial aggressions are able to occur because of white privilege. White privilege is “an

invisible package of unearned assets which I can count on cashing in each day,” as Women’s Studies Scholar [Peggy McIntosh](#) defined it in her seminal essay, [White Privilege: Unpacking the Invisible Knapsack](#). In this piece, McIntosh delineates the ways in which whites are “carefully taught” not to recognize how they benefit daily from various forms of racism and the racial hierarchy. Her examples include being able to socialize with people in their own racial group and disassociate from people they’ve been “trained to mistrust and who have learned to mistrust my kind or me.” In other words, white people can choose to only associate with white people and get by just fine, whereas a group of non-white people might raise suspicions.

Ethnicity

Ethnic prejudice is a close sibling to racism, and the two and are often conflatable. Ethnic bigotry also occurs through similar acts of micro- and macro-aggressions.

Particular to the area of journalism, ethnic biases have come to the forefront when the media reports on Latinx communities and on the topic of immigration. For example, Cecilia Menjívar, a KU Foundation Distinguished Professor of Sociology, has found that [negative media portrayals of Latinx immigrants](#) often reinforce negative stereotypes of Latinx people, which leaves Latinx people striving to debunk such misperceptions in their daily lives. Joseph Erba, assistant professor of journalism at KU, likewise found that such stereotypes threatened the [experience of Latinx college students](#), forcing them to combat the negative perceptions of their non-Latinx classmates throughout their time on campus.

Corporate bias

Corporate bias occurs when an information agency is biased toward the interests of its ownership or financial backing, such as an employer, client, or advertiser.

A recent example of corporate bias occurred at Newsweek. In early 2018, [Buzzfeed broke](#) the news that Newsweek Media Group (NMG), then publisher of Newsweek and International Business Times (IBT), had been buying web traffic to inflate its advertising rates and sales. In other words, NMG had [committed ad fraud](#) involving U.S. government ads.

One [Manhattan District Attorney’s raid](#) later, [Newsweek reported](#) that the magazine was under investigation, in part, because of it was sending millions of dollars to Olivet University, a Christian university founded by David Jang. NMG’s journalistic practices have been [scrutinized in the past](#), but NMG management soon had just about enough of this negative press from its own publication.

A serious breach of journalistic ethics occurred while [Newsweek investigated](#) NMG's advertising practices and its connections to Olivet University. NMG's actions demonstrate how corporate bias can influence the production of a story. First, NMG management fired a reporter, and its executive editor and editor-in-chief. All [played roles in reporting](#) on NMG's scandals. Next, NMG launched an internal review during which NMG management directly questioned sources, tried to strong-arm reporters into revealing their anonymous sources, and showed drafts of the article to subjects of the story.

The [Society of Professional Journalists](#) commands that journalists "resist internal and external pressure to influence coverage." By revealing the article to subjects, NMG management directly applied such pressure to its editorial staff in hopes of altering content. In other words, the corporate entity tried to control the editorial content of Newsweek.

Rather than being bullied into submission, [CNNMoney reported](#), Newsweek staffers continued working on the story outside of the office. NMG allowed them to publish the story only after they threatened to resign. The story ran under a disclaimer explaining Newsweek's struggles to publish the article and a promise that the content of the story was free of corporate bias. The company's owners promised Newsweek "newsroom autonomy going forward." But, [judging by its past](#), the future appears to be dubious for Newsweek.

In advertising and strategic communications, corporate bias is part of the nature of the work. Your clients essentially pay you to represent them in a positive light. But you have to walk an ethical line when doing so. Advertisers must remain mindful of the Federal Trade Commission (FTC), which enforces [truth-in-advertising laws](#). PR practitioners must be guided by the [Public Relations Society of America's code of ethics](#).

In your role as a communicator, you act as a type of intermediary between the public and your client. Even though your client may pay you to promote them or their product, you must do so with the best interest of the public in mind. For instance, if you represent a celebrity who is paid to Instagram themselves with products, you will have to remind them to clearly state that it is a paid advertisement and not just a cute photo in order to adhere to the [FTC's advertising regulations](#).

Or, if you are developing a health-themed ad campaign for Rice Krispies cereal, you should make certain that scientists have verified that the cereal will boost a child's immunity. When the [FTC fined Kellogg's](#) for not backing up such a claim with scientific evidence, the cereal company had to pull all advertising that sported this claim.

It can be difficult to talk a client down from Instagramming their way to a new beach house or from promising that curing all ills is a snap, crackle, pop. But this is why communicators

must establish [good agency-client relationships](#) that value transparency (so they will tell you the truth) and clear and collaborative communications (so that they can tell you the truth).

Algorithms: Human-inspired bias

In her book [Algorithms of Oppression: How Search Engines Reinforce Racism](#), Safiya Umoja Noble details the biases inherent in Google searches. Much of her research stems from a 2010 incident in which the top results of a Google search of “black girls” yielded explicit pornographic content. Noble argues that these primary representations of black women in Google searches are representative of a “corporate logic of either willful neglect or a profit imperative that makes money from racism and sexism.” You can watch [this video](#) to learn more about Noble’s work.

In his book, [The Filter Bubble: What the Internet Is hiding from You](#), internet activist Eli Pariser predicted that personalization and Google News would forever change the media’s role in democratic societies. He summarizes his argument in the following TED Talk video:



A TED element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=68>

Historically, Pariser argues, the media has acted as the informed mediator between politi-

cians and voters, who typically read one preferred newspaper to inform their decisions. Now, though, people can access a variety of sources indirectly through Google News. Google News, like all Google products, is designed to create a personalized experience and provide people with information that they prefer to read.

The problem with this, Pariser warns, is overpersonalization, which can exclude important news from a person's feed completely because it does not fit with someone's reading profile, or it just isn't really popular. In other words, depending on your preferences and reading history, you may not know if our country goes to war, but you'll be totally up on who won this year's [Puppy Bowl](#).

Bias in Journalism

Let us not despair that all is lost to bias. By being aware of our own biases, we can mindfully work to produce more balanced and inclusive work. According to [Harvard's Project Implicit](#), "If we want to treat people in a way that reflects our values, then it is critical to be mindful of hidden biases that may influence our actions."

Taking an implicit bias test, reflecting upon its results, and intentionally countering our own biases is one important step we may wish to take. Below, we share how some professional journalists have worked to counter their own biases to benefit their work.

One Atlantic Monthly reporter was [shocked to realize](#) that he only quoted women 23 percent of the time across 24 articles, and that 35 percent of the time he didn't include any female voices in his writing at all. Ed Yong frequently covers the field of science, which has its own [gender problems](#), and never thought that he would be part of the problem that marginalizes and devalues women and their scientific contributions.

But gender bias in journalism isn't just a guy thing. In fact, Yong reflected upon his work after reading that a [female colleague, Adrienne LaFrance, suffered the same fault](#). LaFrance got help from a computer scientist for some serious number crunching of her own writing. This analysis made her realize that she didn't even consult women for 60 percent of her work, and often gave men more space in her stories when women were included. Ouch.

Issues of race are equally problematic. In one study we conducted, we found that undergraduate students often use familiar, white-authored resources when producing their own work. For instance, students overwhelmingly consulted The New York Times as a primary source in their research, even when they were in classes that focused on non-white historical perspectives, or counternarratives.

Now, The New York Times isn't a bad primary source to use. It has been one of the nation's leading newspapers since it was founded in 1851. But for most of its history, white men have helmed the paper and produced its contents. Moreover, during our discussion of [one New York Times reporter's coverage of Serena Williams](#) in one of the [credibility evaluation chapters](#), we likely saw hints of white privilege.

Some Ways Forward

We can't pretend to have a simple fix for these deeply problematic and complicated issues. We will provide you with some examples of how professional journalists have fought to decrease bias in their own work.

First, LaFrance and Yong pledged to be more intentional. For the most part, Yong has continued to do what he has always done, but spends about 15 more minutes searching for sources until he has a list of female contacts. Additionally, he is tracking who he contacts and interviews for stories. As a result of his mindfulness, Yong is now citing women about 50 percent of the time. This also has catalyzed him to start tracking how many times he includes voices of color, LGBTQ folks, immigrants, and the disabled.

LaFrance, meanwhile, realized that she needed to change up her list of go-to sources and consider seeking out stories that focus on the achievements of women. It works for Yong and LaFrance, so it will probably work for you, too.

Once you have identified a diverse pool of sources, it is important to conduct inclusive reporting. Writing about the developing journalism ethics of covering transgender people, reporter [Christine Grimaldi](#) outlines some important tips. She suggests asking people their preferred pronouns (she, him, they, xe, or ze), and then using such preferred pronouns in your work. She cautions against asking everyone anything, citing the need to respect a person's right to privacy. When the AP Stylebook fails you, turn to the stylebook for the [National Association of LGBTQ Journalists](#) or the [GLADD Media Reference Guide](#). Finally, don't be afraid to ask your editor, manager, or experts inside and outside of your workplace for guidance.

Recognize that there are many experts and professional organizations you also can turn to for guidance. For instance, the National Association of Black Journalists also [has its own style guide](#), and the [National Association of Hispanic Journalists](#) offers points of guidance. These are just a few examples.

We want to reinforce that everyone is biased in some way or another. But there are ways to use this bias for the greater good. It simply means that you have to remain aware of how your

bias may affect your work. [Ronan Farrow](#) exemplifies how a journalist may do so. Farrow is son of Hollywood actress Mia Farrow and director Woody Allen, a former Hollywood It couple. In 2017, he published a [story](#) in the New Yorker recounting explicit details of alleged rape and abuse by disgraced Hollywood mogul Harvey Weinstein.

While Farrow's piece was not the only one or the [first one](#), it caught a lot of people's attention because of Farrow's family history and his possible bias. Farrow has long been a staunch advocate for victims of sexual abuse since he first [vocally supported](#) his sister, Dylan Farrow. As a child, Dylan Farrow accused their father, Woody Allen, of sexually molesting her, and, as an adult, has [called out](#) the Hollywood elite for continuing to support Allen's career. Though Allen was never prosecuted, the allegations of sexual misconduct and [inappropriate relationships](#) have caused some to question if [Allen's time is up](#).

What is important to note is that Farrow was mindful of his possible bias throughout his reporting. In an interview with [The Hollywood Reporter](#) (THR), Farrow said: "Probably, yes, the family background made me someone who understood the abuse of power from an early age." Even Weinstein himself tried to stop the story by alleging a conflict of interest, Farrow disclosed. Though Farrow believes his life experience helped him relate to survivors of sexual abuse with empathy, he denies that his life experience biased his reporting. Farrow told THR: "My mandate going into the Weinstein story was never to believe all survivors; it was to listen to all survivors. I think it's completely possible to be both a skeptical, judicious reporter and also create a space for survivors to be heard."

Creating a space for others to be heard is a good place to end this chapter and to begin your own research. Remembering to respect everyone's voice and to not overpower it with your own can be difficult. By being mindful of your own biases, you can make a brave [attempt to focus and listen](#).

Grammar and Spelling Review

Finally, let's make sure that we are all on the same page about how to spell and when to use variations of the word "bias."

- **Bias.** This is a noun, signifying a singular bias. Correct ways to use this word:
He or she has a bias toward something.
They have a bias against something.
There is bias in this piece of writing.

- **Biased.** This is an adjective, which means that it describes something, like a person or another information source. Correct ways to use this word:
 He or she is biased.
 They are biased.
 The piece of writing is a biased report.
- **Biased.** This also can be a verb, in the past tense. Correct ways to use this word:
 This experience biased me.
 This information biased them against something.
- **Biases.** This is a noun signifying more than one bias. Correct ways to use this word:
 He or she has several biases.
 There are biases in this piece of writing.
- **Biases.** This also can be a verb. Correct way to use this word:
 This experience biases the people who go through it.

A Practitioner's View



Scott Collin

B.S., KU Journalism, 1994

Executive Creative Director, Havit Advertising

One might assume that you develop -- if not need -- bias to be a smart advertiser. Especially when it comes to conducting and evaluating research. Why? In advertising, your job is to get potential customers to love products and services. So ... you need to be the ultimate brand advocate, right?

Well, not always.

Business isn't about what you're selling. It's about what the consumer is buying. So you have to remind yourself constantly that facts are facts. And whatever it is you feel or

assume about information needs to be placed carefully to the side, possibly across the room.

You have to remove your own emotions and take on those of someone who is not sitting at home waiting for your commercial to run, or print ad to delight them as they turn the page.

Prospects don't know your product, and possibly not even the brand. And just like you can't walk into a party and tell someone you're 'cool' ... you can't just tell someone they need to buy something because you think it's great.

I created campaigns for infant formulas long before I was a dad, and for Formula 1 racing while driving a 14-year-old Jeep. And the way I did it was to fully understand the target audience and its bias (for or against) a product, and then went from there.

Activity 1: Ad Bias

Evaluate the credibility of a news article or an ad campaign of your choosing. Identify the primary form of bias in the piece, and provide suggestions for minimizing its bias. Use evidence from the evaluated piece and other sources to support your argument.

Activity 2: Search Bias

- Watch Safiya Noble's critique of [Google's algorithm](#). In her talk, Noble is critical of how Google's search results portray women of color.
 - Google a topic that you know is politically polarizing, or that you have seen portrayed in a biased manner in the media.
 - In a two-minute video, discuss what biases you notice in your search results, if any. If possible, compare your search results with those from someone else's computer.
-

Activity 3: Implicit Bias

Take [Harvard University's Implicit Bias Test](#). Your results of this test are private and you are under no obligation to share them with anyone. Without divulging details, reflect in one paragraph on the difficulties in addressing implicit bias in a professional setting.

Activity 4: Diverse Voices

Read Christina Selby's [tips on including diverse voices in stories](#). Although Selby focuses on the sciences, much of her advice is useful for other areas of journalism and advertising. In 1-2 pages, reflect on how you can incorporate some of Selby's ideas into your own work.

PART III

INFORMATION SOURCES

Google

CARMEN ORTH-ALFIE

Learning Objectives

After reading this chapter, you will be able to:

- Describe how Google is designed to provide results based on the information need expressed by the user's search query.
 - Describe Google's business model and Google's influence as the dominant internet search engine.
 - Identify perspectives that might be missing from Google and other internet search engines.
 - Describe several ways that Google privileges some perspectives and present barriers to others.
-

Google It

Do you need directions to a friend's new apartment? Want to find that website your adviser recommended? Thinking about upgrading your cell phone? Looking to rent your textbooks for next semester? Resolving a bet on who put up the winning goal in the 2008 NCAA championship? No matter the domain, our instinct is to Google the information we need.

Choosing to use Google before all other research tools may seem like a no-brainer. After all,

Google gives us what we want, and it is so fast and easy! We might not know how or why, but Google always seems to give us the results that we like. And Google is not shy about telling us how great it is. At the top of each search engine results page (SERP) a software program declares that “About X results” were retrieved in “0.XX seconds.” This humble-brag seems unnecessary when all we really want is for the answer to our query to appear on the first page. In fact, we really want it to be on the first screen so we don’t have to scroll down, or maybe even as the top result. Fortunately, so often, Google delivers just that.

You are not alone if your preferred search engine is Google. Most internet users rely on Google. During 2017, approximately 75 percent of desktop computer users and approximately 93 percent of mobile device users searched the web using Google over all other internet search engines such as Baidu, Bing, or Yahoo!, according to [NetMarketShare](#), a leading company that analyzes web traffic and web technology.

Using Google without questioning how it works makes sense to most of its users. Media scholars Ken Hillis, Michael Petit, and Kylie Jarrett, in their book, “Google and the Culture of Search,” state it succinctly: “Today Google feels like a good deal to most of its users. It is free, easy to use, and doesn’t require a searcher to reveal his or her ignorance about a subject in front of another human being such as a librarian.”

Given how much we rely on Google for our information needs, it’s helpful to consider just how Google does what it does, and whether we should be more critical when scanning through our Google results. In this chapter, therefore, we consider several questions about Google. Thinking about information systems, that is, about who and what — Google, libraries, librarians, and information and computer scientists — organizes information and how and why they do it, can help us become more conscious and critical consumers of information.

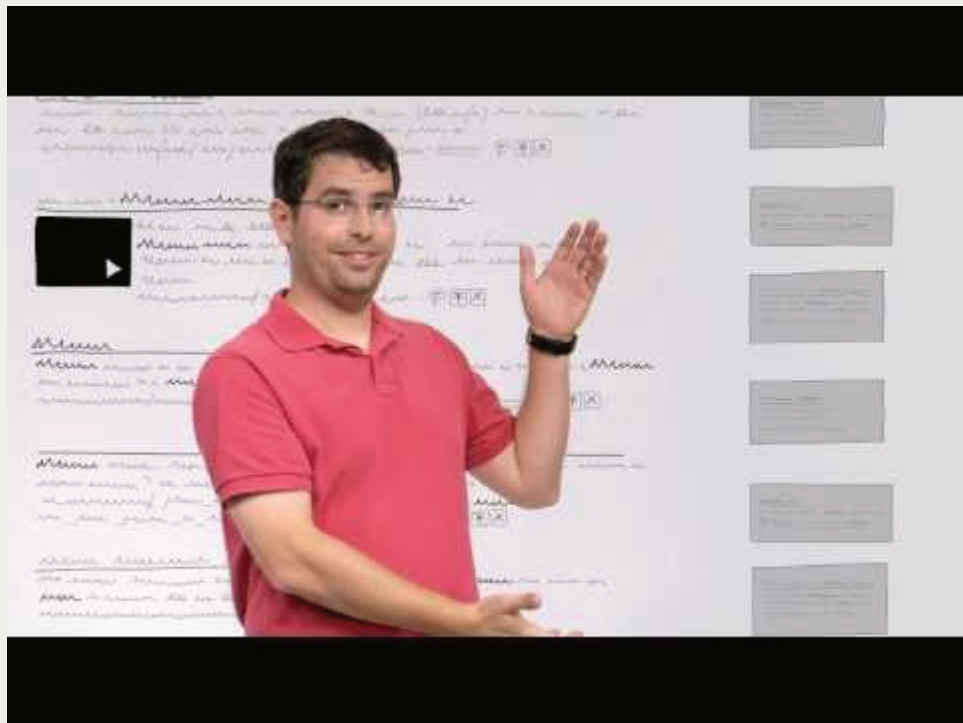
Does Google Have It All?

To understand how Google achieves its fast results, and to judge whether it is actually saving us time, it is helpful to consider how, and how much content, is included in Google’s database of information. There is a myth that everything is on the internet, and that all we have to do to access it is to Google it. Despite Google’s mission to “[Organize the world’s information and make it universally accessible and useful](#),” not all the world’s information is included in Google’s database. If you want to be an expert at finding relevant information, you will have to think beyond this myth.

How does stuff get on the internet?

First off, not all of the world's information is on the internet. For information to be included in the internet, it has to be in electronic format and stored within one of the many connected, networked computer systems. But the content indexed by Google is only a small fraction of the internet. Unless the information is open to search engine crawlers, Google's algorithms will not be able to retrieve it. Google results only provide access to approximately "0.03 percent of the information that exists online (one in 3,000 pages)," according to a 2015 [Popular Science](#) article.

You can watch the following Google video to learn more about crawlers, or spiders.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=56>

[As the video and other content explain](#), Google and other search engines use programs generically referred to as crawlers or spiders, which are algorithms that follow links on web-

pages to discover, scan, index, and sort webpages. But because the spiders' crawling and copying can only include what is made openly available, Google's index includes just a portion of the web.

Google not only scans, indexes, and sorts every word on a web page, but it also does this for every metadata field. Metadata means "data about data" that accompanies internet content. It can be created automatically or manually.

You probably are familiar with basic metadata fields such as title, author, creation date, and subjects, that are created for articles and books to enable fast search retrieval. Similarly, when you take a picture on your phone, the date the picture was taken is automatically assigned as the image's metadata. If enabled, other data such as location and address book contacts also may be saved in the metadata. Users can manually add to the metadata by, for example, identifying everyone in the image or adding information about the event at which the photo was taken. Google indexes all the metadata associated with an image or a document, which help its algorithms to quickly match the words and phrases when searched.

Once spiders index information, [many factors contribute to how](#) Google quickly recalls and ranks results with precision. In its results ranking, Google favors websites that display quickly, over content that loads slowly. Google doesn't have time to wait for pages to load because Google wants users to think its search is lightning quick.

What can't I find?

Not all web content is created equally. Some content on the internet is intentionally hidden, while other content is fraught with errors that cause web crawlers and spiders to not discover and index it. This portion of the web is referred to as the [deep web](#). If it includes illegal activity, the content is considered to be part of the [dark web](#).

There are many techniques that webmasters use to prevent Google and other search engines from scanning and indexing their materials, [according to Google](#). These blocking options include not publishing their URLs, embedding instructions in websites' html code for accessing the websites or other content, and storing proprietary content in password-protected directories.

Proprietary information not indexed in Google may actually be the stuff that you need now, but it is stashed behind paywalls. This includes information like scholarly journal articles and other primary sources. Google discriminates against some content, and in favor of other content, and maintains guides and tools that favor some websites in search results ranking. This

means that the stuff you really need as a student or professional may not even show up in your search results.

Is Every Google Search Treated the Same?

One way that Google speeds up its searches is by guessing which category each search falls into.

In a seminal article, "[A taxonomy of web search](#)," Andrei Broder, a distinguished Google scientist, identified three categories of search types: navigational, transactional, and informational. Google also hinted that it divides user intent into these three categories in a [2017 handbook for search quality evaluators](#).

Let's consider these three categories in greater detail.

Navigational searches

A navigational search happens when a user wants to go somewhere in real life or online. Navigational searches are fairly easy to recognize and for Google to execute successfully.

There are two subcategories of navigational searches: "visit-in-person" and "website" searches. If you enter a street address or a name of a business, the search engine assumes that you are interested in visiting this place in person, and it offers you directions. Alternately, if you enter part of a URL, the search engine guesses that you want to visit the website, and will navigate to a specific website. If the search engine predicts your navigational queries correctly, then you are more likely to see the search engine as accurate, reliable and easy to use.

Transactional searches

When a user performs a transactional search, he or she expects to end up having a dynamic interaction with an internet site. Google defines the transactional query as a "do" query because the user wants to *do* something on a website. These interactions could be anything from filling out an application, to writing reviews and ratings, to downloading files, to making purchases.

Transactional searches are the most easy to monetize, that is, to make money off of, according to Broder. Monetization occurs when the search engine recognizes that a user is potentially in the market to buy something. Users who perform transactional searches are identi-

fied as optimal recipients of targeted advertising. Internet industry leaders assert that many users view targeted advertising favorably. Facebook founder [Mark Zuckerberg said as much during the questioning session of a 2018 congressional committee hearing](#),

“What we have found is that even though some people don’t like ads, people really don’t like ads that aren’t relevant. And that while there is some discomfort for sure with using information to make ads more relevant, the overwhelming feedback we get from our community is that people would rather have us show relevant content there than not.”

Zuckerberg and others believe that Google and other platforms retain their users’ loyalty by sufficiently responding to their transactional queries not only with relevant results but also relevant ads, as opposed to annoying, irrelevant ads.

Informational searches

In an informational search, the search engine algorithm might not determine the full intent of a user’s query. To identify and address the intent of search users, Google conceptually divides an informational query into two levels: the “know simple” query, and the more complex “know” query. A “know simple” query is one that easily can be asked in a trivia night contest question or in a multiple choice, fill-in-the-blank, or short answer test question. Google provides a “know simple” response in a familiar format on the results page, often without navigation to a specific site. You’ve seen these “know simple” results framed in a box at the top of the results page.

A “know” query, in which a user is doing research to gain insight and develop knowledge, is much more complex and challenging for Google to fulfill. In library science circles, a “know” search is also called a cognitive exploratory search. An exploratory search is a process of learning and investigating that requires looking at multiple sources of information, according to information scientist Gary Marchionni. This process of exploration requires more human engagement in browsing, comparing and contrasting, and evaluating results than simpler searches. Contrary to Google’s mantra of “fast and easy,” exploratory search takes time and requires us to examine results in an iterative process of searching, evaluating, and reformulating questions.

Does Google Know What I Want?

It may seem like magic to have Google offer relevant suggestions and useful results. So, does

Google divine our intent? The short answer is, no. Dan Russell, a research scientist at Google, described Google's combination of understanding user intent and user behavior as "divining intent." But it is really the result of good computer programming based on data and research.

Internet search engines such as Google are designed to meet the information-seeking needs of their users, even when these users do a lousy job defining what they are searching for. Google is built on the assumption that internet users are not search experts, and that they do not use advanced search functions. That is, most Google users don't identify keywords to describe their information needs, and they do not know search operators.

Does that mean that Google can read its users' minds when they don't explain well what they want to search for? Not exactly.

Google is programmed to help us "not sweat the small stuff," by accommodating for our variants in capitalization, punctuation and spelling.

More importantly, it turns out, what we search for is not that unique. Other users before us have asked Google about similar things. Google reports that only about [15 percent of searching on any given day is unique](#). The repeat searches (approximately 85 percent) appear as autofill as we type a search.

Because most searches aren't new, this allows Google to collocate and organize information into efficient, precise results. Once this information is organized, Google's algorithm *guesses* what the most relevant information might be for the search term entered. The more users search for the same thing, the more accurate Google's guesses become.

Google's algorithm also personalizes the relevancy of our results and the order in which these results are displayed. This personalization contributes to our immediate satisfaction with Google, and adds to our perception that Google is easy. In order for Google to make it seem so easy to provide fast, precise, personally ranked results, algorithms interpret the intent of the user queries and inform result ranking.

Is Google Free?

We do not directly give Google money for the results it presents us, so that sense, Google is free. But we do pay Google indirectly. By feeding queries into Google's search box, we contribute information about ourselves, and about the things that interest us. [Google and other search engines](#) store data about us and about our collective searches. Google uses this information to make its search results better and to motivate users to continue relying on it for

their search needs. So the first way we pay indirectly for using Google, therefore, is by having Google use the information we leave with it to make itself function better.

Another way we pay Google indirectly is by contributing to the research that Google conducts on its search users.

For years, scientists, engineers, and researchers at Google (and other industry, academic, and government institutions) have been trying to improve their understanding of human-computer interaction (HCI) and information retrieval (IR), which is about figuring out what you want from the internet and how you get it. This research has included controlled scientific experiments, ethnographic observations of how people conduct online searches, and analyses of search logs.

Google and other online companies engage in constant surveillance to collect information about our online internet activities, and in analyses of [what we look at](#), what we click, our reading level, and more. Such research helps technology firms discover what we prefer, dislike, understand, don't understand, use, misuse, observe, ignore, remember, and forget, in order to design information systems that meet our expectations.

Each new search triggers a complex network of programs, to the point that no one outside of Google really knows how specific search results occur. It is even possible that the results that a user looks at are part of a current experiment that Google is running. Researchers outside of Google refer to this testing as "noise" in the results.

The last way we pay Google indirectly is that Google uses the stored data about us and our searches to play matchmaker, pairing us with targeted ads that are displayed alongside search results. Google's main business model is to sell very targeted advertising to its users, based on the search terms these users provide it.

Google feeds our data into an advertising program called [AdWords](#). AdWords is a real-time online broker that displays ads from the highest bidder that match the search terms and phrases a user types into the search bar. As you probably have observed, if you search for a pair of boots, Google will sell advertising space next to its search results to a company that identified boots as one of the keywords it wanted matched with its ad. Loyal and returning Google users are essential for its business model to succeed, because the more information users feed Google, the more targeted and successful its advertising can be.

Are Google Search Results Biased?

Google wants its users to feel that searching with Google is fast and easy, because this ensures that these users keep returning to Google. But we know from experience that doing research and learning, in the way that our teachers have taught us to do it, is slow and frustrating. What is the result of this difference between fast results and slow research?

We are drawn to fast and easy. But because fast and easy search results are possible only when result options are narrowed, using Google means that we continually put ourselves in a [filter bubble](#).

Anytime search results are narrowed to make the results come up faster, results are actively left out while some results are favored. It may not be obvious what is appearing in our filtered results and what is missing from them. Thus, search results are never completely neutral.

Two aspects of Google's search engine function illustrate the concept of bias: Relevancy results instead of possible null results, and biases in programming algorithms.

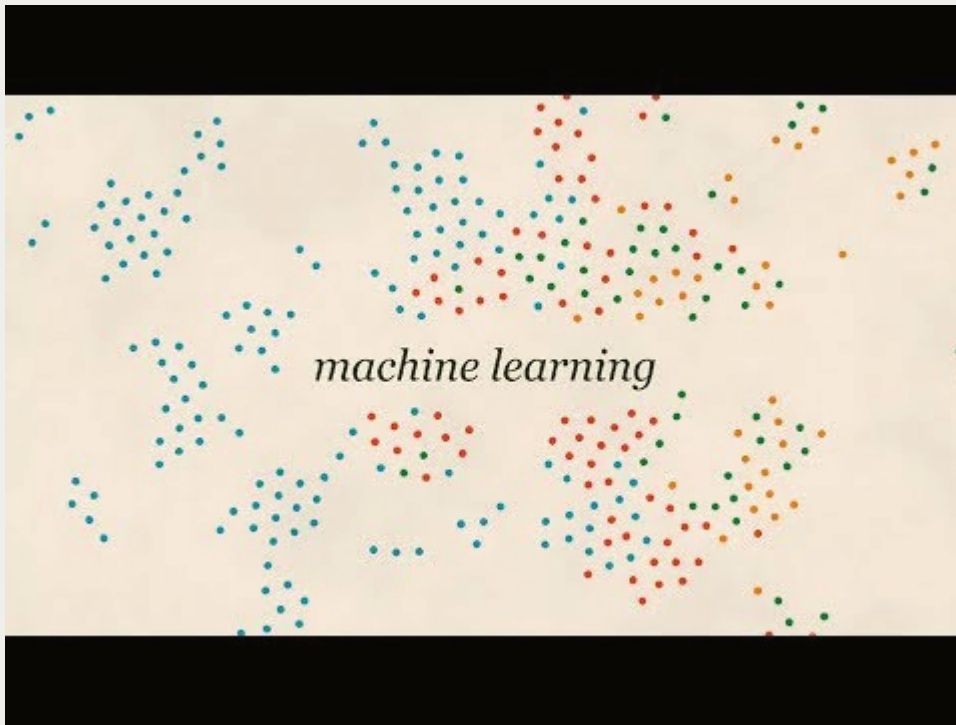
Google and other search engines are designed to avoid giving us zero search results, which is also known as null query results. If we misspell a word, an algorithm automatically searches for alternate spellings or correctly spelled words. If we do not know jargon, another algorithm retrieves semantically similar and related words, as if we had entered additional terms using a thesaurus. Unfortunately, we are often unaware how these algorithms affect the results.

While algorithms are learning from our null query experiences, we might not be learning as much from the experience. For instance, the search engine might learn from others' internet searchers that the phrase "one and done" is related to the NBA Eligibility Rules. So instead of getting results that only include the phrase searched "one and done," the results might include the NBA Eligibility Rules, which lacks the phrase "one and done." This example makes it seem that always presenting something related is always a good thing.

However, consider an instance of when the lack of null results presents inaccurate information when credible sources are not available. Consider the Atlantic's reporting on the problem of [school shooting misinformation](#).

The problem of relying on algorithms to construct our search results, even if there are no search results, is that algorithms can be biased. When a computer program is designed to make assumptions about a query, any bias that we experience in the real world can creep into the computer program and present biased results. This video, Machine Learning and Human Bias, published by Google in 2017, describes a few forms of bias acknowledged to be present

in search engine algorithms. Google has been criticized for not aggressively addressing various biases in its search results.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=56>

We recognize that search engines are not neutral, and we know it is impossible to completely remove bias. At the same time, it is very difficult for us to understand why the programming provided our specific search results. We do, however have a phrase to describe the phenomenon: The black box problem. To close this section, consider the quote from Science magazine's staff writer Paul Voosen:

It [machine learning algorithms and search results] is all about trust. If you have a result and you don't understand why it [computer neural network] made that decision how can you really advance in your research? You really need to know that there's not some spurious detail that's not throwing things all off.

Activity 1: Advanced Search

Watch this video from Google, “[Filter and refine your Google Search results.](#)” Discuss the type of information needs the advance search option is designed to meet.

Activity 2: Impact of Context in Understanding User Intent

When keywords are put into context by including other words, it is easier to design search engines that understand user intent. Watch this video of Sophie Coley’s presentation at BrightonSEO Live 2017, “[Answer the Public: How to Find Top-notch Audience Insight in Search Data and How to Apply It.](#)” You can watch only approximately 14 minutes of her presentation, stopping at 1h 38m 39s. After watching the video, reflect upon what Coley said.

Activity 3: Google Alternatives

Using the search engine [Answer the Public](#), explore the results of the following searches, and discuss the results that appear. You can also choose your own keywords to search.

- [Noun] basketball
 - [Proper Noun/Name] Bill Self
 - [Place] Lawrence
 - [Brand/trademark] Jayhawks
 - [Color] crimson
 - [Verb] jumping
 - [Adjective] fast paced<
-

Wikipedia

PAUL THOMAS

Learning Objectives

After reading this chapter, you will be able to:

- Explain Wikipedia's history and operations, and how these features can influence the site's contents.
 - Articulate the appropriate uses of Wikipedia.
 - Participate in Wikipedia as an editor, creator and curator of original content.
-

The Least Reliable Source, Or Is It?

Wikipedia is a popular online encyclopedia that can be edited by anyone. Because of its open nature, many teachers and professors often warn students that it should never, under any circumstances, be used because it is “unreliable.” As with all things, the situation is much more nuanced than that. While Wikipedia is by no means a replacement for scholarly books and articles, it can be of immense use as an exploratory, tertiary source. Of course, it is not a perfect resource, and its contents should always be judged critically, but much of the fear surrounding the site comes from a place of ignorance.

In this chapter, we will explore the history of Wikipedia, what type of resource it is, whether or not it's reliable, when it is appropriate to use the source, and how to become an editor. By the end, you should be more familiar with how the site operates, what roles editors have

in maintaining this digital resource, and the benefits and downsides to using Wikipedia when doing research.

Brief History of Wikipedia

Arguably, we could trace the origins of Wikipedia back to the 1930s, when the sci-fi writer H.G. Wells [proposed](#) that a “Permanent World Encyclopedia” be created, compiled and edited by the world’s greatest minds. Or we could trace its origins to the mid-1990s, when Eric Hammer and Edward Zalta of Stanford University [suggested](#) that a “dynamic encyclopedia” be created, whose entries “can be improved and updated on a continual basis without requiring the production of an entirely new edition.”

However, most people consider the site to be a direct continuation of the project Nupedia, which was launched by Jimmy Wales in 1999. This encyclopedia project was intended to be a free online encyclopedia that was accurate and — perhaps most importantly — “academically respectable.” Like previous traditional encyclopedias, Nupedia was written only by experts, but it was open and free to use, making it quite revolutionary at the time.

Unfortunately, because Nupedia was written by unpaid experts, only about 20 articles were created, and due to this sluggishness, the project was soon abandoned. Wales, however, did not want his idea to go to waste. Using the [wiki software](#) that had sustained Nupedia, he launched a new site: Wikipedia. With this project, Wales originally wanted select content experts to peer-review and copy-edit material submitted by the public. Initially, few academics wanted to work on this new project, given how far-removed it was from traditional academic scholarship. So Wales left the project open to anyone. In time, the site became popular and grew rapidly. As of January 2019, the English version of the site [boasted over 35 million editors, who collectively helped to create over 5.6 million articles, with an average of 800 new articles being created every day.](#)

The truly remarkable thing about the site is that anyone — with or without a Wikipedia account — is free to modify the contents of the website. As such, Wikipedia, in many ways, is working to ensure that everyone the world over not only has access to knowledge, but can contribute to that vast collection of knowledge.

Is Wikipedia Reliable?

The question of whether Wikipedia is reliable has raged both online and offline since about 2005. Research studies have shown that Wikipedia is roughly as reliable as other sources

commonly accepted as “accurate.” Arguably, the one to demonstrate this first was science journalist Jim Giles, who wrote a 2005 *Nature* article, “[Internet encyclopaedias go head to head](#).” Giles combed through articles on both Wikipedia and the popular hard-bound *Encyclopedia Britannica*, concluding that between the two, “the difference in accuracy was not particularly great: the average science entry in Wikipedia contained around four inaccuracies; *Britannica*, about three.”

[Further studies](#) by *The Guardian*, the *Journal of Clinical Oncology*, *PC Pro*, the Canadian Library Association, and *Library Journal* have all found that Wikipedia is, for the most part, reliable.

None of this is to say that Wikipedia is perfect or 100 percent accurate. It is a human-produced product, and like all human creations, is bound to have flaws and inaccuracies. Because there is no one at the site whose sole job is to ensure that all articles are up to a certain standard, some articles have grammatical errors, poor organization, or out-of-date sources. Sometimes, an article will have good sources, but these sources may be misinterpreted or added to an article without meeting established standards.

But perhaps most dangerous is that Wikipedia articles can be heavily biased depending on the topic at hand. This is especially true for articles about famous people, places, and things, or controversial topics (e.g. U.S. presidents, climate change, certain religions). In articles such as these, some unscrupulous editors try to put forward an agenda by carefully wording certain sections or by adding biased sources. While their behavior is not to be commended, it can be said that these editors are clever. After all, they have realized that, because Wikipedia is used so often, by injecting their bias into an article, they can almost unconsciously affect readers’ opinions on the topics at hand.

Many times, this bias can be easily spotted, as inexperienced Wikipedia editors often make use of “peacock terms” in their writing. According to [Wikipedia itself](#), peacock terms are grandiose words that tend “to promote the subject of an article, while neither imparting nor plainly summarizing verifiable information.” For example, in the sentence, “Company XYZ is the best publishing house in the United States,” the peacock term is the claim that the company is the best in the United States.

Others make use of “weasel words.” These are vague terms or phrases that, [according to Wikipedia](#), “creat[e] an impression that something specific and meaningful has been said, when in fact only a vague or ambiguous claim has been communicated.” For example, in the sentence, “Some people say that Company XYZ is the most innovative publisher in the last 100 years,” the words “some people” signal the use of weasel words. Articles that feature these

sorts of expressions often sound amateurish, and resemble puff pieces or promotional press releases, more so than encyclopedia articles.

Other times bias in articles can be much more insidious. One of the more infamous examples of this sort of problem is Wikipedia's gender bias. According to [a 2015 article](#) published by the MIT Technology Review: "Despite well-publicized efforts to promote equality, Wikipedia articles are deeply biased against women, say computer scientists who have analysed six different language versions of the online encyclopedia."

For a simple example, consider [a 2011 survey conducted by the Wikimedia Foundation](#), which revealed that 91 percent of editors identify as male, whereas only 8.5 percent of editors identify as female. A later [2015 study by information scientist Eduardo Graells-Garrido](#) and colleagues found "systematic asymmetries" on the site, meaning that many Wikipedia articles are biased toward one gender, usually men. The good news is that Wikipedia's gender bias is currently being exposed and discussed.

It is now up to current and future Wikipedia editors to add good quality prose and sourcing to articles, thereby reducing this sort of bias, as well as other forms of bias that can lurk in articles. And the good news is that Wikipedia can be edited by anyone. That means that you can create an account and start to affect this sort of change.

When To Use Wikipedia?

When not to use it?

It is of paramount importance to realize that Wikipedia is a [tertiary source](#). These sorts of resources, which also include encyclopedias, dictionaries, and thesauri, often collect primary or secondary sources, and arrange them in an easy-to-use way. They rarely have credited authors, and are almost always based on previous research. In other words, they merely compile or synthesize what has already been researched, proposed, or argued by others.

An excellent example of a tertiary source is a dictionary. While there might be an editor or a main compiler of a dictionary, it can't be said that this person is the author of the dictionary. Furthermore, while dictionaries often add new words to new editions, it can't be said that the dictionary invents these words. It merely reports which terms and phrases are being used by others and what these terms and phrases mean.

There's nothing wrong with using tertiary sources for your research. In fact, they are often very helpful when you are trying to get a feel for an unfamiliar topic. But they should never

be the only sources you consult, and dictionaries and encyclopedias should never be used to back-up the majority of your research or writing. Why might this be? For one thing, there are simply better sources out there than tertiary ones. Remember that tertiary sources effectively repackage those things which have already been argued or written about. Why would you cite an encyclopedia that relies on a handful of primary or secondary sources when you could simply use those primary or secondary sources themselves? There often is an expectation at the university level that students use scholarly or [peer-reviewed sources](#) for their research. While tertiary sources might undergo editorial review, they rarely are peer-reviewed to the level of a scholarly journal article or book.

When to use it

The tertiary nature of Wikipedia (and not its open access) is the main reason why you should not use it as your only source. With that said, there is a time and a place to use Wikipedia.

Let's say that you have just been given an assignment to write about the history, structure, impact, and so on, of the Associated Press. You'll notice that at the very bottom of the [Associated Press's Wikipedia article](#), there is a section called "References." In this portion of the article, there are a number of useful links and citations, including two books that were published by [university presses](#). If you're wanting reliable secondary sources that discuss the AP, then it would be better to use and cite these sources listed in the References section, rather than the Wikipedia article itself.

Throughout the AP article, you'll also note that many sentences, paragraphs, and sections are followed by footnoted numbers. These numbers lead the reader to specific sources that are listed in the "References" section at the bottom of the article. These footnotes can be very helpful if you need to know both a specific piece of information and the exact place (e.g., page number, website, chapter) where that piece of information came from. Once again, Wikipedia can be very useful in leading you in the "right direction" while you are researching.

A caveat to all of this: You might also notice that some sections in Wikipedia articles don't have any footnotes backing up their claims. While the information contained in these sections might be accurate, the fact that they lack footnotes is a major red flag, suggesting that their assertions should be taken with a grain of salt or ignored entirely. If you're using Wikipedia, you should ideally be looking for sources, not assertions lacking attribution.

Summary

The key to successfully using Wikipedia as a scholar is being able to evaluate whether the

information and sources that you see in an article are reliable. While Wikipedia requires that all sources be of a certain standard (not to mention that seasoned Wikipedia editors often try their best to weed out bad information on the site), subpar and dubious information does linger in many articles.

So, when exactly is it OK to use Wikipedia? While all situations vary in regards to context and academic expectations, if you find yourself in one of the following instances, it is generally appropriate to use the site:

- To quickly look up a fact for general interest or when the stakes are low.
- To begin research by getting an idea about what has been said about a given topic.
- To look for useful sources (e.g., peer-reviewed articles, books published by a reliable third party, pertinent grey literature).

Conversely:

- Don't cite Wikipedia in an academic paper or presentation.
- Don't use Wikipedia as your only source.
- Don't blindly accept what Wikipedia articles tell you just because there is a source attached. Like any source, the source listed in Wikipedia might be bad or inappropriately used.

What and Who Are Editors?

