What We Talk About When We Talk About Impact:

One News Organization's Approach to Practicing Journalism with a Purpose

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Chalkbeat

I. Introduction

The organization now called Chalkbeat began as two tiny operations on two different sides of the country. We were the definition of scrappy. Our New York City office was housed inside a basement. Our longest-range plans were made in the morning, for lunch. One day, having finally arranged our desktops in a logical design, we awoke to learn that our officemates had been forced to execute a midnight evacuation. The shared basement workspace, it turned out, was actually a squat.

We were a news startup born in a time of exciting journalistic innovation, with our own original spin — local rather than national, single-subject rather than general interest, nonprofit rather than commercial. But we spent very little time thinking about this new world we were helping to build. Instead, we focused our curiosity on the universe we covered: the New York City and Colorado public schools and the fascinating national education reform movement that was enveloping them.

We might have stayed that way forever, but by 2011, our situation had begun to change. Three years in, our websites — then called GothamSchools and EdNews Colorado; now Chalkbeat New York and Chalkbeat Colorado — were receiving tens of thousands of monthly visitors. Strange looks and press-pass bans were replaced by offers of exclusive access and angry fulminations when we failed to publish the morning news roundup exactly on time (or, in the case of our more anxious readers, concerned emails making sure we were still alive). Enthusiasts in other cities asked us if we could open up branches covering their schools. Foundations, too, started calling to inquire about our "exciting new model." Perhaps most importantly, we now had, in addition to mind-melded cofounders, a growing team of reporters and a budding organizational chart.

The changes forced us to face questions that we had previously answered incompletely, at best, or punted, at worst. What were we doing? How did we do it? And how could we know if we were having the effect we wanted?

Our effort to answer these questions has spanned multiple years and strategies as we've sought to describe our mission to ourselves and others. It has also thrust us into the heart of a growing discussion about the "quest for measurement" in non-profit journalism, as Richard Tofel of ProPublica put it in a [memorable and important paper](#) last year, the first in a series for which this essay is the second.

One solution is a tool we created called MORI, or Measures of Our Reporting's Influence. A WordPress plugin that allows us to track and visualize impact according to a variety of story attributes, MORI has attracted substantial philanthropic support (including from the Bill & Melinda Gates Foundation, which commissioned this report) and interest from organizations and individuals on the cutting edge of journalism.

MORI does more than just measure. Indeed, we think of it primarily as a tool to aid what one might call "continuous learning." By helping us establish a vocabulary and process for what we are trying to do, MORI helps us do the daily work of reporting about education in a more thoughtful and deliberate way. Indeed, in order to bring MORI into the world and make it work, we have also built:

- A detailed mission statement, defining what we hope to do with our journalism, including our own definitions of two buzzy but often elusive concepts — "impact" and "engagement"
- Taxonomies to describe the different types of stories we aim to write, the specific groups of readers we aim to reach, and the "storylines" into which we think every Chalkbeat story should fall. This sets the boundaries of the work we do and makes it possible for us to explain our unique role in the news ecosystem
- An organizational culture that prizes collective inquiry, continuous learning, and curiosity, and that is supported by carefully designed systems, including a planning process that helps us set editorial strategy and goals for reporting, distribution, and engagement

In examining our own experience inside Tofel's "quest for measurement," we have come to see measurement not as a destination but — and here, we recognize, we risk falling into inspirational poster territory — as an integral part of the editorial journey itself. The rest of this paper will detail how Chalkbeat is making that journey, along with the key lessons we've learned. Among them:

- It is possible for journalists to have a purpose without taking a position.
- To be successful, impact measurement must be integrated into existing workflows.
- Given the right supports and tools, reporters will embrace impact as a goal worth planning for.

We share our story in part with the hope of helping philanthropists, who we know are challenged to defend their support of journalism. More important, we share it for our colleagues working to build a stronger press. By sending out our ideas, we expect to receive them back in better form.

