

CHARTING THE TERRITORY

Report of Initial Findings

May 2001

The ambition of public radio's most inspired organizations is in the direction of becoming public service media companies, defined by the character of their content, their commitments to public service, their trusted relationships with audiences, and their capacity to move across multiple channels to achieve their missions.

OVERVIEW

Earlier this year the Station Resource Group launched a major initiative to chart opportunities through which stations can realize this ambition—strategies in broadcast, on other delivery platforms, and in our communities that extend and enhance public radio's content, services, and distinctive role. SRG's aim is that these opportunities, and the action plans that flow from them, will frame multi-year plans at the local, regional, and national level that will be anchored in service goals, that address financing issues, and that anticipate structural evolution. The effort is aimed at informing and inspiring individuals and organizations throughout our field as well as stimulating the private investment and public support that will be needed to make the vision real.

INITIAL CONSULTATIONS—TOWARD A STRATEGIC MAP

To begin, SRG met with station leaders, national organization executives, and others to assure that core research and policy agendas were closely matched to the planning needs of stations and aligned with efforts at other public radio groups. We wanted to identify the principal concerns, opportunities, and areas of strategic focus for stations' future work and to begin framing activities that, over the coming months, will produce innovative thinking and credible outcomes.

From January through March, with support from CPB, SRG gathered 57 station leaders for five consultation meetings. We sought out our field's distinguished veterans, and added a sprinkling of new managers as well. These managers came from stations in major and smaller markets, both urban and rural communities, representing a wide range of formats and organizations both within and outside SRG's membership. We held separate meetings with the senior management teams at NPR, PRI and DEI in early April. We have also consulted with others from outside our field.

KEY FINDINGS TO DATE

On the significant issues confronting our field, station leaders are “on the same page” with respect to core questions, primary threats, and important opportunities. We heard a remarkable consistency across the station consultation meetings. We also heard an affirmation of the broad assumptions and activities we initially outlined for this project, as well as a sense of timeliness, urgency, and close connection to station agendas.

Deep engagement with mission and community. Public radio’s station leaders are deeply engaged in questions of mission, public service, connection to community, and meaningful roles in local civic and cultural affairs—more than has been the case for a decade or more. There is a powerful and broadly shared impulse toward community-focused and station-originated content that extends public radio’s core values, gives richer meaning to our ambitions for significant programming, and reinforces our importance to our audiences.

Several important perspectives contribute to this service thrust.

1. *Strengthen the programming partnership.* The thirty-year model for public radio’s programming service is premised on a national/local partnership fundamental to most stations’ schedules and the design of our premier national programs. While both the national and local dimensions of public radio’s service have grown in quality, reach, and impact, stations see that their contributions too often fail to meet the standards of value and importance to which they aspire. However one anticipates public radio’s evolution as channels and delivery platforms proliferate, it is clear that the broadcast-based programming stream will be the central vehicle for public radio’s public service for years to come. To protect existing levels of service in a more competitive, more segmented media environment and to capture opportunities for additional impact, stations aim to better fulfill their responsibilities within this enduring partnership.
2. *Prepare for programming “bypass.”* Stations anticipate an environment in which their signature national programs and their major formats will be ever-more available to their audiences through multiple alternative channels, including direct broadcast satellite, wired and wireless Internet, and sideband channels of digital television. This direct-to-public-radio-listener bypass of stations by content creators both within and outside public broadcasting will have uncertain consequences for stations’ own service role and financial support. A strong and distinctive identity centered on original programming, understanding of community needs and sensibilities, and flexible, close-to-the-listener connectedness is an attractive counter-strategy.

3. *Leverage growing capacity and multiple channels.* Many stations today have a greater capacity to create content that resonates with public radio's core values and matches our highest standards of quality than at any earlier time: more funding, more people, more robust technology, and more knowledge of the audiences they serve. Stations are also identifying ways in which they can use additional channels and delivery platforms to expand and enrich their services, extend the life and value of their content creation investments, and reshape the return, in both public service and revenue, of local production. Stations are eager to find innovative, compelling, and effective ways to put this capacity to work in pursuit of their missions.

These distinct but reinforcing perspectives are the foundation of the central themes emerging as priorities for the next phase of *Charting the Territory*.

- **Content creation at the local/regional level.** The most widely shared station ambition is to create distinctive original content that “makes a difference” in the community one serves and that underscores the identity and importance of the station itself. The added value that stations want to bring to their communities takes several forms—as a catalyst for people to take an active role in their communities and make active choices in their lives, as a pathway to community discussion, as a guide to an overwhelming information environment, as a flexible provider of content that reaches listeners on multiple channels and in multiple configurations of service.