The lifeblood of Wikipedia are its contributors, or “editors.” Anyone in the world with internet access is allowed to be a Wikipedia editor. Most edits to the site are made by those who have not secured an account. They are identified in edit histories and on discussion pages by an Internet Protocol (or IP) address (e.g., “204.16.36.56”).

Anonymous and unregistered editing has several handicaps. First, IPs are unable to create new article pages. Second, they cannot upload pictures or other files. Finally, they must answer a CAPTCHA (a type of word-based test used to tell if someone is a human or an automated machine) if they want to insert an external link into an article. These handicaps exist to curb vandalism (i.e. the malicious disruption of article content).

Why should a person become a Wikipedia editor? There are many reasons, ranging from the idealistic (“You will be contributing to the global sum of knowledge”) to the pragmatic (“More editors means less work for everyone involved”). Perhaps the most important is that, as students of journalism, you are likely motivated by the desire to create reliable, accurate, and

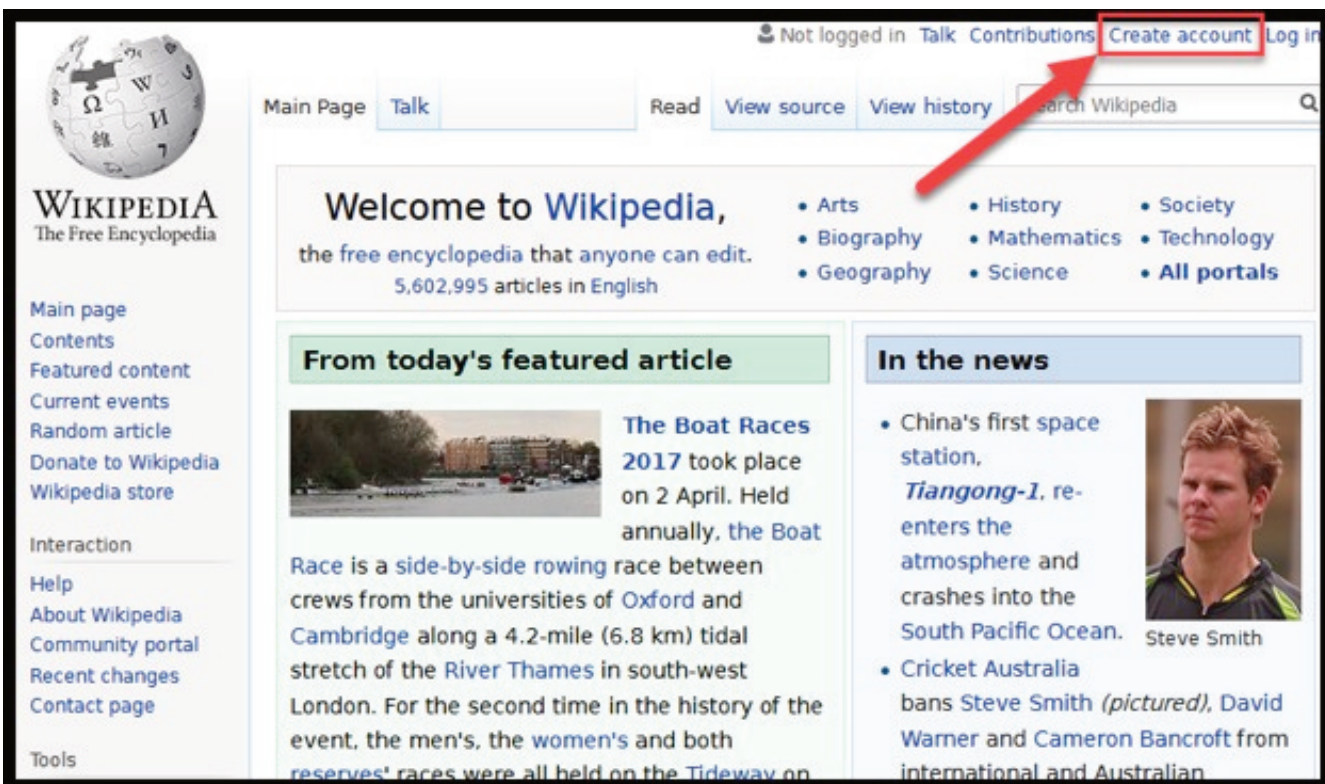
neutral content that will be used to inform the public about the world in which we all live. This, too, is the goal of Wikipedia editors.

Think of Wikipedia as a well where everyone — whether they want to admit it or not — gets their water. If someone poisons that well, it can make the whole community sick. Likewise, if someone adds bad or erroneous information to Wikipedia, it will be read the world over, which could have a very negative impact. It is thus the job of the Wikipedia editor to “remove the poison from the well” and prevent the spread of this false information. And given that as journalism students you are learning many key skills that can aid in this task (e.g., how to report objectively, how to collect references and evidence, how to be transparent in where you get your sources), you are among the best individuals to become editors and help make the encyclopedia a better resource for all.

How To Become an Editor

Although IPs make up the majority of Wikipedia’s editors, they carry less clout than their named counterparts, because their identities are highly anonymized and therefore seen as impersonal. Follow these steps to create a named account.

1. Navigate to the top right corner of any Wikipedia article and click on the link that says “Create account.”

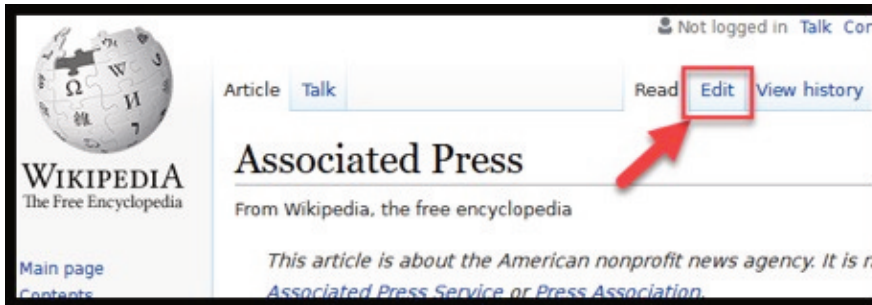


2. You will be asked to create a username and password. NOTE: Don't use your real name or other information that someone could use to ID you in real-life.

How To Edit Wikipedia

Making basic edits

Anyone can edit a Wikipedia article, whether or not they are a registered member. Articles can be edited by clicking on the link at the top of the screen that reads "Edit."



To the left side of any article heading is another "Edit" link.



After you click on either of these "Edit" links, you will be redirected to the editing screen,

wherein you can add or delete characters.

Editing Associated Press (section)

Content that violates any copyrights will be deleted. Encyclopedic content must be verifiable. Work submitted to Wikipedia can be edited, used, and redistributed—by anyone—subject to certain terms and conditions.

B I **Advanced** **Special characters** **Help** **Cite**

==History==

The Associated Press was formed in May 1846<ref>{{cite web|url=http://newyorknatives.com/on-this-day-in-nycs-history-associated-press-formed/|title=Associated Press Founded - This Day in History May 22|work=New York Natives|date=2015-05-22|accessdate=2016-03-18}}</ref> by five daily newspapers in [[New York City]] to share the cost of transmitting news of the [[Mexican-American War]].<ref>{{cite web|url=http://www.economist.com/node/15108618|title=Network effects|website=The Economist|language=en|access-date=2018-02-20}}</ref> The venture was organized by [[Moses Yale Beach]] (1800-68), second publisher of ''[[The Sun (New York)|The Sun]]'', joined by the ''[[New York Herald]]'', the ''[[New York Courier and Enquirer]]'', ''[[The Journal of Commerce]]'', and the ''[[New York Evening Express]]''.<ref>{{cite news|url=https://www.forbes.com/sites/gilpress/2016/06/26/the-birth-of-atari-modern-computer-design-and-the-software-industry-this-week-in-tech-history/#14b8630f6f38|title=The Birth of Atari, Modern Computer Design, And The Software Industry: This Week In Tech History|last=Press|first=Gil|work=Forbes|access-date=2018-02-20|language=en}}</ref> Some historians{{who|date=October 2012}} believe that the ''Tribune'' joined at this time; documents show it was a member in 1849. ''[[The New York Times]]'' became a member shortly after its founding in September 1851. Initially known as the New York Associated Press (NYAP), the organization faced competition from the Western Associated Press (1862), which criticized its monopolistic news gathering and [[price setting]] practices. An investigation completed in

Insert [-] [-] [*] [-] [~] [≠] [≤] [≥] [±] [-] [x] [÷] [←] [→] [↵] **Cite your sources:** <ref></ref>

Edit summary (Briefly describe your changes)

486

Common edit summaries - click to use ▼ Common minor edit summaries - click to use ▼

This is a minor edit Watch this page

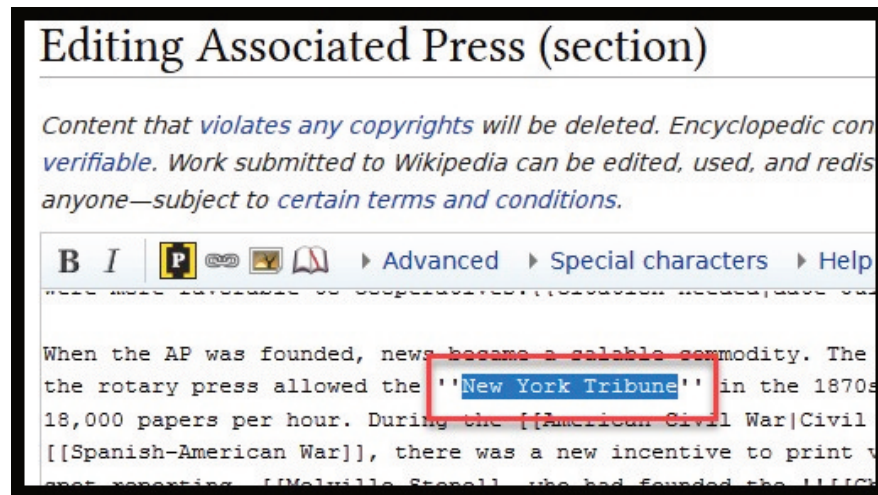
By publishing changes, you agree to the [Terms of Use](#), and you irrevocably agree to release your contribution under the [CC BY-SA 3.0 License](#) and the [GFDL](#). You agree that a hyperlink or URL is sufficient attribution under the Creative Commons license.

Publish changes **Show preview** **Show changes** **Citations** **Cancel**

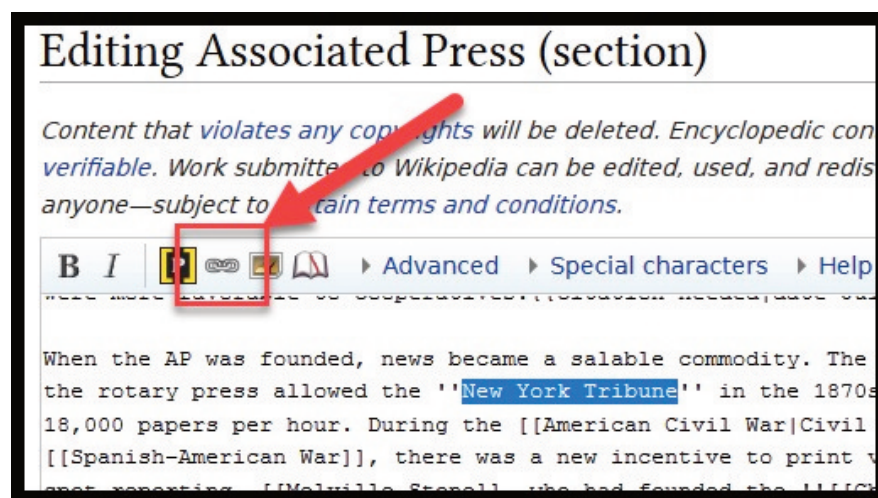
Linking to another Wikipedia article

Follow these steps to insert a hyperlink to another Wikipedia article.

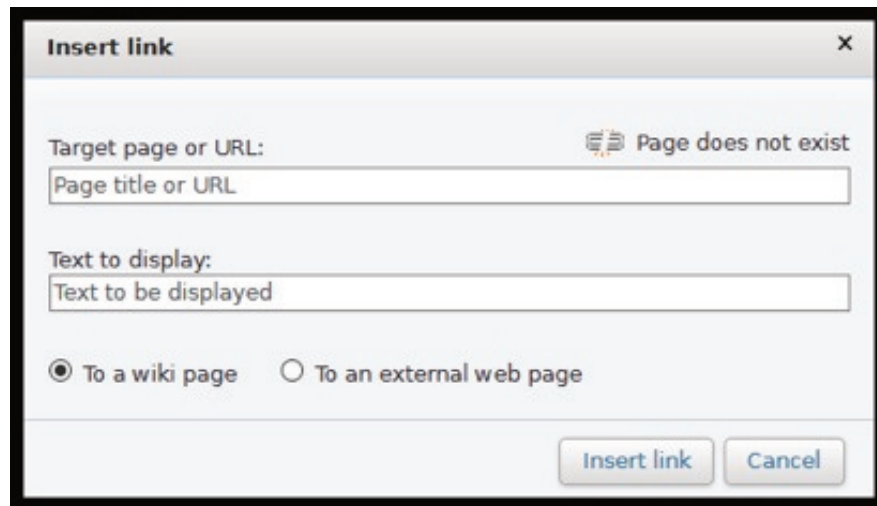
1. Highlight the word or phrase that you want to link.



2. Select the “Link” button from the options near the top of the editing screen:



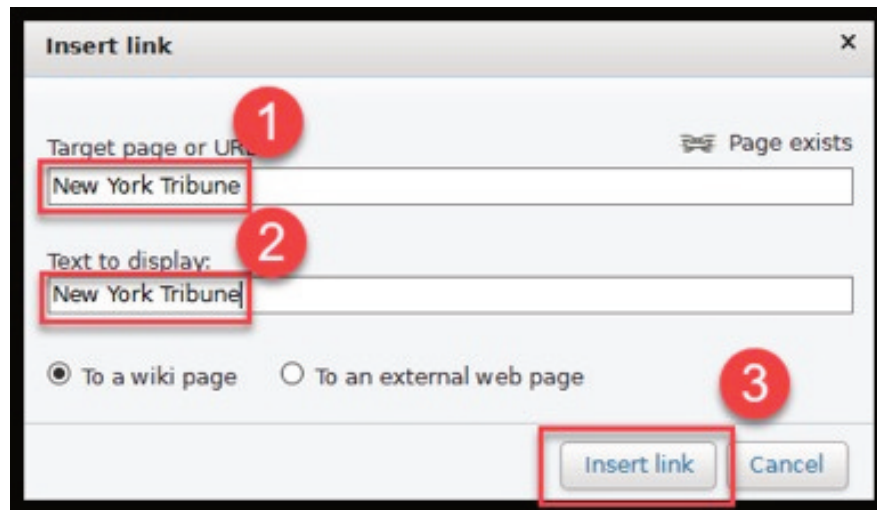
3. You will see the following screen:



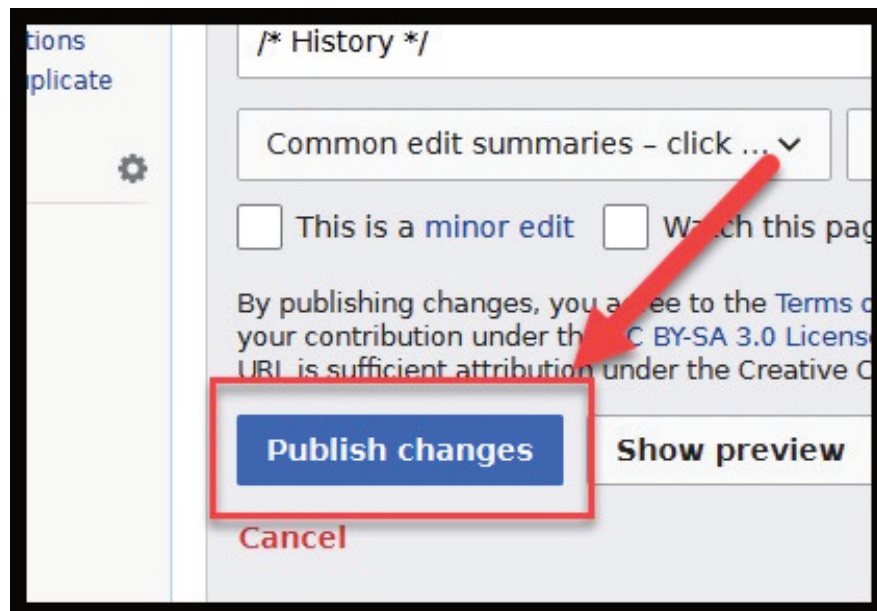
- A. "Target page or URL" is where you will put the name of the Wikipedia article to which you'd like to link.
- B. "Text to display" is where you will put that text that you want to appear in the Wikipedia article itself.

(The reason there are two different fields is because some Wikipedia articles have disambiguating phrases attached to their titles to separate them from other articles with similar names. For instance, "[The Sun \(New York City\)](#)" and "[The Sun \(Sydney\)](#)" are two separate articles about two different newspapers that are both named The Sun. If you'd like to insert a hyperlink to the former in an article, you'd want the "Target page or URL" box to read "The Sun (New York City)", but the "Text to display" box to simply read "The Sun.")

4. Now, add in the appropriate target page and text (often, these fields will be identical), and click insert:



5. Now, navigate to the bottom of the editing screen and click "Publish Changes."



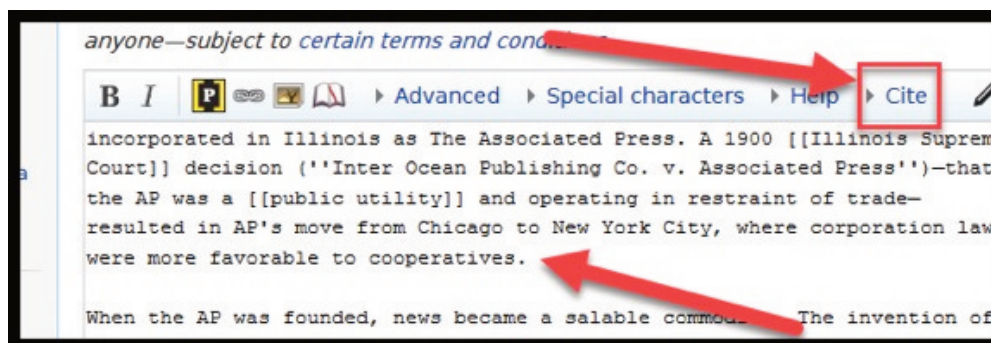
6. This will add the link into the article.



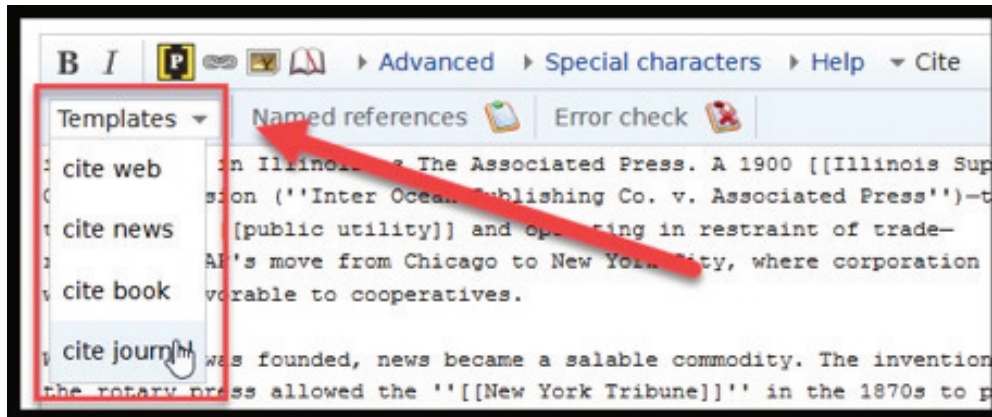
To insert a reference

Adding references to Wikipedia is of critical importance. Thankfully, Wikipedia has an easy way to format these citations.

1. Place your cursor where you'd like to insert a citation. Then, on the edit screen, click on the tab that reads "Cite."



2. Select what citation template you would like to use.



3. A citation manager will pop up; enter in the necessary information and then click "Insert."

 A screenshot of the 'Journal citation' dialog box. It contains various input fields for citation information: Last name, First name, Title, Journal, Date, Volume, Issue, Page?, DOI, PMID, URL, Access date, Ref?, Ref name, and Ref group. The 'Insert' button at the bottom is highlighted with a red box.

4. The citation will appear in the edit box

```

resulted in AP's move from Chicago to New York City, where corporation laws
were more favorable to cooperatives.<ref>{{cite
journal|last1=Smith|first1=Jane|title=A Very Important Journal
Article|journal=Very Important Journal|date=April 2,
2018|volume=2|issue=3|pages=78-92|url=http://www.journal.com|accessdate=Apri
l 2, 2018}}</ref>
  
```

5. Go to the bottom of the edit screen and click “Publish Changes.” After doing so, you will see that the citation has been added to the article.

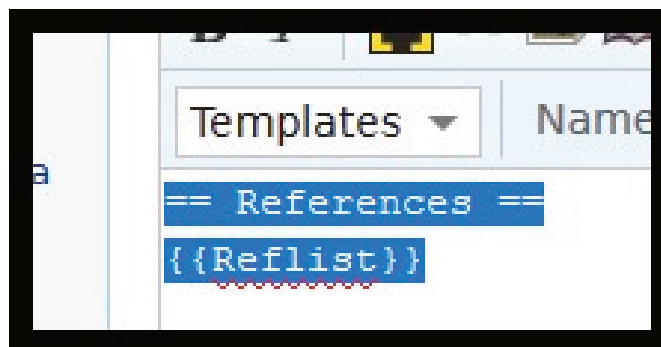


You'll want to make sure that your article has a reference list template. Most large articles will already have one. If you are the first person to add a citation to a page, then you will need to add `{{reflist}}` to the end of the article.

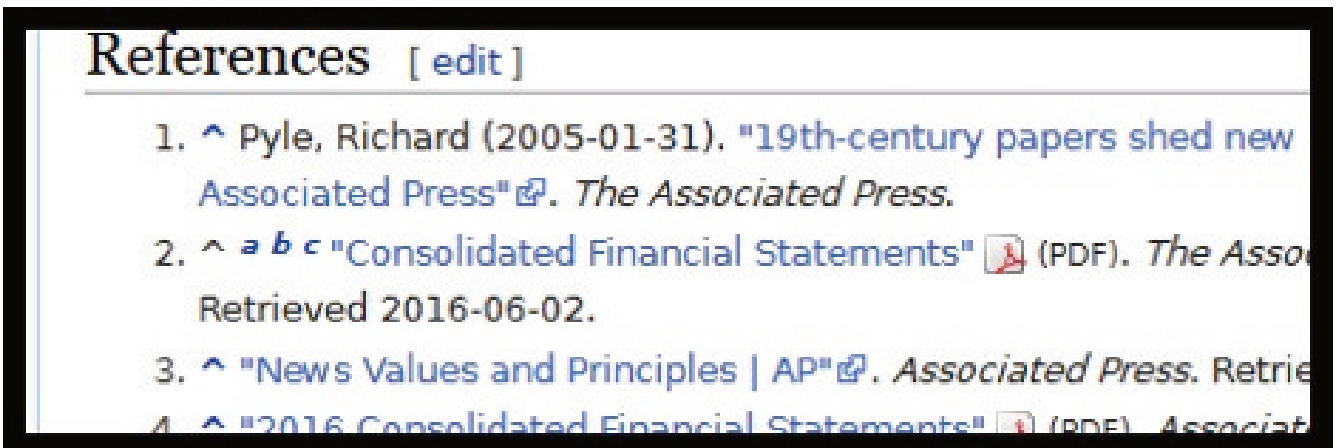
To do this, go to the bottom of the article and click “Edit.” Then enter the following:

```
==References==
{{reflist}}
```

It will look like this:



6. When you're all done, click “Publish changes” at the bottom of the editing screen. You can then see if the references are displaying correctly:



Activity 1: Wikipedia Sources

Locate a Wikipedia entry related to a topic you're working on. Using the steps outlined in this chapter, locate at least two credible sources cited in the Wikipedia sources. In a one-to-two-page reflection, state which entry you found and what two sources you selected. Then explain why you believe the sources are credible and how you may use them in writing an article on your topic.

Activity 2: Cue-Evidence a Wikipedia Entry

Locate and read a Wikipedia entry related to a topic you're working on. Using your knowledge from this chapter and preceding chapters on credibility, evaluation, and bias, write a one-to-two-page evaluation of your selected Wikipedia entry. Make certain to clearly cite the Wikipedia entry under review, and state and explain your criteria for its credibility, providing clear examples. You might discuss such aspects as: Was the entry helpful, well sourced, well written, complete, accurate, biased? In what ways?

Activity 3: Source Genres

In your academic assignments your instructors might require a variety of sources or even specific genres, or types, of sources to be cited. Identify and compares/contrast the different types of sources used in the Wikipedia article used for Activity 1 or 2. Critically analyze if these genres are appropriate for the article, and if or how citing additional genres would improve the credibility of the article.

Activity 4: Open Pedagogy

Create a live-action tutorial for creating a Wikipedia account or editing an article. You can use technology of your choosing, but the tutorial must be fewer than three minutes.

Public Records

PETER BOBKOWSKI

Learning Objectives

After reading this chapter, you will be able to:

- Understand what public records are, why they exist, and why they are public.
 - Access and retrieve information from a variety of online public records.
 - Articulate arguments about the credibility cues of public records, and provide evidence in support of these arguments.
 - Participate in Wikipedia as an editor, creator and curator of original content.
-

All These Directory Websites

Have you ever searched the internet for someone you once knew? Or someone you came across and found interesting? Or yourself? Or one of your relatives?

If you have, chances are that you ended up on a website that claimed to have a ton of information about that person, showed you a tiny preview of this information, and then offered to hand over all of it for something like \$7.99, or for a \$26.99 monthly subscription. There are dozens of websites that function this way, like [WhitePages](#), [Pipl](#), [BeenVerified](#), [Intelius](#), [PeopleFinder](#), [FastPeopleSearch](#), [PeopleSearchNow](#), [TruePeopleSearch](#), [PeopleLooker](#), [TruthFinder](#), [411](#), [SpyTox](#), [GoLookUp](#), [USSearch](#), and [AnyWho](#).

Or, have you searched for information on a small company? If you have, you may have come across websites like [Bizapedia](#), [Manta](#), [Buzzfile](#), [OpenCorporates](#), and [PropertyShark](#). Like the people directory sites, these business directory websites preview information about businesses and their owners, and promise more information for a premium.

Why are there so many websites offering, essentially, the same service?

The answer is that these websites use a very simple business model: They find free information, aggregate it, present it in an appealing way, and then sell it. The technical term is “monetizing”: These websites monetize free information. Every day, millions of internet users search for people and businesses, and some of them are willing to pay for the convenience these websites offer. Many users probably don’t know that the information they are buying is available for free.

There are two key sources of this information: Social media and public records. Most of us won’t be surprised that someone is making a buck off the personal information we feed to Facebook, Twitter, and other social media sites.

But what are public records? Where do they come from? Why and how do we access these free records? And are they credible? These are the questions this chapter addresses.

What Are Public Records

Public records are produced by government agencies in the course of conducting the business with which these agencies are charged. Laws and regulations require government agencies to collect various pieces of information, or records, about individuals and other entities that are under these agencies’ jurisdictions. Records make governing possible. The government agencies use these records to provide services, administer oversight, forecast trends, determine funding, and perform various other functions.

Think about all of the different records that various government offices have created about you.

Most of us have birth certificates, visas, or naturalization documents that designate our resident status in this country. Those of us who weren’t born here also have immigration forms that precede these resident documents. We have Social Security numbers and related files that document our age, Social Security contributions, and when we will be eligible to be paid back from this system.

If we drive and own a car, there are records about our driving proficiency tests, licenses, our cars' registrations, and the taxes we pay on them. Every time we return from a trip to another country, we complete customs forms indicating our whereabouts and what we are bringing back.

If we sought federal student loans, the Department of Education has those applications and follow-up documents. If we happen to be licensed as teachers, cosmetologists, pilots, or other professionals, there are records of these licenses and when they are up for expiration or renewal.

Every year, we fill out and submit tax records, and every 10 years the Census Bureau collects information about where we live and what we do. All of this information assists government agencies to make our society function properly.

Each of these records helps a government agency fulfill some kind of a function. For example, without census records, election commissions and legislatures would not know how to reapportion representation on local, state, and federal governing bodies, to reflect population changes. Without property records, counties and school districts would not know how much money to expect every year from property taxes. Without driver's license records, motor vehicles departments would not be able to ensure that all drivers have basic knowledge of traffic safety.

Many of these records are not public. For example, the public does not have access to individual driver's license records. Other records are embargoed for some time, that is, they are not made public right away. Census records, for example, are released 72 years after a census is taken. This means that the 1950 census records will be made available to the public in 2022.

Why Are Public Records Public

Many public records are public. By virtue of living in a transparent democratic society, we have the right to see how our governments conduct their business. Public records are an important element of keeping our governments transparent and accountable. Property tax records, for example, allow us to determine whether property owners are being taxed evenhandedly.

Another reason for keeping public records open to the public is that many of these records are available for our benefit. Voter registrations, for example, tell us where and when we can participate in the next election, while food safety inspection records tell us whether our

favorite restaurants are keeping their kitchens clean. In short, public records are open to keep government agencies accountable and to help us effectively function as members of society.

So, what records are public? One way to understand the scope of what's available to the public is to look at retention schedules, which are lists of government agency records that specify for how long these agencies are required to keep their records. The Kansas Historical Society maintains a list of these [retention schedules for the state](#). The National Archives maintains [lists of records control schedules](#) for all branches of the federal government. These lists contain thousands of record types. Most of these records are available by request from the agencies that maintain them, under state and federal open records laws, which govern the public's access to these records.

But an increasing number of public records are available on the internet, through the websites of the various government agencies that create and update these records. This chapter contains several videos on how to access and interpret some of these records.

Why Look for Public Records

Journalists and strategic communication practitioners may be tasked regularly with finding information about individuals and entities. Journalists often need to search for information about individuals or businesses that are the subjects of news stories. Strategic communications practitioners may have to find information about individuals or businesses that are potential clients or competitors of their clients.

Some information like this is aggregated on commercial directory websites such as [Pipl](#) or [Manta](#) that come up high in Google results. In our experience, while these websites provide some accurate information, oftentimes this information is not complete, or no longer accurate. Think back to our discussions of primary and secondary sources in the chapters on [evaluating credibility](#) and [attribution](#). Much of the information in directory sites comes from public records, that is, public records are the primary sources of this information. This means that it's incumbent on communication professionals to find and verify information on these websites in public records, where this information originates.

How to Access Public Records

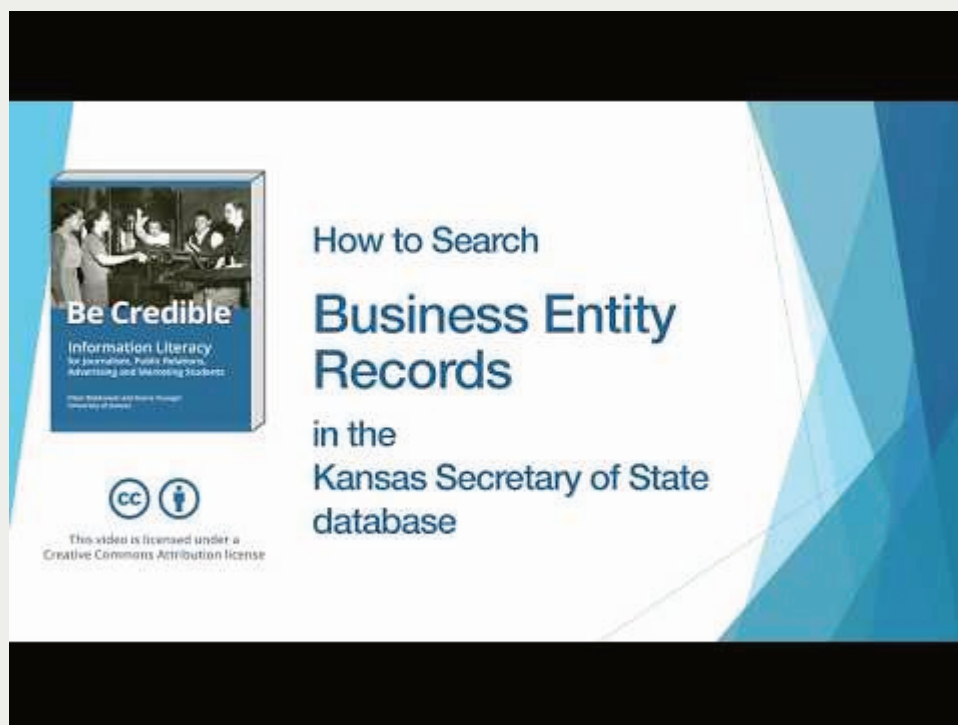
Public records generally are not searchable from Google. This means that to access them, we first have to figure out which agency produces the record in which we are interested. Second,

we have to find our way to that agency's website. Finally, we have to learn how to operate the agency's online database.

This section contains links to six videos on searching public records, and links to several other records without instructional videos. The first two videos focus on searching information about non-human entities. The other four videos focus on searching information about individuals.

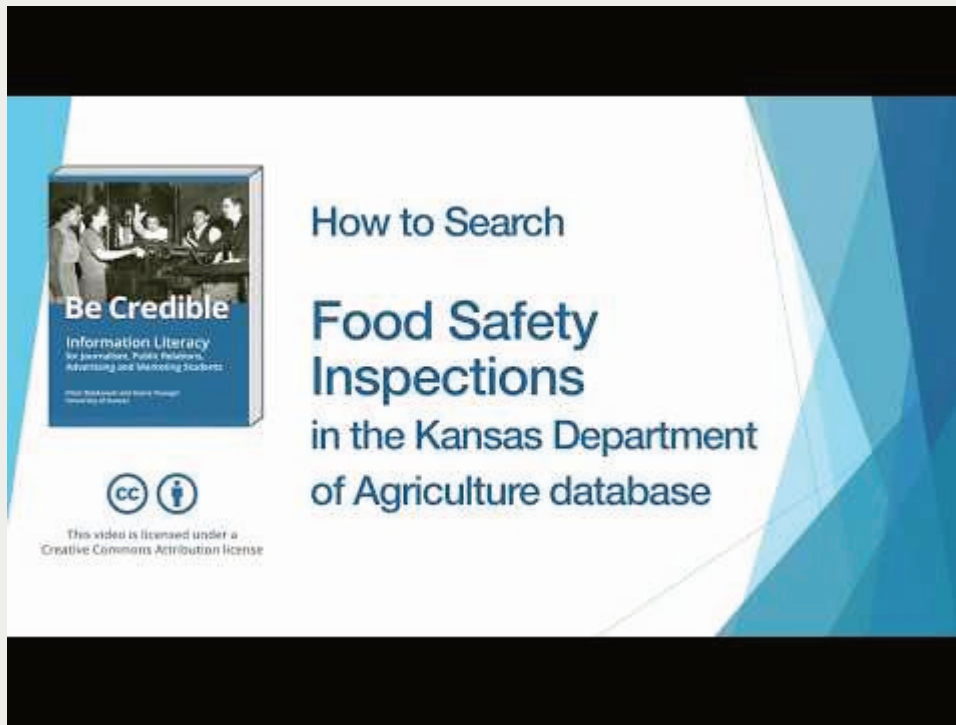
Records about entities

Business Entity Records



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=76>

Food Safety Inspection Records



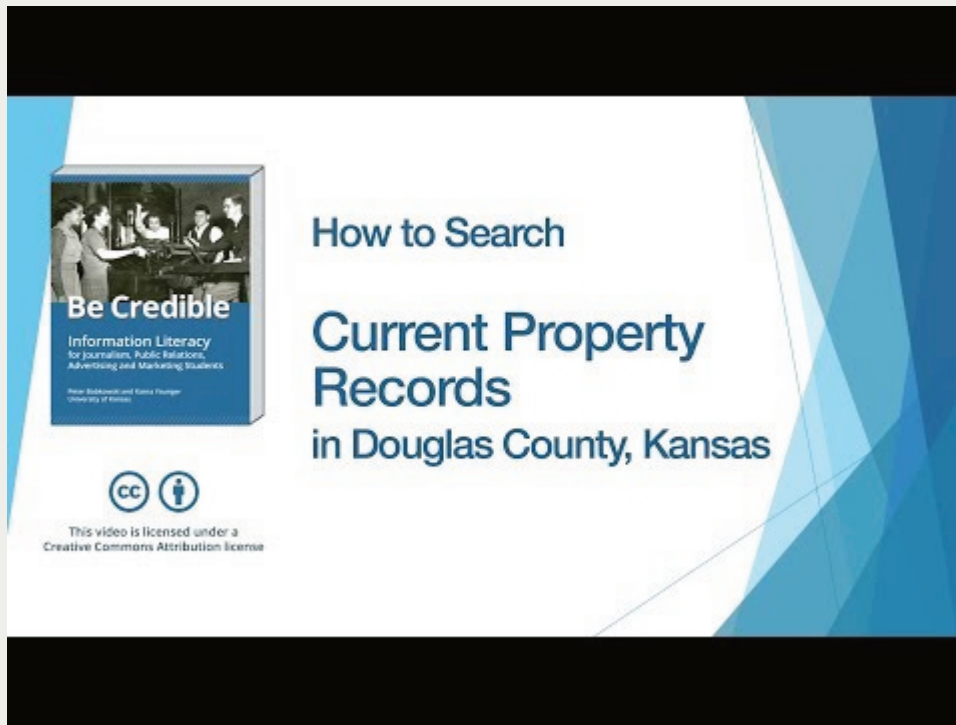
A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=76>

Additional links to public records about entities:

- Kansas liquor licenses
- Kansas cosmetology facility licenses

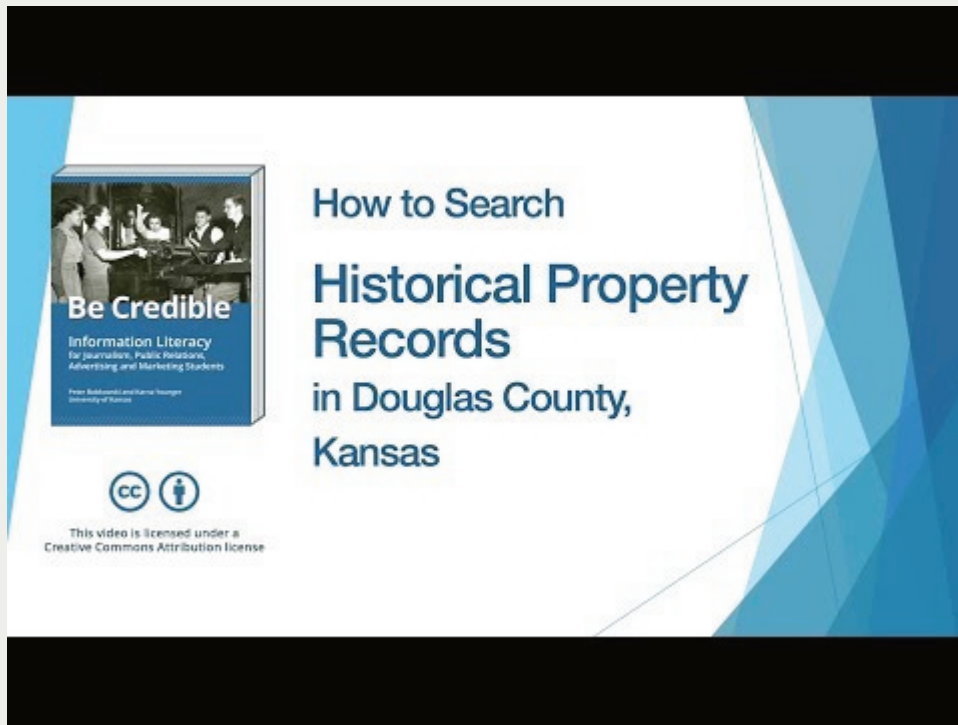
Records about individuals

Current Property Records



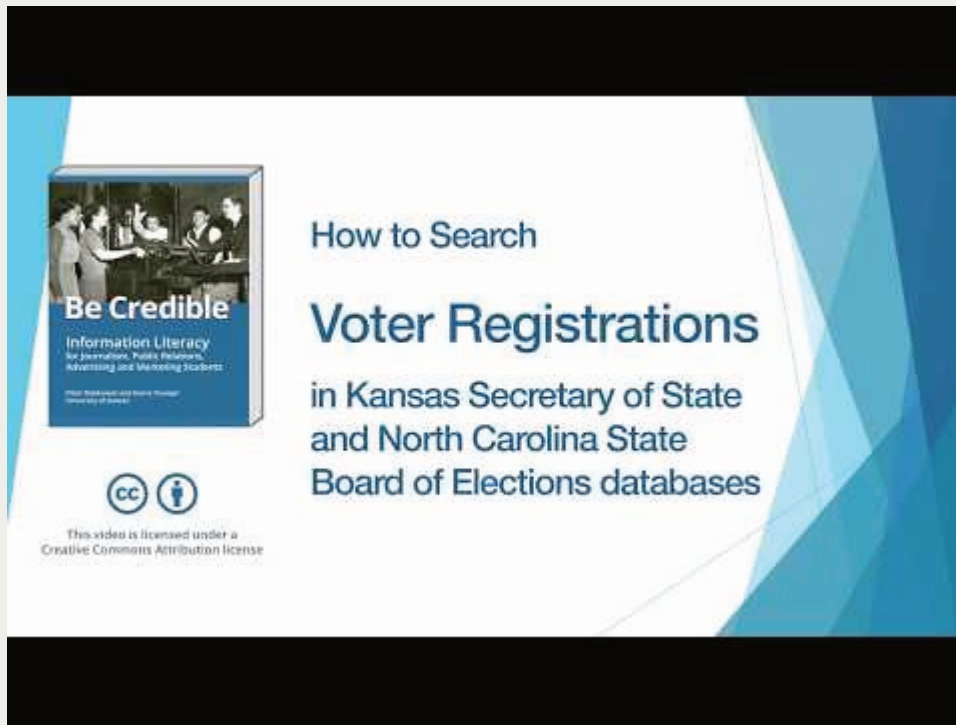
A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=76>

Historical Property Records



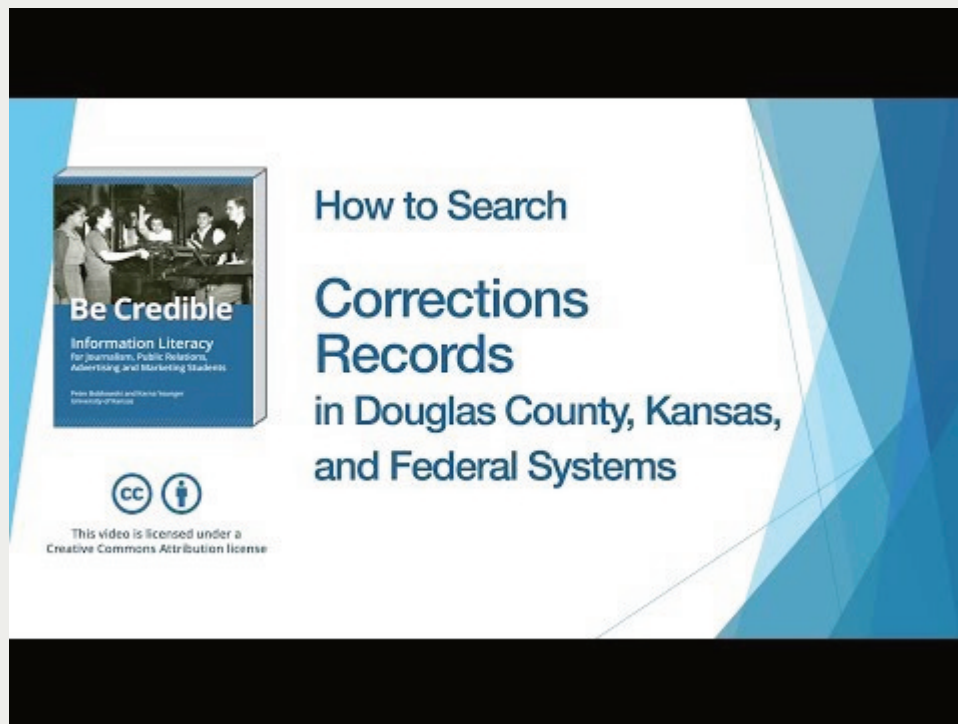
A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=76>

Voter Registrations



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=76>

Corrections Records



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=76>

Links to additional online public records about individuals:

- Kansas teacher licenses
- Kansas health professional licenses
- Kansas cosmetology professional licenses
- Lawrence, Kansas contractor licenses

How Credible Are Public Records?