II. What is Journalism For?

At the heart of the questions we had to answer as we began to grow was one about purpose. What was it that we hoped our journalism would accomplish?

Sometimes, the question was put very directly. Making our first "About" page, we reached the section that was supposed to be called "Mission" and realized that we did not have a mission statement. Or, filling out a grant application, we were told to enter our "theory of change," something we were not sure if we had.

More motivating for us were the times when our own work began to demand a clearer purposefulness. Faced with a long list of story ideas and only so many working hours each day (a different concept, we learned, than *waking* hours), we realized we needed to prioritize. Traditionally, print newspapers had clear barometers to help us make decisions. A front-page story was a day well spent; a scoop on the front page that forced rival papers to respond, even better. We had only our own judgment to lean on. What stories should we spend the most time on? When should we congratulate ourselves for a job well done?

This challenge accelerated as we began training new reporters. Often, they would pitch stories that, while interesting, did not constitute our emerging idea of "a GothamSchools [now Chalkbeat] story." But pressed to explain what that was, we fumbled. We wrote stories that we thought *mattered*, but what did it mean for a story to matter?

The question emerged again when we first identified a problem we came to call "impact loss" — our trapped-in-the-present tendency to lose track of everything we'd accomplished in the previous year, month, and even week, thereby making it hard to figure out what to do better in the future. Hoping to combat impact loss, we built an early version of MORI, a Google spreadsheet designed to track each story's success with a mix of automatically populated and hand-entered data. The idea was to paint ourselves a running record of what we had done over time. But this begged the same question: what data should we track? What did success mean in journalism?

Defining our purpose was especially tricky because doing so threatened to pull us into the territory of "advocacy journalism," reporting that seeks to advance a predetermined idea, agenda, or outcome. Unlike some journalists we knew, we had no problem saying that we thought education should improve, especially for the poorest children. But we were adamant that the best way for us to contribute to educational improvement was to remain neutral on the question of how it should happen — and even neutral on the question of exactly what improvement ought to look like.

As we saw it, education had a surplus of people supplying answers to these questions, including a growing number of advocacy groups that existed solely for that purpose. What education had too little of, we thought, was people asking questions, offering context, and acknowledging nuance. We could make the biggest difference, we thought, if we served as independent mediators, not advocates.

To articulate a mission statement that would work for us, we turned to other journalists' definition of their work.

Other People's Definitions

What should journalism be for? The prevailing ideas seemed to fall into four buckets:

- The first and most common view describes journalism as the work of **providing accurate information**. The PewResearch Journalism Project [defined](#) this work as a process of "assembling and verifying facts" to create "a map for citizens to navigate society." In the same vein, [E.B. White suggested](#) that journalists should not just account, but enlighten — in his words, "restate and clarify the social dilemma and the political pickle."
- Another prominent school of thought holds that the purpose of journalism should be **to hold powerful people and governments accountable.** Richard Tofel, in his white paper, said the goal of the investigative journalism ProPublica produces is "to reveal something that someone with some modicum of power (a person, group or institution) seeks to keep a secret." Journalism is, in other words, "something someone somewhere doesn't want printed."[1]
- A third view says journalism should **convene conversation**. Journalists are "framers of the public discussion" and so "must provide a forum for public criticism and compromise," the PewResearch Journalism Project says.
- Finally, a currently in-vogue school of thought holds that the purpose of journalism is to **serve readers** by figuring out what they need and then giving it to them, whatever it is. "The purpose of journalism," Jonathan Stray writes in an [essay](#), "is to deliver each story to the right [people], at the point when they need it." The argument has spawned a fashionable new way of describing what journalists should try to achieve as the outcome of their work: "engagement," or evidence of reader interest and action.

Each of these definitions appealed to us. We even printed some of them out for motivation. But while they were inspiring, none seemed sufficient to build an organization around, at least, not our organization.