At the same time, stations fully understand that there are substantial risks on this path—of losing focus, of costly production investments with uncertain returns, of discovering that ambitions exceed the skills and resources at hand. Success will require close attention to the realities of market opportunity, management discipline, business planning, and public service outcomes.

- **Partnerships.** Realization of these more ambitious public service goals will turn, in part, on building relationships with other organizations that can give stations access to content, connections to their communities, and a means to leverage their media skills for greater civic and cultural impact. Partnership is the buzzword for what, in fact, will be a wide-ranging mix of relationships at the local, regional, and national levels with organizations both outside and within public broadcasting.

Public radio's collective experience in this area, however, is limited and not always encouraging. Relationships require clarity of purpose and intended outcomes, and understanding the expectations of other parties. Partnerships also raise important issues concerning integrity, independence, and preserving the public's trust.

- **New vocabulary of service and metrics for performance.** Stations seek ways in which to assess the importance of programming to audiences that go beyond measures of consumption. When we say “significant programming for significant audiences,” what do we really mean with respect to the programming itself? There is a sense that important opportunities may be found in shaping deeper, stronger relationships with listeners that will make a qualitative difference in the character of the interaction—with the individual listener and perhaps with the larger community—for which we do not currently have adequate indices.

We need to advance our tools of measurement and accountability to keep pace with evolution in our environment and our purposes. Our service benchmarks must increasingly reflect both the success of discrete services as well as aggregations across multiple channels and platforms. We must reshape expectations and reapply familiar techniques in ways that are not bound by the models we have been using for the past twenty years. We must develop a shared vocabulary for our expectations that can serve as the foundation for our services, collaborative work, joint investments, and mutual accountability.

Stations also highlighted a short list of critical organizational issues that form an important backdrop to these themes and shape stations’ context and capacities for addressing them.

- **Personnel.** Recruiting, training, and retaining a capable and diverse workforce is an immediate and continuing challenge. Public radio is a “graying industry” that must address compensation, conditions of work, career path expectations, and a motivating sense of opportunity that will bring talented and energetic individuals to our field.
- **Structure and governance.** “How can I think of myself as a public service media company; I am a department!” said one manager. The ambition of many stations confronts the structural reality of public radio’s ownership patterns with unhappy results. Many of our entities do not have the scale, autonomy, or ability to partner that will be necessary for success along the directions outlined above. At the same time, stations based in larger institutions have significant assets they might leverage in a new service environment, provided they can realign expectations and working relationships with an eye to public service.
- **Channels.** The service plans toward which many stations are heading require the coordination of multiple channels, both broadcast and new media, across which to configure and deliver different services. This assumption introduces a cascade of ramifications regarding acquisition of spectrum, coordination of services, management of identity, and economic viability.

- **Diversification of revenue.** To fuel all this activity, stations want to augment and diversify their revenue streams, including major giving, planned giving, the development of endowments, and proceeds from activities that transcend broadcast services. If stations are to emerge as significant community institutions, they may need different revenue portfolios than the current mix.

NEXT STEPS – FROM PUBLIC RADIO STATIONS TO PUBLIC SERVICE MEDIA COMPANIES

Throughout the remainder of 2001 and beyond, *Charting the Territory* will develop a cluster of activities designed to understand and illuminate the major themes and priorities identified by stations. These activities will likely include:

Audience research in the field.

Economic and partnership models.

New benchmarks and metrics.

Reports from outside experts.

Further consultations and discussions with station and public radio system leaders.

Goals and outcomes. *Charting the Territory* will provide a substantial body of material—case studies of local programming, models for partnerships, economic analysis, and audience research findings—all aimed at envisioning a robust and significant future for public radio stations throughout our field.

As we knit together our results and present them to the public radio system, our focus will be on four broad outcomes:

- A sense of opportunities for public service and imperatives for organizational change that will spark and support station planning and action.
- Service targets that can guide content creation, delivery channel growth, and organizational development.
- Goals and principles that inform funding and regulatory policies.
- A vision of our future that warrants significant investment in our field.

Disseminating findings. We will advance these outcomes through reports of our audience research findings, our economic analyses, and our strategic planning that will be delivered both as presentations/discussions at industry meetings and as publications on the SRG website.

For this work to have its greatest effect, though, we must inspire and enable our stations' managers to work as effective change agents within their own organizations. We will therefore look to ways that we can deliver resources that help these key players lead toward a stronger future, not necessarily with answers and prescriptions, but with the right questions, provocations, and issues and the backing of powerful research, analysis, and vision.

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