Public records are the official, primary sources of the information they contain. Government records generally do not cite other sources, so whenever a journalist cites a public record, the journalist is in the desired position of serving as a second source of information.

While a personal directory website might list University of Kansas basketball coach Bill Self's address, such a website also is a secondary source of this information. The primary source for Bill Self's address is the Douglas County property record that shows what property or properties Bill Self owns in the county. Another primary record is in the Kansas Business Entity database, showing the address where Bill Self's businesses are registered.

Records created and maintained by government agencies need to be accurate. Otherwise, the government will not function properly. To ensure the accuracy of records, these records are created as part of some process, with a specific set of requirements needing to be met for the record to be issued.

For example, a renewal driver's license in Kansas can be issued only when eight requirements are met: an individual presents his or her expiring license, another ID showing Kansas residency, and an ID showing his or her Social Security number, plus the individual needs to pass a vision exam, pay the renewal fee, get a new photo taken, provide a signature, and do all this in person at a motor vehicles division office.

In other words, the accuracy of public records is safeguarded by the processes required for their creation.

Moreover, it generally is illegal to create false government information. For example, in submitting an annual report about a company operating in the state of Kansas, which constitutes the public record of this company's existence, an agent of this company (that is, its owner or representative), has to sign their name above a line that says, "I declare under penalty of perjury under the laws of the state of Kansas that the foregoing is true and correct." The public agent has a strong incentive to create a truthful public record, thus avoiding legal trouble.

Public records oftentimes constitute the authoritative documentation of something happening. Government agencies have an interest in keeping track of information that otherwise would not be recorded, or not recorded in a centralized place.

For instance, if a county register did not keep records of properties being bought and sold in a county, it would be difficult to figure out who owns a property, who sold it, and whether anyone owes any money on the property. Banks that lend money for property purchases would have some records of these transactions, real estate agents would have some records of the sales they facilitated, and individual owners would have other records. Each of these parties would have only the information in which they were interested, and the length of time they kept this information would be unpredictable.

A county register's office, in contrast, has a standardized way of recording and retaining

records of property sales so that these records are easily searchable and referenced when the information they contain is needed. For this reason, the county register's records are the authoritative records of the properties owned, bought, and sold in the county.

Of course, some public records contain errors because clerical mistakes happen. But for the most part, we put considerable faith in the accuracy of public records. These two qualities — the authority and accuracy of public records — combine to make public records some of the most credible sources of information we discuss in this book.

Activity 1: A Classmate's Public Records

Conduct a short interview with a classmate, recording the student's basic demographic information (e.g., name, hometown, etc.). Use a combination of Google searches and public records searches to identify as many public records as possible about this classmate and the classmate's family.

Activity 2: Local Business Public Records

Identify a local business to which you do not have any personal connection (e.g., store, restaurant, bar, apartment, gas station, etc.). Identify the address of this business. Use a combination of Google searches and public records searches to identify as many public records as possible about this business, its owners, and the property where this business operates.

Activity 3: Open Pedagogy

Create a tutorial for accessing a public record that isn't covered in this chapter. Use a format that you learn from best, like a short video or a narrated slideshow.

Freedom of Information Requests

JONATHAN PETERS

Learning Objectives

After reading this chapter, you will be able to:

- Determine which public records are readily available to you.
 - Define the Freedom of Information Act (FOIA).
 - Access public record using the provisions of FOIA.
-

FOIA at Work

“German Bosque’s personnel file looks more like a rap sheet than a résumé,” the [Miami Herald-Tribune reported](#). When you are a cop, this is not a good thing.

The Herald-Tribune uncovered flaws in Florida’s Internal Affairs agency, which is charged with “policing the police.” After obtaining Bosque’s personal file from his police department, Herald-Tribune reporters were able to piece together why the system had failed to protect the citizens of Opa-Locka, Florida, from a police sergeant with a violent and criminal past.

Bosque had retained his post despite undergoing 40 internal reviews for misconduct, including 16 instances of battery or excessive violence. Bosque also was “fired five times and arrested three, he was charged with stealing a car, trying to board an airplane with a loaded gun and driving with a suspended license.” Kind of unbelievable, huh?

Well, to prove their credibility, the reporters uploaded each relevant piece of Bosque's file to [Document Cloud](#) so that their readers could read the original source of information throughout the article.

But how did these reporters pull this off? If someone published your work history online, wouldn't you think that was an invasion of your privacy? It probably would be because most employee personnel files are confidential. Bosque, however, is a public official and an employee of a government agency, the Florida Department of Law Enforcement, which is held to a standard of transparency and accountability to the general public.

The authors of this piece were able to obtain Bosque's troubled past by filing a request for the Florida Department of Law Enforcement's discipline cases under the Freedom of Information Act (FOIA). Analyzing and sharing these records allowed the reporters to call into question a system that was failing to fulfill its duty to serve and protect Floridians.

Moreover, their transparent research and reporting proved their credibility as journalists.

Journalists are "watchdogs over public affairs and government," the [Code of Ethics](#) for the Society of Professional Journalists (SPJ) mandates. In this role, they are "to ensure that the public's business is conducted in the open, and that public records are open to all."

In our example, the Herald-Tribune forced the secrets of Florida Department of Law Enforcement into plain sight and kept it there so that the citizens of Florida would be informed of what was wrong with their local police department. As outlined in SPJ's Code of Ethics, they had proven their credibility in uncovering and reporting information that was essential to the public making informed decisions about their government.

In this chapter, you will learn what public records are, and gain a general sense of which ones are readily available to you. For those records that are not freely accessible, we will discuss how FOIA can be a useful tool for you to access government information. By the end of this chapter, you will have a sense of how to access undisclosed public records using FOIA.

Public Records

As we did in the [Public Records chapter](#), let's reflect again on the documents that tell the story of you: birth certificate, school records, phone book, driver's license, diploma, voter registration rolls, military records, discharge document, marriage certificate, mortgage lien, pilot license, diving certification, criminal record, inmate locator records, bankruptcy records,

divorce decree, and, finally, a death certificate. If your life results in the production of all of these documents, then you'll know you lived a very full life, indeed.

But who can access all of this stuff about you? That is, what information about you is public and what is private? Better yet, what information can you access?

There is an abundance of information that is available to everyone in the form of public records, which many journalists have used to craft compelling and credible journalism. For example, public records have been used by a teenager who blogs about the Supreme Court of the United States, or to create a database that people can use to police local homicide rates.

There are many branches and agencies that are required to publish their records. This means that the information you need may already be available through the [Government Publishing Office](#) (GPO). The GPO catalogues publicly available government information and links to the websites for other government branches for more focused searching and browsing. Most current government information is produced digitally, but this has not always been the case. As a result, you may have to work with a Federal Depository Library, such as the [University of Kansas Libraries](#), which archives printed government information.

Your Right To Access

The right to access public records and demand a transparent government is deeply rooted in a strain of political philosophy used in the United States to justify the continuance of a free democratic society. This philosophy basically states that a democratic government is based on the will of the people, and the people need to know what the government is doing, in order to vote and make other informed decisions related to governance. The importance of an informed public having access to information has echoed throughout political theory:

“A popular government, without popular information, or the means of acquiring it, is but a prologue to a farce or a tragedy; or perhaps both,” wrote James Madison, a founder of the United States.

Only an informed electorate can govern effectively, to paraphrase the beliefs of Thomas Jefferson, founder and author of the Declaration of Independence.

“People denied information will make decisions that are “ill-considered” and “ill balanced,” reasoned political theorist Alexander Meiklejohn.

“A democracy without an informed public is a contradiction,” civil rights attorney Thomas Emerson, explained.

Their words recognize that citizens need transparent information to scrutinize the government. At the same time, just as transparency is important to maintaining a free democratic society, so are other things. For instance,

- Military effectiveness can hinge on the secrecy of tactics.
- Police officers hold information about investigatory tactics, which suspects may demand to know.
- The U.S. government holds information about citizens’ personal health conditions, but would infringe upon privacy laws if it released this.

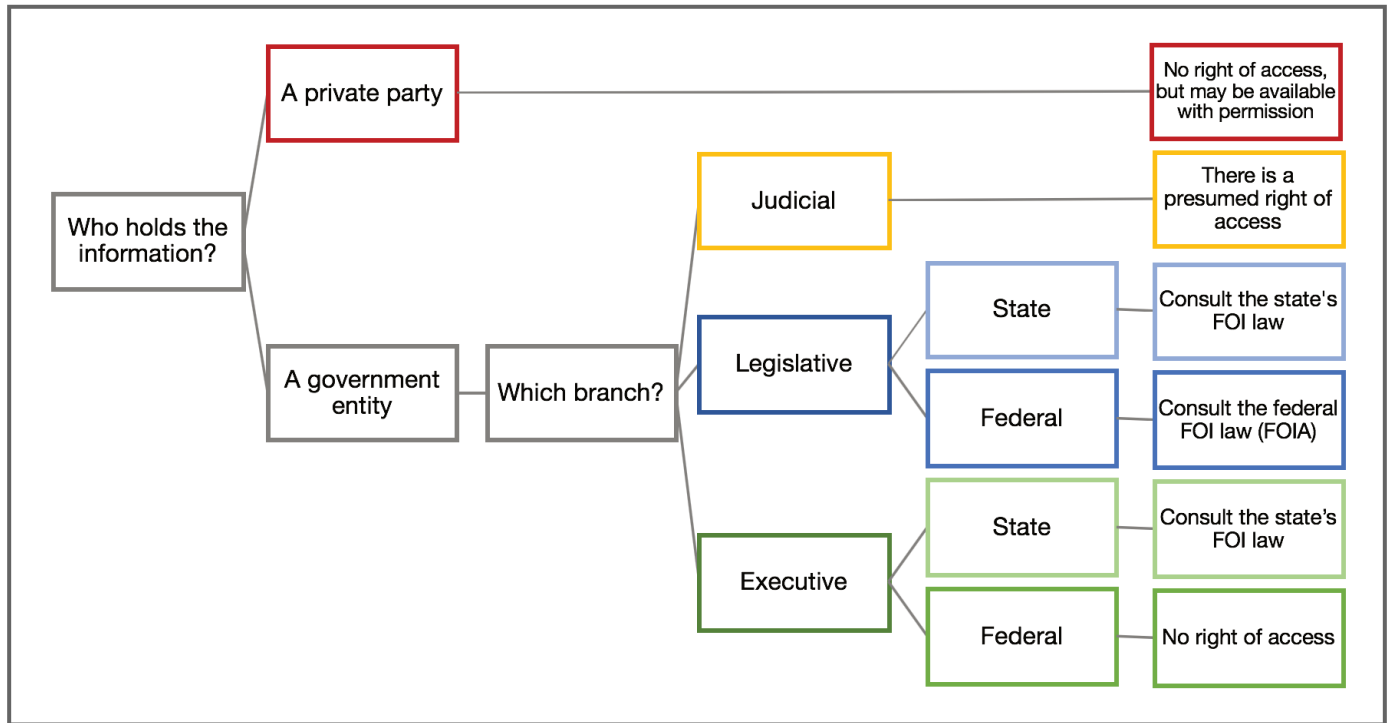
In other words, how information feeds a democratic society is really about balancing interests. We may want to make particular information available, but don’t give short shrift to other public interests or private rights.

General Rules for Accessing Public Records

Let’s begin by looking at what information is publicly available and what is off limits for various reasons. For the purpose of determining whether you have a right of access, information can be divided into two categories: private and government. Government information can be subdivided into three categories, based on the branch that holds information: executive, legislative, judicial. Executive and legislative can be further split into two: federal and state.

For the purposes of our conversation, we are going to focus primarily on federal branches. Each state has its own laws of access, which lie outside the scope of this chapter (and the time you want to spend reading it).

This chart illustrates how these categories are divided:



Privately held information?

The easiest way to determine right of access to documents is to determine if the information is owned or held by private parties. If the answer to this question is “yes,” then journalists (or any person) can request access, but have no right to demand this access. You must obtain an owner’s permission to legally use privately held information. Using such information without permission will likely lead to people distrusting you and your work, and even legal action. Either way, your credibility will take a hit.

Accessing government information is not a clear-cut “yes” or “no.” There is a chance that the information you seek is already available. Below, I discuss accessing information from the judicial and executive branches of the federal government.

Judicial branch

Let’s first start with the judicial branch. Be aware that courts make records, and generally you’re entitled to look at them. For instance, state and federal courts often publish opinions, transcripts of oral arguments, case documents, and more. Accessing court information is generally governed by case law, and there is a First Amendment right of access to court proceedings and common law right of access to court documents. But in some cases, courts

will permit restrictions on access (i.e., closing courtrooms, sealing documents, instituting gag orders). Those are done, typically, in the interest of justice, to ensure that parties get their fair shake in court.

So, do you have access to court documents? Yes, but it may not be to everything.

Federal executive branch

As mentioned above, many offices and agencies in the federal executive branch make certain documents readily available to the public. There are exceptions to this. Below, I will give you a rough outline of how to predict what will and will not be at the ready through the GPO or the like.

Freedom of Information Act

Congress created a right of access to federal executive branch records by enacting the Freedom of Information Act (FOIA), which allows any person to request federal agency records for any purpose. This means that access to executive branch records is governed by statute. Let's break down the elements of FOIA:

- a. **Any person** means any person. The requester doesn't have to be US citizen, or a journalist, or fulfill any other requirements.
- b. **Agency** means all executive branch agencies (e.g., Federal Communications Commission, Federal Trade Commission, Securities and Exchange Commission, Federal Bureau of Investigation, Internal Revenue Service, and the entire alphabet soup), the military, presidential commissions, the U.S. Post Office, and other government-controlled entities. However, FOIA does not include the president, the U.S. Congress, or the courts.
- c. **Records** means any paper or electronic record. This includes documents, computer files, databases, photographs, videos, audio recordings, and emails. It does not include physical objects. For instance, you can't demand to inspect a person's computer, look through file cabinets, obtain other objects. For example, a transcript of FBI interviews with witnesses about the assassination of President Kennedy would be a record, but the guns and bullets gathered as evidence would not be.
- d. **Any purpose** means any purpose. You don't have to explain why you want the records, generally. But you may be required to state your purpose if asking for fee waiver. To get it, you must demonstrate that you're making a request for the purpose of informing the public about government operations.

This means that many of these agencies, offices, and bodies will produce some information that is available to anyone through their website or [GPO](#). All may have information that anyone may request. Not all information is available for consumption, however, because it may be classified for national security or for other reasons. There are no clear-cut lines with this, so you should work closely with a librarian or a professor who has experience with government information or FOIA before moving onto our next step, which is placing a FOIA request.

Before You Make a FOIA Request

Before you file a FOIA request, we recommend that you visit the [FOIA website](#). Here, you will notice and click on a tab, “Before you request” before clicking “Search government websites.” Here, you can conduct a simple topical search for the information you are seeking. This will allow you to determine if the information is already available.

If you can’t find the information in your search or have questions, call the agency with which you will file the FOIA request. They can tell you over the phone if you will need to file a FOIA request.

Making a FOIA Request

After determining that you must file a FOIA request, then follow this advice and procedures.

You must request records in writing. Each agency has rules defining what must be included in the request and how the agency accepts requests (by mail, email, online submission, or otherwise). All agencies post procedures on their website and many provide the option of making requests online.

As an alternative, the Reporters Committee for Freedom of the Press has created [a FOIA generator and tracking system called iFOIA](#) that allows you to fill out a form and generate a letter that can be emailed to the appropriate agency. It’s worthwhile to play around with iFOIA without submitting a request, to become familiar with the options and proper language for submitting FOIA requests.

FOIA request processing

Let’s break down this whole process. First, requests must reasonably describe the record you’re seeking. As a practical matter, it is important to describe records as specifically and nar-

rowly as possible. Doing so makes it much easier — and faster — for an agency to understand exactly which documents are responsive and fulfill the request. Agencies are not obligated to fulfill requests that are so vague that they amount to fishing expeditions, or that require the agency to do research on the requester's behalf.

This means that you need enough information before making a request to describe with specificity what you want. That a request may involve large number of documents is not a major issue. The question is whether the agency can reasonably figure out what those documents are without extensive independent research.

The statute regarding FOIA states agencies have 20 days to grant or deny a request, although as a practical matter, it may take longer. The law acknowledges times when an agency cannot promptly respond because it is flooded with requests and lacks the resources to respond in timely manner.

So, if an agency is otherwise acting diligently, courts will not punish an agency for being overwhelmed and understaffed. You might have to wait your turn, and that may take months or years.

Processing fees

You might have to pay fees for searching and copying costs. It is possible to get a waiver if you show that the records you want are of public importance.

But, if fees are not waived, you'll be placed in a fee category, of which there are three: (1) commercial users, pay all costs, (2) noncommercial educational, scientific, or journalistic users, pay nothing for first 2 hours of research and first 100 pages of copies, and (3) all others, who pay for search and copy costs, but not review costs.

Journalists should include in their letter both a fee waiver request and a statement that if the waiver is not granted, they belong in the journalism fee category. If fees will be over a certain amount (typically \$25), the agency will inform you so you can decide whether or how to proceed. But you should state the highest amount you're willing to pay.

Exemptions

In theory, government should provide records responsive to a request unless one of nine exemptions applies. If an exemption applies, the government may withhold the requested information. There is a concept known as "discretionary disclosure," which means an agency

may choose to release records even if the request falls within exemption, but as a practical matter, you'll rarely get anything covered by exemption.

Let's discuss the nine types of exemptions.

1. **National Security:** Congress granted the executive branch authority to determine which records should be withheld to preserve national security. For example, documents pertinent to ongoing armed conflict will likely be exempt.
2. **Agency Rules & Practices:** This applies to records "related solely" to internal personnel rules and practices. Over time, courts divided this into two, called "high" and "low." "Low" refers to records of mundane activities of no interest, such as where employees park. "High" refers to records vital to how an agency functions as an enforcer of the law.
3. **Statutory Exemptions:** Applies to records declared confidential under other laws. Family Educational Rights and Privacy Act (FERPA) prohibits federally funded educational institutions from releasing educational records without consent, though there is some information universities can share, such as your email address. "Federally funded" means the institution receives federal funds, directly or indirectly. So, almost all schools are subject to FERPA.

Driver's Privacy Protection Act (DPPA) prohibits release of personal information held in Department of Motor Vehicle (DMV) records without an individual's consent. This does not restrict disclosure of information about accidents, driving violations, suspended licenses, and similar matters. It only restricts personal information such as address, Social Security number, height, and weight.

Health Insurance Portability and Accountability Act (HIPAA) prohibits health care providers from releasing protected information, such as medical records, without the consent of the patient. It applies to healthcare providers and business associates.

4. **Confidential Business Information:** If record contents would qualify as a trade secret, they may be withheld. In other words, if someone could use the information to make a lot of money trading on Wall Street, then it's a no.
5. **Agency Memoranda:** Allows agencies to withhold "working documents," like drafts of documents, internal notes, other preliminary materials that agency employees create or obtain in the course of doing their jobs. The reason? To allow employees to propose ideas or have honest discussions without fear that material will be disclosed and used against them. Everyone can make mistakes or propose ideas that need to be refined.
6. **Personnel, Medical and Other Personal files:** Often called the "privacy exception," it

applies to information about a particular individual. When determining this exemption, the question is whether disclosure “would constitute a clearly unwarranted invasion of personal privacy.” The first issue is whether there’s information in the record that would raise a privacy issue. Second, a privacy interest must be weighed against the interest in disclosure.

7. **Law Enforcement Investigations:** Government may withhold records compiled for law enforcement purposes if disclosure would (a) interfere with investigations, (b) deprive a defendant of a fair trial, (c) invade personal privacy, (d) disclose the identity of a confidential source, (e) reveal enforcement techniques, or (f) endanger life. As practical matter, broad language makes it difficult to get law enforcement records, at least until a matter is closed. Even then, portions of record may be redacted to hide names of sources or witnesses, or to prevent disclosure of enforcement techniques.
8. **Banking Reports:** Applies to information related to examination, operating, or condition of reports prepared by an agency responsible for regulation or supervision of financial institutions. It is designed to promote openness between bank and examiners, and to protect financial institutions from the release of honest evaluations about stability.
9. **Information about Wells:** Probably the least-used exemption, this covers “geological and geophysical information and data, including maps, concerning wells.” Congress intended to protect the oil and gas industry from unfair competition when it developed this exemption.

If the government ignores or denies a request

If an agency denies a request, in whole or in part, it should say why — e.g., because a request is invalid (fails to specify identifiable record) or because an exemption applies, in which case the agency should specify which exemption.

If you believe your request was improperly denied, you may appeal the agency’s decision. Each agency has different deadlines for filing an appeal. If you’re not satisfied after appealing, you can file a lawsuit, and the court will determine whether the agency acted properly.

Another resource is the Office of Government Information Services (OGIS), created by Congress to be a FOIA ombudsman. OGIS conducts mediation between requesters and agencies, smoothing communication and trying to improve the process of obtaining records.

As a last resort, you may consult with an attorney or your organization’s legal counsel and, perhaps, file a lawsuit in a federal trial court.

Lifecycle of a FOIA request

1. Before you submit a request, determine if it's necessary.
2. Research which agency is likely to have responsive records.
3. Request only what you want.
4. Send the request to the appropriate agency.
5. You'll receive acknowledgement that includes a tracking number and the date the request was received, and whether the agency will comply within the 20-day deadline.
6. You may be charged fees. An agency should provide an estimate.
7. Agencies process the requests in order in which they are received.
8. Once a search is performed, FOIA personnel review records to determine if exemptions apply.
9. You will receive releasable records in one batch or portions distributed in rolling releases. If any portions are redacted or denied, an agency should cite the exemption(s).
10. If you appeal and win, the agency will process your request. Timelines for their response will vary.
11. If you are not happy, contact an agency to speak to their FOIA liaison, contact OGIS, or file a lawsuit.

Federal legislature

Although FOIA provides right of access to federal records, Congress exempted itself. No law or court decision gives citizens a FOIA-like right of access to Congressional records. If Congress refuses to hand out protected information, there is little recourse except to appeal to an official's conscience — or political opponents, who may be willing to turn over information if they have it and it is not otherwise illegal to do so.

State laws

Every state has its own law for open records requests because they each have their own state agencies. Some state open records laws also cover their legislature, but other state laws don't. Some require written requests, and others let a requester show up at an agency and ask to see records in person.

Each state is different. You must look at the law for the state where you want access. The Reporters Committee for Freedom of the Press provides state-by-state compilation of laws, called the Open Government Guide, to guide reporters through their state laws and processes.

Conclusion

In this chapter, we have defined public records and discussed some general rules for determining what information is public or off-limits to us. After touching on some tips for verifying that you will need to file a FOIA request, we discussed the lifecycle of a FOIA request.

Activity 1: Can FOIA help ya?

Search for a topic in which you are interested [at the FOIA website](#), and identify what documents are publicly available. Explain how these might be useful to your research. Summarize and evaluate at least two sources.

Using the FOIA website, identify which agency you would need to contact to file a FOIA request.

Navigate to the [iFOIA platform](#), create an account, and walk through the prompts to generate a FOIA request about the topic in which you're interested, from the agency you identified on the FOIA website. Along the way, resolve any issues that arise (e.g., indicate whether you're entitled to expedited processing and/or a fee waiver, and make your case accordingly). Decide if you will submit the request.

Activity 2: FCC Complaints

Using the [iFOIA platform](#), draft a FOIA request for viewer complaints about violent television programming.

Assume that you're a reporter for The New York Times, and you're working on a story about consumer complaints sent to the [Federal Communications Commission](#) (FCC) about violent television programming aired in the prime-time block from 2016 to 2017.

You want copies of any such complaints the FCC has received and copies of the agency's responses to those complaints. You believe it is critical for the public to receive this information as soon as possible, because next week Congress will review the authority it has granted to the FCC to evaluate whether the FCC is performing its duties effectively.

With those things in mind, draft a request using the [iFOIA platform](#). Create a free account, and follow the step-by-step prompts to draft the request. As you work, resolve any issues that arise (e.g., indicate whether you're entitled to expedited processing and/or a fee waiver, and make your case accordingly).

Do not submit the request, since you're not really a New York Times reporter doing a story on the FCC. But you can save it to your computer, or print it out.

Additional resources

- The [iFOIA generator](#) and project-management system.
 - [Muckrock](#) helps you file, track, and share records requests.
 - [FOIA.gov](#): a government explainer and database on FOIA.
 - [State FOI resources](#) from the National Freedom of Information Coalition (NFOIC).
 - [State FOI resources](#) from the Reporters Committee for the Freedom of the Press.
 - [FOIA explainer and resources](#) from George Washington University.
 - Electronic Frontier Foundation's (EFF) [transparency project](#).
 - [FOIA Center](#) from the Investigative Reporters & Editors (IRE).
 - Society of Professional Journalists' (SPJ) page for [FOI-related info](#).
 - SPJ's page for [state FOI-related info](#).
 - The Student Press Law Center (SPLC) focuses on student journalists and [access to school records](#).
 - [Federal mediation service](#) for FOIA disputes.
-

Examples of FOIA-driven stories

- The Sunshine in Government Initiative maintains "[Without FOIA](#)," a tumbler that tracks many news stories.
-

- [Police disciplinary reports](#) from the Miami Herald-Tribune.
-

News

KARNA YOUNGER AND CALLIE BRANSTITER

Learning Objectives

After reading this chapter, you will be able to:

- Articulate how business models in the media limit readers' access to the news.
 - Identify news sources for your daily news consumption and research needs.
 - Use strategies for finding new and archived news on an assigned issue topic.
 - Evaluate news sources for their credibility.
-

Playing Catch-Up on News

The City of Lawrence is planning to build a new headquarters for its police department. While city leaders believe that a new building is long overdue and is necessary for the police department to continue effectively serving the ever-growing city, the plan is controversial. Some Lawrence citizens don't believe that a brand-new police headquarters is necessary, and think that the city can save taxpayer money by refurbishing existing police facilities. Others are opposed to the location of the new headquarters because it's not central: it is on the edge of a quiet residential neighborhood and across the street from a high school.

Let's pretend that you arrive in Lawrence for your first post-college job, and this is a controversy that's handed to you. If you are a news reporter, your editor wants you to write an arti-

cle on what the city's current plans are for the headquarters, and what public opinion is like on this issue. If you are a strat comm professional, your manager assigns you to work with a client that has a vested interest in the headquarters being built: the police officers' union. The union is paying your firm to come up with messaging that will convince more Lawrencians to support the new headquarters.

It is not unusual for a young communications professional to be handed an issue they know nothing about and to be told to learn all about it in a finite amount of time. Before you are put in such a situation, you need to develop the skills and strategies for learning about an issue effectively and efficiently. Knowing how to find and read credible news is a crucial first step in this process.

Being an informed news consumer requires time and commitment. Back in the day, journalists would read two to three print newspapers front to back every day, between listening to radio and watching television broadcasts. With digital media, we have so many options, and our news binges can go from healthy to excessive really quickly.

In this chapter, we briefly discuss the state of the news business, as we consider access to news, and the paywalls that an increasing number of news publications are putting up. We then walk through evaluating the credibility of a news article, focusing on the accuracy of its content. The chapter ends with suggestions for accessing news sources, both directly and through library subscriptions and databases.

Access to News

Access to the news is one of the most important topics in journalism today. Much of this discussion is centered on [the business of news](#) as the media shift to digital platforms and seek new ways to generate revenue. For over 100 years, news agencies have relied on advertising money to pay their operating costs and to reap a profit.

Today, 85 cents of every advertising dollar goes to Facebook or Google, according to The Aspen Institute's [annual report on journalism](#). Moreover, individuals and companies don't buy as many print ads in newspapers as they used to, resulting in steep drops in print advertising revenue. In 2017, newspaper companies in the United States made from advertising about a third of what they made in 2007, according to the Pew Center's [State of the News Media report](#).

To compensate for the shortage of advertising revenue, many for-profit digital news agencies are shifting from the advertising model to a reader subscription model, which restricts read-

ers' access to news. By putting up semi-porous paywalls, some news companies [have succeeded](#) in generating revenue on their digital products.

For instance, The New York Times allows non-subscribing readers to read five articles a month before blocking their access and asking them to subscribe. In 2017, The New York Times made more than [\\$1 billion in subscription revenue](#), with digital subscriptions increasing by over \$100 million. The Times is not alone — after the 2016 presidential election, many major publications saw a [major increase in reader subscriptions](#) and, in the case of not-for-profit outlets such as The Guardian, donations. Readers sign up because they want access to quality local news, or because they want to support good journalism, the [American Press Institute found](#). The reader subscription model can generate a lot of money.

Whether you are Googling or using some of the libraries' resources, you are likely to hit a paywall eventually. However, freely accessible news does still exist. For example, not-for-profit media agencies, such as [ProPublica](#) and [The Guardian](#), ask for donations in lieu of subscriptions and do not block content.

Paywalled news media also promise to drop their paywalls in emergency situations, so that the public can have unfettered access to the news. But what constitutes an emergency? You may argue that the [Sudanese refugee crisis](#) constitutes an emergency, but these agencies are unlikely to drop their paywalls for a story like that.

Do Paywalls Signify Credibility?

While many credible news sources are moving behind paywalls, the [porosity of paywalls varies](#). This means that some companies are allowing more free article reads than others.

Editors, publishers, and owners of subscription publications have promised that paywalls will enable their staff to produce quality journalism. Vanity Fair's editor, [Radhika Jones](#), explained that subscriptions would support "more breaking news, more in-depth reporting, more voices in commentary and opinion, more access to our incredible archives, and more of the intelligent, prescient, agenda-setting journalism" on which Vanity Fair prides itself. Some in the business of journalism see paywalls as [the only way to ensure that credible news continues](#).

Following this logic, you may be tempted to view a paywall as a marker of credible journalism. For instance, you know that The New York Times will ask you to pay for the sixth article you read, but that [clickbait](#) websites will not do that. For instance, [Buzzfeed's quizzes](#) lure you in, and there are always those advertised headlines lampooning the latest celebrity couple or the president. All of this stuff is free and less-than-credible, right?

But critics (and even some supporters) of the paywall or digital subscription model beg to differ. They critique digital subscriptions as capitalistic ventures that do not benefit the newsroom, but instead fund company owners' profit margins and their [side pet projects](#) or [failures](#).

The Denver Post paywall

The ways in which digital subscription models do not improve the quality and credibility of news can be seen in The Denver Post's battle against its owner. The Post is owned by Digital First Media (DFM), a company that is controlled by a hedge fund called Alden Global Capital, which is owned, in turn, by Wall Street tycoon Randall D. Smith.

DFM, the nation's second largest newspaper chain, [is infamous](#) for purchasing newspapers, laying off staff, centralizing content and operations, [recycling content across multiple platforms](#), and thus widening its profit margins, according to a news business analysis by [Nieman Lab's Ken Doctor](#). In other words, an Alden/DFM-owned local newspaper's website may not publish any news about the local government or local happenings. Instead, it will present a series of clickbait articles written by freelance writers, not local journalists, that were run in several newspapers across the country about strange-yet-captivating subjects like [raccoon cats](#).

On April 6, 2018, the Post's editorial board [published an editorial spread criticizing DFM, its owner](#), throwing the first blow of a national war. Leading the charge against "vulture capitalists," editorial page editor Chuck Plunkett lambasted DFM for its "cynical strategy of constantly reducing the amount and quality of its offerings, while steadily increasing its subscription rates." Plunkett continued to explain that the Post was no longer adequately staffed to cover Denver, the state, or its surrounding regions because its staff had been reduced from more than 250 to fewer than 100. And more cuts were coming.

Under such conditions, the Post would not be able to muster the same Pulitzer Prize-worthy local coverage as it did when reporting on the massacres at [Columbine High School](#) and at the [Aurora movie theater](#). "The inevitable result is that the reduction in quality leads to a reduction of trust," Plunkett surmised before issuing a [public plea for a new owner](#). In other words, the Post feared its owner's lust for profits was undercutting its credibility with its readers, who, Plunkett argued, deserved quality local journalism.

Smith is no more than a "vulture capitalist," [The Nation's Julie Reynolds](#) declared. In her investigation of Smith's finances, Reynolds uncovered that Smith buys local newspapers at rock bottom prices, lays off staff at twice the rate of other news companies, jacks up subscription and advertising rates, and then sells off the printing presses and facilities once the publica-

tion is defunct. Reynolds and Ken Doctor found that Smith profited greatly from this model, making **almost \$160 million** in 2017, and **\$36 million on the Post alone**. What does Smith do with this kind of money? Rather than reinvesting in newsrooms and reporting, he **buys lots and lots of Palm Beach mansions**.

With **the national press** taking note of this threat to local journalism, other DFM newspapers joined the protest. Dave Krieger, the editorial page editor of neighboring Boulder Daily Camera, also owned by DFM, **self-published a piece** in solidarity with Plunkett's call for new ownership. **DFM fired Krieger** for **speaking out** and got rid of the Camera's editorial section. Plunkett pushed to publish another editorial defending Krieger. **A DFM executive refused to allow it** and instituted a policy mandating DFM approval of editorials. **Plunkett resigned in protest**. Then, **two senior editors** and the **chair of the Post's board** quit in solidarity. **Fifty-five Post employees decried DFM's actions** in a letter published by The NewsGuild, a newspaper union. Post reporters gathered outside of **Alden's New York City offices to protest DFM**, alongside journalists employed by other DFM publications. Even **student journalists at Duke University** called on DFM to do better by the Post. All of this because a newspaper owner valued profits over credible local news.

The case of The Denver Post illustrates that a paywall is not an automatic indicator of credibility. Some publications that use a paywall, like The Denver Post and its siblings, **do not benefit** from the revenues these paywalls generate. Other paywalled companies, however, are doing great journalism. The Washington Post, for example, operates under the digital subscription model. Its journalists continues to thrive, **winning two Pulitzer Prizes in 2018**, including one for its coverage of U.S. Senate candidate Roy Moore, discussed earlier in this textbook.

How to Assess the Credibility of News

News articles, in general, are **secondary sources**. This is because in the process of writing the news, reporters collect information from a variety of sources, like other news articles, news conferences, news releases, spokespeople, eyewitnesses, records, reports, and studies. In their articles, reporters present the information from these sources in new and reconfigured ways. The primary sources of information presented in the news reside outside of news articles, but hopefully are attributed inside these articles.

Because the news media is secondary sources of information, when assessing the credibility of any news, it is important to skeptically interrogate it. This process entails retracing the reporter's steps, checking their research and sources, and determining if it is reasonable to reach the same conclusions as they did.

To understand better the credibility of news, let's return to The Denver Post's stance against Alden/DFM, its owner, and focus on how student journalists at Duke University helped to localize this national story. As we know, the national topic was that DFM was threatening the future of local newspapers by slashing newsroom staffs in favor of widening profit margins. Even though neither Duke University nor its home, Durham, North Carolina, were not part of DFM's newspaper chain, Duke's student newspaper, The Chronicle, answered The Denver Post's call to take a position against DFM with a [news article](#) and an [editorial](#). Examining this news article helps us illustrate how to assess the credibility of news.

Duke's involvement with the story started when the [NewsGuild](#), the same union that published Post employees' [letter of dissent, called out Duke University](#) for benefiting from Alden/DFM. In two letters to Duke's president, and in a news story on its website, the national union criticized Duke for accepting donations from Heath Freeman, a Duke alumnus and president of Alden Global Capital, the hedge fund that owns DFM.

The NewsGuild's president decried Duke's relationship with a "vulture capitalist" in [the union's article](#): "Receipt of his donations contradicts the mission of Duke and of the DeWitt Wallace Center for Media & Democracy, and it is an insult to journalists everywhere." He argued that Duke had no business researching journalism or training future journalists, or being home to the DeWitt Wallace Center for Media & Democracy, as long as the university accepted profits from Alden's destruction of local journalism. In response to the union's private communications to the university president, Duke [denied having any relationship](#) with Alden.

Duke might have gotten away with their denial if it hadn't been for some meddling student journalists, particularly Sam Turken, who wrote [a news article](#) for The Chronicle, Duke's student newspaper. In his piece, Turken refuted Duke's denial that the university was not benefiting from a relationship with Freeman.

To assess the credibility of Turken's article, we retrace his reporting steps, focusing on a single credibility cue: the accuracy of the article's content. We can use the lateral search process we discussed in chapter 7.

Duke's Turken would have started his research with the main topic that is being investigated, the controversy between The Post and Alden/DFM. If we hadn't done so already, we would Google information about The Denver Post and Alden/DFM to learn more about the controversy. Since we are informed on this subject already, we move onto locating the beginning of the beef between Duke's Heath Freeman and The NewsGuild. We might question, for example, if The NewsGuild's criticism of Duke is true, or whether Duke is right to deny that it benefits from Alden/DFM's "[vulture capitalism](#)." So we quickly Google "Heath Freeman Duke NewsGuild," and find [The NewsGuild's web story](#) among our top results of news outlets also

reporting on the topic. This story gives us (1) the primary source for much of the backstory Turken includes in his story, and (2) the letters exchanged between Duke and The NewsGuild, which are linked in Turken's story. So already, we have substantiated Turken's timeline for The NewsGuild communicating with Duke, and verified the union's version of events. Additionally, we might go back and read what other news outlets are saying. If their information aligns with what Turken provided, then this is another point in his favor.

Next up, we could investigate Heath Freeman, his employment, and his connection to Duke. We could try contacting Freeman directly, and could try to find his contact information via Google. Our first instinct might be to start with his company's website. Unfortunately, as of publication, [Alden's website](#) did not appear to be fully functioning, even though a quick search on [Whois](#) shows that the domain is owned by Alden. (Sidenote: This makes Alden look even more shady. What kind of big business doesn't have a working website?!)

Anyhoo, we return to Google to search Freeman's name and Duke. This yields a [#NewsMatters biography](#) of Freeman, but the organization's "About" page discloses that it represents protesting DFM employees. This doesn't seem like an unbiased source, so we should seek other information. Moving on, we find a [Bloomberg profile](#) of Freeman and his [LinkedIn profile](#). But no contact information, so contacting Freeman directly would be tricky. However, we know Bloomberg is an established business news company, and we see that the LinkedIn profile confirms the Bloomberg listing. To be certain, we could jump over to [Nexis Uni](#), a subscription database [available through the libraries](#), to research Freeman. Here, we find many articles from business wires and other news sources that detail Freeman's latest business deals and the DFM-Post controversy as president of Alden. We're pretty sure he is who he says he is.

But what about Freeman's affiliation with Duke? His LinkedIn profile confirmed that he attended Duke, but it would be better if we could get confirmation from Duke. Turken provides such information as Freeman's graduation year, what activities he participated in as a student, and details about his fundraising on behalf of the university. The [Family Educational Rights and Privacy Act \(FERPA\)](#) allows a university to confirm some information about a student's attendance, such as the dates they were there and their official activities. So Turken would have been able to contact Duke directly about some of this information. However, he hyperlinks to the [2016-2017 annual report](#) for Duke's Freeman Center for Jewish Life. This makes it pretty clear that Turken probably Googled The NewsGuild's assertion that Freeman resides as the chair of advisory board for the Freeman Center, named for his family. The report confirms the fundraising sums Turken mentioned in his report, as well as details about the Freeman family, which Freeman details in an opening letter. Through our own Google searches, we find similar family and educational background in an [alumni magazine posting](#), and confirm Freeman's interest and involvement in Duke football in the same posting, by

Turken's link to a [Duke athletic's article](#), and [an interview of student-athletes](#) Freeman worked with. Looks as though Freeman's association with Duke checks out.

We could continue checking the credibility of Turken's article. For instance, we could confirm that the journalist he interviewed, Lisa Krieger, does work for San Jose Mercury News and graduated from Duke by looking up [her profile at the newspaper](#), calling Duke to confirm her graduation date, or, using the contact information on her work profile, contacting her directly to verify her quote.

We could even check where Duke's newspaper got The NewsGuild image posted above the article. To do this, we right-click on the image, copy the URL or the image itself. Then we hop over to [Google Image search](#) or [TinEye](#), and right-click again to paste the picture or URL into the search box. Our [search results](#) confirm that the image is originally from The NewsGuild website, and that the newspaper didn't doctor the image.

At the end of it, we can feel assured, through our prior research and skeptical verification process, that Turken researched and published a credible news story that successfully localized a national issue for his Duke audience.

As we think about the accuracy of news, it's important to keep in mind that journalists sometimes do make mistakes. Sometimes a journalist receives misinformation from a seemingly reliable source or they may just get something wrong. However, a credible journalist and news source will acknowledge when an error has been made and issue a correction. Being able to judge whether or not information is accurate comes from reading and balancing the information, argument, and perspectives presented in multiple sources. Experienced journalists follow such a verification process when reporting, and we must do the same when evaluating their reporting.

To recap, we used the following sources when evaluating the accuracy of the content presented in the Duke article, and recommend that you use similar techniques and sources in the credibility checks you perform:

- Google. This is basic but, as you know, can allow you to check out a person's web presence: LinkedIn, Facebook, Twitter, Instagram as well as any directory listings on a company website, which would confirm employment. Do this for the reporter and any reference sources to get a snapshot of their past experiences and work.
- Use WHOIS to look up company names and web or IP addresses, which is particularly useful if you stumble across a website that you are not familiar with. This tool allows you to see who or what owns a website and when they created the website.
- Subscription databases, particularly Nexis Uni, available through KU Libraries.