One issue was that, to borrow from foundation-speak, the definitions focused more on "outputs" than "outcomes" — the collection of facts, investigations, convenings, and services journalists should make, but not the societal ends they should aim to achieve. They outlined a kind of work to do, but they did not constitute "theories of change": models for explaining how the stuff that journalists created then made its way through the world, presumably for some better end.[2] Defining what kind of work we wanted to do was important, but to prioritize among stories and decide which had succeeded, we also needed to define what we hoped the work would lead to.

The closest case we could find to a clear theory of change was in the accountability definition. In its mission statement, for instance, ProPublica says that its investigations aim to "spur reform." By exposing corruption, the idea is, journalists can inspire others to eliminate it. They are like

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[1] In their [excellent paper "Post-Industrial Journalism"](#), C.W. Anderson, Emily Bell, and Clay Shirky attribute this adage to a 20th-century publishing magnate named Lord Northcliffe.

[2] Anderson, Bell, and Shirky describe this lack of a clear theory of change in ["Post-Industrial Journalism."](#) Until very recently, they write, "journalism was simply what journalists did, journalists were just people hired by publishers, and publishers were the relative handful of people who had access to the means of making speech public."

democracy's cops, identifying bad actors so that others can punish them, restoring goodness. The implied prioritization for a news organization, then, is to take on the investigations that will reveal the worst behavior, so that it can then be eliminated.

This was a defensible position, and important work. But it implied an idea of how the world worked that felt too black and white to describe the sector we cover (and maybe others, too). The assumption seemed to be that democracy's deepest dysfunctions, injustices, and failures stemmed from deliberate malfeasance. In education, though, malfeasance was just the tip of the dysfunction iceberg. Equally problematic if not more so was a complex stew of incompetence, circumstance, weak design, and ignorance.

So while we could easily spend all our time exposing teachers, principals, and superintendents who abused their powers, overspent their budgets, or otherwise violated a sense of good and just behavior, these investigations on their own would not be enough to help education improve in the way that we felt, intuitively, that the best journalism could. We also wrote stories in the vein of the Solutions Journalism Network's model of illuminating promising ideas and practices. Most often, though, we wrote stories that fell somewhere in the middle, pointing out difficult choices between, for instance, valuing order and discipline, on one hand, and fostering self-reliance, on the other.

To structure our organization, we needed a mission statement that would reflect this more complex view of the world.

Our Definition

The theory of change we finally landed on, with help from smart colleagues[3], is pretty simple.

While we didn't want to advocate for certain prescriptions, we realized that we *did* want to push for a particular way of arriving at these answers.

We wanted all the people whose debates and actions wound up collectively producing education, through laws, policies, and practice, to do so with the maximum amount of information. They would proceed based on ideas and understandings anyway, whether right or wrong. As journalists, our job was to make sure those understandings were as accurate and evidence-based as possible. In this way, we thought, we could do our part to ensure that the education they ended up making was as good as possible.

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[3] A team at the Bridgespan Group led by Kira Mendez and Peter Kim helped us develop our "theory of change" model, with our board chair, Sue Lehmann, and cofounder, Alan Gottlieb, taking important roles. Joan Hochman of Fintech LLC worked with us in a carefully structured design process to expand the theory of change into the more specific and elaborated management tool described in the rest of the paper. And C.W. Anderson helped us use basic political philosophy — in particular, the idea of civic deliberation as a crucial ingredient to building policies and practices in a democracy — to clarify an extremely complex system without sacrificing accuracy.

In more general terms, the mission of journalism, as we saw it, was to inform the debates and decisions that people make in order to lead to a better civic outcome.

The final thing we had to define was what we meant by a "better" outcome. So did every journalist who made choices about what to cover out of a desire to contribute. To determine which sorts of malfeasance most required attention, investigative reporters aiming to "spur reform" had to have a sense of what actions were most worth reforming. Similarly, to pick among the debates and decisions we would invest our resources in informing, we needed to define what elements in education we cared most about.