- TinEye and Google's image search allows you to search by images. You simply drag and drop an image into the search box or upload it. Use this to determine if any graphics included in the story are original to the source and to verify any social media accounts. Lots of fake social media accounts sport stock photos.

And that's how we would assess the content accuracy cue, as part of evaluating the accuracy of Turken's article. Any news article also can be evaluated on several other cues, like publisher, author, timeliness, sources, and bias. Ideally, we would interrogate Turken's work on these cues. As always, the balance of the evidence from these cues should determine whether the article is credible enough to use in our own research or reporting.

Using News to Understand the Context of News

The process of coming to understand an issue from news articles that have reported on the issue entails reconstructing for ourselves this issue's multi-level context. Most issues have several levels of context, including global, national, and local or hyperlocal.

The Duke Chronicle's article on the Alden/DFM-The Denver Post standoff localized a national story. In the article, Turken, the journalist, conveyed to his readers why they should care about a battle in Colorado. He showed them how and why this national news was impacting their community, Duke University.

As you research an issue, think similarly about the global, national, local, or hyperlocal lenses through which you can view this issue. Doing so will help you more fully understand the issue.

- Global sources can help you understand the big picture of an issue. For instance, many of Alden/DFM's critics accused Alden of being a threat to local journalism or free speech in the United States. To get a global perspective on this, you could benchmark this case against historical instances of the freedom of the press being mitigated by capitalistic or governmental forces. The non-profit Committee to Protect Journalists is constantly reporting on such threats against journalism and journalists.
- National news is valuable for a variety of reasons. It can tell you how global issues are playing out in the United States or the larger implications of something happening in your neighborhood, city, or state. It can also help you determine if and how your local issue has played out in other states. For instance, The Denver Post story became national news because other DFM-newspapers across the nation faced similar problems, and the wider journalism community responded. Additionally, freedom of the press is a constitutional right, enshrined in the First Amendment, which makes it difficult to discuss the troubles in Denver without the context of this right.

- Local/hyperlocal news is vital but endangered. Local news helps citizens stay informed about the issues that are most likely to have an immediate impact on their lives. It drives home for readers, viewers, and clients why national and global issues are important or why they should care. It often answers the “So what?” question. For example, Turken told the Duke community why they should care about The Denver Post: One of their own was involved and engaging in shady behavior that stood in conflict with the values of Duke’s (journalism) community.

Accessing News

Being an information professional entails constantly consuming the news. Good journalists and strat comm professionals know what’s going on. They read, listen to, and read as much news as possible, to stay informed of current events, and track how news stories develop. This means cultivating a habit of browsing and consuming news every day. Below we discuss tactics and resources for helping you do this without becoming overwhelmed.

Newsletters

To save time while chasing down news, you can have the news emailed to you. Nearly every news source issues a newsletter or digest of the most important recent news. Below are links to a few newsletters. Editors of these digests summarize the news so that you become informed in about five minutes. The newsletters on this list are all free, but may link to items behind paywalls.

- Lawrence World Journal
- The Skimm
- Need2Know
- NextDraft
- Poynter’s Morning Mediawire
- Race/Related from The New York Times. This weekly newsletter offers provocative reporting on news related to race, as well as recommendations for further reading.
- The Week. Unlike those other newsletters, this one includes the best photojournalism of the week.

Social media

Journalists often are required to tweet throughout their workdays. By following key journalists, you often can trace [a developing news story for free](#) and find heaps of experts on a given topic. Photojournalists also take advantage of Instagram to showcase their work. Figuring out which social media accounts are actually helpful, though, can be difficult. Here are some tips for getting started.

1. Begin by following a major news agency that is reporting on your topic. Pretty much all news outlets have their social media bases covered and will repost their reporters' content. Following a reporter's employer will help you find out who is assigned to a particular area or beat.
2. Find one good source.
 - If you've found one good source, you've probably found a lot of good sources. First, read the reporter's bio and check out their other publications. If they frequently write on a topic or similar ones, then they have probably been assigned to cover this particular area and are the beat "experts" at their publications.
 - Check out the sources. To build their credibility, reporters interview and cite various experts. These experts likely have their own work and publications that they want to publicize, so you can track them down on social media to directly access their expertise.
 - Pay attention to who broke the original story. In journalism, reporters strive to get it first and get it right. Doing both means that a reporter is on top of his or her game, that is, is an expert on a given topic. Out of respect for those who get it first, reporters will cite who was the first to break a story or a major lead. If you see this, locate that original news and reporter. Read their reporting and follow their social media posts.
3. Follow the leader. It is also good to note that many journalists also find stories through social media, so you should also pay attention to whom reporters are following on social media. This can lead you to find other reporters and their sources for your work.

Bear in mind, though, to follow the official [verified](#) accounts of news sources. Even if your best friend tweets a link to an article published by a reputable source, you should track that source down to verify its authenticity.

If the above sounds familiar, it is probably because you would follow similar steps when using

Google News and Google Scholar and the Libraries' subscription databases to locate information. Keep the above tips in mind throughout your research process.

Aggregators, Like Google News

A news aggregator is a website that presents news from a range of sources, organizing the news around the key news topics. Google News is one of the most popular news aggregators around. Though it does not produce original content, Google culls the internet in search of the latest news headlines. Using Google News has its advantages. First, it serves as a one-stop shop for reading across many news organizations. Second, you can customize your news page to follow trends and topics that are important to you.

Customize Google News

To customize your Google News sections, click a topic in the menu on the left or search for a specific topic in the search bar at the top. When you've selected that topic, you can click on the Follow button in the upper right of that page. Google provides [detailed instructions](#) on how to get the news customized.

Set Google Alerts

To receive emails about specific topics in the news, you can sign into your Google account, and navigate to its [alerts page](#). Here, you may type in any topic, and determine how frequently you want Google to deliver news on this topic to your email inbox. For complete instructions and tips for managing your Google Alerts, you can read [this article by TechRepublic](#).

Downsides of Google News

Google News is convenient but it also has all of the downfalls and traps of its parent product that we discussed in our earlier chapter on Google. Like the search engine side of Google, Google News uses web crawlers to find content, as this article from [Search Engine Land](#), a news site about search and marketing, explains. The reliance of Google News on an algorithm also means that there is a whole lot of news [that Google does not uncover](#).

Moreover, what Google News displays is personalized to meet what Google thinks you need,

based on your past reading history and location. This may be great when you are tracking a particular topic, but it also puts you in a [filter bubble](#) and an echo chamber of your own interests. An overreliance on the curated flow of news in Google News (and in all social media platforms) may prevent you from discovering interests that may turn out to be vital to your research, work, and life.

Finally, the popularity of a news story contributes to the algorithm that determines what news Google News presents. As a result, Google news has been guilty of circulating false information. [The Atlantic reported](#) that when there is an absence of credible news — say when news of a mass shooting has just broken and news outlets haven't had a chance to cover it — Google News will retrieve half-baked conspiracy theories and misinformation that circulate in the dark corners of the internet.

To avoid being deceived by such algorithmic traps, we suggest that you develop a healthy and varied news diet. This can include visiting specific news agencies directly, such as websites for local, regional, and national newspapers, and watching broadcast news.

Searching for News

When searching for news using either Google or the Libraries' subscription databases, remember some of our earlier tips from the [search/re-search](#) and [search toolbox](#) chapters. In particular, pay attention to your search terms.

If you are not finding the information you need, it may be because your search terms are either too broad or too narrow. When researching Lawrence's new police headquarters for example, you may first search for "new police station." This may capture some recent articles, but not every article is going to use this phrase. Change it up and try "law enforcement facility" OR "law enforcement facilities." Or look for the specific referendum or ballot initiative that proposed funding for the facility, such as "Proposition No. 1" AND "law enforcement."

Limiters in Google News and research databases work much like the options on Amazon or other shopping sites. Limiters allow you to select specific dates, locations, and languages, full-text articles, and other facets of the results. These limiters are typically listed under an ["advanced search"](#) link, or along the top or left side of the results page. We often start a search without any limitations and gradually add them until we start getting more precise or relevant results. Keep in mind, however, that adding more limiters will decrease the number of search results we have in general. The key limiters to play with include:

- Dates. The past repeats itself, and you want to make certain that you find information

about the specific incident you are researching.

- Location. Lawrence, Kansas, isn't the only place that has debated funding a law enforcement complex. For this reason, take advantage of any geographic limiters available, or add the city and state name to your search. Alternatively, if you want to find out what is happening in other places, do not limit your search geographically.
- Languages. Google News and news databases will contain information in several languages. Take advantage of language limiters to ensure that you access languages that you can read, and the viewpoints you are interested in learning about. For instance, if you want to know what the Latinx population is thinking about immigration, limit your search to Spanish.

Library resources

There really isn't any sure way of getting around a paywall unless you work for [Mr. Robot](#). You can, however, take advantage of the subscriptions you have through university and local libraries. These subscriptions aren't really free because they are funded by your tax and tuition dollars, but at least you won't have to fork over any additional money to access a news publication. Below is a short list of resources available through the [KU Libraries' website](#) (check your school's library for similar resource lists). These resources have been vetted as credible resources by information experts (i.e., librarians).

Specific publications

KU and Lawrence Libraries have access to many news publications. The following is a very small sample of what's available. To locate specific publication titles through KU Libraries, start at the [Libraries' website](#), and click on "e-Journals," under "Find," in the middle left of your screen. From here, you can search for paywalled local and national publications such as:

- Kansas City Star
 - Wall Street Journal
 - New York Times
- KU has full access to The Times through the database ProQuest Newsstand, but it is not presented there in the browser-friendly format as on the Times website or mobile app. If you prefer to look at the Times the way it's published online, the Lawrence Public Library is your gateway to unlimited New York Times access. Because you reside in Lawrence as a student, you can get a library card at

the LPL to gain access to the most recent online edition.

- Christian Science Monitor

Databases

The libraries' databases contain more than just news publications. Some also contain trade publications, such as [AdAge](#), scholarly articles, and business reports. You typically can filter out the noise with the options listed on the left side of the results page.

To locate a specific database, you may type its name directly into the main search box, or locate it under the "Articles and Databases" link in the "Find" section on the [homepage](#).

- Access World News
 - This has a bunch of news from across the globe, and it also has news sources from the United States and from Kansas specifically. Equally helpful, there is content from military media and broadcast transcripts from television and radio.
- Associated Press collections online
- Nexis Uni
 - This has a natural language search function and plenty of filters to make it easier and faster to find the news you need. Filter by time period, geographic location, subject, and even whether the news is negative or not.

Historical sources

- Chicago Defender
 - The nation's influential African-American newspaper. Based in Chicago, two-thirds of its large readership was outside of the Second City. If you are researching an issue related to African-American history and life, check this source. We promise it will give you a needed perspective.
- Chicago Tribune
- ProQuest Historical Newspapers

- If you are looking for back issues, this archive of many newspapers houses material from the 19th Century to the early 21st Century.

Conclusion

When reading and using media sources for your research, remember to go through the processes we outlined in the chapters on evaluation and bias. It is particularly important to be mindful of the geographic, demographic, and temporal scope of media outlets. Journalists used to read two to three newspapers a day so that they would be informed by multiple perspectives. You should seek divergent perspectives in your daily life and research as well.

Activity 1: Newsletter Review

Identify and subscribe to one of the newsletters listed above. After receiving and reading at least one issue of the newsletter, write a review of this resource.

- Did it contain relevant content?
- How long did it take you to read?
- What did you think of the editor's tone?
- Would you recommend it to a friend?

These are just a few things you could discuss in your 200-400 word review.

Activity 2: Open Pedagogy

Create a tutorial for one of the news resources discussed in this chapter. Explore the resource's search functions, information, ease of use, limitations, and other positive and negative features.

- Using your findings, create a tutorial that demonstrates how to use the tool.
 - The audience for the tutorial is one of your fellow classmates.
-

- Use whatever technological tool you wish to create the tutorial, which should run approximately 2-3 minutes.
-

Activity 3: New Resource Open Pedagogy

Identify and create a tutorial for a news source that is *not* discussed in this chapter. Explore the resource's search functions, information, ease of use, limitations, and other positive and negative features.

- Using your findings, create a tutorial that demonstrates how to use the tool.
 - Your audience for the tutorial is one of your fellow classmates.
 - You may use whatever technological tool you wish to create your tutorial, which should run approximately 2-3 minutes.
-

Activity 4: News Research

Use one of the resources discussed in this chapter to research your topic.

- Write a one-page synopsis of your search process.
 - In the first paragraph, summarize the steps you took to find the information, including the search terms you used, what they yielded, and how your searching developed.
 - In the second paragraph, summarize the credibility of the information sources you found. Explain how the credibility of the sources you found led you to use some of these sources, but not others.
 - Summarize the information about your topic that you found, attributing all of the sources you referenced.
-

Nonprofits

PETER BOBKOWSKI

Learning Objectives

After reading this chapter, you will be able to:

- Understand nonprofits as potential sources of information and expertise on a topic.
 - Be familiar with several categories of nonprofits.
 - Know how to find a nonprofit related to a specific topic.
 - Be able to evaluate the credibility of a nonprofit using information from a Form 990.
-

Beyond Homeless Puppies

This chapter's primary goal is to convince you to consider a nonprofit organization as a potential source for any news article, news release, or strategic communication report you write. In other words, as you plan your sources, I *always* want you to ask yourself, "Is there a nonprofit I can contact about this issue?"

This may seem like a strange goal because, if you're like me, the word "nonprofit" conjures up images of sad-looking puppies and kittens, and Sarah McLachlan crooning, "Will You Remember Me." Or appeals to "text such-and-such" to some five-digit number, for an automatic \$5 donation to a natural disaster relief fund.

So this chapter's secondary goal is to stretch your definition of a nonprofit beyond charities.

Charities like the Humane Society and the Red Cross constitute only one category of nonprofits. There are many, many nonprofits that are not as well-known as these charities because they do not solicit donations from the public, and because they do not run vivid funding campaigns that pull at our heart strings.

For the purposes of this chapter, let's use this definition of a nonprofit: A nonprofit is an organization of people who come together around a common cause about which they care deeply.

Nonprofits In the News

Let's consider three examples of nonprofits being used as sources in news stories.

First example: Women CEOs

An Associated Press [article published in USA Today](#) and other outlets, discusses the relative absence of women CEOs in large companies. The article states that in 2017, women led only 5 percent of the top 500 companies traded on U.S. stock exchanges. It also reports, however, that these women were being compensated on par with, or more than, men CEOs. The bulk of this article is based on an analysis that a research firm named Equilar conducted for the Associated Press.

About two-thirds down, the article states that, "There is a bright spot, though: female representation on boards is improving, according to [Catalyst](#), a nonprofit that works with companies to build a diverse workforce." A couple of paragraphs down, there is a quote from a Catalyst vice president, who argues that this change is not generational, but driven by the recognition that diverse boards of directors are better for business than all-dude boards.

Our definition of a nonprofit as a group of people who come together around a common cause can help us understand why Catalyst ended up being a source in this article. Catalyst is an organization whose common cause is the promotion of a more gender-diverse workplace. It is likely that this story's writer looked for a source that could provide some context or additional information about women as CEOs, or women in the workplace more generally. Catalyst fit the bill of such a source, and its vice president served as an expert voice in the story. The nonprofit also shared with the writer its own data about women on boards of directors. By including Catalyst in the story, the writer ended up with a richer report.

Second example: Employee perks

Another [workplace-related story from the Kansas City Star](#) describes efforts by companies to recruit millennial employees by offering them unique employee perks. The article's sources are representatives of several Kansas City-based companies, including Cerner, Grant Thornton, Pro Athlete, and Black & Veatch. These companies' unique employee benefits include gyms, cooking classes, phone plan discounts, and a breastmilk delivery service for traveling mothers.

The nonprofit source in the article is a group named [American Student Assistance](#), which supports young people in their educational and career planning. One of the perks discussed in the article is assistance with student debt. The article cites research conducted by American Student Assistance, in which "76 percent of college students said such offers would be a deciding factor in accepting a job, as the average debt on a bachelor's degree is around \$30,000."

The nonprofit plays a secondary but important role in this story, providing background information that the local company sources didn't have. American Student Assistance, whose cause is educational and career planning, was a natural source to plug into an article about both career planning and, indirectly, college debt.

Third example: How these clowns suffer

[An article in the Hollywood Reporter](#) discusses the unintended consequences of the 2017 horror film "It," about the murderous clown Pennywise. According to the article, the clown industry suffered following the movie's release, with fewer clowns being hired for performances at schools, libraries, and birthday parties.

Key sources in the article are members of the [World Clown Association](#), a nonprofit that supports clowns through conferences, training, and access to an insurance policy. Yes, clowns need insurance, and this isn't medical insurance, but liability insurance. It's to assist the clowns in case something goes very wrong during their performances. In the article, members of the association bemoan the negative perceptions of clowns that "It" and other negative media portrayals of clowns have generated.

How do the World Clown Association and its members become sources in this article? The writer of the article likely looked for a source that was well-versed on the plight of professional clowns, and one that could connect him to individual clowns who could witness to their struggles in the post-"It" era. The World Clown Association is a group of people who care deeply

about clowns, and that fits precisely this writer's needs for this story. And if nobody at the World Clown Association responded to the writer's email or phone call, then maybe someone at [Clowns of America International](#), another clown-focused nonprofit, would have been available.

In all three articles, nonprofits served as one of the sources because a nonprofit, by our definition, is a group of people who come together around a common cause about which they care deeply. When the article is about a nonprofit's cause or issue, that nonprofit can be an ideal source. The people who work at the nonprofit, or the nonprofit's members, are some of the most educated and passionate individuals on the issue at hand. They often have access to data and research that isn't available elsewhere. And they know individuals whose first-hand experiences with the issue can contribute vivid details to the story.

In sum, a key question that a writer of an article covering any issue should be asking is: Is there a nonprofit whose cause is the issue I am writing about?

Categories of Nonprofits

While there are [several legally defined categories of nonprofits](#), let's consider a few common categories of nonprofits that may be especially useful as sources for journalists and strategic communications professionals.

Trade associations

A trade association is a group of people whose cause is their common trade, business, or industry. Trade associations often are formed by companies, and these companies and the people who work for them constitute the members of these nonprofits. Trade associations organize trade shows, conferences, trainings, certifications, and publish newsletters or magazines. All of these programs are meant to advance their members' trades or businesses. Trade associations also can hire lobbyists to advocate for their members' interests with lawmakers.

Examples: The [American Home Furnishings Alliance](#) is the trade association for companies that make furniture. [Airports Council International – North America](#) is the trade association for the operators of airports, and for vendors who do business inside airports. The [National Association of Convenience Stores](#) and the [Association of Convenience Store Retailers](#) both are trade associations for the owners of convenience stores and the suppliers of stuff that's sold in them. The [Kentucky Blueberry Growers Association](#) is the trade association for blueberry growers in Kentucky.

Professional organizations

A professional organization (or society) is a group of people whose cause is their common profession. Whereas trade associations tend to focus on companies and industries, professional organizations focus on individuals. Professional organizations' programming, however, tends to be similar to that of trade associations, often consisting of certifications or accreditations, continuing education, conferences, publications, and lobbying.

Examples: Each of the professions listed in this book's title has a nonprofit professional organization associated with it: [Society of Professional Journalists](#), [Public Relations Society of America](#), [American Advertising Federation](#), and [American Marketing Association](#). Specialized professionals often have more specific organizations, like the [Association of Health Care Journalists](#), [ACES: The Society for Editing](#), [National Association of Black Journalists](#) and the [Association of LGBTQ Journalists](#). The two clown associations mentioned earlier — [World Clown Association](#) and [Clowns of America International](#) — also are professional organizations. Other professional nonprofit organizations with which you may be familiar: [American Bar Association](#), [American Medical Association](#), [American Psychological Association](#), and so on.

Labor unions

A union is a group of people whose causes center on the work conditions, compensation, and employment benefits of its members. Unions represent and advocate for their members in negotiations with their employers. Some unions double as professional associations. Most workers in the United States do not belong to a labor union, according to a 2018 [Economic News Release](#) from the Bureau of Labor Statistics.

Examples: The [NewsGuild](#) is a labor union for journalists and other communication professionals. The [National Education Association](#) is a labor union for teachers and other school employees. [United Food and Commercial Workers](#) is a labor union for food and commercial workers. [Actors' Equity Association](#) is a labor union for actors.

Advocacy organizations

An advocacy organization is a group of people whose cause is an issue, broadly defined. These organizations support the advancement of their issues by means that are as varied as the issues themselves. Their programs may include education, advocacy for regulatory or legislative change, assistance with legal representation, days of action, volunteering, and promotion of the issue in the media and public discourse.

Examples: Catalyst and American Student Assistance, discussed in the news examples above, fall into this category. Some of these organizations are massive and known nationally, like the [American Civil Liberties Union](#) (ACLU). Others are tiny and local, like [Friends of Lawrence Area Trails](#) (FLATS).

Foundations

A foundation is a group of people whose cause is the financial support of some issue or entity through fundraising and/or the stewardship of investments. Private foundations, like the [Bill & Melinda Gates Foundation](#), the [Ford Foundation](#), or the [Ewing Marion Kauffman Foundation](#) are endowed by families or corporations, and use their funds to support causes they like through grants. Community foundations, like the [Lawrence Schools Foundation](#) or the [University of Kansas Endowment](#), solicit donations from individuals who care about the entities these foundations support.

In sum, depending on the topic at hand, an organization from one of these categories — trade associations, professional societies, labor unions, advocacy organizations, or foundations — can serve as an insightful source for the article or report on which a journalist or strategic communications writer is working.

How to Find Nonprofits

In [Chapter 3](#) of this book, we covered the use of operators in Google searching, including the `site:` operator that can narrow down search results to specific domains. Because the extension `.org` stands for organization, many nonprofits use URLs that end in `.org`. Therefore, one way to look for a nonprofit on Google is to type the issue in which we are interested, and follow this with the `site:` operator and the `.org` extension. For example, the search

```
journalism site:org
```

results in links to a number of journalism-related nonprofits: the Pew Center's website on journalism research ([journalism.org](#)), American Press Institute ([americanpressinstitute.org](#)), Columbia Journalism Review ([cjr.org](#)), the Poynter Institute ([poynter.org](#)), and Society for Professional Journalists ([spj.org](#)).

A problem with this approach is that the nonprofit Wikipedia, one of the most popular websites on the internet, uses the `.org` extension. So the `site:org` search inevitably brings up a

bunch of Wikipedia entries related to journalism. To clean this up, we can use the - (minus) operator, and eliminate Wikipedia pages from the search results. The search

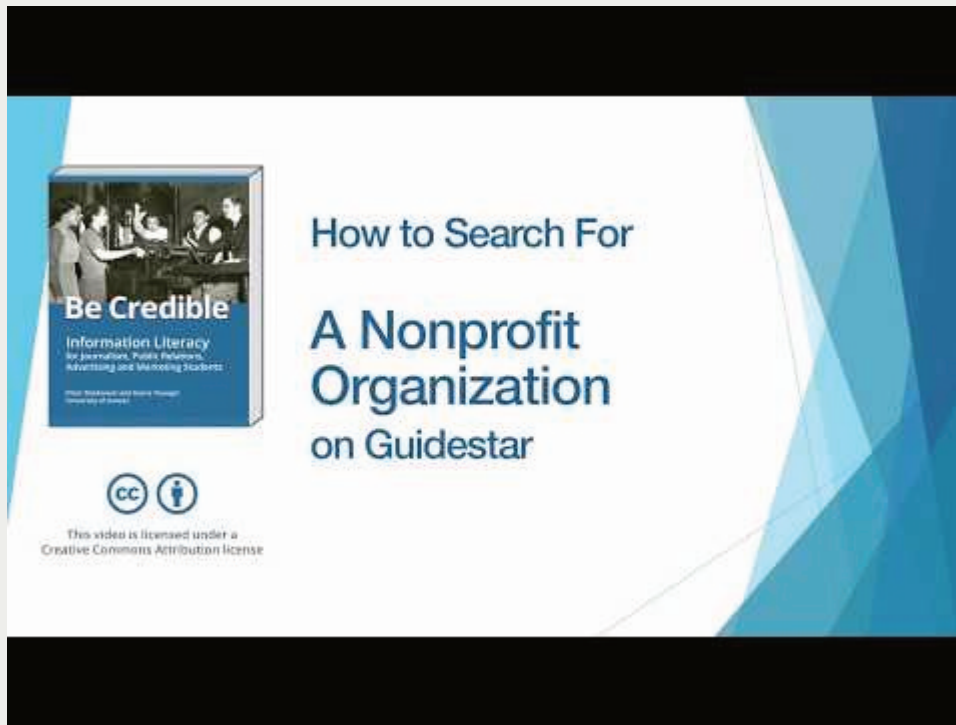
```
journalism site:org -site:wikipedia.org
```

returns results that do not include Wikipedia pages.

Another problem with this approach is that some nonprofits' websites do not end in .org. For years other top level domains have also been used by nonprofits. For example, The World Clown Association website ends in .com (worldclown.com), the American Home Furnishings Alliance website ends in .us (ahfa.us), and the website of the Kentucky Association of Collegiate Registrar and Admissions Officers ends in .net (kacrao.net).

Also, in 2015, a new top level domain .ngo was introduced for exclusive use by nonprofits. NGO stand for non-governmental organization. So the site:org search may miss some nonprofits that do not have the .org extension in their URLs.

In addition to using Google, it is also possible to search specialized databases of nonprofits. Several organizations maintain such databases, including [GuideStar](#), ProPublica's [Nonprofit Explorer](#), [Charity Navigator](#), and [Charity Watch](#). The following video walks you through using GuideStar to find a nonprofit that's related to a specific issue.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=78>

How to Evaluate a Nonprofit's Credibility: Bias

Every nonprofit is biased, and this bias should be identified when evaluating a nonprofit's credibility. A nonprofit's cause for being points to that nonprofit's bias.

What is the bias of the [World Clown Association](#)?

This nonprofit's cause is clowns and the need to support the clowning profession. Given this cause, this organization would never say that clowns are creepy, or that clowning is a waste of time and a worthless profession, or that it's not a profession at all. In other words, the nonprofit's bias is what it would never say about its cause. Doing so would undermine the organization's reason for being.

What is the bias of the [Association of Convenience Store Retailers](#)?

This nonprofit cares deeply about the financial well-being of convenience stores and its operators. What would it never say? It probably would never say that convenience store prices are ridiculously high, that its products are subpar, and that through the processed food and tobacco they sell, convenience stores contribute to various avoidable health problems. Doing so would undermine convenience store profits, and the organization's reason for being.

Expect every nonprofit to be biased. Identify this bias as you evaluate the nonprofit's credibility.

Other Sources of a Nonprofit's Credibility

In addition to bias, we can use other metrics to assess a nonprofit's credibility. There are two obvious places and one less-obvious place to look for evidence of a nonprofit's credibility.

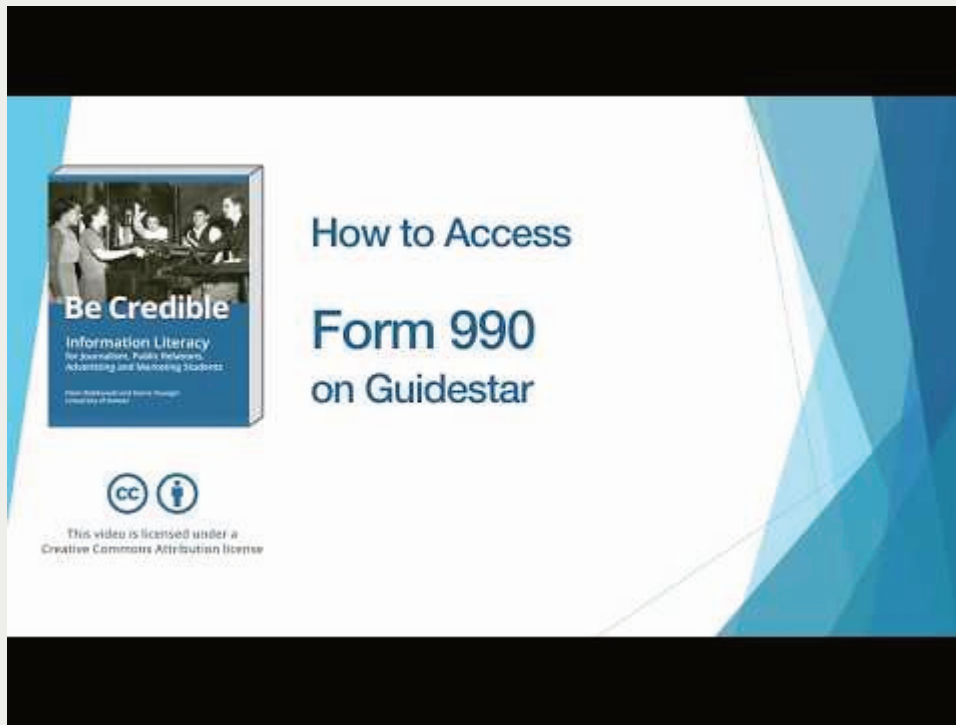
The organization's website is one obvious place to start. How much the organization says about itself, its leadership, its members, and its programs, and how current this information is, can provide clues about the organization's credibility. The news is another obvious place to search. How an organization has been covered in the news and what about it has been newsworthy can be revealing about how credible an organization is.

Form 990

The less-obvious source about a nonprofit's credibility is the organization's Form 990, a financial statement that many nonprofits are required to file annually with the IRS to support their claim for tax-exempt status. One benefit of looking at the Form 990 as a source of credibility information is that an organization is obligated to report the truth about itself in this form.

Another benefit of looking at the Form 990 is that it is standardized, that is, from one year to the next, and from one organization to another, the form and the information it requests stay the same. This allows us to easily compare organizations historically and between one another.

The most transparent nonprofits will post their Forms 990 on their websites. Many nonprofits do not make these forms this easily accessible. Fortunately, GuideStar (and other databases) collect and make these forms available to the public. The following video shows how to access a nonprofit organization's Form 990 on GuideStar.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=78>

How to read the Form 990

Like any tax form, Form 990 at first can be daunting to read. The trick is to know the four or five sections of the form to look for evidence of a nonprofit's credibility. We discuss these sections below, using the 2015 Forms 990 for the World Clown Association and Catalyst, the workplace diversity nonprofit discussed in one of the news examples above. We include screenshots of the specific sections of the forms we discuss. Before you read the following, you may want to download the entire forms for yourself (they are 25 and 50 pages, respectively), and find each of the sections we discuss in these actual forms.

Part I

The first page of the form provides summary information about the organization and its finances. Let’s compare the “Activities and Governance” boxes of the World Clown Association and Catalyst. What is the main difference between these two organizations?

Part I Summary													
Activities & Governance	1 Briefly describe the organization’s mission or most significant activities THE PURPOSE OF THE WORLD CLOWN ASSOCIATION IS TO SERVE THE NEEDS OF THE MEMBERS OF THE ASSOCIATION, TO SERVE THE NEEDS OF LOCAL AFFILIATE CLOWN ALLEYS, AND TO PROMOTE THE ART OF CLOWNING THROUGHOUT THE WORLD												
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets												
	3 Number of voting members of the governing body (Part VI, line 1a)												
	4 Number of independent voting members of the governing body (Part VI, line 1b)												
	5 Total number of individuals employed in calendar year 2015 (Part V, line 2a)												
	6 Total number of volunteers (estimate if necessary)												
	7a Total unrelated business revenue from Part VIII, column (C), line 12												
	b Net unrelated business taxable income from Form 990-T, line 34												
	<table border="1"> <tr> <td>3</td> <td>30</td> </tr> <tr> <td>4</td> <td>30</td> </tr> <tr> <td>5</td> <td>0</td> </tr> <tr> <td>6</td> <td>0</td> </tr> <tr> <td>7a</td> <td>0</td> </tr> <tr> <td>7b</td> <td>0</td> </tr> </table>	3	30	4	30	5	0	6	0	7a	0	7b	0
3	30												
4	30												
5	0												
6	0												
7a	0												
7b	0												

World Clown Association

Part I Summary													
Activities & Governance	1 Briefly describe the organization’s mission or most significant activities CATALYST IS THE LEADING NONPROFIT ORGANIZATION WITH A MISSION TO ACCELERATE PROGRESS FOR WOMEN THROUGH WORKPLACE INCLUSION												
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets												
	3 Number of voting members of the governing body (Part VI, line 1a)												
	4 Number of independent voting members of the governing body (Part VI, line 1b)												
	5 Total number of individuals employed in calendar year 2015 (Part V, line 2a)												
	6 Total number of volunteers (estimate if necessary)												
	7a Total unrelated business revenue from Part VIII, column (C), line 12												
	b Net unrelated business taxable income from Form 990-T, line 34												
	<table border="1"> <tr> <td>3</td> <td>35</td> </tr> <tr> <td>4</td> <td>34</td> </tr> <tr> <td>5</td> <td>107</td> </tr> <tr> <td>6</td> <td>36</td> </tr> <tr> <td>7a</td> <td>0</td> </tr> <tr> <td>7b</td> <td>0</td> </tr> </table>	3	35	4	34	5	107	6	36	7a	0	7b	0
3	35												
4	34												
5	107												
6	36												
7a	0												
7b	0												

Catalyst

Other than the different missions of the organizations, the main differences are the numbers listed in lines 5 and 6, which denote the total number of individuals employed by each organization. World Clown Association says that it has no employees and no volunteers, whereas Catalyst employs 107 people, and has 36 volunteers. The other numbers, in lines 3 and 4, are

similar — both organizations have about 30-35 people on their boards of directors, and most of these directors are independent, that is, not employed by, the organizations.

The next section provides a financial overview.

		Prior Year	Current Year
Revenue	8 Contributions and grants (Part VIII, line 1h)	64,377	63,331
	9 Program service revenue (Part VIII, line 2g)	249,956	240,904
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	163	102
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	197	3,944
	12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	314,693	308,281
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)	1,384	4,999
	14 Benefits paid to or for members (Part IX, column (A), line 4)	167,541	150,336
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	0	0
	16a Professional fundraising fees (Part IX, column (A), line 11e)	0	0
	b Total fundraising expenses (Part IX, column (D), line 25) ▶ ⁰		
	17 Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	148,551	175,550
	18 Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	317,476	330,885
19 Revenue less expenses Subtract line 18 from line 12	-2,783	-22,604	
Net Assets or Fund Balances		Beginning of Current Year	End of Year
	20 Total assets (Part X, line 16)	251,040	234,932
	21 Total liabilities (Part X, line 26)	11,464	17,960
22 Net assets or fund balances Subtract line 21 from line 20	239,576	216,972	

World Clown Association

		Prior Year	Current Year
Revenue	8 Contributions and grants (Part VIII, line 1h)	12,793,113	9,927,343
	9 Program service revenue (Part VIII, line 2g)	1,003,365	2,276,789
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	738,591	228,461
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	351	156
	12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	14,535,420	12,432,749
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)	0	0
	14 Benefits paid to or for members (Part IX, column (A), line 4)	0	0
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	10,231,067	10,217,183
	16a Professional fundraising fees (Part IX, column (A), line 11e)	0	0
	b Total fundraising expenses (Part IX, column (D), line 25) ▶1,544,528		
	17 Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	3,419,386	3,787,750
	18 Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	13,650,453	14,004,933
19 Revenue less expenses Subtract line 18 from line 12	884,967	-1,572,184	
Net Assets or Fund Balances		Beginning of Current Year	End of Year
	20 Total assets (Part X, line 16)	28,351,749	27,976,638
	21 Total liabilities (Part X, line 26)	4,492,311	5,339,302
22 Net assets or fund balances Subtract line 21 from line 20	23,859,438	22,637,336	

Catalyst

Let’s focus on one sub-section (or box) at a time, and examine the Current Year column on the right.

The Revenue box comes first. Line 12 shows the nonprofit’s total revenue for the year. A key difference between these two groups is their revenues. World Clown Association’s total revenue was \$308,281. Catalyst’s revenue for the same year was \$12,432,749. Catalyst brought in 40 times as much money as the World Clown Association. The lines above line 12 also reveal a key difference. World Clown Association makes most of its money (\$204,904, or 66 percent) from the programs it organizes and runs (line 9). The rest of its money comes from contributions and grants (line 8). Catalyst’s revenue sources are the opposite. Most of its money (\$9,927,343, or 80 percent) comes from contributions and grants, and the rest comes from its programs.

Do these differences in total revenue and revenue sources say anything interesting about the credibility of these nonprofits? Maybe, maybe not. It’s hard to make a clear credibility argument based on the size of revenue by itself. For now, we can conclude that the World Clown Association is very reliant on its programs to generate its revenue. Catalyst, meanwhile, relies on outside grants and contributions. This difference likely translates into what these two organizations say and don’t say about themselves and their programs to potential donors and members.

The next box presents an organization's expenses. The World Clown Association spent \$330,885, while Catalyst spent \$14,004,933 (line 18). This means that both organizations spent more money than they brought in (line 19), which is called having a deficit. Does this say anything about either organization's credibility? It suggests that neither organization was great at managing its finances, although the World Class Association's deficit as a proportion of its revenue (7 percent) was smaller than Catalyst's (13 percent). This evidence can be used in either organization's credibility evaluation.

Can a nonprofit make a profit, by the way? Yes, absolutely. Catalyst's financial summary, in the Prior Year column (line 19), shows that the organization had more revenue than expenses by \$884,967. What happens to this leftover money? If Catalyst was a for-profit company, the owner or investors would share the profit, but because of this organization's nonprofit status, no individual can take home this profit. A nonprofit's profit stays with the organization, in its savings or investments account. Having some profit is desirable, so that an organization can add to a financial cushion it may need in a year when its expenses exceed revenues. At the same time, we would be justified to question the credibility of an organization that has huge profits but does not direct those to expanding its programs or benefits to its members or clients.

Before we leave this first page, let's look at the amount of money that each organization spent on salaries and benefits to employees. Some charities [have been accused](#) of not spending enough of the donations they collect on the programs they say they organize. One way to gauge this is to consider what percent of an organization's expenses goes to its employees (line 15), versus what percent goes to grants, programs, and member benefits (lines 13, 14, 17). Catalyst spent \$10,217,183, or 73 percent of its expenses on salaries. The World Clown Association spent nothing on salaries. Could these numbers be used as evidence of either organization's credibility? It depends on the organization's mission, and the nature of its programs. But the figure 73 percent going toward salaries should raise a yellow flag, suggesting that we proceed with caution, and try to understand more clearly how this organization operates, before using this figure in an evaluation of its credibility.

Part III

On the next page, in Part III of Form 990, the nonprofit describes three of its major programs, along with how much each program costs and how much revenue it generates.

4a	(Code) (Expenses \$ 41,699 including grants of \$) (Revenue \$ 45,714)
	ANNUAL CONVENTION - THE ORGANIZATION HOLDS AN ANNUAL INTERNATIONAL CONVENTION TO WHICH ALL MEMBERS ARE INVITED. EVENTS AT THE ANNUAL CONVENTION INCLUDE BUSINESS MEETINGS, AN AWARDS BANQUET, NUMEROUS OPPORTUNITIES TO ENHANCE CLOWNING SKILLS BY PARTICIPATING IN VARIOUS WORKSHOPS AND COMPETITIONS, TOURS OF THE AREAS OF INTEREST IN AND AROUND THE HOST LOCATION, ACCESS TO VENDORS SPECIALIZING IN CLOWNING PARAPHERNALIA, AND THE FELLOWSHIP OF CLOWN ENTHUSIASTS FROM AROUND THE WORLD. THE ANNUAL CONVENTION HAS BEEN HELD IN VENUES AROUND THE WORLD, INCLUDING THE UNITED STATES, EUROPE AND ASIA.
4b	(Code) (Expenses \$ 150,336 including grants of \$) (Revenue \$ 195,190)
	LIABILITY INSURANCE - THE ORGANIZATION CONTRACTS FOR AND SERVICES A GROUP LIABILITY INSURANCE POLICY EXCLUSIVELY FOR MEMBERS. THIS IS INSURANCE SPECIFICALLY GEARED TO CLOWN ACTIVITIES AND IS OF A TYPE THAT MANY MEMBERS ARE UNABLE TO OBTAIN ON THEIR OWN AT REASONABLE PRICES.
4c	(Code) (Expenses \$ 52,455 including grants of \$) (Revenue \$ 3,944)
	PUBLICATIONS - A MAGAZINE IS PUBLISHED FOR THE MEMBERS THAT CONTAINS INFORMATION ON TRAINING PROGRAMS, CONVENTIONS AND AVAILABLE MERCHANDISE FROM SPECIAL DEALERS WORKWIDE. ADDITIONALLY, IT CONTAINS MANY ARTICLES ON IMPROVING CLOWN SKILLS.
	See Additional Data
4d	Other program services (Describe in Schedule O)
	(Expenses \$ 57,867 including grants of \$ 4,999) (Revenue \$)
4e	Total program service expenses ▶ 302,357

World Clown Association

4a	(Code) (Expenses \$ 2,202,934 including grants of \$) (Revenue \$ 548,175)
	MARKETING AND PUBLIC AFFAIRS - THE MARKETING DEPARTMENT CREATES AND EXECUTES STRATEGIES TO INCREASE CATALYST'S VISIBILITY IN THE UNITED STATES, CANADA, EUROPE, INDIA, AUSTRALIA AND JAPAN BY DEVELOPING STRATEGIC PARTNERSHIPS AND STRENGTHENING ITS BRAND, PRODUCTS, AND SERVICES. THE DEPARTMENT IS RESPONSIBLE FOR EDITING, DESIGNING, AND PRODUCING ALL PRODUCT, PUBLICATIONS, AND COLLATERAL MATERIALS, AND FOR PUBLIC EDUCATION ACTIVITIES SUCH AS MEDIA RELATIONS AND SPEAKING ENGAGEMENTS. THE DEPARTMENT MANAGES SPECIAL EVENTS, INCLUDING THE CATALYST AWARDS DINNER AND CONFERENCES TO DISSEMINATE CATALYST RESEARCH AND ADVISORY KNOWLEDGE.
4b	(Code) (Expenses \$ 2,776,867 including grants of \$) (Revenue \$ 449,745)
	RESEARCH - RESEARCH CONDUCTS QUALITATIVE AND QUANTITATIVE RESEARCH ON BOTH WOMEN'S LEADERSHIP ADVANCEMENT AND WORK/LIFE ISSUES ACROSS A WIDE RANGE OF INDUSTRIES, GEOGRAPHIES, GENERATIONS, AND RACIAL/ETHNIC GROUPS. THIS RESEARCH CULMINATES IN PUBLISHED STUDIES THAT INCLUDE FINDINGS FROM INTERVIEWS, FOCUS GROUPS, AND SURVEYS, AS WELL AS COMPANY BEST PRACTICES AND RECOMMENDATIONS FOR COMPANIES AND FIRMS INTERESTED IN RECRUITING, RETAINING, AND ADVANCING WOMEN. CATALYST HAS CONDUCTED RESEARCH ON WOMEN IN LEADERSHIP IN THE UNITED STATES, CANADA, EUROPE, INDIA AND JAPAN.
4c	(Code) (Expenses \$ 2,288,126 including grants of \$) (Revenue \$ 1,183,020)
	ADVISORY SERVICES - ADVISORY SERVICES IS THE DEPARTMENT CHARGED WITH FOSTERING IMPACT THROUGH A VARIETY OF SERVICES, BENEFITS AND ACTIVITIES. IT DRIVES ENGAGEMENT AND IMPACT THROUGH CONSULTING SERVICES, VITAL SIGNS, AND LEADERSHIP OF THE CEO SUMMIT FRANCHISE. IT SUPPORTS CATALYST'S RELATIONSHIPS WITH DONORS THROUGH INVOLVEMENT WITH RELATIONSHIP MANAGERS. THE TEAM ALSO CONTRIBUTES TO CATALYST'S KNOWLEDGE DEVELOPMENT THROUGH THE INSIGHT LOOP, FOCUSING ON IMPACT METRICS AND BY SCALING INSIGHTS FROM CONSULTING WORK INTO PUBLICATIONS, TOOLS, COMMUNICATIONS AND EVENTS.
	See Additional Data
4d	Other program services (Describe in Schedule O)
	(Expenses \$ 3,134,740 including grants of \$) (Revenue \$ 95,849)
4e	Total program service expenses ▶ 10,402,667

Catalyst

It's worth reading through the descriptions of these programs to get a clearer sense of what each organization's key programs are, and how much money is tied up in each program. World Clown Association's convention (line 4a) and liability insurance (line 4b), for example,

are revenue-generating programs. This means that the organization relies on these programs to support its other ventures that do not make money. This can influence how much the organization promotes and spends on these programs. This may be important context for evaluating its statements about these programs.