We needed to spell out the values and beliefs undergirding our reporting:
- We value high levels of learning for all children
- We think education should aim to create informed citizens and to give students the tools they needed to succeed in the workforce
- We believe that improving educational opportunity and quality for historically marginalized communities, including poor children and children of color, is especially important

We did not know how to balance among these values, and we didn't think it was our place to do that. That was the role of policymakers, professionals, and the public to work through together. Indeed, we believed that if we ever did step into the role of decision-makers, we would impede our ability to create honest, impactful journalism. Doing the most accurate work, we thought, required a freedom from the imperative to choose among compelling alternatives — our definition of editorial independence.

Together, the theory of change and values added up to our mission statement:

> Our mission is to inform the decisions and actions that lead to better outcomes for children and families by providing deep, local coverage of education policy and practice.

Implications for Measurement

Whereas fuzzier definitions of journalism's purpose did not suggest a clear way of measuring whether that purpose had been served, ours implied a straightforward definition of "journalistic impact." We broke the "decisions and actions" from our mission statements into two categories that we hoped to inform — actions and "civic deliberation," or the public debate.

Here is the definition we came up with:

> **journalistic impact** — evidence that our stories have influenced either:
>
> A. *informed action* — the actions that readers take based on our reporting
> B. *civic deliberation* — the conversations readers have based on our reporting

As we explained to our team, the key was not to determine what sort of actions and conversations our reporting directly *caused*. What we wanted to know was whether or not our stories *influenced* the complex stew of ideas, predispositions, and understandings that build community debate and individual actions. That was also the outcome we had to focus our resources on affecting: getting our stories into the mix, not making sure they led to a certain end.
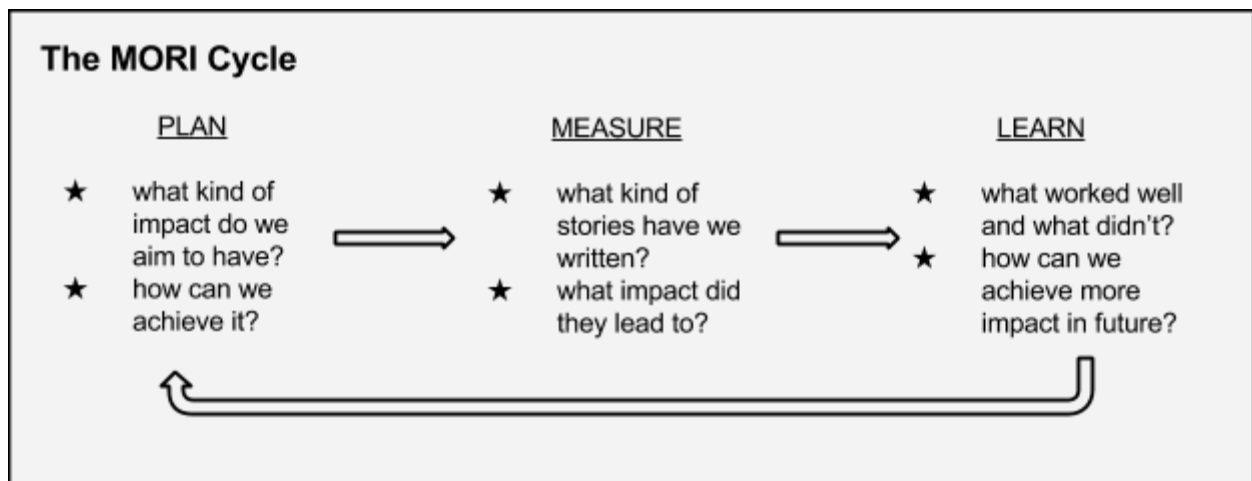
As a result, we did not see a need for elaborate pre- and post-testing of whether our readers had learned particular concepts or taken particular actions solely as a result of reading our stories. As we explain below, we found more efficient ways to assess whether we'd focused on the kind of stories that mattered most, ways that protected us from warped incentives that might have harmed our editorial independence (the imperative that we focus on informing, not deciding).

Armed with this clear framework defining what we hoped to achieve, we could build a better version of the tool we had in mind when we first dreamed up MORI.