Part VII

The next important section of the Form 990 is Part VII, which lists the organization's officers and highest-paid employees. Before reading this section, it's important to understand a typical nonprofit's governance structure. Most nonprofits are governed by a board of directors (sometimes called trustees), which is led by a board chair or president. These directors typically do not work for the organization and are not paid by it. They have "real" jobs elsewhere, but meet regularly to make key decisions for the organization.

A main decision for many boards of directors concerns hiring an individual who leads the nonprofit's day-to-day operations. This person might be called an executive director, a chief executive officer, or something similar. That person is a paid employee of the organization, usually drawing the highest salary. This executive also hires a staff to complete whatever tasks need to be completed. These staff members (e.g., directors, managers, assistants) also draw salaries from the organization.

While this structure consisting of a board of directors, executive director, and staff, is typical, there are many other nonprofit governance variations.

World Clown Association's Part VII is three-pages long (below is the first page). It lists 30 individuals, none of whom work more than 10 hours a week for the organization (column B), with most working two hours a week. None of these individuals receive compensation from the organization or related organizations (columns D – F).

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
RANDY CHRISTENSEN PRESIDENT	10 00	X						0	0	0
PAM MOODY PRESIDENT ELECT	5 00	X						0	0	0
MARTIN D'SOUZA VICE PRESIDENT	2 00	X						0	0	0
ED ESTRIN TREASURER	10 00	X						0	0	0
AURORA KRAUSE EDUCATION DIRECTOR	5 00	X						0	0	0
BOB NEIL ALLEY DIRECTOR	2 00	X						0	0	0
NORM BARNHART MARKETING DIRECTOR	2 00	X						0	0	0
ADRAN REVINDREN AWARDS DIRECTOR	2 00	X						0	0	0

World Clown Association

Catalyst’s Section VII is five pages long and lists 50 individuals (see the fourth of five pages, below). Thirty-nine of these individuals work one hour per week for the organization (column B), and receive no compensation (columns D – F). The other 11 of these individuals work 35 hours per week, and receive between \$130,106 and \$259,208 in primary compensation (column D), and between \$24,571 and \$109,272 in compensation from related organizations (columns E and F). Note that the title of Part VII says that this chart lists “Key Employees, Highest Compensated Employees, and Independent Contractors.” Recall from Part I that Catalyst has 107 employees, so most of them are not listed in this table.

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors										
(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
MARK WEINBERGER DIRECTOR	1 00	X						0	0	0
CHANDA KOCHHAR DIRECTOR	1 00	X						0	0	0
DEBORAH GILLIS PRESIDENT & CEO	35 00	X		X				259,208	109,272	0
JAQUELINE HINMAN DIRECTOR	1 00	X						0	0	0
MARK LAUTENBACH DIRECTOR	1 00	X						0	0	0
BETH MOONEY DIRECTOR	1 00	X						0	0	0

Catalyst

It is evident that whereas the World Clown Association is run by an uncompensated board of directors, Catalyst has both a board of directors and a well-compensated staff.

What can be done with all this information when evaluating a nonprofit's credibility? First, each of the names listed in this table of board members and employees is searchable. There probably is a fair bit we can learn about the credibility of an organization by evaluating the credibility of its board members and key employees. So, Google away.

Second, the people listed in this table often are the sources quoted in news articles and other reports. The Hollywood Reporter article quotes Pam Moody, president of World Clown Association, who is listed as vice-president in the form (with time, vice-presidents sometimes rise to become presidents, so this discrepancy in titles is understandable). Like others listed in the table, she receives no compensation from the World Clown Association. Brandee Stellings, a Catalyst vice president quoted in the USA Today article, is a full-time employee who earned

almost \$175,000 in 2015. Does knowing this information affect how we evaluate the credibility of these individuals and the quotes they gave?

On the one hand, Stelling's salary might suggest that she is not super credible because she has a lot to lose if the organization doesn't perform well. This could mean that what she says is always going to "toe the line" for the organization. Alternately, her high salary might suggest that she is super-knowledgeable and qualified to speak on the issues that are important to Catalyst. What about Pam Moody's credibility? Is she super-credible because she is a passionate, non-paid advocate of the clowning profession, or is she not very credible because she doesn't make a salary from the organization (like everyone else associated with this group)? All of these arguments could be appropriate.

Parts VIII and IX

The last two sections of Form 990 that are worth considering are Parts VIII and IX, which are labeled Statement of Revenue and Statement of Functional Expenses, respectively. These sections provide more in-depth information about how these organizations generate and spend money. They provide detailed explanations of the financial summary we read on the first page of the form.

Part VIII Statement of Revenue					
Check if Schedule O contains a response or note to any line in this Part VIII <input type="checkbox"/>					
		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
Contributions, Gifts, Grants and Other Similar Amounts	1a Federated campaigns 1a				
	b Membership dues 1b	58,169			
	c Fundraising events 1c				
	d Related organizations 1d				
	e Government grants (contributions) 1e				
	f All other contributions, gifts, grants, and similar amounts not included above 1f	5,162			
	g Noncash contributions included in lines 1a-1f \$				
	h Total. Add lines 1a-1f ▶		63,331		
Program Service Revenue	2a MEMBER INSURANCE PREMI	Business Code 524298	195,190	195,190	
	b ANNUAL CONVENTION	900099	45,714	45,714	
	c				
	d				
	e				
	f All other program service revenue				
	g Total. Add lines 2a-2f ▶		240,904		

World Clown Association

World Clown Association’s form shows that about a quarter of its revenue comes from membership dues (line 1b), that is, from individual clowns paying the organization to be its members. Insurance premiums from these member clowns bring in nearly half of the organization’s revenue (line 2a). The annual convention brings in almost the last quarter of the revenue (line 2b). That’s a pretty straightforward breakdown of this organization’s revenues.

Part VIII Statement of Revenue					
Check if Schedule O contains a response or note to any line in this Part VIII <input type="checkbox"/>					
		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
Contributions, Gifts, Grants and Other Similar Amounts	1a Federated campaigns 1a				
	b Membership dues 1b				
	c Fundraising events 1c	3,362,129			
	d Related organizations 1d				
	e Government grants (contributions) 1e				
	f All other contributions, gifts, grants, and similar amounts not included above 1f	6,565,214			
	g Noncash contributions included in lines 1a-1f \$	92,173			
	h Total. Add lines 1a-1f ▶	9,927,343			
Program Service Revenue	Business Code				
	2a BLESSING WHITE COURSES	900099	766,898	766,898	
	b MARC LEADERS COHORT/WORKSHOPS	900099	425,745	425,745	
	c ADVISORY SERVICES	900099	361,005	361,005	
	d CONFERENCE REVENUE	900099	319,669	319,669	
	e HONORARIA	900099	226,250	226,250	
	f All other program service revenue		177,222	177,222	
	g Total. Add lines 2a-2f ▶		2,276,789		

Catalyst

Catalyst’s form shows that unlike the World Clown Association, Catalyst is not a member organization. We know this because it generates no revenue from membership dues (line 1b). Instead, it holds fundraising events (line 1c), and more importantly, it receives contributions, gifts, and non-governmental grants (line 1f). Moreover, a number of its programs generate revenue, including courses, workshops, and consulting services it offers. It also organizes a conference (line 2d), and it charges for speaker services (i.e., honoraria, line 2e).

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A)

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments See Part IV, line 21				
2 Grants and other assistance to domestic individuals See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	1,618,017	1,059,013	286,055	272,949
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	6,335,540	4,690,630	997,083	647,827
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	539,218	406,193	85,544	47,481
9 Other employee benefits	1,136,500	846,911	175,042	114,547
10 Payroll taxes	587,908	427,553	98,053	62,302

Catalyst

On the expenses side, one thing we wondered earlier about Catalyst was how it managed to spend 73 percent of its expenses on salaries. The top part of Part IX gives us some clues. While column A lists the total spent on salaries, pension plan contributions, and other benefits, columns B, C, and D break down these totals into expenses that support programs, management, and fundraising. Column B suggests that most of Catalyst’s salaries go toward supporting its programs. If these numbers were more skewed toward management (column C) or fundraising (column D), we would have some evidence that the organization is spending money on its key personnel and generating more revenue, rather than supporting the programs it claims to run.

11	Fees for services (non-employees)				
a	Management				
b	Legal				
c	Accounting				
d	Lobbying				
e	Professional fundraising services See Part IV, line 17				
f	Investment management fees	74,339		74,339	
g	Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	573,095	469,715	75,625	27,755
12	Advertising and promotion				
13	Office expenses	47,071	39,468	4,046	3,557
14	Information technology				
15	Royalties				
16	Occupancy	859,594	603,683	122,624	133,287
17	Travel				
18	Payments of travel or entertainment expenses for any federal, state, or local public officials				
19	Conferences, conventions, and meetings	678,206	531,645	10,305	136,256
20	Interest				
21	Payments to affiliates				
22	Depreciation, depletion, and amortization	560,146	427,996	63,322	68,828
23	Insurance				
24	Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O)				
a	REPAIRS AND MAINTENANCE	368,931	342,935	16,724	9,272
b	MISCELLANEOUS	346,925	282,921	44,857	19,147
c	PRINTING & DESIGN	125,867	125,867		
d	BOOKS AND SUBSCRIPTIONS	91,855	88,789	2,044	1,022
e	All other expenses	61,721	59,348	2,075	298

Catalyst

The bottom of Part IX lists several other categories of expenses that the organization incurred, from lobbying (line 11d), to investment management (line 11f), advertising and promotion (line 12), and repairs and maintenance (line 24, other).

Reading these numbers can give us a good sense of how wisely an organization spends its funds. If the number in the advertising and promotion line is exorbitant, we could argue that the organization cares more about its public image than the programs it claims to support. This could undermine its credibility.

One large number in the Catalyst document is its occupancy figure (line 16), or the rent it pays for its office space. This figure is \$859,594, or \$71,633 per month. With 107 employees, this comes out to about \$670 per month per employee. We all know that New York rents are expensive, and the total rent constitutes only 6 percent of the organization’s total expenses.

Still, it's worth considering whether the rent, in addition to the high salaries it pays its key employees, affects the organization's credibility.

11	Fees for services (non-employees)			
a	Management	42,500		
b	Legal			
c	Accounting	2,321		
d	Lobbying			
e	Professional fundraising services See Part IV, line 17			
f	Investment management fees			
g	Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)			
12	Advertising and promotion			
13	Office expenses			
14	Information technology	1,560		
15	Royalties			
16	Occupancy			
17	Travel			
18	Payments of travel or entertainment expenses for any federal, state, or local public officials			
19	Conferences, conventions, and meetings	7,052		
20	Interest			
21	Payments to affiliates			
22	Depreciation, depletion, and amortization			
23	Insurance	6,583		
24	Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O)			
a	MAGAZINE PUBLICATION	52,455		
b	ANNUAL CONVENTION EXPEN	41,699		
c	MERCHANT FEES & BANK CH	7,937		
d	OTHER PROGRAM EXPENSES	7,924		
e	All other expenses	5,519		

World Clown Association

World Clown Association's expenses include management (line 11a), which comprises about 12 percent of its total expenses. This suggests that the organization pays another company or organization (or an individual) to run its day-to-day operations. While the member volunteers listed in Section VII do some of the organization's work, a professional manager or managers is charged with making the organization function. That's not an exorbitant cost, especially compared to Catalyst's 73 percent spent on salaries. And unlike Catalyst, World Clown Association pays no rent.

Comparing these two organizations' numbers gives us a sense of the diversity of nonprofit structures, and the various costs that contribute to an organization's overhead, that is, what it

spends on itself. While some organizations like [Charity Navigator](#) provide evaluations of nonprofits' program expenditures, you now know where such evaluations come from, and you can conduct them on your own using the figures listed in a nonprofit's Form 990.

In sum, an organization's Form 990 provides the journalist or strat comm professional a wealth of unvarnished information about a nonprofit organization that potentially can be used to evaluate the credibility of the organization, and help determine its appropriateness as an information source.

A Practitioner's View



Susan Henderson

B.S., KU Journalism, 1995

Director of Marketing & Communications

Wholesale & Specialty Insurance Association (WSIA)

As the communications professional for an insurance trade association, I am frequently called upon as a source of information on behalf of our members, who work in a complex niche of the insurance industry.

Reporters often don't fully understand the nuances of that market, but I can provide them with industry research, trends and demographics, and I can also quickly facilitate interviews with professionals who are experts on specific topics. Writers are always working under deadline, so my goal is to help them gather credible information that puts the association, our members and the media in the best position to tell the story and creates a win for all of us.

To ensure that we are credible and have current information, WSIA commissions research on the industry, gathers information from our members, and shares research with other industry trade associations. That broad source of facts helps me be a trustworthy source for media, but it also underscores the importance of working with trade associations for research; I do it, too.

While our members are experts in certain facets of insurance, we regularly collaborate with related associations whose members' interests intersect with ours. Those partner associations make my job easier as the experts in their arenas, just like I do for media.

As we work on legislative and regulatory issues of interest to our collective members, where we essentially become the storytellers with elected officials, those nonprofit partners as sources of information are key to our success.

Activity 1: Nonprofit Categories

Identify an issue to cover in an article or a strategic communications report. Find one or more organizations in each of the following categories that may serve as sources for this article or report: trade associations, professional societies, advocacy organizations, foundations.

Activity 2: Spokesperson Contact Info

At each of the organizations you identified above, find the name and contact information of an individual you can contact, who might serve as a source for the article or report on the issue you identified.

Activity 3: Form 990

Download the most recent Form 990 for one of the organizations you identified, and articulate 2-3 credibility arguments about this organization using evidence gleaned from this form.

Scholarly Research

KARNA YOUNGER

Learning Objectives

After reading this chapter, you will be able to:

- Understand the creation process and purpose of research studies.
 - Articulate strategies for reading scholarly sources.
 - Understand how the creation process and purpose of scholarly sources contribute to their credibility.
-

That Research Study Sure Makes You Look Smart

The jobs of communications professionals often center on consuming complex information, and translating it into advertising campaigns, press releases, or news articles that busy, average people can relate to, read quickly, and learn from.

As a communications expert, you will increase your credibility if you consult the work of other experts. As a college student, you probably have caught on to the fact that you are surrounded by experts, such as your professors, who research and produce scholarly information.

Journalists and strategic communicators can benefit from research studies in a couple of other ways. First, new research studies often present unique insights or information that isn't

general knowledge yet. Journalists looking for new story ideas sometimes will turn to freshly published research studies. Strategic communicators can get a leg up on the competition by reading new research about their clients' fields.

Second, the authors of research studies and those they reference are ready-made interview subjects. Researchers are experts in their fields, and they usually are well-practiced in discussing their work, so they often can talk about their research in a more succinct, friendly manner than their written work.

In this chapter, we discuss scholarly research studies like the ones that many of your professors produce. Research studies are known by many different names: scholarly sources, peer-reviewed sources, and academic literature, among others. We start by discussing peer-reviewed sources, and focus on how the creation process and purpose of research can contribute to their credibility. Then, we share strategies for accessing and reading research studies.

Scholarly Research Is a Conversation

University faculty, that is, many of the professors who teach your classes, spend their entire careers learning the everything of a topic, right down to the most boring details, which they find absolutely fascinating. They then publish journal articles or books based on their research.

Research studies don't exist just so a bunch of stuffy people can bore the rest of the world. Many of your professors, librarians, and other members of the faculty are hired to research and produce scholarly material. Why? Because universities are about the production of new knowledge. Universities are measured by the research output (articles, books, patents, etc.) that their faculty members produce, and by the research funding they generate. As a result, many of the things that make our lives easier and richer today were invented through university research, as [this article in The Atlantic magazine enumerates](#).

Academics write for each other and for the rest of us. Over the course of their careers, academics write and publish their work so that other experts can read and respond to their findings by publishing their own work. This publishing practice creates a scholarly conversation and a community.

Most members of the public do not participate in this conversation. As a university student who produces his or her own research, however, you do participate in this conversation. All members of this scholarly community strive to uncover problems and solutions, which are

seemingly endless, because new problems, evidence, and possible solutions are always popping up.

One way to plug into this ongoing conversation is to pay attention to the citations that authors use in their research. These citations indicate to whom an academic piece of writing is responding. When your English and history professors ask you to cite your sources, they are really asking you to show the scholarly conversations that your writing is a part of. Citations allow readers to locate and read the same sources as the authors of academic writing, so that they, too, can participate in this scholarly chit-chat. Scholarly research articles and their citations give readers a deeper understanding of a topic.

All research studies share a larger purpose of educating people who are engaged in a scholarly conversation. Let's examine the process and purpose of research studies more closely using the characteristics we introduced earlier, including purpose, research, length, editing, time, and ease of creation.

How to Recognize Good Research: Format as Creation Process

The world seems full of research, and it's sometimes hard to tell the good stuff from junk science. Librarian [Kevin Seeber](#) recommends focusing on the creation process of information to determine its credibility. We also recommend that you use this process to identify and evaluate research studies.

[Seeber suggests](#) considering several factors of the research and publication process to determine information type: the time it took to research and publish the piece, the amount or quality of research conducted before writing it, the editing process, the length of the piece, and how easy or difficult it was to create the piece.

You could use a scale that considers all these factors to determine how the different information sources you encounter, like tweets, Wikipedia postings, articles of all types, and books, stack up against each other. Chances are you are doing a version of this already.

The other element that helps us evaluate the creation process of information, and to assess its credibility, is the information's purpose. In other words, determining why and for whom the information is published. Thinking through the creation process goes hand-in-hand with thinking about the information's purpose.

To get a better sense of these concepts, let's use this evaluation process to analyze a tweet, and then compare this to an evaluation of a scholarly article.

Example 1: A tweet

Let's walk through a tweet together to get a sense for how this whole "format as a creation process" works. [Exhibit A: adorable dogs doing their own research](#).

[@dog_rates](#) I got my friend your book but I think her pets might appreciate it a little more [pic.twitter.com/BIsCNBljko](#)

— Patrick Foley (@Bevolent) June 11, 2018

While we are not certain how long the dogs were reading and researching their books, we can probably make some accurate judgements about the human purpose and process behind the tweet. Let's walk through evaluating this tweet using the criteria we introduced above.

Purpose. Why and for whom did the author create this tweet? We could safely assume that the tweet exists for the enjoyment of people trapped at work or in class, who are in desperate need of a dog fix. If we generalize this, people tend to create social media posts to express what they are doing, often in amusing ways, to followers. The author of this tweet likely wasn't looking to be seen as an expert in anything dog-related, but as someone with a sense of humor, and an appreciation for dogs.

Research. We might guess that the human who posted these photos didn't really do too much research before doing so. How can we tell? Well, the author of the tweet doesn't reference or cite anything other than [WeRateDogs](#), a delightful Twitter account dedicated to rating dogs on a cuteness scale of 1 to 10. But the purpose of this reference only is to send the tweet to the dog-loving account, not to document any research the human user did.

Length. It's a tweet. The user didn't come close to his 280-character limit, and it takes us a hot second to look at those dogs and love them. Short and sweet is this tweet.

Editing. This looks like a point-click-and-post job. The photos appear to be natural shots that haven't been Photoshopped. Plus, there isn't any standard punctuation used. It may be safe to assume that the dog-loving user typed and posted the tweet without reading over his statement or having anyone else edit it.

Time. Looking up the [WeRateDogs](#) handle (@dog_rates) may have taken a second, and staging and taking the photo may have taken a minute. All said and tweeted, though, the whole process probably took no more than five minutes.

Ease of creation. It looks as though this tweet was pretty easy to create and publish. Prop

up a book in front of a dog, don't care if the cat photobombs, snap the pictures, and post them along with a fragmented sentence. Many folks familiar with Twitter and their phone camera can complete these tasks pretty quickly. Plus, Twitter allows almost anyone to create an account, and it doesn't charge users to post content. So we know that the poster probably didn't have to jump over any difficult hurdles to make this tweet happen.

Summary. We determined that a tweet does not take much time or effort to research, edit, or create, because it is so short and usually is an act of one person, and not delayed by any editorial or peer-review process. The quick turnaround time and accessible platform encourages a variety of people to share their thoughts with the general public. For these reasons, a tweet can be useful if we want to know regular people's perceptions of a trending or current topic. For instance, during the 2018 World Cup, many journalists dotted their articles with social media posts in order to report on [the reactions of fans](#), or on [how the media was covering and tweeting the action](#).

The research-less and easy process behind social media posts make them suitable for quickly sharing news with others, and for keeping your finger on the pulse of trending topics. But it may not be the most credible source if you are wanting a deeper understanding of a topic. To gain such deeper understanding, you will need to consult sources that have been developed over time and with more research.

So, next, we use the same evaluation criteria to assess a peer-reviewed article. Consider the differences between these two sources, and why your professors insist that peer-reviewed sources are good sources of information.

Example 2: A peer-reviewed article

We illustrate the process of creation and purpose of peer-reviewed research with this article: [“The Impact of a Therapy Dog Program on Children’s Reading Skills and Attitudes toward Reading.”](#) The article is written by three researchers from The College of New Jersey, and published in the *Early Childhood Education Journal*, which is owned by [Springer Publishing](#). (We found this article by searching for the terms “dog reading therapy” in the database [Academic Search Complete](#).)

Length. Most peer-reviewed articles are pretty lengthy. Peer-reviewed articles may have an abstract, introduction, literature review, methods, results, discussion, conclusion, and references. Not all of the sections may be present or labeled such in every article, especially if it is a humanities article. But all of these sections and the works cited or references sections can add up to 15 or 25 pages.

Our Therapy Dog Program article is no exception to the typical length. It is 16 pages of heavy text, charts, and citations.

Research. The authors of peer-reviewed articles must be transparent about the research they document. They usually will list the works cited or consulted at the end of their articles, and fill their pages with footnotes, endnotes, or in-text citations. They do this to properly credit ideas to their original authors, and to demonstrate their own knowledge of a larger scholarly conversation.

Other indicators of research in a peer-reviewed article may be a literature review and a discussion section of the findings. If an experiment or another measurement was conducted, there will be details of the research methods, and tables and charts illustrating the results. While all peer-reviewed articles will cite other works to prove that they are engaged with a scholarly conversation, these other elements may not be present or clearly labeled. What matters is that there is evidence that the author conducted research.

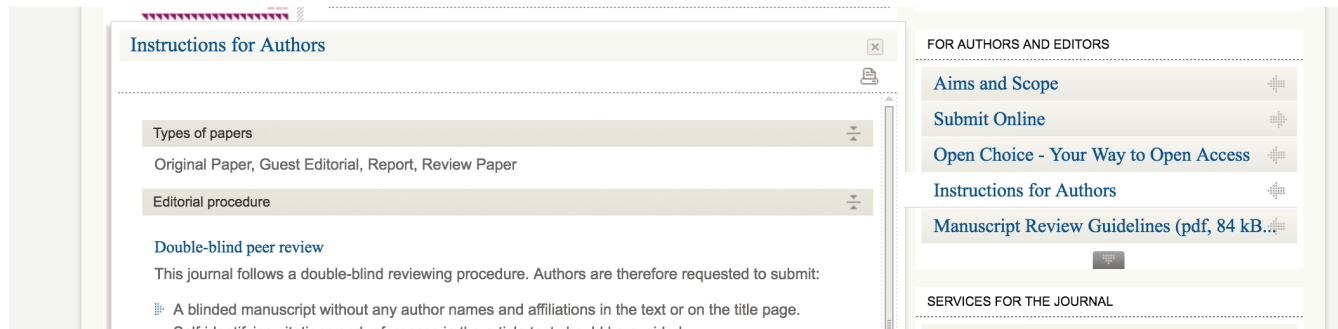
Let's take a look at our dog article. There is a literature review, in-text citations, and more than a page of references. The authors also included charts of their research and summaries of their interviews, alongside a summary of their methods, and a discussion section. By discussing and citing other authors' works, the authors clearly communicated that they were informed of the latest research, that they were participating in a greater scholarly conversation, and that they contributed their own original research to this conversation.

Editing. After researchers write, re-write, self-edit, and ask a buddy to look over their article or book, they often submit it for publication at a university press or in an academic journal. At least two other experts in the same field, called referees or reviewers, read the manuscript. This is where the "peer-reviewed" in peer-reviewed research comes from. In many cases, the referees do not know who authored the article, chapter, or book, and the authors don't know who their reviewers are. This is called a double-blind peer review.

Once they have read the manuscript, the referees tell an editor or publisher to reject, revise, or accept the article or book for publication. Acceptance rates at many peer-reviewed journals are as low as 5 or 10 percent. If the manuscript is accepted for publication, a copy editor then edits the article or book for writing mechanics and style. The publishing company that owns the journal or publishing house then prints or disseminates the work. These publishing companies often are large conglomerates, like [Springer](#) and [Elsevier](#) (more on them later).

The Dog Therapy Program article is published in a journal as opposed to a magazine, which usually means that it is probably peer-reviewed, and that it probably followed all of the steps we just listed. To make darn sure that this is a peer-reviewed source, we can click on the

hyperlinked journal name in the database, or Google the name of the journal (that is, Early Childhood Education Journal). Then we find a link that says “Instruction for Authors.”



The “Instruction for Authors” opens with an explanation of the double-blind peer review process. After this is a long list of formatting and editorial procedures authors must follow to be accepted for review. Finally, the “Manuscript Review Guidelines” tell reviewers all the things they should consider and edit while reading a manuscript. Based on these documents and the look of the final article, we can safely conclude that the authors and reviewers did a lot of editing, both before and after the authors submitted the article to the journal, which was published and disseminated by Springer.

If you don’t have time to click around a journal’s instructions for authors, a library database called [Ulrichsweb](#) indexes academic and non-academic journals. You can type a journal’s title into the database and see whether it tells you that the journal is “refereed,” which is its name for peer-review.

Time. It’s OK if you took a nap while reading our long section about the editing of peer-reviewed sources. You can only imagine how many naps authors have to take when they are living through the peer review and publication of their research. The publication process of peer-reviewed research may take years. Why? Because academics want to make certain that they know what they are talking about before they put it before a scholarly audience, who will go over the work with the most fine-toothed comb you have ever seen. So after researchers have spent at least a year developing and writing an article, it will go through the peer-review process, which can easily add another year. As a rough estimate, it can take at least two years to create a scholarly article. For a scholarly book, multiply that number a few times.

How about our dog article? If we look at the clues in this article, we can see that the authors started conducting experiments in 2010, interviewed their subjects, read a lot of research on the topic, and, finally, wrote the article. They published it in the online version of the journal in 2015, and in the print version of the journal in 2016. (It is now common for journals to publish a digital version online first, and wait some time before printing a hard copy.) It seems

like it took these researchers five or six years, from start to finish, to publish this article. That's longer than most of you will spend in college!

Ease of creation. Typically, peer-reviewed articles are on the difficult side of ease because of the research, editing, and time that goes into creating them. In other words, as far as ease of creation goes, peer-reviewed articles are about the exact opposite of tweets.

Based on our discussion above, the dog therapy article was probably pretty difficult to create.

Purpose. What is the purpose of the dog therapy article? First, it likely was written for other researchers who study how children can better learn to read and enjoy reading. Second, the article may be used by future teachers and school reading specialists who come across it in their undergraduate or graduate research. Third, the reading method this study presents could be used by teachers or parents to help kids learn to read. Finally, since professors are evaluated on their research, publishing this study probably helped the authors keep their university gigs and advance their careers.

Summary. Our dog article, similar to all peer-reviewed sources, involved a great deal of time, research, review, and editing. This is what differentiates peer-reviewed sources from other sources, such as tweets and daily news articles. The authors of the article went through the grueling peer-review process geared to ensure that their final product would positively contribute to the scholarly conversation and community.

The peer-review process is intended to assure the reader of the author's credibility. You probably have heard your professors extol the virtues of peer-reviewed sources. Some of them maybe even made you write papers using nothing but peer-reviewed sources.

The peer review part of the peer-review process is one reason why many professors hold these sources in such high esteem. It's about quality control. Having at least two experts review a piece of writing and judge whether or not it should be published ensures, to a certain degree, the quality of the published research. Note, however, that this process is not fool-proof. You must rely on your own judgement and subject knowledge to determine if a source is credible.

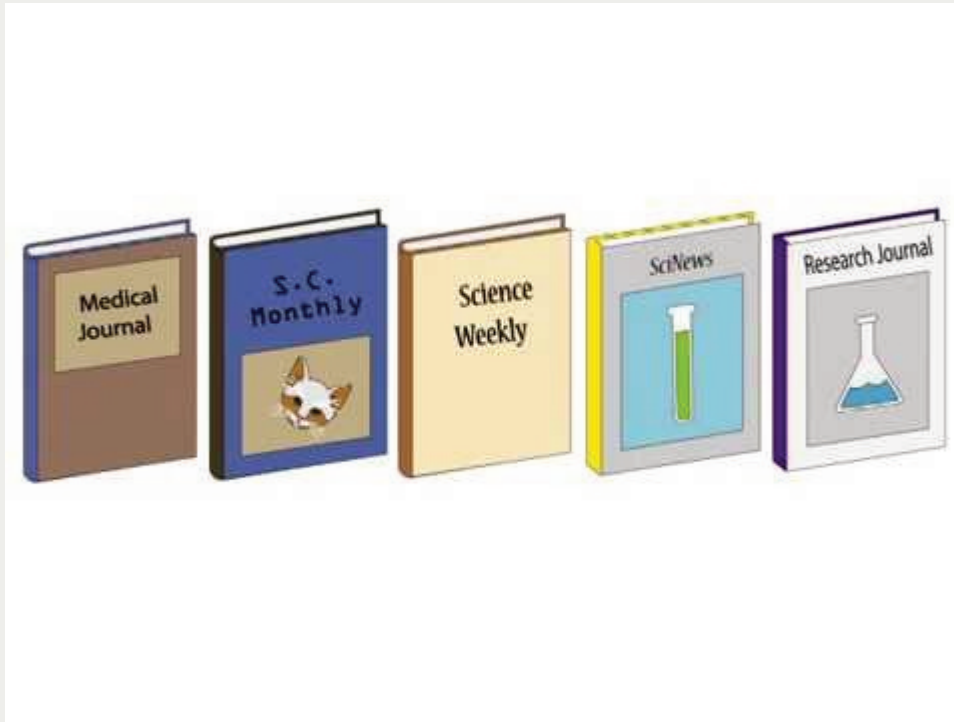
If you are still fuzzy about the creation process and purpose of peer-reviewed scholarly articles, watch the following tutorial for more tips and information.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=566>

Accessing Research: The Big Business of Scholarly Publishing

Now that we know more about the value of research studies, let's discuss how to access them. To do this, let's first understand how academic publishing works. Watch the following video from North Carolina State University Libraries for a brief overview.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=566>

While this video discusses journal articles, journals, databases, and libraries, it says very little about the money that this academic publication process generates. For example, how much money does a journal's publisher pay a professor to publish an article in its journal? The answer is nothing. Academic researchers get paid zero dollars for their published articles, and very little for every sold copy of a book they publish. Peer reviewers do it for funsies, too: [they aren't paid](#) for their labor either.

The biggest publishers of scholarly literature are [Elsevier](#), [Taylor & Francis](#), [Wiley](#), and [Springer](#), including their subsidiaries such as [Springer Nature](#). While these publishers do not pay authors for their work, they turn around and charge individuals and libraries hefty sums for access to the journals and books they sell.

These publishers also create their own databases that index their journals and journal articles. They then charge individuals and libraries for access to these databases. Because they

control multiple databases, these publishers also create database bundles, and sell those to libraries. Think of bundling as a mystery box of databases that you may or may not need, but definitely will pay for. Such bundles may or may not be cost effective for libraries to buy.

Libraries pay a lot of money to subscribe to databases that contain peer-reviewed scholarly sources. In the 2017 fiscal year, the [University of Kansas Libraries](#) paid more than \$1.1 million for the year's subscription to databases from [Elsevier](#) and its subsidiaries, according to Angie Rathmel, associate librarian and head of acquisitions and resource sharing. Additionally, KU paid almost half a million dollars for Wiley database subscriptions. Some of KU's bargain databases come from companies that only charge around \$200,000 a year.

These access costs are rising, even though library budgets remain stagnant. As a result, many libraries are [canceling their subscriptions](#). In recent years, KU has hit the decline button for its Springer bundle of databases. After [ditching its \\$315,000 bundle](#), KU now only subscribes to select Springer journals, which saves the libraries more than \$100,000 annually.

If you get the sense that there is something odd about the scholarly publishing marketplace, you aren't alone. Think of how many colleges and universities there are in the country and in the world. Each is paying more or less than KU, which, as you can imagine, adds up. Elsevier pulled in just under 2.5 billion British pounds in the 2017 fiscal year, according to its parent [company's annual report](#). This publisher's profit margin is higher than those of Google, Apple, or Amazon, according to [The Guardian](#).

Did we mention that none of the creators of the content are paid for their work? "In effect, universities, and the public that supports them, are charged twice (and more) for research: once to produce the research and again to access it," wrote KU's Marc Greenberg, professor of Slavic Language and Literatures, and Ada Emmett, director of the Shulenburger Office of Scholarly Communication & Copyright, [in a scathing indictment of the system](#). In other words, publishers like Elsevier aren't exactly known for their generosity of spirit.

Google and the paywall problem

Scholarly publishers' drive to make money is the reason why Googling usually doesn't work when looking for peer-reviewed research studies. Take a look at the screenshot below. Does it look familiar?

1



Purchase PDF

Export ▾

Outline

Abstract

Introduction

The Roots of Information-Seeking Research

Motivation

Critical Thinking

Learning Theory

Information-Seeking Behavior

Conclusions

References

Show full outline ▾

2



The Journal of Academic Librarianship

Volume 31, Issue 1, January 2005, Pages 46-53



Information-Seeking Behavior in Generation Y Students: Motivation, Critical Thinking, and Learning Theory

Angela Weiler (Instruction Coordinator, Circulation Director) ✉

Show more

<https://doi.org/10.1016/j.acalib.2004.09.009>

[Get rights and content](#)

Abstract

Research in information-seeking behavior, motivation, critical thinking, and learning theory was explored and compared in a search for possible motivating factors behind students' dependence on television and the Internet for their information needs. The research indicates that only a very small percentage of the general population prefer to learn by reading.

Choose an option to locate/access this article:

Check if you have access through your login credentials or your institution.

or

Purchase

or

> Check for this article elsewhere

Check Access

It's a paywall. While you may be able to use Google to discover that this article exists, you won't be able to access the full article because it is hidden behind a wall that will come down only if you pay for it to do so. Access to this one article costs \$35.95.

Fortunately, as a university student, you have the privilege of accessing these materials without having to pay \$35.95 out of pocket. The answer to your problems is library databases, a type of closed source of information.

Closed Sources

“Closed” is a term applied to information that is housed behind a commercial publisher’s paywall. Many of the sources hidden behind these paywalls are research studies housed in library databases. Accessing these sources through your libraries’ subscriptions is key to getting past paywalls without coughing up your lunch (and dinner) money. Here we briefly discuss using library databases and Google Scholar to access closed research studies.

Library databases

As a student, you have access to the databases and scholarly literature to which your university’s library subscribes. At KU, all databases are available through the [libraries’ website](#), under “Find” and “Articles and Databases.” You can then use [the subject listing](#) to target databases related to your topic, or access specific databases from the alphabetical list.

Here are some tips for using the databases:

- Refresh your searching skills by reviewing Search More Effectively chapter. You can customize your searches by using the operators covered there (e.g., quotation marks, AND, OR, etc.).
- KU Libraries has several tutorial videos that offer useful tips for searching databases.
- To make sure that you are searching scholarly or peer-reviewed publications, you can click “scholarly” or “peer-reviewed” on the left-hand side of your results screen. You can also look up the “about,” “for authors,” or “submissions” sections on any journal’s or publisher’s website, for descriptions of the publication process.
- Remember that citations are windows into an ongoing scholarly conversation. So if you find one good scholarly source on your topic, you have found the mother lode.
 - Pay attention to in-text citations and skim the works cited or references pages to identify other scholarly sources on your topic.
 - Look up citations using the libraries advanced search option under the “Quick Search” on the libraries’ homepage.
 - Enter at least two search criteria to get your article: ex. “Title” AND “Journal Name” or “Journal Name” AND “Author Name” or “Title” AND “Author Name.” Don’t forget to put the names of the journal or article in quotes to save time.
- If off campus, remember to log in using your university ID and password to get

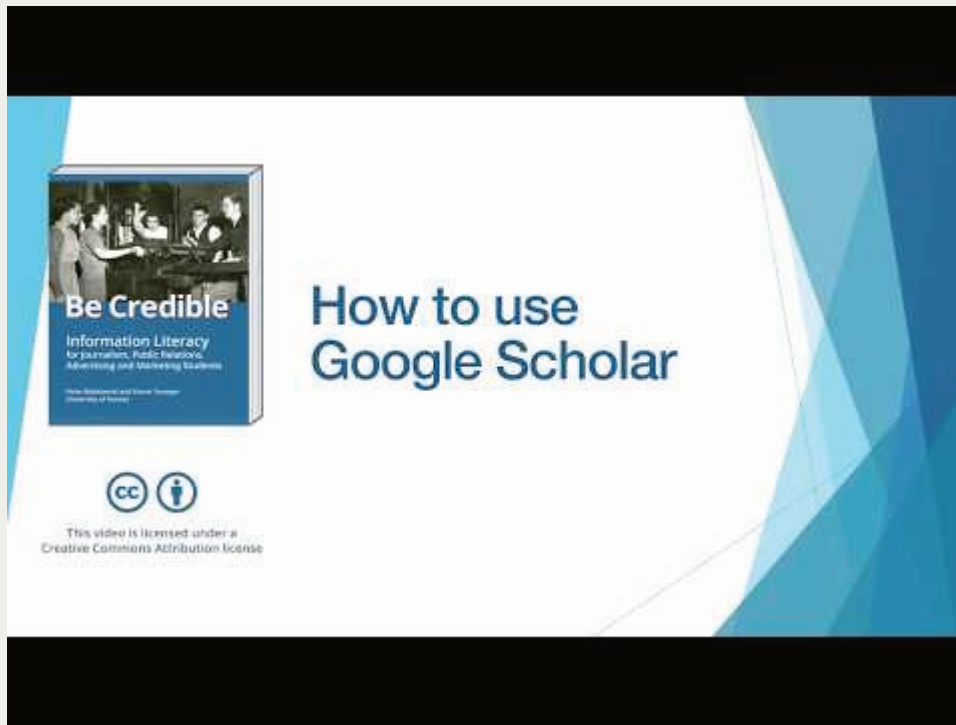
around our firewall (which we are required to have by good folks, like those at Elsevier, to prevent anyone not affiliated with the university from freely accessing the information).

Google Scholar

[Google Scholar](#) is a Google search engine that indexes some research and returns results of scholarly articles and books (and, if you want, patents and some legal cases). Many of the items indexed by Google Scholar are hidden behind paywalls, though, and many more not indexed by Google Scholar are hidden behind paywalls. This means that you likely will hit a paywall while using Google Scholar or miss out on an important work not available through Google Scholar.

If you want to use Google Scholar, that's fine. But be smart about it. Access Google Scholar through the [library's list of databases](#). Doing so will sync up your Google Scholar search with materials available through the library. You may still hit a paywall if the library does not have access to a particular article, but your searching will go a lot more smoothly.

The following video presents tips on effectively using Google Scholar.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=566>

Open Sources

Sources that are not hidden behind paywalls are commonly called “open” sources. Many open sources are available as a result of the open access movement, which works toward making information freely accessible outside the scope of the profit-making commercial publishers.

Open access supporters are [working to make scholarly information as freely available as this textbook](#), so there is hope that one day we will be able to Google peer-reviewed articles and read them for free. When searching material that is open, you will find a mix of stuff, and the credibility of this stuff sometimes may be difficult to ascertain. This is why it is important to use the process of evaluating a study’s creation and purpose we introduced in this chapter.

Two open access tools include the Directory of Open Access Journals, which hosts peer-

reviewed sources, and KU ScholarWorks, a repository for research and other materials produced at KU.

Directory of Open Access Journals

Some peer-reviewed journals publish materials openly and for free, without the help of the big, commercial publishers. These journals are of the same quality as those hidden behind paywalls.

The [Directory of Open Access Journals](#) is a good tool for discovering these journals. The directory indexes the content of nearly 12,000 open access journals that do not put up paywalls. Despite this large number of indexed journals, this should not be the only place you look because, unfortunately, not all journals are open. The [Directory of Open Access Journals database](#) is like other library databases, so use the same smart search strategies you use elsewhere.

KU ScholarWorks

Until all journals are published openly, authors and proponents of the open movement have developed institutional repositories to access peer-reviewed literature. An institutional repository is basically a website where scholars upload their stuff so that anyone with internet access can read it.

[KU ScholarWorks](#) is KU's institutional repository. KU was [one of the first universities](#) in the nation to establish a repository for research publications, making the information open and freely available to anyone with internet access. KU's [open access](#) policy asks KU scholars to deposit copies of their work in the repository, and it asks editors to open their journals. This means that whether or not an article was published in a closed (paywalled) journal, [we should be able to access it freely](#).

[KU ScholarWorks](#) contains publications by faculty, staff, and students. There are a number of peer-reviewed sources, such as articles from [open journals published at KU](#), and pre-prints of journal articles. Additionally, there are conference presentations, theses, dissertations, and more.

Searching KU ScholarWorks is pretty simple. Using the search box, just type in your keywords, or the name of an author, and roll. Keep in mind that other universities have their own repositories, so if you are looking for work by a specific author, look for a research repository at his or her institution, and search for his or her research there.

How to Read Research Studies

Reading scholarly information can be difficult at first, but there are methods to make this task easier. First, it is often best not to read a research study from beginning to end, like a novel. Rather, it's easiest to read it out of order, in chunks, and at least twice, in order to fully understand it.

This sounds like it will take forever to read an article, but these methods will actually save you time. You will need to experiment with your reading preferences to figure out what works best for you. Below are some reading tips to help you do that.

First, recognize the formula of the article. Many research articles are written in a formulaic way. Sandwiched between an introduction and a conclusion is the meat or body of the paper, which lays out the author's argument through a literature review, methods, results, and discussion.

Think back to a time when you wrote lab reports in a chemistry or a biology class. You might remember that your reports contained these same sections. These sections usually are clearly marked in science, medicine, and social science articles. Social science includes subjects like psychology, sociology, political science, and communication. Humanists (i.e., people who study subjects such as literature, history, art, culture, gender), however, may not label the sections of their works in this manner, and may only use the demarcations of introduction and conclusion.

Scientific articles

[Here's a visual representation](#) of how a typical scientific, medical, or social scientific article is organized, and the order in which to read such an article. Here's a step-by-step discussion of this process:

- Start with the abstract. This italicized paragraph is like a miniature version of the article and will give you all the big highlights: the background or larger scholarly conversation of which the author is a part, the author's argument, and their findings or conclusion.
- Most of these articles report the collection of some new data. From the abstract, try to figure out how the data was collected, and who or what were the study subjects.
 - The most-used data collection methods are experiments, surveys (or questionnaires), interviews, focus groups, observations, and content analyses. Your study

used one or two of these.

- Most scientific and social scientific studies study people, but study subjects also can be inanimate objects, like laser beams or news articles.
- Articles that have the term “meta analysis” in the title or abstract are studies of other studies. They aim to establish what the research consensus is on a topic, that is, what most experts agree is true about a topic.
- After the abstract, look for hypotheses or research questions in the first couple of sections of the article. Hypotheses and research questions summarize the researchers’ goals in the study. They should give you a clear idea of the researchers’ focus. Look for “This article argues” or “This study aims to.”
- Read the beginning of the discussion section, which usually is the last major section in the article. This section again should summarize what the study tried to accomplish, what its results were, and what are the implications of these results. You can skip any subsections that list limitations or future research suggestions.
- If you want to plug into the larger conversation around the study’s topic, look through the citations listed in the literature review, or in other sections at the beginning of the article. This is where researchers establish what conversations their research fits into. Look for these citations at the back of the article in the references or works cited section.

Humanities articles

To read an article or book in the humanities:

- First, read the abstract, if there is one. This italicized paragraph contains the same loot as one in a scientific article.
- Read the introduction and conclusion until you understand their main points.
- Pay attention to any sentence that begins with something like “This article argues.” This is the author’s thesis statement or argument. Keep this in mind while dissecting the rest of the article and evaluating whether the author proved his or her argument.
- If you see a portion of the paper where the author is describing previously published books or studies, this is the literature review. Skip this part for now.
- Move onto the body of the paper, where the author is actually making their argument, not just stating it. Once you locate that, read this intensively until you have a good understanding of what the author is saying. Remember that this may not be labeled

clearly as the discussion, so you may need to skim the article to figure it out.

- Next, read the literature review to gain an understanding of the larger conversation the author is engaged in, and to identify possible sources to use in your own research.
- Finally, you can read the whole thing from beginning to end. Having broken down the article beforehand, this should go pretty quickly. Keep an eye out for any parts of the argument that you have lingering questions about, and read these parts more closely.

How to Evaluate Research Studies

In conducting a credibility assessment of a research study, draw on the evaluation criteria and methods we outlined and practiced in previous chapters: [Evaluate Information Vigorously](#), [Go Lateral With Cues and Evidence](#), and [Tap Into a Credibility Network](#). In addition, here are a few credibility considerations that are unique to assessing research studies.

Creation process

At the beginning of this chapter, we wrote about evaluating the credibility of research by thinking about how it's created. We used these considerations: how long it took to conduct the research and publish it; how much research was conducted, and what was its quality; the extent of the editing process; the length of the research report; and how easy or difficult it was to create the piece.

In general, the longer the research takes, the more hoops a researcher has to jump through to conduct the research, and the higher the barriers that the researcher has to clear to get the research published, the more credible the research tends to be.

In this chapter, we compared these characteristics in a tweet and in a peer-reviewed published study, and decided that the peer-reviewed study was more credible than the tweet. But the correlation between these characteristics and the credibility of research isn't always as direct. So, it's important to consider other elements of each study.

Verify the author's credentials

Most peer-reviewed studies are written by college professors or graduate students who have expertise in the field about which they are writing. You can verify their credentials by Googling one of these variations:

- Google the author's name;
- Google their name and their place of employment;
- Google their name and use the "site" operator, limiting it to educational institutions (i.e., "Jane Doe" site:edu);
- Look up the author's name in their university's directory (usually located on a university's homepage).

Consider the author's degree, education focus, and experience. That is, an author with a doctoral degree has more education than an author with a bachelor's degree, and the amount of education can affect credibility.

It also may be worthwhile to compare the field in which an author got their education, and the research topic. The more overlap there is between a researcher's education field and the topic of the research, the more credible the research may be.

Finally, the longer someone has been a researcher, and the more research their has published, the more credible they may be.

Once you have found sufficient evidence, you may summarize it along these lines: "Jane Doe obtained her PhD in public affairs and administration in 2007 from such-and-such university. Since then, she has taught undergraduate and graduate classes on X. Additionally, she has published several articles on X in Journal A, Journal B, and Journal C. Such credentials indicate that she is a credible source of information on X subject."

Read and evaluate citations and works cited

If you notice that authors cite many of the same sources, there is a reason for this. Frequently and commonly cited sources are called seminal works. Seminal works are ones in which a major finding is presented or challenged. Authors cite seminal works to demonstrate their credibility, that is, that they are well informed, and engaged with the major issues in their research field.

In order to be an informed and credible researcher yourself, you should do the same. Use [Google Scholar](#) or the [library's main search function](#) to locate commonly cited sources, and read and include seminal works in your research.

Evaluate the argument and evidence

This is probably the most difficult thing to do when learning about a new topic. Have faith in your own abilities to judge a source's credibility, though. Here are some tips:

1. Question an author's evidence. Scholars must back up their opinions with facts. Make certain that they are fairly representing their research. For example, if the author is studying college students' attitudes about X, make certain that they interview or survey college students to directly seek their opinions. If they only talk to parents of college students, the author is misrepresenting their work.
2. Compare arguments. If two of your sources make argument A and one makes argument B, consider the evidence they use and decide which one seems most plausible to you. Just remember to back up your decision with evidence as well.
3. Check the representativeness of their research.
4. Double check their sources. If four of your five sources all cite and rave about a particular publication in their literature review, that probably means that is an important work. If your fifth source doesn't cite this source, it could be an indication that the scholar is not the most knowledgeable authority on the subject.

Conclusion

Research studies are available through library subscription databases and freely on the web. There are closed and open research studies, which refers to how people access the information.

If the information is behind a paywall, it is closed, and best accessed through a library database. If it is open, it is freely accessible through an open access journal site, the Directory of Open Access Journals, or an institutional repository. Using Google or Google Scholar is possible, but you may hit a paywall, or not discover all of the information that's available. This is why it is best to search a mix of resources.

Research studies can be pretty dense, so it is important to take time to read, re-read, and digest them. Don't read beginning to end, and focus on the key information of each.

Finally, if you have found one good scholarly article, you probably have found 10 to 20 more. Scholars explicitly refer to each other's work throughout their publications and include a list of citations at the end. Track down and use these cited sources in your own work.

Activity 1: Search

Use one of the resources listed in this chapter to search for research on a topic in which you are interested. Locate and read one scholarly source and write a one-page synopsis of your findings.

In the first paragraph, summarize the article, the author's argument, evidence and how it is used. In the second paragraph, detail why the information will be useful to your project, how it relates to other information you have found, and how it will support your argument. If you disagree with the author, explain why, and support your explanation with evidence.

Activity 2: Open pedagogy

Create a tutorial for one of the tools for locating research studies listed in this chapter. Explore the tool's search functions, information, ease of use, limitations, and other positive and negative features.

Using your findings, create a tutorial that demonstrates how to use the tool. Your audience for the tutorial is one of your fellow classmates. You may use whatever technological tool you wish to create your tutorial, which should run approximately 2-3 minutes.

Data

KARNA YOUNGER AND CARMEN ORTH-ALFIE

Learning Objectives

After reading this chapter, you will be able to:

- Define data, differentiating it from information.
 - Identify open, privileged, and closed sources for data.
 - Recognize and consider ethical implications of using data, such as privacy and other concerns.
-

Using Data to Tell a Story

Over the last decade, there have been more than 52,000 unsolved homicides across 50 major U.S. cities. Even more disturbing, there are distinct patterns to where murders occur and arrests are or are not made, according to [The Washington Post](#). Surviving family members feel their loved ones have been forgotten by apathetic police. Police feel disconnected from members of low-income communities who are too frightened to speak out against violent gang members.

In its feature article on these murders, the Post brought to life multiple tragedies from Boston to Kansas City to Los Angeles, using the words of law enforcement officials, surviving family members, and community members. These witnesses attested to the multiple factors that

prevent community members from speaking out against crime and police from capturing the culprits. Their tales twist throughout the article and evoke teary eyes in an embedded video.

These heart-wrenching stories, however, do not prove that these unsolved homicide matter. They do not confirm The Post's credibility.

The numbers do.

The newspaper's transparent use of data was the key to connecting the dots between all of these deaths, and establishing article's credibility. The Post [made its data public](#) and detailed the methods its data reporters followed to collect, clean and crunch the data into interactive maps that illustrated the story's argument.

Reporters collected data from police departments and filled in the departments' gaps with public records, including death certificates, court records and medical examiner reports. As a result, the Post's homicide report "is more precise than the national homicide data published annually by the FBI," the newspaper explained. The Post faulted federal data for failing "to distinguish whether a case was closed due to an arrest or other circumstances, such as the death of the suspect, and does not have enough detail to allow for the mapping of unsolved homicides."

What the Post accomplished is impressive and time consuming. Data journalism is a "[frustrating](#)" process, said Sarah Cohen, a New York Times data journalist who [won the Pulitzer Prize](#) for her investigative work with the Post. Transcribing data from paper and digital formats and making certain that it is "clean," or [machine readable for a program such as Excel](#), takes about 90 percent of a journalist's time on time-consuming projects, Cohen said.

Data are vital to the storytelling of journalists and strategic communicators. As seen in the Post's article, journalists' use of data allows readers to understand the bigger picture. By crunching the numbers and creating easy-to-use maps of homicide and arrest rates, the Post helped its readers see and understand that this is not just a matter of a few unsolved murders, but more of a national crisis. In other words, data enabled the Post to create convincing visuals and tell more stories of victims, survivors, and police in a way that would not have been otherwise possible.

Like journalists, strategic communicators need to use data to convey to key stakeholders the needs and achievements of their clients. For instance, strategic communications teams for The New York Times Company and other public businesses detail and synthesize data in [annual reports](#) to sell their companies as successful investment opportunities. Other com-

munications professionals use data to conduct [audience analyses](#), or to develop a company's [digital strategy](#) to better market a product.

Don't worry. By the end of this chapter, you will not be expected to launch a national investigation about how the FBI tallies homicides, or to decide why "Deadpool" fans would [love to rock Crocs shoes](#). Instead, in this chapter, we will define data, identify some places to access it, and briefly discuss some guidelines for using it in your own work. This will better prepare you to enter a world that is increasingly producing and consuming data.

Defining Data

Our worlds are saturated in data and [have been for some time](#), even if we do not even know it. Anytime you use a computer, buy something at a store or online, listen to music, or just live your life, you are encountering and creating data. But what exactly is data?

Data are "little points of information that are often not relevant in a single instance, but massively important when viewed from the right angle," according to journalist [Mirko Lorenz](#) in the "[Data Journalism Handbook](#)." In other words, data enable communicators to piece together numbers, pictures, words, and other forms of facts into big, meaningful pictures for readers.

More precisely, data are "statistics and facts collected for analysis," according to [Rob Stokes](#), an e-marketing executive and textbook author. A trick to recognizing data when you see it is to remember that data do not make any sense when you just look at them. This is because data lack context. Data with context are information.

For example, if you saw [a list of words on it including the word "river,"](#) you wouldn't really know what it was about, because you do not have the context, or greater understanding of what binds all that data together. But if you listened to [Leon Bridges's "River,"](#) the greater context of hearing Bridges sing that spreadsheet would help you understand the data to be lyrics, or information.

Even if you don't use it in your own work now, data will be important to [your future self](#). [Newsrooms in New York](#) and elsewhere are increasingly data-driven. Data is being implemented in [reporting](#) to make reporting more transparent and credible to readers. In the business of the news, data can be used to boost revenue by implementing such programs as [personalizing editorial content](#).

And don't think you will escape [data in marketing](#). Data is part of [marketing's future](#), too. So

be kind to your future self, and spend some time now learning about how to access and use data.

Data Access Categories

When you are looking for data, it is helpful to think to yourself, “Who would create or collect this data? Who is willing to pay for the data to be collected? Why did they do this? How can I get access? Is the data open or closed?”

To help you answer these questions, we will define and walk you through categories of data, based on your ability to access and use data: open, privileged, and closed. There are many, many different types of data, and not everyone will define and categorize data the way we do here. We will move through and provide examples of these different data access categories, from those that are easiest to locate, to the ones most difficult to access.

Open data

When data is open, it typically does not cost any money to access it via the internet. Open data can also be available in print because (1) it existed before the internet, and (2) to be available to people who [do not have reliable access](#) to the internet. Below are some, but not all, sources for open data, grouped by categories of data producers.

Government

All levels of government (federal, state, local) produce troves of data to enlighten government officials’ decisions and policies, to document oversight of entities and individuals, and to inform the enforcement of regulations. Much open government data is aggregated, macro-level (not identifying individuals), while other open government data is available at a micro-level (identifying individuals) as [records for public inspection](#).

The website [Data.gov](#) is a portal to hundreds of thousands of data sets created by various government agencies across the country. Users can enter keywords into a search bar to find data sets related to their topics, or browse datasets grouped into 14 broad categories. The portal links users to data sets that reside on the websites of the various government agencies

that create them.

The screenshot shows the Data.gov homepage. At the top left is the Data.gov logo with an American flag icon. To the right are navigation links: DATA, TOPICS (with a dropdown arrow), IMPACT, APPLICATIONS, DEVELOPERS, and CONTACT. Below this is a blue banner with the text: "The home of the U.S. Government's open data" and "Here you will find data, tools, and resources to conduct research, develop web and mobile applications, design data visualizations, and [more](#)." Below the banner is a "GET STARTED" section with a search bar containing "Federal Student Loan Program Data" and a magnifying glass icon. Below the search bar is a "BROWSE TOPICS" section with a grid of 14 topic icons and labels: Agriculture, Climate, Consumer, Ecosystems, Education, Energy, Finance, Health, Local Government, Manufacturing, Maritime, Ocean, Public Safety, and Science & Research.

In addition to Data.gov, it can be useful to search the individual websites of these government agencies. Here's a very select list of government data sources:

- Kansas Department of Revenue
Check out financial statistics at the state, county, and city levels, place an open records request for such things as a driving record, and all things related to taxes (property, sales, liquor, life, and death).
- United States Census

Every 10 years the US government surveys the U.S. population to determine how many seats a state may have in the U.S. House of Representatives. Census takers tell the government about who people in the U.S. are (race, ethnicity, sex, age), where they live and with whom, and whether they rent or own their abode. Questions for the census have changed over the years, but these are some of the basics that help you understand more about the population in a general sense.

- **American Community Survey**
Conducted annually, this survey helps determine the distribution of state and federal funds. Learn about jobs, educational attainment, veterans, and housing in communities.
- **United States Economic Census**
Conducted every five years, this Census covers the small to big business in a variety of industries across the United States. It is helpful when you want to learn more about revenue streams for industries or the gross national product.
- **Census of Agriculture**
Data on farms and ranches, farmers, crops, and livestock. The census is conducted every five years.
- **National Center for Education Statistics**
It's got it all from K-12 through college. Turn to this source to analyze college costs, school characteristics, drop-out rates, retention, and school and student performance by state.
- **Bureau of Labor Statistics**
The BLS is known best for the national unemployment rate it releases every month. The Bureau's Occupational Outlook Handbook contains in-depth numbers about every occupation, including starting and median wages, and employment need projections.
- **Bureau of Justice Statistics**
Data about law enforcement, the justice system, crime, and criminals.
- **U.S. Department of Housing and Urban Development (HUD)**
Data on housing and housing costs, including government-supported housing.

Other organizations

Similar to open government data, other organizations collect data and make the data discoverable and accessible to the public. These organizations include non-governmental organiza-

tions (NGOs) such as nonprofits (foundations, associations, societies, charities, etc.), as well as for-profit corporations.

- **Kansas OpenGov**
Data about government spending in Kansas, including the entire state employee payroll. Other categories include school district, city, and county data.
- **Pew Research Center**
Pew is one of the most respected private research organizations in the United States. It is funded by The Pew Charitable Trusts, which was established initially by a wealthy oil family. The center consists of several distinct units, including ones that research Politics & Policy, Journalism & Media, Social Trends, Internet & Technology, and Religion & Public Life. Each of these units regularly releases research reports, and the datasets on which these reports are based.
- **OpenCorporates**
Brought to us by information from the World Bank Institute, OpenCorporates contains data about global companies. You can browse and search for specific companies and judge how well countries are faring in requiring companies to share their data.
- **globalEDGE: Your source for Global Business Knowledge**
Draws on more than 5,000 open data sources to create a user-friendly tool to discover and compare history, demographic, economic and political data by state and by country.
- **Open Elections**
Aims to turn all US election results into useable data. Its process involves converting handwritten county-level poll results into comma-separated value (CSV) files so that journalists may download election data to handy spreadsheets and crunch some numbers. Check out Open Elections' GitHub site to see the raw and in-progress data.
- **Open Secrets**
Allows you to look up who and which interest groups have made political donations, and to whom. Additionally, its staff provides timely and topical research reports on recent topics, such as the Women's March on Washington or how much money Facebook Inc. has given to the lawmakers who interrogated Mark Zuckerberg after a data breach. Finally, it also contains educational articles so that you can learn the ins and outs of political donations.
- **Transactional Records Access Clearinghouse (TRAC) Immigration Project**
Syracuse University houses this project that obtains U.S. government information regarding immigration through Freedom of Information Act requests, fact checks the information, and then makes it available to the public through reports or easy to use tools. With TRAC's materials, you can drill down to the county level to understand big

issues like deportation, Immigration and Customs Enforcement (ICE) raids and arrests, and immigration court activity.

- **Google Trends**
Find out what topics and news stories Google users are searching for across many countries. Google also provides visualizations for these analytics, which are searchable by topic and date.
- **Twitter Trends**
Many journalists and marketing professionals follow what's trending on Twitter to develop relevant stories and campaigns.
- **YouTube Data Viewer**
Amnesty International created this tool to check who and when someone uploaded a video to YouTube. Such data can help you determine the credibility of a YouTube video.

Privileged Data

We use the term privileged data to describe data that is not freely accessible. This data is available to you because you are in a privileged position. This privileged access might come from being a student at the university, an employee of a corporation, or from another means of privilege.

Let's consider your privilege as a student. The [University of Kansas Libraries](#) pays companies for access to their resources. These resources may contain data that is privately owned by marketing companies or other businesses. These resources also may present publicly available data in a new way, such as mapping U.S. Census data to provide data visualizations.

As a student, you have free access to all of these resources. That's your privilege. Once you separate from the university, you will no longer have access to this information unless you physically come to the library and use one of the public computers. Your future employer may subscribe to some of these databases, but you should enjoy them while you have access to them at the university.

The following databases are examples of what's available through the [KU Libraries website](#). Click "Articles and Databases" in the Find box, which is in the middle left side of your screen.

- **Mintel**
Mintel is a company that compiles and analyzes data on consumer and industrial mar-

kets. These reports are short, simple, visually appealing, and easy to digest. When using Mintel, make certain you pay close attention to the fine print on a piece of information. This is where Mintel will tell you where the company got the information. If possible, it is always good to track it down to the original source, such as the U.S. Census or Pew Research Center. (This textbook includes a video on how to use Mintel.)

- eMarketer
Research consumer trends and behaviors here. You can focus your search on a specific topic, industry, audience, or country. Like Mintel, eMarketer produces short and digestible reports. Also, you can export their data to an Excel spreadsheet and download chart images.
- Social Explorer
Social Explorer maps demographic data to give you and your audience a visual understanding of your argument. You can easily download data and visuals from Social Explorer, which is why news giants like The New York Times use it. Bonus: You can also annotate your maps with your scribbles, photos, and more.

Closed Data

Closed data is not open or easily accessible. Instead, it is privately held by companies, the government, and individuals. While it can be frustrating as a researcher not to have access to such data, it is important to consider the reasons why such data is not freely available.

Why some data is off limits

Money, money, money

According to [OpenCorporates](#), the United States scores 31 out of 100 for open company data. This is because people typically can only find basic information about private U.S. companies. Moreover, this information usually isn't downloadable, and it doesn't include some basic information like shareholder names.

Searchable data is available only from publicly traded companies. If a company is publicly traded, the U.S. Securities and Exchange Commission requires the company to make some information available, such as [annual reports](#) (also called 10-Ks). Privately held companies are not required to participate in such show-and-tells, so they usually don't, and there virtually is no private company data available for public use.

Just because you cannot access a company's private data doesn't mean nobody can. Many companies are willing to sell their data and their consumers' data for a price. Companies may sell consumer data to some of the privileged sources we discussed above, or to other companies, such as those discussed in the [chapter on Google](#).

The business of consumer data is very lucrative, and the average consumer often does not realize that "when an online service is free, you're not the customer. You're the product," [according to Tim Cook](#), Apple CEO and vocal critic of Google and Facebook. Cook again criticized these companies in 2018, during the unfolding of Facebook's [Cambridge Analytica](#) scandal, which revealed that Facebook users' data were appropriated to aid the Trump campaign. This time, Cook promised that Apple could make a "ton of money" if it trafficked in its users' data, but said that it refused to do so because he believes [data privacy is a human right](#).

Privacy

When companies release their customers' data intentionally to researchers or other companies, chaos and a whole lot of bad publicity can follow. For instance, back in 2006, AOL [released the search data](#) of anonymized users as part of a new initiative to aid academic research. Information scientists specializing in information retrieval downloaded the data in hopes of improving information retrieval systems, or designing more effective and efficient search engines.

Here comes the bad news. The [data revealed](#) people's habits, hobbies, interests, and other seriously embarrassing stuff that marketing companies were dying to find out. And even though the data was anonymized, it took [The New York Times](#) little time to identify a user and run a big story about how easy it was. This was so not good, considering the data revealed people and their searches for private issues that they were too embarrassed to ask another human being. AOL pulled the data and [apologized](#) before being sued for breach of privacy. The bad thing is, once such data is released, there is no stopping who has access to it. Even though AOL took down the data, more than 10 years later, some researchers who had already downloaded it continue to hang on to it.

Using Data Responsibly

Through your work, you may encounter a variety of the data listed above. You may also encounter data when a source or your boss provides you with basic figures, such as the cost of a new city initiative, or how much money your organization has fundraised. Whether you are dealing with small or big data, you should use it responsibly.

Be data literate

The first step to using data responsibly is to become data literate. Data-literacy “is the ability to consume for knowledge, produce coherently and think critically about data,” wrote data journalist Nicolas Kayser-Bril in the “[Data Journalism Handbook](#).” Becoming data literate isn’t as daunting as it may sound, though. To be a data expert, Kayser-Bril recommends asking three questions.

1. How was the data collected?

Kayser-Bril cautions to always check the source of your data to make certain that it is credible. Additionally, if you come across numbers that sound too good to be true or just seem off, then they probably are. It’s always good to verify numbers against other sources. In The Washington Post’s story about homicide rates we discussed earlier, for instance, reporters didn’t just rely on the numbers. They contacted family and friends of victims, residents, and local police to verify that homicides were unsolved. In other words, it is important to think critically about the information and question its accuracy.

2. What’s in there to learn?

Don’t take everything at face value. Check the mean, median, and mode of a study’s results to make certain you are not misleading people. For instance, one in 15 million Europeans may be illiterate, Kayser-Bril cautioned, but the same number of Europeans also are under the age of 7. Likewise, report data in terms of magnitude and not percentage, to convey how representative a study is. Write one in 100 instead of 1 percent, the data journalist advised.

3. How reliable is the information?

First, Kayser-Bril believes the reliability of data can often depend upon the research study’s sampling size, or the size and number of the subjects under study. For example, a survey may have a sample size of 1,000 people. When evaluating a study, keep an eye out for the margin of error, which ideally should be 3 percent or below. “It means that if you were to retake the survey with a totally different sample, 9 times out of 10, the answers you’ll get will be within a 3% interval of the results you had the first time around,” Kayser-Bril explained. Second, even if the sampling size and margin of error is reliable, you can always question if the researchers have successfully pinpointed the true cause of their results. We’ll discuss cause and causality more below.

Bias

It seems as though we just cannot get away from bias. If you use information from any government, it can carry a nationalistic bias. A for-profit company can produce data that makes

the company look good (corporate bias). A not-for-profit organization may have some benefactor it may want to make happy with its numbers.

Some data sources may oversimplify information so that it is easily digestible for their readers, or only produce data that people will want to buy. In other words, all those privileged data sources we mentioned above, like [Intel](#) and [eMarketer](#)? Those companies' agendas are to make money from the data they sell, and those agendas can influence the way these companies produce and present these data.

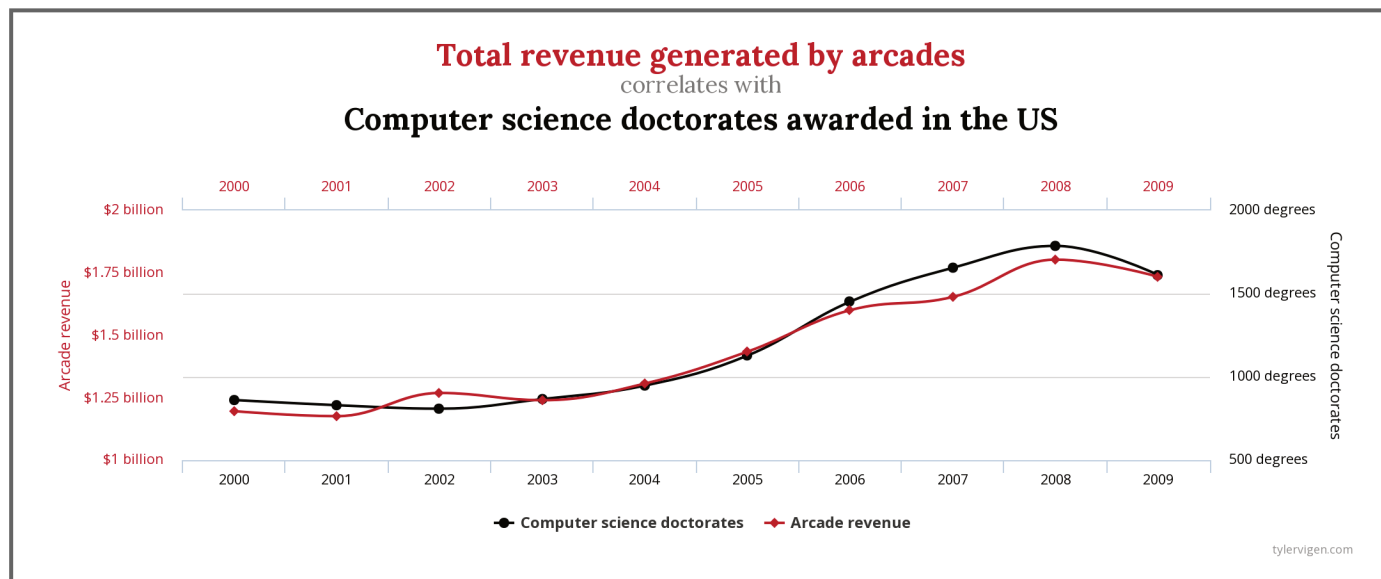
We realize that we may make it sound like you just can't trust anyone or anything, right? Well, the point is that you should be skeptical about what you read, but not to get so jaded that you become a cynic, as [veteran journalist Roy Peter Clark recommended](#). Being skeptical allows you to recognize some biases or shortcomings of the data you are using and to find alternative information to balance it out.

For instance, if you are reporting on high school dropout rates by race, you would want to use numbers from the [National Center for Education Statistics](#). But you would realize that this source can only give you the number of people who did not return to school, but not the reason why students left. This is because this source is limited by national reporting standards in education. That is, schools and school districts are required to report numbers to the states, and then to the NCES, but they are not required to report qualitative data that provide context for these numbers. As a result, you would want to interview students, teachers, or principals to get better insights into the causes for individual student dropouts. Drilling down to the individual level would balance the national perspective.

To help you avoid the pitfalls of bias, you should always chase down the original source of information, and research that source. The original source may be written as footnotes and endnotes in teeny, tiny print on a Intel infographic, for instance. Also, remain aware of your own implicit and explicit biases, and try to keep those in check. Include and discuss material that runs contrary to your thinking to reassure your reader that you are considering all possible angles. Finally, revisit our [bias chapter](#) for a quick refresher.

Correlation versus causation

Often when we are searching for an answer, we are not as skeptical as we should be because we have a deadline and we're busy. If we are researching how to boost revenue generated by arcades for a client, for instance, we may stumble upon the following graph:



This graph is one of hundreds of spurious correlation graphs presented on the website [TylerVigen.com](http://tylervigen.com). This graph shows that increases and decreases in arcade revenue closely match the increases and decreases in the rates at which people get doctorate degrees in computer science. The numbers don't lie, right?

Well, if we think about it, there really isn't a way we can prove that the graduation rates of computer science Ph.D.s *causes* a rise in arcade revenues. While the two rates are *correlated*, or rise and fall at similar rates and similar times, we do not know for certain that one is causing the other to happen.

Most correlations we deal with in real life aren't as ridiculous as this one. But too often, *our confirmation bias kicks in* anyway, and we accept an interpretation of data because it seems to make sense and agrees with our thinking.

If you aren't an expert in statistics, you are not alone. Don't be afraid to ask someone to fact-check your findings. You may also watch this [Khan Academy tutorial](#) to learn more, or read the [Data Journalism Handbook](#).

Conclusion

What we have covered is only a tiny sampling of the world of data. Becoming *data literate* is an ongoing process, and we encourage you to continue to explore different data resources and tools through real-life situations and online communities, such as [The Data Journalism](#)

Den, or the [data journalism Slack team](#), and the [Data Journalism Handbook](#) or [Stokes's eMarketing](#) textbook.

Activity 1: Existing Resource Tutorial

Create a tutorial of one of the data resources presented in this chapter. Explore the resource's search functions, information, ease of use, limitations, and other positive and negative features. Your tutorial should demonstrate how to use the tool efficiently and effectively. Your audience for the tutorial is one of your fellow classmates. You may use whatever technological tool you wish to create your tutorial, which should run approximately 2-3 minutes.

Activity 2: New Resource Tutorial

Identify and create a tutorial for a source that is not presented in this chapter. Explore the resource's search functions, information, ease of use, limitations, and other positive and negative features. Your tutorial should demonstrate how to use the tool efficiently and effectively. Your audience for the tutorial is one of your fellow classmates. You may use whatever technological tool you wish to create your tutorial, which should run approximately 2-3 minutes.

Activity 3: Data Research

Use one of the resources presented in this chapter to research your topic. Write a one-page synopsis of your findings. In the first paragraph, summarize your process of finding and accessing the information you found. In the second paragraph summarize the information you found. In the remaining paragraphs, detail why the information will be useful to your project, and how it relates to other information you have found.

Market Research

PETER BOBKOWSKI

Learning Objectives

After reading this chapter, you will be able to:

- Understand what market research is
 - View market research as a useful information source
 - Know how to access and read market research reports
 - Evaluate the credibility of market research
-

New Pet Store's News Release

Let's say that there is a new specialty pet store in town. The store bakes its own pet treats, and sells other locally produced pet food and accessories. The owner asks you to write a news release about the store. The news release will inform local news websites and TV stations about the store and, hopefully, generate some news coverage about the store's opening and unique merchandise.

Getting the basic facts for the news release is a piece of cake for you. Who is the owner of the store? What is this business about? Where is it located? When is the grand opening? How does this business distinguish itself from other pet stores in town? Why is this a good time to open a store like this? Your interviews with the store owner and her pet-parent friends con-

tain good background information and quotable soundbites. In no time, you have a solid draft of a straightforward news release.

But you are not fully satisfied. You wonder if there is a larger context for the opening of this business that you can mention in your release. Is this store part of a larger trend? Are there other stores like it opening elsewhere? How are pet stores doing, in general? You wonder if you can find a more authoritative source than the business owner about why a new specialty pet store is opening in your town.

You could go down the nonprofit route. Are there nonprofits that represent pet store owners or the pet supplies industry? You search Google and Guidestar. All that come up are links to humane societies and pet rescues. You wish there was some source that provided information about the pet store industry and about what pet owners are buying.

You're in luck! There are sources like this available to you, in the form of market research companies. These companies generate reports about industry and consumer trends, and sell these reports to other companies that use this information to plan and enact their business strategies. These reports can be bought individually or by subscription. Large marketing and advertising agencies, for example, tend to subscribe to these services for the benefit of the diverse clients they serve. A prospective pet store owner might buy only the pet store industry report to learn what her store should carry, and how she should market it.

As a student at the University of Kansas, you have access to market research sources licensed by the KU Libraries. These include: [IBISWorld](#), [Intel](#), [Plunkett Research](#) and [Euromonitor's Passport](#). Two of these, IBISWorld and Intel, will be described as we continue the discuss the pet food market.

IBISWorld's reports focus on individual industries, so you find "Pet Stores in the U.S." in its directory, and immerse yourself in the 33-page report on this industry. You learn that this is a growing industry, with revenues expected to increase steadily over the next five years. Rising pet ownership, particularly among millennials, and higher demand for premium and organic pet food, and specialized pet services, have driven this growth. However, there is strong competition in this space, with mass merchandisers (e.g., Walmart, Costco), grocery stores, and the two largest pet store chains — PetSmart and PETCO — exerting considerable pressure on smaller stores and the prices they are able to charge. You also learn from this report about the nonprofit for this industry, [American Pet Products Association](#), which could serve as a source for your release, especially since it conducts an annual survey about pet supply trends.

The Intel report titled "Pet Store Retailing – US" echoes IBISWorld's forecast for growing sales, but also identifies further challenges for pet supply retailers. Pet owners tend not to

be loyal to specific pet stores, but to make purchases based on convenience and price. The report suggests that specialty pet stores need to distinguish themselves by the exclusive brands they carry and by the unique experiences they offer, to compete with pet store chains, mass merchandise stores, and online shopping options.

Some of this information definitely can strengthen your news release. Using IBISWorld and Mintel as your sources, you can frame the opening of the new store as a response to the forecast for steady growth in the pet retail industry. The store's focus on home-baked treats and other local products reflects the need articulated in the Mintel report for independent pet stores to distinguish their offerings from those of their large competitors.

Why Use Market Research

A wide range of communications professionals use market research reports every day to gain insights on their clients and on their clients' competitors, and to contextualize news about individual companies.

Let's say that a strategic communication professional is asked to devise a marketing strategy for a soap company. The resulting document that contains this marketing plan likely will include a section on the soap industry as a whole, and on the main companies that operate in this industry. Before starting her planning, the strategic communication professional would read market research on the overall trends in the soap industry, and learn which segments of the industry are doing well and which ones are lagging. All this information would inform her understanding of how her client needs to position itself to remain competitive and what marketing steps it needs to take to do so.

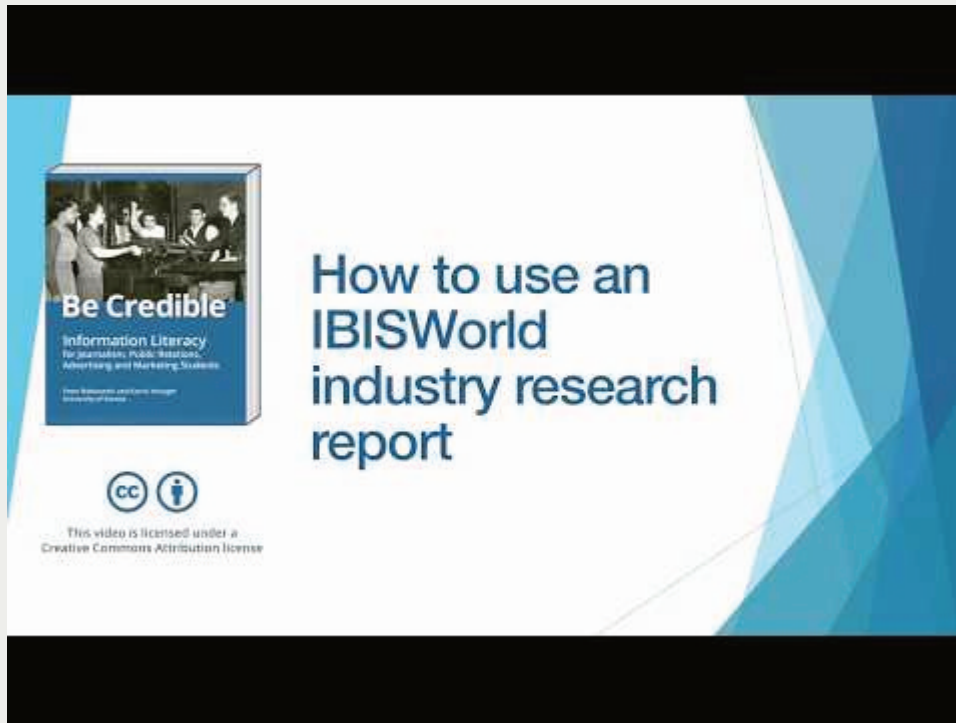
News journalists also regularly use market research reports as sources. Business journalists draw information from these reports to include in news reports about companies, industries, and consumers' shifting preferences. The reports help fill in the gaps when reporters cannot access information such as a private company's revenue, or to better contextualize a company's happenings. Market reports aren't limited to manufacturing and retail businesses. Trends in sports, education, and entertainment, for example, also are covered in market research reports.

How to Access Market Research

[Nielsen](#), [IQVIA](#), and [Westat](#) are some of the largest American market research companies. Each one provides specific research products by contract, subscription, or through individual

purchase. Access to the reports of two other market research companies, [IBISWorld](#) and [Mintel](#), is available through the University of Kansas Libraries.

The following videos guide you through accessing and navigating IBISWorld and Mintel.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=568>



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=568>

How to Evaluate the Credibility of Market Research

Consider our standard credibility cues when evaluating the credibility of market research.

The publisher is an important credibility cue. In this case, the publisher is the market research company that produced the research. If we are considering the credibility of an IBISWorld report, we want to evaluate IBISWorld. If we are looking at Mintel, we want to evaluate Mintel.

Where can we find evidence about the credibility of a market research company? The company's (often) glitzy website may be one source of information, although we need to keep in mind its self-serving bias.

Another way to gauge a market research firm's credibility may be to look at its reputation

among organizations and businesses that use market research. For example, the American Marketing Association publishes [an annual ranking of the top U.S. market research firms](#). Greenbook, itself a market research company, [ranked the largest market research firms in the world](#).

Searching for how often a company's market research is quoted in the news may be another way to gauge its credibility. This can be accomplished by opening a news database (i.e., [Access World News](#), [Google News](#), etc.), and searching for the name of the research firm. If the company's research has been quoted both recently and frequently, that may be an indication of the trust that journalists put in the company's work. Few hits mentioning the company's work could indicate that it's not a trusted source, or that its work is not accessible to journalists.

A credible research source will present its research methods, that is, it will explain how it conducts its research. We can then evaluate the credibility of the research based on this information. For instance, Mintel provides [a general research methods report](#) for its U.S. research, and [separate reports](#) for the research it conducts in other regions.

The author may be another credibility cue to evaluate. Whether a single author or a team of authors is identified will depend on each research company's conventions. Some companies do not identify by name the individuals who write or contribute to their research reports. In cases like these, an entire company serves as the research report author.

Can market research be biased? Unlike nonprofit trade associations, market research firms should not have built-in biases in favor of their clients. Market research firms aim to provide their clients with accurate research, that is, research that business leaders can trust to make profitable decisions for the companies they run. It usually is not in a market research company's interest to sugarcoat a negative business forecast or an unfavorable industry trend. Market research companies generate repeat customers for their research reports by being accurate and credible.

Still, market research companies can be biased in the way they conduct their research. To assess this, examine a company's research methods, and identify sources of information that may have been underrepresented in how the research was conducted. For example, if part of a company's research comes from online surveys, it is possible that consumers without reliable internet access are under-represented in this research. Such a company's research results may be biased toward populations with reliable internet access.

In sum, when evaluating the credibility of market research, consider all of the regular credibility cues. The report's publisher, author, and bias, may be especially important to assess.

Activity

Pick an item or product you use every day. Using IBISWorld and Mintel, write a summary of the market trends related to this item. Identify this item's manufacturing and retailing industries, and read the IBISWorld reports for these industries. Find and read the Mintel consumer report that is most closely related to this item.

Public Companies

PETER BOBKOWSKI

Learning Objectives

After reading this chapter, you will be able to:

- Define and identify public companies.
 - Explain why public company filings are worth locating and reading.
 - Evaluate the credibility of public company filings.
 - Access and read a company's 10-K and DEF 14A documents.
-

Toys Are No Longer Us

Businesses can be important sources of information about themselves, and about the industries and markets in which they operate. What a business does and says about itself affects many people, from consumers and employees to shareholders and those who work for companies that support it. Business news can be big news.

The March 2018 announcement that Toys “R” Us would close all of its U.S. stores is a good example of this. The news generated journalistic writing focused on [Toys “R” Us employees](#), [empty big box store spaces](#), [toy manufacturers](#), [competition among toy retailers](#), and [independent toy stores](#). Behind the scenes, strategic communications practitioners probably

researched the toy chain's bankruptcy for lessons that would benefit their clients in the toy and large retail sectors, or in customer and shareholder relations.

In doing their research, both journalists and strategic communicators had a lot of information to work with. What led up to the Toys "R" Us demise was documented in many public documents that the company is legally required to publish about itself.

In the [public records chapter](#), we discussed how to access public records about companies that do business in a specific state. Every company, from a mom-and-pop shop to a conglomerate, must register with the state in which it's located. State filings are a good place to start when establishing the ownership of a business. But these state records are limited, usually containing little more than the owners' names and their addresses.

In this chapter we focus on the information disclosed by large, publicly traded companies in their filings to the federal [Securities and Exchange Commission \(SEC\)](#). Throughout this chapter, we refer to these documents as public company filings. We start our discussion with the crucial distinction between public and private companies.

Public and Private Companies

A public company is one whose stock is traded on the stock exchange. This means, theoretically, that anyone can buy a piece of the company in the form of stock. A public company is public because members of the public (like you and me) can invest in the company.

But investment is risky. Public companies, meanwhile, have an interest in motivating potential investors to buy their stock. To protect the public (that is, us) from making misguided investment decisions, the federal government, through the SEC, requires public companies to disclose a considerable amount of information about themselves. This lessens public companies' ability to misinform potential investors about the risks involved in buying their stock.

From our perspective as researchers, public companies are really great because there is a lot of freely available information about them.

Private companies, on the other hand, are not very transparent because, unlike public companies, they are not required to disclose much information about themselves. Private companies are owned by private individuals, and shares in these companies are not available for purchase by the public. These companies may have investors, but their stock is not traded publicly on the stock exchange. For this reason, the public does not need to know as much about private companies as we do about public companies.

Many of the businesses we deal with on a day-to-day basis are private companies. Our favorite local coffee shop, like [La Prima Tazza](#)? Private. Grocery stores, like [Checkers](#) or [HyVee](#)? Private. Favorite local restaurant, like [The Burger Stand](#)? Private. Corner gas station and convenience store, like [Kwik Shop](#)? Private. But this doesn't mean that all private companies are small or local. Some of the largest companies around are private. For example, the largest employer in Kansas, [Koch Industries](#), is a private company.

On the other hand, we also frequently do business with public companies. [Starbucks](#), [Dillon's](#) (or Kroger), [McDonald's](#), and [Phillips 66](#) are all public companies.

So how do you tell the difference between a private company and a public company? Recall that a public company's stock is traded on the stock exchange, whereas a private company does not offer its stock for purchase. While most of us might not know much about investments, one visual cue we may associate with investments is the ticker symbol. Ticker symbols are abbreviations of public company names that represent the companies' stock on the stock exchange. Starbucks is SBUX, Kroger is KR, McDonald's is MCD, and ConocoPhillips is COP. Ticker symbols and stock prices scroll at the bottom of cable business channels like CNBC and Fox Business. Private companies do not have ticker symbols.

One way to figure out if a company is public or private, therefore, is to Google the company's name and look for that company's ticker symbol. Google provides company summaries to the right of its search results. Summaries of public companies include ticker symbols and their stock prices.

In the screenshot below, the circled text in the sidebar of Google results for Starbucks is the company's ticker symbol and stock price. A private company search results would not include

this information.

The image shows a Google search for "starbucks". The search results page includes a search bar with "starbucks" entered, navigation tabs for "All", "Maps", "News", "Images", "Shopping", "More", "Settings", and "Tools". Below the search bar, it indicates "About 83,500,000 results (0.70 seconds)".

The top result is "Starbucks – The Best Coffee and Espresso Drinks" with the URL "https://www.starbucks.com/". Below this, there are sections for "Menu", "Sign In", "Store Locator", "Drinks", "Bauer Farms, W. 6th Street", and "7th & Massachusetts".

On the right side, there is a knowledge panel for Starbucks. It includes the Starbucks logo, the website "starbucks.com", and a description: "Starbucks Corporation is an American coffee company and coffeehouse chain. Starbucks was founded in Seattle, Washington in 1971. As of 2018, the company operates 28,218 stores worldwide. Wikipedia". A red circle highlights the stock price information: "Stock price: SBUX (NASDAQ) \$52.23 +0.55 (+1.06%)". Below this, it shows "Aug 3, 4:00 PM EDT - Disclaimer", "Customer service: (800) 782-7688", "CEO: Kevin Johnson (Apr 3, 2017–)", "Founded: 1971", "Founders: Gordon Bowker, Jerry Baldwin, Zev Siegl", and "Did you know: Starbucks is the third-largest fast food restaurant chain by number of locations in the world (25,085). wikipedia.org".

Once we know that a company we are interested in is a public company, we can forge ahead to unearth troves of public information about it.

Why Look for Public Company Filings

First, public company filings are relatively easy to research. The SEC is very specific about the information that it requires public companies to disclose, in what order and format this information needs to be presented, and how frequently it needs to be disclosed. This means that researching this information can be fairly straightforward: We know what information to look for, where to look for it, and when it will be updated next. This makes specific details about public companies relatively easy to pinpoint.

Second, public company documents are primary sources of information about individual companies. There is an industry of secondary sources, such as investment advisors and business information aggregator websites, which make a profit from this freely available information by repackaging it and presenting it in digestible chunks. Websites like [Bloomberg](#), [Yahoo Finance](#), and [D&B Hoovers](#), for instance, offer reports about individual public companies using information they cull from these companies' public disclosures. While these can be good sources of background information, as information experts, we need to know where

this information comes from and how to access it so that we can verify this information for ourselves and, maybe also, make a profit from it.

Third, smart, real people read these documents. For example, [Steve Ballmer](#), former chief executive of Microsoft and owner of the LA Clippers, said this in a [New York Times article](#) about how he learns what companies are up to:

“You know, when I really wanted to understand in depth what a company was doing, Amazon or Apple, I’d get their 10-K and read it. ... It’s wonky, it’s this, it’s that, but it’s the greatest depth you’re going to get, and it’s accurate.”

A 10-K, as we will soon learn, is a public company’s annual report.

In sum, public company disclosures are relatively easy to access and read, they constitute primary source information, and successful people read them all the time.

How Credible Are Public Company Filings

When assessing the credibility of public company filings, at least two elements contribute to these documents’ credibility: their regulated nature and their position as primary sources. What can detract from the credibility of these documents is the self-enhancing and euphemistic language that companies can use to avoid being brutally honest in describing themselves.

Companies have strong incentives to provide accurate information in their disclosures. The SEC requires that public company filings include specific sections, that each section discusses particular business details, and that financial information follow precise accounting standards. The 10-K Annual Report, for example, is a document that every public company has to file once a year. [This list discusses](#) the sections that every 10-K needs to contain, the order in which these sections are to be presented, and what each section is supposed to cover.

The SEC oversees public company disclosures, and periodically evaluates and audits whether companies are complying with their disclosure requirements. Failure to disclose can result in various levels of reprimand, from a discussion with the auditors, to a formal investigation, to litigation, and to the [suspension of trading](#). A public company does not want to be investigated, reprimanded, or suspended by the SEC because this generates negative news and can result in investors selling the company’s stock, thus devaluing the company.

For these reasons, there is a high likelihood that the information presented in public company filings is accurate.

The other element that contributes to the credibility of public company filings is the primary source nature of these filings. It's worth it to reiterate a point we made earlier. There are many secondary business news sources that rely on, in large part, public company filings to generate narratives about the financial well-being of these companies, and to articulate projections for how these companies will be doing in the future. A quote from a primary document is more credible than a quote from a secondary document that quotes the primary document. The lessons we learned from playing telephone should help us appreciate the credibility of public company filings over the credibility of reports about public company filings.

Can anything detract from the credibility of public company filings? Sometimes the text of the filings, written by strategic communication practitioners who work in a company's investor relations division, can lower the credibility of these filings. As much as the 10-K or another document is regulated by the SEC, there is considerable room for this document to present a somewhat biased version of reality. When reading a public company filing, it is useful to consider how the information presented in the document matches other reporting on the issues being discussed.

To illustrate how the language of a public company filing might undermine its own credibility, let's consider how [Chipotle's 2017 10-K Annual Report](#) discussed the food safety issues with which the company had been dealing. Here's what the company said about its recent food safety incidents:

During late October and early November 2015, illnesses caused by E. coli bacteria were connected to a number of our restaurants, initially in Washington and Oregon, and subsequently to small numbers of our restaurants in as many as 12 other states. During the week of December 7, 2015, an unrelated incident involving norovirus was reported at a Chipotle restaurant in Brighton, Massachusetts, which worsened the adverse financial and operating impacts we experienced from the E. coli incident. As a result of these incidents and related publicity, our sales and profitability were severely impacted throughout 2016. In July 2017, cases of norovirus associated with a Chipotle restaurant in Sterling, Virginia had a further adverse impact on our sales, particularly throughout the mid-Atlantic and Northeast regions. The significant amount of media coverage regarding these incidents, as well as the impact of social media (which was not in existence during many past food safety incidents involving other restaurant chains) in increasing the awareness of these incidents, may continue to negatively impact customer perceptions of our restaurants and brand, notwithstanding the high

volume of food-borne illness cases from other sources across the country every day. As a result our sales may not return to levels we were achieving prior to late 2015.

How many people got sick after eating Chipotle in 2015? Well, the annual report doesn't tell us this. Was this a conscious omission by the annual report's writers? That's not clear. What does seem clear in this report is that Chipotle is most concerned about its customers' perceptions of their food safety, and that it largely attributes these perceptions to negative media and social media coverage. There is a subtle subtext in this narrative suggesting that the food-borne illnesses attributed to Chipotle were not as big a deal as they were made out to be in the media.

So, how many people got sick? Ten? Twenty? Fewer than 50?

According to the website Food Safety News, which [compiled information from county and state health departments](#), the two food safety outbreaks mentioned in Chipotle's annual report accounted for nearly 200 people getting sick. But there also were three additional food safety outbreaks in 2015 that health officials linked to Chipotle. These three outbreaks did not receive wide media coverage and Chipotle did not even bother mentioning them in its annual report. How many people got sick in these under-reported outbreaks? More than 300. That's a total of about 500 people getting sick after eating Chipotle in the second half of 2015.

Does 500 people over six months getting sick after eating at one restaurant chain seem like a large number? To me, it does, and if I was a potential investor and saw that number in the company's annual report, it would give me pause. By avoiding specifics about the number and scale of these outbreaks, the annual report writers do appear to minimize the perception of the problem. While this narrative is not misleading, it does not present fully the scope of the problem. What does this do to the overall credibility of the report?

One more quick, related example. In the paragraph that immediately follows the one cited above, the writers continue the theme of identifying factors that can contribute to Chipotle losing revenue from lapses in food safety. In the previous paragraph, these factors included consumer perceptions and social media. In the following paragraph, notice the clever way in which the company's food safety problems are equated with its greatest selling point, that is, its fresh ingredients and conventional cooking methods. (Also notice that this whole paragraph is one long sentence, and never aspire to write like this.)

Although we have followed industry standard food safety protocols in the past, and over the past two years have enhanced our food safety procedures to ensure that our food is as safe as it can possibly be, we may still be at a higher risk for food-

borne illness occurrences than some competitors due to our greater use of fresh, unprocessed produce and meats, our reliance on employees cooking with traditional methods rather than automation, and our avoiding frozen ingredients.

The implication of this paragraph seems to be that the risk of contracting a food-borne illness is higher when eating food prepared with fresh, unprocessed, unfrozen ingredients and with conventional cooking methods, than when eating food from unfresh, processed, and frozen ingredients, and automated cooking. Whether that's true or not can be debated. Framing a liability in terms of the company's greatest asset is a masterful slight-of-hand. The message seems to be, "Hey, the deck is stacked against Chipotle. That's what we get for trying to be super-wholesome." How does such defensiveness relate to the report's credibility?

In sum, are public company filings credible? For the most part, probably. The information contained in these filings tends to be accurate because companies do not want the SEC to come after them and hurt their stock prices. Plus, it's primary source information, which is more credible than secondary source information. But companies also can engage in self-enhancement in these filings, which can detract from their overall credibility. Companies in these documents want to present themselves in the most positive light within the limits of what the SEC requires them to disclose.

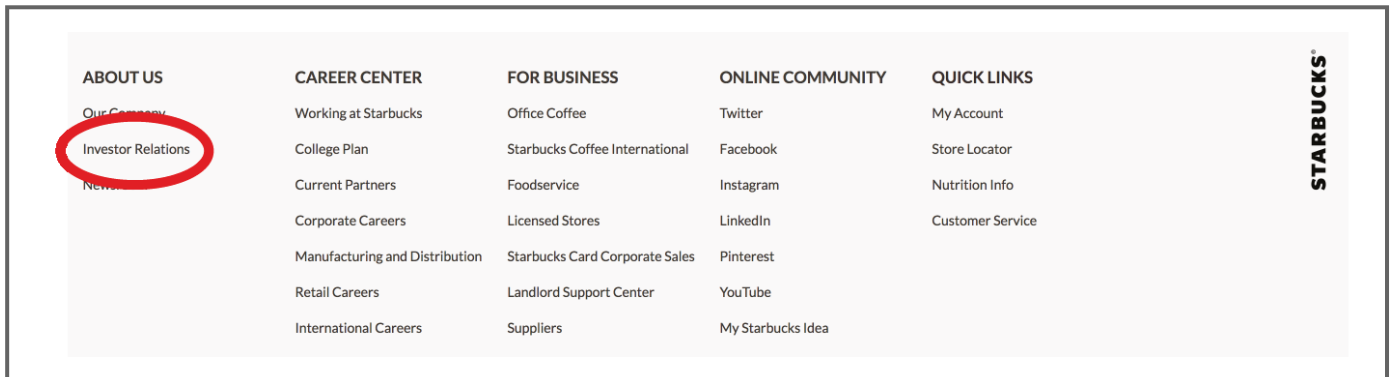
How to Find Public Company Filings

There are two places online where we can find public company filings. The first is a company's website. Public companies designate sections of their websites to investor relations. Oftentimes, these sections feel very different from these companies' main, public-facing web pages or apps. This is because the goal in these sections is to come across as serious, transparent, financially responsible companies worthy of investment.

To access this section on a public company's website, look for a link at the top or bottom of the company's main page that says "Investor Relations." Alternately, you might need to look for an "About Us" or "Company" link, and then look for an "Investor Relations" link on that page. Once there, look for a link that says "Financial Information" or "SEC Filings."

The screenshot below shows the footer of the Starbucks website, with the Investor Relations

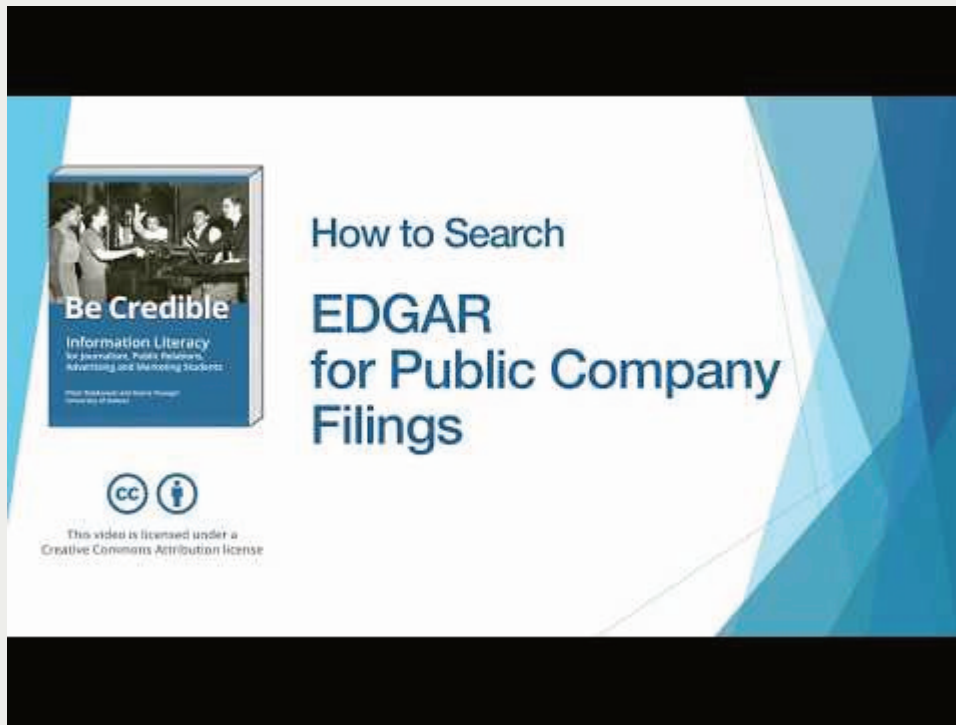
link circled in the “About Us” column.



ABOUT US	CAREER CENTER	FOR BUSINESS	ONLINE COMMUNITY	QUICK LINKS
Our Company	Working at Starbucks	Office Coffee	Twitter	My Account
Investor Relations	College Plan	Starbucks Coffee International	Facebook	Store Locator
News	Current Partners	Foodservice	Instagram	Nutrition Info
	Corporate Careers	Licensed Stores	LinkedIn	Customer Service
	Manufacturing and Distribution	Starbucks Card Corporate Sales	Pinterest	
	Retail Careers	Landlord Support Center	YouTube	
	International Careers	Suppliers	My Starbucks Idea	

Most public companies will post on their websites the main documents they file with the SEC. Company websites also might include other financial information that’s not required by the SEC. When doing research on a public company, it’s good practice to read through these documents.

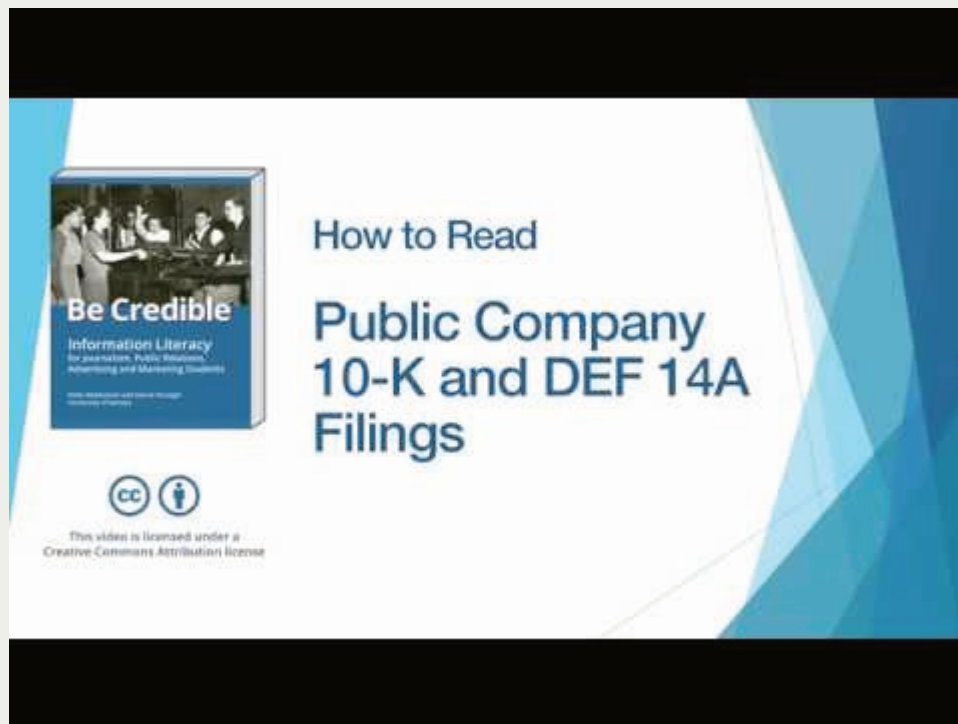
The second place to find public company filings is [EDGAR](#), the SEC’s database. The following video walks you through how to find and use this database.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=80>

Three public company filings tend to be the most informative as we begin learning about a company, the 10-K, the 10-Q, and the DEF 14A.

The following video will help you navigate through, and find the most important information in the 10-K and DEF 14A documents:



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=80>

If you are researching a public company that's owned by an international company, such as Anheuser-Busch, these companies have different disclosure requirements than American companies. The equivalent of the 10-K for such companies is called the 20-F. These companies do not file quarterly reports or a proxy statement.

Archives

CAITLIN DONNELLY KLEPPER

Learning Objectives

After reading this chapter, you will be able to:

- Define archives, and distinguish them from libraries.
 - Identify a variety of categories of archives.
 - Integrate archival research into journalism and strategic communication projects.
 - Plan and navigate archival research.
 - Evaluate the credibility of archival sources.
-

Archives of Our Lives

“In an informal and possibly unselfconscious way, we maintain a personal archive, a treasure chest of cherished artifacts and the memories they hold for us,” [David M. Levy](#), an information expert at the University of Washington, observed.

Think about the contents of your bedroom at home, or your apartment or dorm room on campus, or all the different files stored on your laptop. What kinds of records do you have? What kinds of records do you generate on a daily basis? Think, too, about the kinds of records you’ve had but thrown away or deleted. Why do you save some things but not others? They

can be physical (paper) or electronic materials. They can be from the distant past (e.g. your childhood), the more recent past (e.g. last year), or the present.

Do you have any of the following?

- Correspondence: letters, cards, postcards, emails, and text messages.
- Diaries or journals: physical volumes or blogs.
- School records: course notes, exams, papers, projects, report cards/transcripts, and copies of readings.
- Financial records: bank and credit card statements; receipts; and documentation pertaining to taxes, scholarships, tuition, and loans.
- Vital records: Social Security card, birth certificate, marriage license, passport, driver's license, and car title and registration.
- Published materials: yearbooks, magazines, clippings, and articles.
- Ephemera (i.e. materials created for a specific, limited purpose and generally designed to be discarded after use): concert programs, tickets, posters, bumper stickers, and buttons.
- Audiovisual materials: photographs and video.
- Social media posts.
- Historical records: family documents, photographs, and videos.

Just as you maintain a personal archive, so too have people in the distant and recent past kept written documentation of their lives as individuals and as members of networks of relatives, friends, neighbors, coworkers, and associates. Like your personal archive, these collections capture a range of people's thoughts, feelings, experiences, and activities, from the mundane and everyday to the extraordinary, from the joyful to the heartbreaking, and from the commendable to the questionable.

What Are Archives?

You probably have encountered the word "archives" in conversation or writing. It's commonly used to refer to any collection of data, information stored long term, or old documents. However, among information professionals, [the term "archives" has more specific definitions](#). Let's examine and unpack two of these definitions.

Definition 1: Archives are records and collections

Archives are collections of noncurrent records created or received by a person, family, or organization, public or private, in the conduct of their affairs and preserved because of their enduring value.

Collections are groups of related documents. Each individual document derives some of its significance and meaning from its relationships to other items in the archives. According to [archivist Peter Hirtle](#), “A true archives is a contextually based organic body of evidence, not a collection of miscellaneous information.”

Noncurrent materials are no longer used in the day-to-day activity of a person or organization. Clearly, this applies to historical materials like letters written in the 1800s. What may be surprising is that materials created much more recently can also be considered noncurrent. This includes materials such as receipts for groceries you bought yesterday, a text message conversation you had with a friend last week, an airline’s record of a flight you took last month, and notes and readings from classes you took and completed last semester. In short, noncurrent doesn’t necessarily mean old.

Records are documentary materials in any format. Records historically and generally refer to textual paper documents, items, or materials such as letters and diaries. Audiovisual materials like photographs, films, and videos are also considered records. Increasingly, archives are also collecting electronic, born-digital records like emails, spreadsheets, and websites.

Archives include records **created or received** by someone. Think back to your personal archives. It contains documents you have created, like journals. It also contains documents that your friends, relatives, professors, and others have sent you, for example letters, postcards, and cards.

Archives contain the records of **people, families, or organizations, public or private**. The records of a person or family are sometimes referred to as personal papers. It’s important to remember that, while archives document the lives of famous individuals and leaders in various fields, they also preserve information about the experiences of ordinary people. Organizations can be businesses and corporations; churches; community organizations; schools, colleges, and universities; and local, state, and national governments.

Individuals and organizations create archival records **in the conduct of their affairs**. They are a byproduct of the normal course of daily, planning, decision-making activities, and they are generally not purposely created for long-term posterity or with other users (like future scholars) in mind. For example, when you email a professor or text a friend, are you thinking

about creating a record, or are you creating a record as a tool to communicate and conduct your daily business?

Archival records are **preserved because of their enduring value**. In other words, they are kept and saved after they have served their original purpose because they are judged to have value to others who were not the original users. Keep in mind that not all records can and need to be saved permanently. This is especially true of the archives of organizations, as information professionals have a systematic process for determining what is saved, what is destroyed, and when.

For example, the [National Archives and Records Administration](#) — an independent agency of the U.S. government and the keeper of the Declaration of Independence, Constitution, and Bill of Rights — [keeps only about 2 to 5 percent of the federal records generated in any given year](#). You, perhaps unknowingly, do the same thing with your personal archives. You probably don't save every piece of paper, every email, and every photograph you've ever created or received. You have various reasons for keeping some documents and throwing away or deleting others after varying periods of time.

Definition 2: Archives are institutions and places

Archives are organizations that collect, preserve, store, and provide access to the records of individuals, families, or other organizations. The term "archives" also refers to the building (or portion thereof) housing the organization.

Think again about your personal archive. You may have materials stored in a variety of places, such as your laptop and desk drawers in your dorm room or apartment on campus. Additional parts of your personal archive might be in your room, or in your parents' attic, basement, or garage. In this condition, your personal archives are potentially disorganized and at risk from theft, fire, water, mold, bugs, and rodents. They also cannot be accessed by other people like, for example, scholars researching the experiences of 21st-century Kansans or college students. For this reason, you might consider eventually giving your personal archives to a professional archival organization like [Kenneth Spencer Research Library](#).

Records make their way to archival institutions in three primary ways. First, materials can be donated or gifted. This is often how the personal papers of individual and families make their way to archives. Second, materials can be purchased. This is often how archives acquire the papers of prominent individuals and leaders. For example, the [Harry Ransom Center](#) at The University of Texas at Austin purchased [Bob Woodward and Carl Bernstein's Watergate Papers](#) in 2003 for \$5 million. Third, archival materials can be transferred. Generally, the

records of a parent organization are [systematically transferred](#) to its archival repository. For example, records generated by departments within the University of Kansas are transferred on a regular basis to the KU University Archives.

Archives Versus Libraries

Broadly speaking, archives are different from libraries.

Library collections contain published items like books, scholarly journals, newspapers, and maps. Archive collections contain unpublished materials like letters and diaries.

Materials in library collections are available elsewhere. Materials in archival collection are unique, that is, there is only one copy in existence anywhere.

Library materials are organized individually by a predetermined subject classification system that enables users to browse by subject in open stacks. Archival materials are organized by provenance: records of different origins -- the individual, family, or organization that created or received the items in a collection -- are kept separate from other collections in order to preserve their context.

Items in libraries are independently significant: items in archives derive significance from relationships to other records in the collection.

These differences are not always so cut and dry in practice. Archives frequently exist within a library and contain books, maps, and other published materials in addition to unpublished collections of records. For example, KU's University Archives are housed at Kenneth Spencer Research Library, which is also home to collections from across Kansas and around the world. Within KU's University Archives, researchers can access university publications like Jayhawker yearbooks, annual catalogs, alumni publications, and the University Daily Kansan, in addition to records, photographs, and audiovisual materials.

Archive Categories

As shown in the list below, there are many different types of archival repositories. They range widely in size, funding, and audience. Although we're focusing on U.S. archives in this chapter, archival institutions exist around the world. For more information about each type of repository listed below, see the ["Types of Archives"](#) section of *Using Archives: A Guide to Effective Research* by the Society of American Archivists.

College and university archives

- KU University Archives, Kenneth Spencer Research Library
- K-State University Archives, Kansas State University Libraries
- Baker University Archives, Baker University

Corporate archives

- Hallmark archives, Kansas City, Missouri
- Boeing archives, Bellevue, Washington
- ExxonMobil Historical Collection, Briscoe Center for American History, University of Texas at Austin

Government archives

- Douglas County (Kansas) records, Kenneth Spencer Research Library
- Kansas State Archives, Topeka
- National Archives and Records Administration (NARA) – Kansas City branch

Historical societies

- Franklin County (Kansas) Historical Society Records and Research Center
- Library and Research Center, Missouri Historical Society, St. Louis
- Massachusetts Historical Society, Boston

Museums

- Watkins Museum of History, Lawrence
- Edward Jones Research Center, National World War I Museum and Memorial, Kansas City
- Archives Center, National Museum of American History, Washington, D.C.

Religious archives

- Kansas United Methodist Archives, Baker University
- Archives of the Diocese of Kansas City-St. Joseph
- American Jewish Archives, Cincinnati, Ohio

Special collections

- Special Collections and the Kansas Collection, Kenneth Spencer Research Library
- Special Collections, Kansas State University Libraries

- Special collections within the Stephen A. Schwarzman Building, Dorothy and Lewis B. Cullman Center, and Schomburg Center for Research in Black Culture, New York Public Library

Community archives

- Black Archives of Mid-America, Kansas City, Missouri

Additionally, an organization, business, or church may maintain their own historical records — perhaps without formally designating them as archives — instead of donating or transferring them to archives.

What Are Digitized Archival Collections?

Archivists seek to [promote and provide the widest possible accessibility of materials](#). They have long used technology to provide access to users who may not be able to physically visit an archives. In the past, this included efforts to compile collections of documents and publish them as a book that could be purchased by libraries around the country. For example, the papers and correspondence of a [Founding Father](#), which might be scattered across multiple institutions, would end up in book form to allow individuals unable to visit the archives in person access to the materials.

Today, archival institutions are working to make substantial amounts of their physical holdings available online. Institutions accomplish this through the process of digitization, which is the conversion of analog text, pictures, or sound into a digital form that can be processed by a computer. Archives continue to maintain collections of physical records that have been digitized.

As a result of these efforts, you can discover and access a tremendous wealth of archival materials online, along with digitized copies of rare print sources like books and maps. Moreover, once archival materials have been digitized, they are no longer organized simply by provenance, which we defined above. Researchers can search digitized materials in a variety of ways, including browsing by subject and conducting keyword searches of the text. This means that a user can quickly find all letters about a specific person, place, or thing without reading an entire collection.

Countless digital collections are available freely on the open web. See KU Libraries' [guide to primary sources for U.S. history](#) for a list of some examples.

Additional digital collections are available by a paid institutional subscription. See [KU](#)

[Libraries' guide to primary sources for U.S. history](#) (and click on the time period you're studying) to see digital collections that are licensed to KU students, faculty, and staff.

[Ancestry.com](#)

The genealogy website [Ancestry.com](#) is an important for-profit digital collection of public domain archival records (i.e. not protected by copyright) from institutions across the country and world. Included are several billion historical records like federal and state censuses; birth, marriage, and death records; immigration records; and military records. Ancestry is an important resource for piecing together the details about the life of a person who lived in the past, especially when paired with other sources like articles found in [Newspapers.com](#) or physical records by, to, or about the individual.

Ancestry is available to paying subscribers. However, due to the popularity of genealogy, many public libraries, including [Lawrence Public Library](#), provide free on-site access. Additionally, Kansas residents with a valid driver's license or state identification can access digitized state records from [the Kansas State Archives on Ancestry](#) for free.

Despite the wealth of archival materials available online, remember that they represent only a small fraction of the physical, analog archival collections that are held at physical repositories. This is true even of impressive digital collections, like Ancestry.com. Digitization is a time-consuming and expensive [process](#) that involves retrieving documents, assessing the physical conservation needs of the materials, and making any necessary repairs; scanning or photographing materials; creating and updating accurate and complete metadata; and continuing to make the digital materials available as technologies change over time. As a result, the vast majority of archival materials have not been digitized.

For example, KU's University Archives holds over 1 million photographic items that document the development of the campus and its buildings, student life, faculty, commencement, and athletic events. Almost 35,000 of those images have been [digitized and made available online](#). That is a substantial number, but it's only 3.5 percent of the entire collection.

Why Use Archives?

Archival records are a rich and important source of information for journalists.

First, they provide powerful connections with people who lived in the past. Archives capture and preserve the humanity of people who may no longer be with us. Consider, for example,

this excerpt from a [letter written by Lawrence resident Elisabeth Crittenden](#), a survivor of [Quantrill's Raid](#), to her mother a month after the 1863 attack.

Dear Mother I am alive, but have had my nerves so unstrung by the late Massacre of our citizens that I have not written to let you know that I had escaped, unhurt, you have heard all about Quantrill's coming into Lawrence before this, but Mother, you cannot imagine the distress and suffering of our women and children by the sudden death of their Husbands and Fathers. 100 and 180 widows and over 200 orphans were made in one day, and in two hours time . . .

By putting individuals' stories together, archives strengthen collective memory and preserve the histories of families, communities, states, regions, and nations. As we'll see later, however, this has not and is not always equally true for all groups and individuals.

[Archives](#), particularly government archives, also protect and preserve evidence of citizens' rights, property, and identity, and they make transparent government possible. "[The Importance of State Archives](#)," created by the Council of State Archivists, provides some examples. In documenting how individuals working in governments, companies, and organizations conduct their affairs on a daily basis, archives provide a paper trail that helps journalists and others reveal to the public when these activities are questionable, misleading, or illegal.

Additionally, unpublished documents in archives capture individuals' private, unguarded, and unfiltered thoughts, feelings, and words, which were recorded for themselves and perhaps a small number of other readers. What someone says privately may differ from what that person says in public, published accounts. This discrepancy can be fertile ground for journalists to investigate, especially when the individuals in question work in government, business, or an organization.

For example, reporting on the Democratic National Committee's leaked emails during the 2016 election, [Aaron Blake of The Washington Post wrote](#) that "many of the most damaging emails suggest the committee was actively trying to undermine Bernie Sanders's presidential campaign. Basically all of these examples came late in the primary — after Hillary Clinton was clearly headed for victory — but they belie the national party committee's stated neutrality in the race even at that late stage."

Moreover, archival records can be useful or significant for reasons other than that for which they were originally created. This can be particularly true when records are analyzed in new contexts and in conjunction with other sources. For example, in their October 2017 article "[How We Found Tom Price's Private Jets](#)," Politico journalists Dan Diamond and Rachana Prad-

han described the role of non-current, unpublished records in their investigation into the use of private jets for routine travel by Tom Price, then Health and Human Services secretary. For example, Diamond and Pradhan wrote:

As we looked at our growing database [of information about Price's travel], we noticed some peculiarities about his trips. For instance, there was a Friday afternoon charter flight that took him to an island off the Georgia coast, even though he didn't have any formal events scheduled for nearly two days. We checked property records, HHS financial disclosures and fundraising records from Price's political career and realized the former Georgia congressman had long-standing ties to St. Simons Island: He and his wife regularly visited during the summers, both for fundraisers and to participate in the local medical association, and they owned undeveloped land worth more than \$1 million there.

Note that property records are created and maintained to document who owns what land. But, in this case, they are also evidence of wrongdoing.

Journalists, strategic communications professionals, and others use archival materials in myriad ways.

- A news story or press release might highlight the activities at an archives, such as the acquisition of new collections, new or expanded services, discoveries made within the collections, or projects like exhibits and digitization.
- Archival records, especially photographs and other visual materials, can influence and provide inspiration for new products, advertising campaigns, and brand development.
- Archival records can be used to highlight, explore, and share the history and stories of the parent organization, for example institutional anniversaries, milestones, accomplishments, significant events, important people, and painful aspects of the organization's past.
- Historical photographs from archives can be featured as part of social media efforts like Throwback Thursday, Flashback Friday, etc.
- Archival records can be used to explore local and institutional connections to national or international events and anniversaries.
- Archival records can provide historical background or context.
- Archival records can be used for fact checking, corroboration, and written proof of claims made in interviews.

One powerful example of the use of archival materials by a journalist is [David Grann's](#) work

“Killers of the Flower Moon: The Osage Murders and the Birth of the FBI” Grann spoke about the role of archives in his research process in a [2017 article in The Village Voice](#):

It took David Grann nearly five years to write his latest bestselling nonfiction book, “[Killers of the Flower Moon](#),” because of how much time he spent in archives. The book is about the Osage, a Native American tribe whose Oklahoma land, in the early 1900s, was discovered to be sitting on an oil reserve. The tribe members became per capita the wealthiest people in the world. Then they started getting murdered.

Grann had known about the killings, but not their extent, until he came across a fabric-covered logbook in the National Archives in Fort Worth, Texas. It was a simple document. It was a list of the names of Osage “guardians” — the white people assigned, on a deeply racist premise, to manage the Osage fortunes — and next to them, the name of the Osage they were the guardian for. The only other thing written in the book was, underneath the names of certain of the Osage, the word dead. One guardian was assigned to five Osages, and all five of their names were followed by that word. “That defies any natural death rate,” Grann said. “I thought that was strange, and I began to look at other individuals. Sometimes there would be a guardian who had a dozen Osage whose wealth they had been in charge of, they’d been guardians of, and there might have been 50 percent of them who had the word ‘dead’ next to them. And on and on it went.”

“That document,” he said, “which really just looked like a bureaucratic ledger — it was very forensic, had no kind of emotion to it — really contained the hints of a systematic murder campaign.” He said that that was the nature of archival work: a document that looked like nothing could turn out to be telling a powerful story — but only if you had a sense of what you were looking at. “I was not looking for that book, I just came across it. And unless you were versed in what was going on, it might’ve just seemed innocuous. And yet this very innocuous document really showed the banality of evil.”

In the process of writing the book, Grann said, through all the archival work, there’s “a kind of relationship with these documents that you begin to develop as you become more familiar with them, and as you hold them, and as you look at them.” He likened it to the relationship you develop as you speak to someone, face to face, in an interview; it’s more than you could ever get over email. “I thought the handwriting in that ledger was revealing,” he said. “It was just a simple word. And I just kept thinking, ‘Who was that bureaucrat who kept writing this word dead?’ And I just would look at

the handwriting, and that's all they wrote, and in that word it contained volumes of hidden history, suffering, death, poisonings — souls.”

Keep in mind that, while archival records are used in many news stories, they may not be identified as such. Other words like “records,” “documents,” and “sources” may be used instead. Or, numbers may be provided that were compiled or calculated using unpublished, noncurrent written sources. As you encounter news stories, watch and listen for these and other words that hint at archival records being used.

Finding Archival Collections

Conventional search strategies

You can start your search for archival collections by checking books and articles, including those on Wikipedia, that have already been written about your topic. Pay particular attention to the reference lists or bibliographies of these books or articles. As you search and read, ask yourself: What archival sources did the authors use, and where are they located?

You can continue your research with a Google search, using the same search strategies covered in the [Search and Re-Search](#) and [Search More Effectively](#) chapters.

When searching online for archival materials about a topic, pair the name of the person, organization, or event you're researching with words like “archives,” “collections,” “records,” “letters,” or “photographs.” Including those additional words helps you find archival collections about your topic, not biographies, articles, or news stories.

This search may turn up digitized archival sources about your topic. However, you may not find much or any digitized content. Remember that the overwhelming percent of archival materials have not been digitized. Additionally, as you will recall from our earlier [chapter on Google](#), the search engines cannot index or make discoverable much of what is on the web. In particular, Google will generally not index primary sources housed behind the firewalls of library archival databases. For this reason, we recommend you visit the library's list of databases and follow the below steps.

Your online search may turn up links to online descriptions of archival collections called finding aids. Finding aids are sometimes called indexes, guides, or inventories. One of the key pieces of information in a finding aid is the location of the collection being described. A video at the end of this chapter discusses finding aids in more depth.

Searching for repositories

If your Google searches reveal neither digitized collections nor finding aids, you'll need other strategies for locating archival materials, likely physical records housed at a repository. There are several ways of going about this.

First, see if you can easily guess where records you need are located. For example, if you do strategic communications for a unit within a college or university, information about the history of that unit -- in the form of records, photographs, and published materials -- will be found in the school's archives, even if you couldn't find a reference to these materials through a Google search. Likewise, a business, organization, or church may maintain its own historical records, possibly, but not necessarily, as an officially designated archives program. Geography can also guide you to relevant records. For example, if you're researching a local event, person, or topic, archives with records documenting local history might be a good place to start.

Second, approach your topic differently by identifying other potential search terms and thinking more broadly. Conduct preliminary research about your topic using sources like Wikipedia or books or articles written about it. For example, say you're researching an individual person. Make a list of (1) the important people who were in this person's network, (2) the organizations with which this person was affiliated, (3) where the person went to school, (4) where the person worked, (5) where the person volunteered or worked with nonprofits or community groups. The names on this list become your new search terms, and again pair them with words like "archives," "collections," "records," "letters," or "photographs." Doing this may not reveal specific archival records about the individual you're researching, but it may direct you to collections of records by, to, or about related individuals or organizations, which in turn may contain information about the person you're researching.

Third, you can reuse your original and expanded list of search terms to search tools like [ArchiveGrid](#) (free online) and [Archive Finder](#) (licensed by KU Libraries). These tools search descriptions of archival records held by libraries, archives, and other cultural institutions across the United States and beyond.

Finally, think about the records themselves and ask yourself the following questions:

- What types of sources would I ideally like to find?
- What types of materials were -- or might have been -- created during the time period I'm studying?
- Where would those documents have been housed at the time they were created?

- Can I extrapolate from the above answer to determine where the documents are located now?

After all of this searching, you may still find yourself at a dead end. Perhaps the records you would like to find were never created, or they were created but haven't survived to the present day. Perhaps the records are still in someone's personal custody, meaning they have not been donated to a publicly accessible archives. Or, perhaps an archives has the records, but they are inaccessible because they're restricted or have never been processed, or made ready for researchers. Or, an archives has the records and they're available for use, but the finding aid exists only as a paper document.

If you hit a dead end, make an educated guess as to where the relevant records might be — likely based at least partially on geographic proximity to the topic you're researching — and contact an archivist at that institution for guidance. For example, in honor of the centennial of World War I, Spencer Research Library used its blog to follow the experiences of one American soldier — 19 year-old Forrest W. Bassett — at Fort Leavenworth. Forrest's [letters are held in Spencer's Kansas Collection](#). The final entry of the series revealed what happened to Forrest after World War I. Google searches did not turn up any photographs of him, but keeping in mind that he lived his entire life in Beloit, Wisconsin, I reached out to the Beloit Historical Society. The staff there was able to find four photographs of Forrest and his wife and children.

Using Archives

Despite the wealth of digitized archival materials available online, always remember that they represent only a small fraction of the physical archival collections that are held at brick-and-mortar archival repositories. Thus, even if you have been able to access records that are relevant to your project online, you may also need to visit an archival institution and use physical collections. Here are some things to keep in mind as you do this.

Archives are meant to be used by researchers

Archives are not warehouses for records, and they're more than places to simply store materials. Access and use are among the [core values of the archival profession](#).

Archivists can be as invaluable to you as the sources

You can email, call, or talk to an archivist at any stage of your research. Don't think you're

bothering the archivist. Remember, part of an archivist's job is to help researchers access and use collections. It's also something that archivists enjoy. Don't hesitate to ask for help!

You may feel intimidated when working with archives, but archivists understand that working with collections can be challenging, and they can help you navigate the process. Archivists may also know additional information about collections, beyond what is available in finding aids and other tools. That means archivists may be able to direct you to relevant collections that you hadn't or wouldn't have otherwise discovered.

Research frequently requires the use of collections at multiple repositories

Think again about your personal archive. If you sent a postcard to your friend while on vacation, that postcard would be in your friend's personal archives, not yours. As a result, a future scholar researching your life would need to consult your personal archives, plus the personal archives of your friends, your relatives, and other people in your network. Electronic documents muddle these distinctions somewhat. While you likely don't have a copy of a paper letter you wrote and sent, you probably do have copies of emails you've sent.

Archives operate differently than libraries, and each archive is unique

Earlier in this chapter we considered ways in which archives and libraries are different. These differences mean that archives operate differently than the public and university libraries to which you may be accustomed.

Unlike public and academic libraries, collections at archival institutions are stored in closed book stacks, which are employee-only areas inaccessible to researchers. Closed book stacks are secure spaces that protect materials from theft, damage, and disorganization. Archival materials also don't circulate, meaning they cannot be checked out and taken home. Researchers must work in dedicated spaces at the archives, generally called a Reading Room. Reading Rooms are supervised by staff, who guard against theft and make sure materials are handled properly.

Additionally, archives generally have more rules and procedures than public and academic libraries. These guidelines may be surprising and unfamiliar to you at first. However, they are in place because most archival materials are unique and irreplaceable, so they need to be handled with extra care. When you use archival materials, you are helping to make sure those items stay safe and in good condition for future researchers. An archives' rules will help you do that. Consult [Using Archives: A Guide to Effective Research](#) by the Society of Ameri-

can Archivists to read about some [typical usage guidelines found at archives](#) and the reasons behind them.

Archives may implement the above general guidelines in different ways, so specific rules across institutions can vary. Be sure to familiarize yourself with an archives' rules before you visit. Check the repository's website for information and contact the archivist for more details if necessary.

Working in archives is not a fast process, so allow enough time

It's difficult to conduct archival research at the last minute, with a deadline looming. Using archives is kind of like being a detective: you're following clues and piecing them together in order to answer a question. You might make unexpected discoveries, and frequently new information leads to new questions. You might need to conduct additional research on a name, organization, place, or event referenced in a record. While archivists and discovery tools like finding aids are invaluable resources, you may still have to do quite a bit of digging in boxes, folders, and records.

Remember, too, that many records from the past are handwritten in cursive. It can take time to make sense of an individual's handwriting, especially if it's quirky and contains unfamiliar abbreviations and inconsistent spelling. Sometimes it helps to transcribe (i.e. make a typed copy of) a document.

It's also important to record thorough citation information about the materials as you work. You may later need to go back and refer to those materials again, or another researcher may later need or want to track your sources.

Keep in mind, too, that many archives have more limited hours than public and academic libraries. They may be closed on certain days (e.g. weekends), may not be open in the evenings, and may be closed around lunchtime. Additionally, some archives require researchers to make appointments.

Archivists are happy to assist researchers with their work. However, archives generally don't have enough manpower for archivists to conduct extensive research for users. If you have a simple, focused question that can be answered in a short amount of time, an archivist may be able to review materials on your behalf and relay the information to you. If you have a broad research question that requires examining, reading, and interpreting a sizeable quantity of documents, you should expect to visit the archives and conduct that research yourself. If a visit to an archives facility is not possible, an archivist will still try to assist you. For example,

an archives may direct you to a list of proxy researchers, who are local researchers whom you can hire to conduct research on your behalf.

Archives generally offer services for obtaining copies or scans of items

Regulations vary across archives, but most have some kind of process for providing researchers with copies, scans, or reproductions. Sometimes researchers are allowed to make their own copies, and more frequently archives staff provide them. You may need to complete and submit paperwork to request copies, and you may have to pay a fee. Archives likely also have a process for researchers who would like to request permission to publish or display an item from the archives. This would apply, for example, if you want to include a photograph from an archives to accompany a piece you're writing. Again, you may need to complete and submit paperwork and pay a fee. These processes generally take a bit of time; anticipate that they cannot be done quickly.

Evaluating Archival Sources

In general, you can think about archival materials as primary sources, whether they're paper documents, electronic records, or digitized surrogates. A [primary source](#) is a document that contains firsthand accounts of events and that was created contemporaneous to those events or later recalled by an eyewitness. Primary sources are characterized by "a lack of intermediaries between the thing or events being studied and reports of those things or events," according to a definition from the [Society of American Archivists](#).

Importantly, this definition continues to say that, "newspaper articles contemporaneous with the events described are traditionally considered primary sources, although the reporter may have compiled the story from witnesses, rather than being an eyewitness."

For this reason, primary sources may be more reliable and accurate than [secondary and tertiary sources](#) written later. Think about playing a game of telephone: the original information becomes increasingly distorted each time it's repeated. Likewise, as archival records get quoted, paraphrased, and summarized by multiple authors in various texts over time, the original account or story can become twisted. Even basic facts can become untrue over time. Once an erroneous piece of information enters the literature, it frequently gets repeated in subsequent works.

This problem is compounded when claims about the past are invoked to make arguments about the present, when present-day attitudes and events influence our view and interpreta-

tion of the past, when scholars reassess known information in new ways, when problematic ideas about the past enter and persist in popular culture and collective consciousness, and when communities of all sizes seek to ignore painful aspects of their history. The antidote to this complexity? Go back to the original primary sources and the archival record.

Archival credibility cues

Despite their research value, archival materials must be read with skepticism. Take into account the same considerations with which you would analyze any other source of information or news, such as credibility assessments discussed in earlier chapters. When working with archival records, though, there are layers of additional challenges.

First, just because an archival record was written at the time of an historical event doesn't automatically mean that it is completely accurate. Records contain errors and are not always straightforward, with their precise meaning sometimes unclear. For example, the federal population census has been conducted every ten years since 1790. If you trace a person's life using the census, you'll notice that the information doesn't always match up. Most commonly, people don't always age ten years within the ten years between censuses. This is true even though census information was self-reported or provided by someone close to the individual.

When examining an archival record, it's important to assess the perspective and bias of the author and think about the author's original audience. Keep in mind that, in important ways, people in the past lived in a world that was radically different than what we know today. As L.P. Hartley wrote in his novel "The Go-Between" (1953), "The past is a foreign country; they do things differently there." As a result, people who lived in the past possessed different worldviews and assumptions. And, just like today, not everyone who lived in the past shared the exact same perspectives and beliefs. This is perhaps obvious when considering archival records written in the distant past, but it's true of the more recent past, too.

For example, consider an [opinion piece in Forbes in 2016](#). The article examined the formative experiences of 70-year-old white men, who were born in 1946 and became adults in 1964. Their interactions with women and people of color were influenced by the societal context in which they lived. For example, "across roughly half of America, voters born in 1946 would have been adults before they ever saw a black person eat in a restaurant dining room, stay in their hotel, or enter a restroom with them. In the South, these voters spent all of their formative years drinking from the whites' only fountain." It can be easy to forget that the world was significantly different even just a few decades ago, and to forget that broad, abstract historical contexts had real implications for the individuals who experienced them.

While interpreting an individual archival document can be challenging, considering that document within a larger collection of records can raise additional uncertainties. Biases exist across collections, not just in individual documents.

One document from the archives generally doesn't tell an entire story. Most documents are incomplete by themselves but are invaluable pieces of a larger puzzle. These pieces rarely fit together neatly or easily. This can be true even when the historical record seems relatively complete. Consider the work of John Badger Bachelder, who sought to write a definitive history of the Battle of Gettysburg during the American Civil War. Despite his efforts — which began within months after the July 1863 battle — Bachelder was ultimately unable to complete his project. Historian Thomas Desjardin described Bachelder's struggle in his book, ["These Honored Dead:"](#)

Few, if any, historians ever had more information, support, and funding for their work than Bachelder did in writing a history of the Battle of Gettysburg...Despite years of written and oral conversations with hundreds, if not thousands, of eyewitnesses, the final product of his endeavor was an eight-volume, 2,000 page summary of the battle taken largely from the already published official reports of the battle...When it came time to put pen to paper and commit to one version of the truth over another, Bachelder came to the realization that...there is no "what really happened" at Gettysburg; only a mountain of varying, often contradictory accounts that are seldom in accord, all tainted in some way or other by memory, bias, politics, ego, or a host of other factors.

Moreover, the historical record is full of holes, gaps, and silences that are not accidental.

Some records that modern researchers would love to use were never created. For example, your personal archive does not contain any evidence of verbal conversations you've had on the phone or in person, unless you have recorded conversations using WhatsApp or Snapchat. Individuals' decisions to write down information frequently has been a result of historical context as much, if more so, than about personal decision.

Think, for example, about enslaved African Americans. They were prohibited from learning to read and write, meaning that there are very few first-person accounts written by the enslaved documenting their experiences, thoughts, and feelings. The enslaved were also considered property, an idea that is reflected in documents from the time. The 1860 population census of "free inhabitants" records each person's name, age, gender, occupation, and birthplace. In contrast, the 1860 "slave schedule" records only the age, gender, and color (black or mixed-race) of each enslaved person. The effects of the institution of slavery were reflected and

preserved in the historical record, and those effects will permanently influence research conducted by their descendants and scholars.

Some records that archivists would assess as having enduring value have not survived to the present day. The earliest records of Lawrence, Kansas, for example, were destroyed in [Quantrill's Raid in 1863](#). Collections of personal wartime letters frequently have only the letters written by soldiers to their families. Many letters from families to soldiers no longer exist, because soldiers probably were unable to carry and keep those documents on the front. Additionally, the personal writings of some prominent individuals have been intentionally destroyed in anticipation of others' interest in the documents. For example, poet Emily Dickinson asked her sister Lavinia to destroy her papers after her death; it was a promise Lavinia kept.

Finally, documents are preserved in archives as a result of the actions of past and current generations of scholars and archivists. The historical record therefore reflects what documents -- and what stories -- they have considered and do consider to be important and worth collecting and saving. These decisions have reflected the values and power structures of the broader society in which scholars and archivists have operated. Thus, the voices of individuals and organizations in historically marginalized communities -- those, for example, of women, LGBT individuals, indigenous peoples, working class and poor people, and African Americans -- have also been largely excluded from the historical record.

Conclusion

Working with archives can be challenging for a variety of reasons. But, working with these materials — handling original documents, uncovering stories of people who lived in the past, making discoveries, and piecing together stories — can also be very exciting. In conducting archival research, remember that a wealth of digitized materials is available online and that a tremendous amount of additional physical collections are available at brick-and-mortar repositories. Finally, remember that archivists are available and excited to help you with various aspects of your research.

Interviews: An Introduction

PETER BOBKOWSKI

Learning Objectives

After reading this chapter, you will be able to:

- Prepare for an interview.
 - Use appropriate strategies during an interview.
-

How to Prepare for an Interview

No matter what you end up doing in journalism or strategic communication, at some point in your future classes and then in your professional life, you will have to interview someone. So it's important to know how to prepare for and how to conduct an interview.

Let's discuss a four-step checklist of preparing for an interview:

1. Identify the purpose.
2. Set up the interview.
3. Research, research, research.
4. Generate questions.

Step 1: Identify the purpose

The first thing you want to do is clearly identify the issue that you want to cover in your interview. This could be something that a professor already assigned to you, or a topic in which you're really interested. Write down concisely what this issue is.

Let's say that my issue is investigating the effects of drought on trees in Kansas. At the top of my notebook paper, I would write:

Issue: The drought's effect on Kansas trees.

The next thing I would do is figure out who I want to interview. The many individuals available for interview generally fall into two categories: experts and non-experts.

Experts are very steeped in a specific topic. Non-experts are people who might have a very individual experience to share with you, but aren't necessarily very knowledgeable about the subject. Figure out which type of source your story needs and, ideally, how many individuals you want to interview. It's possible that for your story or for your assignment, you want to interview both experts and non-experts.

Once you have an idea of the types of individuals you want to interview, you need to identify them and reach them.

Let's say I want to find an expert on trees, and on the effect of the drought on trees in Kansas.

Universities are really great places to find experts on just about any general topic in which you're interested. So, to find an expert, I would start with the website of a nearby university, in my case, the [University of Kansas](#).

KU has a [searchable portal about its experts](#) and their areas of expertise. You can type any subject into the search box, and the site will present you with a list of individuals whose expertise is related to that subject.

If a university doesn't have an experts portal, look for links on its main page that say "Academics," and then "Departments" or "Schools," to get a complete list of all the academic units on campus. Then, figure out what academic units would house experts on your topic, and find these units in the list of departments or schools.

Once you're inside a department website, find a list of faculty, and read through the profes-

sors' research and teaching interests. Identify a few people whose interests seem to match your topic, at least in part.

For my topic, I would look for departments like biology, ecology, and geography, and then scour their faculty bios. I would identify two or three possible experts and write down their names and contact information, including their office locations and, if they have them posted, office hours.

What about finding non-experts? Two strategies for this are social media crowdsourcing and nonprofits.

Crowdsourcing is about generating stuff from the crowd. So, if you go to Facebook or Twitter and ask your friends and followers: "Do you know anybody who has a story to tell about [insert your topic]?" you might be surprised at how many people will respond that they know somebody with a story.

The other strategy is to find a nonprofit whose issue is your topic. As we wrote in the [Nonprofits chapter](#), there is a nonprofit for every issue under the sun. If you find a nonprofit related to your issue, you will connect with people who care deeply about the topic you are covering. A nonprofit can connect you with non-experts who are dealing with the issue, and with experts who are knowledgeable on the issue. As we discussed in the [Nonprofits chapter](#), however, always keep in mind a nonprofit's inherent bias.

Step 2: Setting up the interview

Getting people to agree to an interview might be the most difficult part of the interview process. This is especially difficult if you're working on a deadline.

Remember that nobody is obligated to give you an interview. So you have to be very nice about it, but also be persistent.

Here's a very important recommendation: don't rely on email.

Emailing your contacts is worth a try. But here's the problem: it's very easy for somebody you're emailing to ignore your email. If we're honest with ourselves, all of us are ignoring several emails at any given time. So you need to be prepared for the fact that people might not want to respond to you, even if you're on deadline. Don't restrict yourself to email as a means of getting in touch with the people you want to interview.

If you're trying to get in touch with an expert at a university, walk over to where his or her

office is. If you can find out when the person's office hours are, walk over during those office hours. If the office hours are not online, see if they are posted on the professor's door. If that doesn't work, get in touch with the departmental secretary, and ask if there are better times to see the individual.

But I can't stress this enough: go over to where the person's office is, and try to see them in person.

Often times, even if you don't find the person you're looking for in his or her office, there will be other people around with office doors open, who might be able to answer your questions, or to connect you with another expert.

Be persistent.

Plan on people refusing to respond to you. This is why you need a list of a few experts, so that you have a plan B, C, D, and so on, when the other plans don't pan out. Also, all of this is going to take time, so build disappointment and frustration into your timeline.

Step 3: Research, research, and research

The next step in preparing for an interview is doing research, research, and more research. You want to make sure that you have read a lot of things that other people have written about your issue. Also, you want know as much as you can about the person that you're going to interview, and the work that they have done.

The first place to start doing research on a topic are news articles. The [News chapter](#) discusses strategies and issues related to searching for news. You want to make sure that you have read plenty of news articles on your topic, and that you have educated yourself about what other journalists and other experts have said about it.

Second, you want to make sure that you know the expert or the non-expert whom you will be interviewing.

Let's say that in my quest to interview an expert about drought and plants, I identify [Dr. Helen Alexander in the Department of Ecology and Evolutionary Biology](#) at KU.

To familiarize myself with her work, I would locate a list of her most recent articles on her departmental web page (click the Publications tab). If that's not available, I would type her name into [Google Scholar](#), and find a list of her articles there. Then, I would read her most

recent articles to understand the issues and ideas with which she engages in her research. The [Scholarly Research chapter](#) discusses strategies and issues related to doing this.

The reason for reading the person's research is to sound intelligent when I ask the expert questions. A good interview will confirm things that I already know from prior research. By familiarizing myself with the expert's work ahead of time, I will be able to know the types of questions to ask, and to get the expert engaged in the subject matter. I might even make a list of vocabulary words that the expert uses in his or her writing, and make sure that I know their definitions, and how to use them in the questions I ask.

Step 4: Generate interview questions

The fourth step is generating good questions for the interview.

There are two types of questions: open-ended questions and closed-ended questions. Some people will say that closed-ended questions are off-limits in an interview, but I think that a good combination of questions will result in the best answers and the best information in an interview.

Closed-ended questions are ones that will elicit a short answer, often just a "Yes" or a "No." So for example, if I was inquiring about the effect of the drought on trees in Kansas, I might ask, "Is the drought affecting tree populations in Kansas?" My interviewee would then either answer "Yes" or "No," and then I'd have to move on to the next question.

But if my question was something like, "I've read that maple trees are particularly susceptible to the drought. Can you explain why maples are at greater risk than other trees?" That's an **open-ended question**. It gives my interviewee an opening to explain what he or she knows about trees and, in particular, about maples.

While the number of questions to write ahead of time is going to vary, let's say that as a general guideline I want to have somewhere between five and ten solid questions with which to go into the interview. Out of those, no more than two or three should be closed-ended questions. So seven or eight questions will be open-ended questions.

At the end of the ten questions, it is customary to write a standard question to use at the close of the interview. Usually, it's something like, "Is there anything else that you'd like to tell me" about whatever your topic is. What will sometimes happen is that your interviewee will then open up about something that they think is important. What they tell you may enrich your story, take it in a completely different direction, or suggest follow-up stories that you might pursue later.

Once you have a list of questions, arrange them. You may start with an open-ended question that asks your interviewee to describe the larger problem at hand, maybe in relation to his or her own work. For instance, “Can you describe how, in your experience, drought affects trees that’s different from how it affects other plants?” A question like this may prompt the interviewee to discuss a topic that’s familiar to him or her, which can put them at ease.

Finally, prioritize your questions. Identify the ones that you really, really want answered, and also the ones that it’d be nice to get answered, but that may not be essential. You probably won’t get to all of the questions during the interview. By prioritizing the questions, you make sure that you cover the four or five questions that you really want answered.

Now that you have an interviewee and interview questions, let’s focus on good and not-so-good interview strategies.

Interview Strategies

In this section, in a series of videos, two KU journalism school alumnae, Becky and Leah, demonstrate good and not-so-good interview strategies. Let’s say that Becky’s assignment is to write a report on [Rock Chalk Revue](#), and Leah is her expert source on Rock Chalk Revue.

Let’s see how well Becky does in the interview:



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=72>

What are all the things that Becky did wrong in this interview?

She was late, improperly dressed, and forgot her interviewee's name. Remember that people often are doing you a favor by sitting down with you for an interview. So show them proper respect.

Becky also obviously did not read the first section of this chapter on preparing for the interview. She didn't come in with a prepared list of questions, and asked Leah things she should already know about Rock Chalk Revue from her research.

Let's see if she redeems herself further in the interview.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=72>

What a relief! Becky did create some prepared questions. But what was the problem with these questions?

If you said that they were closed-ended questions, and that Becky was getting one-word answers that really wouldn't provide a lot of information for her report, you are correct.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=72>

What are the things Becky did wrong in this last clip?

She wasn't listening to Leah's answers, and she wasn't willing to go off-script to ask a follow-up question. Instead of sticking closely to her pre-written questions, Becky needs to be actively listening to what Leah is telling her, and be willing to ask follow-up questions that will provide more in-depth information.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=72>

That ending was a little rude, wasn't it? There must be a more gracious way to finish an interview. So let's take this back from the top, and see if Becky can do better in an alternate universe interview.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=72>

That was a much better way to start! Becky arrived on time, was dressed professionally, and was gracious towards Leah about the time she was giving her for the interview.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=72>

Here we see that Becky does not jump in right into her interview questions. She warms it up a little bit. She tries to set up trust between her and Leah. It's like running a warm-up lap around the track before running a race.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=72>

Becky is asking some good open-ended questions! They prompt Leah to do most of the talking, and to give Becky a lot of colorful information for her report. Did you also notice how well researched Becky's questions are? Becky came into this interview knowing a lot of information about what Leah is going to tell her.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=72>

What did Becky do right here?

She went off script and asked an important follow-up question.



A YouTube element has been excluded from this version of the text. You can view it online here: <https://otn.press-books.pub/becredible/?p=72>

Becky's wrap-up also was very good. First, Becky asked the standard final question, which allowed Leah to give Becky additional information that Becky hadn't thought of asking. She also thanked her for her time, and she left open the possibility that she will communicate with Leah in the future.

So let's review what are some not-so-good interview strategies you saw Becky practice:

- She was late and unprofessional in how she looked and how she acted.
- She was unprepared, having done no research, and coming into the interview without any prepared question.
- When she did find a list of questions, they were all closed-ended.
- She did not listen actively and was unable to ask follow-up questions.
- She was abrupt in the way she closed the interview.

What were Becky's good strategies?

- She was professional and gracious.
- She built trust between her and Leah before launching into the questions.
- She asked open-ended questions, she listened, and asked on-the-spot follow-up questions.
- She asked the final open-ended question.
- She left the lines of communication open for future follow-ups.

Now it's your turn put your knowledge into practice, and enjoy your interviews.

The next interview chapter will explore more advanced strategies for conducting interviews, and for approaching interviews as conversations with risk.

A Practitioner's View



Jenni Carlson

B.S., KU Journalism, 1997

Sports Columnist, The Oklahoman

Interviewing, at its best, revolves around curiosity.

Before an interview, I am curious to know as much as possible about my subject. I scour archives and websites and anything else at my disposal for information that starts painting a picture about this person, but I never assume that my research fills in all the lines.

That's what a good interview will do.

When I go into that interview, I use the information that I've learned to not only shape my questions but also let the person know that I care enough about them to come prepared. In the same way that you wouldn't show up to someone's house for a dinner party empty handed, you shouldn't show up to an interview with no clue about the subject. It's disrespectful, for one, but it's also not going to help you do your best work.

If you go into the interview with some working knowledge of your subject, it will help you open your ears and listen. You will engage, and when your subject says something interesting, you will follow up and ask more. You will wonder why they did this. You will ask how they did that. You will drill down into the story. You will uncover great riches.

So, *be curious* — curious enough to find out some information about your subject before the interview, and curious enough to ask them for more information during it.

Interviews: Conversations with Risk

ERIC THOMAS

Learning Objectives

After reading this chapter, you will be able to:

- Define what it means for interviews to be conversations with risk.
 - Articulate risks that interviewers can take during an interview.
 - Understand how to prepare questions for interviews that are conversations of risk.
-

Stepping It Up A Notch

The preceding chapter presents guidelines for beginning interviewers about how to prepare for and conduct solid interviews.

This chapter picks up where the first chapter leaves off, and presents advanced interviewing ideas for those who have some practice following basic interviewing strategies.

From Boring to Good Interviews

At the outset, let's agree on what is an interview, what makes an interview boring, and what is a good interview.

An interview is research. It is research in that it is the gathering of fact, the gathering of opinion and the gathering of emotion from people and sources surrounding us.

But interviews that use only pre-scripted interview questions are boring and predictable.

Why are they boring and predictable? Because the people we are interviewing are going to say interesting things. And if we have a list of 20 questions that are going to inspire our next question, then we are never going to be responding to what the person says. If someone says something interesting, and we simply move on to the next question, we are not reacting to the interesting thing that they just said.

In contrast to boring, pre-scripted interviews, good interviews aim to gather new information, of course, but more than that, they are *conversations*.

But what is a conversation, and what makes a good conversation?

This chapter answers these questions with five audio clips from different podcasts. These audio clips demonstrate what makes a good conversation and, by extension, a good interview.

Good Conversations

The first audio clip shows what good conversations are like.

It comes from [Slate](#) magazine's [Culture GabFest](#) podcast. Slate is an online magazine that, in addition to articles, puts out a variety of podcasts. This podcast talks about culture. In this episode, the hosts Stephen Metcalf, Dana Stevens and Julia Turner, discuss what makes a good conversation.

Listen to this clip: note what Stevens, Turner, and Metcalf define as good conversations.



An audio element has been excluded from this version of the text. You can listen to it online here:
<https://otn.pressbooks.pub/becredible/?p=820>

These hosts say that good conversations involve humor and a bit of unexpectedness.

Conversations entail people saying things that are unexpected, off the cuff, and not scripted. In this, these hosts reinforce the idea that we shouldn't be having these pre-scripted interview questions. Instead we, as interviewers, should be willing to take risks. This means being willing to say things that might offend, that might make people laugh, or maybe even that might confuse people.

Through all of this, we will enjoy and learn from our partners in the conversation.

Categories of Risk Interviewers Can Take

Here are five basic categories of risks that interviewers can take to turn an interview into a good conversation.

Be naïve. One of my favorites is to be naïve when you are interviewing. This means to act as though you don't know the answers to questions that you already know. Being naïve in this way gets the person you're interviewing, the expert, the person of authority, to give you their take on the issue at hand. This approach gives these people an opportunity to explain a basic concept in an unexpected way.

Be bold. The second risk that interviewers can take is to be very bold. This means saying something that could be construed as impertinent, or maybe even on the edge of being disrespectful. To have a bold take can be really helpful in taking a risk in interviewing.

Have your own theory. The third risk an interviewer can take is having your own theory: To present something as your own take. Normally, when we think about interviews, we think about just having questions formulated. But what if you were to walk in with your own theory of an issue or of how something happens, present that to your interviewee, and get this person to respond to that theory?

Be funny. Being funny in an interview is an incredible risk. There is perhaps nothing more intimidating than standing in front of people and trying to make them laugh. That's a lot of pressure, but in taking that risk in an interview, that might be something that would elicit an interesting reaction that you could include in your research.

Be personal. The fifth and most obvious risk you could take in an interview is to be personal. This means not only being personal in the questions that you ask, but also being personal about your own experiences. What are the things you have gone through in relation to the

topic of your interview that you could share with the interviewee? For example, say you are talking to a student athlete about a particular win or loss that they have just experienced. Being personal, and talking about your own past win or loss, might help your interviewee connect with you as a peer with a shared experience.

One Conversation Filled With Risks

The second interview that we will listen to is from [Terry Gross](#), the famous radio interviewer who hosts NPR's daily program "[Fresh Air](#)." In this podcast, Terry Gross is interviewing [Uta Hagen](#), an actress and a drama teacher.

As you will hear, Gross takes some particular risks in her interview with Hagen. As you listen, keep this central question in mind: What type of risks does Gross take during this interview?



An audio element has been excluded from this version of the text. You can listen to it online here:
<https://otn.pressbooks.pub/becredible/?p=820>

Gross takes three main risks in this interview.

The first risk she takes may not seem very risky at all in terms of what we generally mean by risks and that is the idea of being informed. Gross sat down with Hagen's books, she read the books, and likely researched Hagen using other sources as well. Gross did all the preparation that was needed, and that takes time.

Any occasion that you take time to research something is a risk because you could spend time researching something that doesn't end up being relevant to your interview. But Gross has taken the risk of being informed and taking the time to be informed. The result was that Gross was able to ask informed questions and, as we will discuss, engage in a conversation with Hagen as an informed person.

The second risk she takes is the risk of being quiet and of listening actively. Consider how personal Hagen's criticism of Gross asking Hagen about acting technique could have seemed

to Gross. Hagen basically attacks everything Gross does for a living, but Gross just sits there and takes it.

If you ever had to sit there and be lectured to, and not defend yourself, you understand that it takes a huge amount of restraint from Gross to be submissive.

Remaining quiet and listening to Hagen's perspective granted Gross a keen insight into the mind and opinion of a great acting coach, and time to use her prior knowledge of Hagen to formulate her response to the thespian. This leads us to Gross's third risk.

The third risk that Gross takes is the risk of defending herself. Once she has listened to Hagen, Gross defends her question and fights back in a way, and explains her opposing argument. That could have further inflamed this situation and made Hagen even more offended by what Gross was asking and saying.

But, as you may notice, Gross is able to pull from her years of experience as an interviewer and her research of Hagen to explain why she asked the question that offended Hagen. In response, Hagen is convinced that Gross's question wasn't flippant but a thoughtful attempt to improve her own and her listeners' understanding of the acting craft. In the end, Hagen sounds apologetic and almost flattered, and the two return to a congenial conversation.

Terry Gross later explained her thinking during the interaction:

"What I liked about [Uta Hagen] challenging me is that sometimes interviewing is like question, answer, question, answer, and that's fine. But other times there's this real whammy that's thrown at you, and I like it. First of all, it really forces me to think, and second of all, in her case, it was challenging the basic premise of the interview. In a situation like that, if somebody is either hostile or challenging, I like to examine the problem and talk that through — I think that makes for provocative radio."

Studs Terkel on the Train

The next podcast is from "The Studs Terkel Program." [Studs Terkel](#) was a famous author and radio producer from Chicago. This clip is from Aug. 27, 1963, so you need to do a bit of time travel to understand the risks that Terkel takes here.

This clip is called "This Train." It is from interviews that Terkel conducted with individuals on the way to a Civil Rights March in 1963.

The question I would like for you to keep in mind while listening to this clip is: What type of risk is Terkel taking? Again, focus on particular things that he says, and particular ways he sets up the interview that might be risky.



An audio element has been excluded from this version of the text. You can listen to it online here:

<https://otn.pressbooks.pub/becredible/?p=820>

I see Terkel as taking one major risk in this interview.

The risk he takes is by simply being there, on location, in the train station, at the event. He took **the risk of leaving the newsroom**. This is something that is incredibly easy to avoid. You might be tempted to stay away from the personal interaction that might take place. He could have just picked up the phone, even back in 1963, and attempted to do these interviews over the phone.

However, the difference between being in-person and being over the phone is huge. Being there is an incredibly helpful thing to do in regard to doing the interview. It allows you to see and hear things firsthand. You directly interpret things instead of asking for someone else's spin.

I think we can all agree that in 1963, as people were marching on Washington to advocate for civil rights, that this was not a topic that was seen as simple or easy to cover. This would have been something of great controversy. To add to this, Terkel was a white man covering an event that greatly impacted African Americans. By taking the risk of leaving the newsroom, Terkel improved his ability to find sources and to better obtain their trust to share their experiences.

So Terkel went out of the newsroom, found people where they were, and asked them about something that could be incredibly offensive to them, or incredibly controversial to them. All of this involved risk.

Telling a Story

The fourth clip is from the podcast “[Radiolab](#).” This episode is titled “Dark Side of the Earth.” We are going to listen to a short interview with [astronaut Dave Wolf](#), conducted by hosts Robert Krulwich and Jad Abumrad. The interview was posted Oct. 12, 2012.

This clip needs a little bit of a setup. What Dave Wolf, the astronaut, is going to explain here is this: He is trapped outside of the International Space Station, hovering out in the solar system, and the cooling unit of his space suit has failed. And so he is essentially slowly cooking from the outside in. It is a situation that is very likely to kill him unless he finds a way to get back into the space station.

He has already failed to get into one of the entrances of the space station. So, he is going to try another entrance into station.

He is getting so hot within the space suit that his perspiration and body heat is fogging up the front shield of the space suit, which he uses to look out of. You’ll hear him figure out a way to look through that shield so that he can see what he’s doing.

Again, what risks do interviewers Krulwich and Abumrad take in this interview?



An audio element has been excluded from this version of the text. You can listen to it online here:
<https://otn.pressbooks.pub/becredible/?p=820>

Of course, the interviewers are being quiet, in a way that we talked about previously, to allow Wolf to tell a personal story.

But they take one key risk that we haven’t discussed previously. This risk is allowing Wolf to tell a story from beginning, to middle, to end. That is really, really tricky to do, to get someone to tell an interesting narrative story. And they’ve taken that risk of asking him to tell his story, and then given him the space and time to do so.

One thing I would encourage every interviewer to do is to have a “tell me a story” question at the ready.

It is very easy for people to avoid telling us stories if we ask them questions like, “How was your day?” “How was your presentation?” “How did the budget meeting go?” They can answer very easily by saying, “Good,” or “OK,” or “Not so great.”

But if we say, “Tell me a story about the budget meeting,” then they are very unlikely to just respond quickly. They’re going to be forced by social manners and also by our question to tell us a story, and we likely will get much more out of it by asking that question.

Back to Middle School

The next podcast is from the radio program “[This American Life](#)”. This episode, “Middle School,” focuses on the embarrassment, the fun, and the awkwardness of being a middle-schooler. This was produced by This American Life’s co-producer Ira Glass, and it was first published on Oct. 28, 2011.

You’re going to hear a variety of interviewers here. The risks that these interviewers take are very similar to the risks taken by the previous interviewers. So I’m going to ask you to keep a different question in mind. While listening, ask yourself: What are the specific things that the interviewers do and ask here that are particularly good?



An audio element has been excluded from this version of the text. You can listen to it online here:

<https://otn.pressbooks.pub/becredible/?p=820>

I think one of the most striking moments comes from the interviewer who asked, “Take me through it minute by minute.” That prompt, that follow-up question that she asked, allows the boy in this case to explain exactly what happened, and to feel OK about indulging the interviewer in this minute-by-minute of what life is like for him.

There are other risks that these This American Life interviewers took:

1. They enter their sources' most comfortable space. They find them among their friends, at their school, they find them outside of their school in places that put the interviewees at ease.
2. They don't have pre-written questions. Instead, they have impromptu, of-the-minute follow-up questions. They ask questions based on what the previous question to the answer was. It takes years of practice to get to this point, though. Below we will give you some tips on how to build up to this level of mastery.
3. They also ask lots and lots of confirmation questions. They ask and re-ask the same questions, and in doing so they are asking their sources to dive deeper into their experiences, and say things in a more detailed way.
4. This American Life producers take incredible risks with the actual questions they ask. These are adults who go into a middle school with a microphone and ask students about petting, dating, boys and girls at their school, and dances. In doing so, they ask some incredibly sensitive questions. In other words, the producers go out of their comfort zones to ensure that their interviewees feel comfortable enough to be their authentic selves.

Preparing for Conversations With Risk

So, if we are trying to do all of this conversational interviewing do we just walk into an interview unprepared?

I think we already know the answer to that: No. But we are going to prepare for a conversation differently than we would for a pre-scripted interview.

The following process comes from [Bill Tammeus](#), who is a former long-time journalist with the Kansas City Star. He presents this as a step-by-step process for preparing for a conversational interview.

Focus. The first thing Tammeus says that we should know is the focus of our story. Make sure that your focus is narrow enough for the time and space we are given, or that it is broad enough to fill the time and space we are given. For instance, we shouldn't be trying to answer a huge question about our culture with a 200-word brief. Similarly, we shouldn't try to answer a very, very narrow question with a 10,000-word story we've been assigned. We should make sure that our focus is appropriate.

Research the story. We should do as much factual research as we can on our topics, much in the same way that Terry Gross researched acting and knew tons and tons about it. We should do lots and lots of research on the story we are hoping to research.

Research the interviewee. We should do as much factual research on the interviewee as we did on the topic or story. Remember how Terry Gross read all of Uta Hagan's acting books? You may not have to read books, but taking a glance at the interviewee's LinkedIn account or another biographical source should be a good starting point.

We shouldn't need to ask the interviewee where they went to school or how many years they have been in their careers, or how to spell their names. We should know all those things heading into that interview. We shouldn't be surprised by any of their answers. We should be asking more interesting and more conversational questions that will get our source to tell us something interesting.

Prepare questions. This is going to seem absolutely counterintuitive, but you should write down 20 to 25 questions to ask. Now, we just said that we would not ask our subject 20 to 25 questions in a pre-scripted way. That is still true. The point of writing down these questions is to get our questions on paper and into our minds. Then, we will go through a mental exercise.

Group questions. We are going to group all of those questions into five or six subject areas that will dominate our questions. So in the end, we are not going to ask those exact 20 to 25 questions, but rather we are going to talk about five to six the major subject areas.

Throw questions away. You now have all of those questions in your head. There is no reason why you need to go into an interview with your written-down questions. If you do, you will likely rely on them and likely ask questions that seem stilted, and not seem responsive to the person you are sitting in front of. So instead, allow those five or six subject areas guide you.

Note sections. What do you do with those five to six subject areas? You go ahead and put them in bullet point in the corner of each page of your note-writing materials. If you put them up there, you will be able to ask those questions without needing to refer to those exact questions. It will allow you to work through each of those subject areas one by one, without having to ask questions that are pre-formulated. And it will allow you to ask follow-up questions that are more conversational.

Subject conversation. During the interview, have a conversation about those bullet-point subject areas. Allow this conversation to be free-flowing, take the risks of being naïve, being bold, being funny, coming up with your own theory, and all the things that we talked about in this chapter.

Finish up. How do you finish this? You finish this by asking the interviewee: What did I forget to ask? This is often a really good question to finish with, because it flatters the interviewee a

little bit. This question signals to them that that they probably know the topic better than you do. Their answer to this question may help you to generate your next story idea.

Double-check preferences. Double-check how your source wants their name to appear in your writing. I said before that we don't need to check the spelling of someone's name, but someone might prefer to be Jen instead of Jenny or Jennifer, so it's always good to learn of someone's preferred title and how they would like their name to appear. You may also ask how they wish their professional title to appear, and if they have a pronoun preference (i.e., he/his, her/her, they/them/theirs).

Review

What are we seeking from interviews? We are seeking news. We are seeking something that few people already know. We want something unexpected, and we want something that is unknown. And we are much more likely to get this very unknown information if we ask questions using a conversational approach rather than pre-scripted Q & A. We are always looking to have a conversation that hinges on risk.

A Practitioner's View



Zak Beasley

KU Journalism, B.S. 2007, M.S. 2014; KU Law, J.D. 2015

U.S. Marine Corps Captain

I'm a judge advocate in the Marine Corps, which is just another way of saying I'm a Marine lawyer.

As part of my job, I have to interview people in order to understand their side of the story, as well as their recollection of events.

It's not unusual to interview someone weeks or even months after an event has happened, which makes the interviews that much more difficult.

How to select individuals. If a person is likely to have relevant information to my case, I want to talk to them, period. If there were five witnesses to a crime, you better believe I'm trying to talk to everyone.

How to conduct interviews. First, deciding the proper tone of the interview. If I'm

talking to a victim of sexual assault, my tone is going to be entirely different than if I'm talking to an expert witness about how cocaine affects the body, or with a person suspected of committing a violent crime. Establishing the proper tone creates an environment where the interviewee feels comfortable and gives the impression that I am a professional. Typically I always take time to thank the person for their time upfront and tell them the importance of their interview.

Second, tell the truth. Without failure, I always stress the importance of telling the truth. I don't care whether the facts I get from a person are good for my case or not: if I don't have reliable information, then I can't do my job.

Sometimes people feel pressured that they have to give a certain answer, so I do my best to make sure they know their only obligation is to tell the truth. This comes in handy if the interviewee/witness is testifying, and the veracity of their prior statements ever comes into question.

Third, don't be afraid to ask lots of questions. The importance of having a firm understanding of a person's recollection of events or expert opinion cannot be overstated. I typically spend a good portion of my morning reviewing investigations, case law, and prior witness statements in order to maximize my understanding of the case and the relevant issues.

I like to outline topics and sub-topics I want to cover with the interviewee to make sure we cover those areas. I like open-ended questions when conducting interviews so I can let the person talk without having to interrupt them, and then ask more pointed questions on the back end.

Don't be afraid to ask the same question a couple of times. Never leave an interview being unsure about what the person was trying to convey.

Fourth, don't be afraid to ask hard questions. Typically, those are the most important ones to ask. I always like to preface those questions with a disclaimer and why it's important for me to know. At the end of the day, I can't do my job if I don't have all the facts.

Activity 1:

Find an audio or video clip of an interview conducted by a journalist. Answer the following questions through a presentation: Does this interview exemplify a conversation with risk? What risks are present in this interview? What risks could the interviewer have taken during this interview? How could/did these risks contribute to the interview? Write 1-2 pages double spaced explaining your impression.

Activity 2:

Choose a topic you are passionate about and a key person related to this topic you would want to interview. Following Bill Tammeus's process: research and prepare questions for a conversational interview. How does this preparation process ensure that your interview will be more conversational? Include 2-3 specific risks strategies you could include in the interview. What are the strengths and weaknesses in regards to using these risks? Provide drafts of your question-writing process with notes explaining your decisions.

Activity 3:

Select 1-2 of the clips or podcasts from this chapter. Based on Bill Tammeus' process, how did the questions in these interviews make these interviews conversational (or not)? Does it seem like the interviewers researched the topic or story ahead of time? How so? What were the major subject areas covered in the interview?

Author Bios

Book Authors

Peter Bobkowski is an associate professor in the William Allen White School of Journalism and Mass Communications at University of Kansas. He has been teaching JOUR 302: Infomania since 2012. His research focuses on the developmental role of media among adolescents and emerging adults, as well as information and data literacy.

Karna Younger is an assistant librarian and faculty engagement librarian at the University of Kansas Libraries. Her research focuses on media and information literacy, as well as open education.

Chapter Authors

Kerry Benson is chair of Strategic Communications and a lecturer at the William Allen White School of Journalism and Mass Communications at the University of Kansas. She has more than 30 years of news and advertising experience.

Callie Branstiter is the first-year experience and undergraduate student success librarian at San Francisco State University and former undergraduate engagement librarian at the University of Kansas Libraries, with a background in marketing.

Caitlin Donnelly Klepper has been the Head of Public Services at Kenneth Spencer Research Library at the University of Kansas since 2012. Her previous professional experience includes working as the archivist at the Daughters of the Republic of Texas Library at the Alamo in San Antonio, Texas, from 2008 to 2012.

Carmen Orth-Alfie is an assistant librarian and graduate engagement librarian at the University of Kansas Libraries. Orth-Alfie has taught graduate courses in data journalism and government information at the University of Kansas and the School of Library and Information Management at Emporia State University, respectively.

Jonathan Peters is an assistant professor of journalism at the Grady College of Journalism and Mass Communication at the University of Georgia. Also holding an affiliate faculty position in the School of Law, Peters specializes in communication law and policy and is the Columbia Journalism Review's press freedom correspondent.

Eric Thomas is the director of the Kansas Scholastic Press Association and lecturer in the William Allen White School of Journalism and Mass Communications at University of Kansas. Previously, he taught high school journalism, becoming a Master Journalism Educator through the Journalism Education Association, and was nominated for a Pulitzer Prize for his photojournalism.

Paul Thomas is a library associate at the University of Kansas Libraries specializing in citation management systems. Thomas is currently pursuing a Ph.D. at the School of Library and Information Management at Emporia State University.