III. A Tool and a Taxonomy for Making Journalism that Matters

How MORI Works

MORI serves three intersecting purposes: to help us plan, measure, and learn.

The MORI Cycle

PLAN
- what kind of impact do we aim to have?
- how can we achieve it?

MEASURE
- what kind of stories have we written?
- what impact did they lead to?

LEARN
- what worked well and what didn't?
- how can we achieve more impact in future?

We didn't just want to track our stories' influence; we also wanted to look at the stories that had the most impact and decipher their common traits. Then, after figuring out which types of stories led to the most impact, we wanted to plan to write more of them.

As a result, we had to enter multiple data types into MORI. One category was the stuff from the tool's name, Measures of Our Reporting's Influence — evidence of each story's journalistic impact, as well as evidence of the readership and reader engagement (instances of readers contributing to or interacting with our stories) that are impact's building blocks. Some of this data collection, such as tracking readership and engagement, could be automated. The evidence of impact, meanwhile, needed to be collected qualitatively.

In addition to impact data, we also had to collect "input" data for each story — a sense of the story's key characteristics.
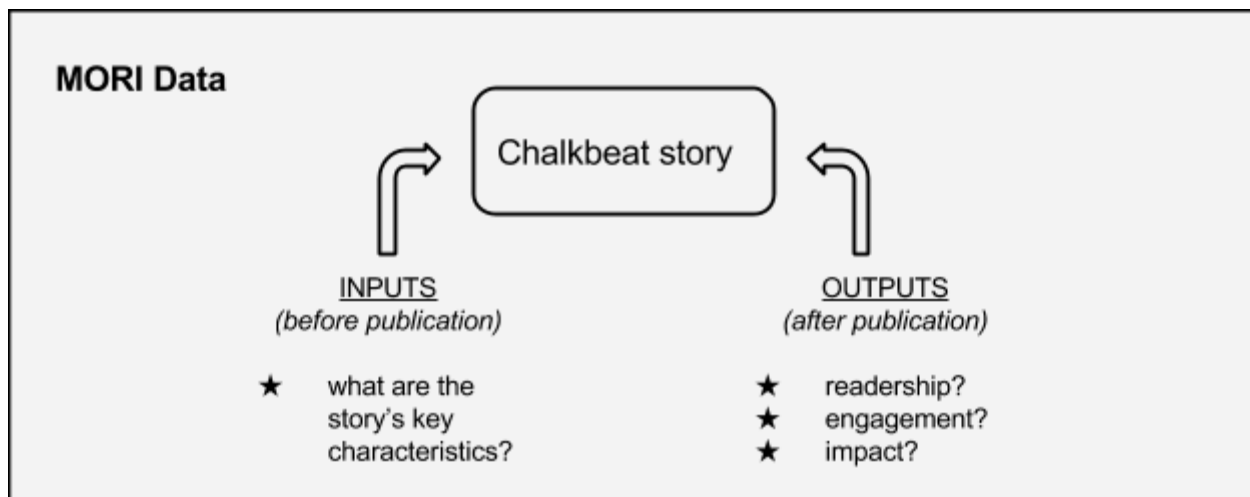
At first, we built MORI as a database stored in a Google spreadsheet. The spreadsheet could automatically import readership and engagement data for each story; our reporters, in turn, were responsible for entering qualitative input and impact data. But this process suffered from terrible user experience for our reporters, who had to remember not only to enter the data, but where to enter it and how. Storing all the data in a single database also made it difficult for us to learn from our results. Looking over the last month's performance, we only saw a list of variables, not an aggregate picture of what we had accomplished.

As a result, when we built the latest version of MORI, we decided to build it right into our content-management system, WordPress. As a WordPress plugin, MORI could take the form of data fields that reporters entered right into the place where, in their minds, the story lived. It could then convert the data it stored into more meaningful reports that we could learn from. Finally, it could give us a space to plan, setting goals at the start of each year and tracking our progress against them.
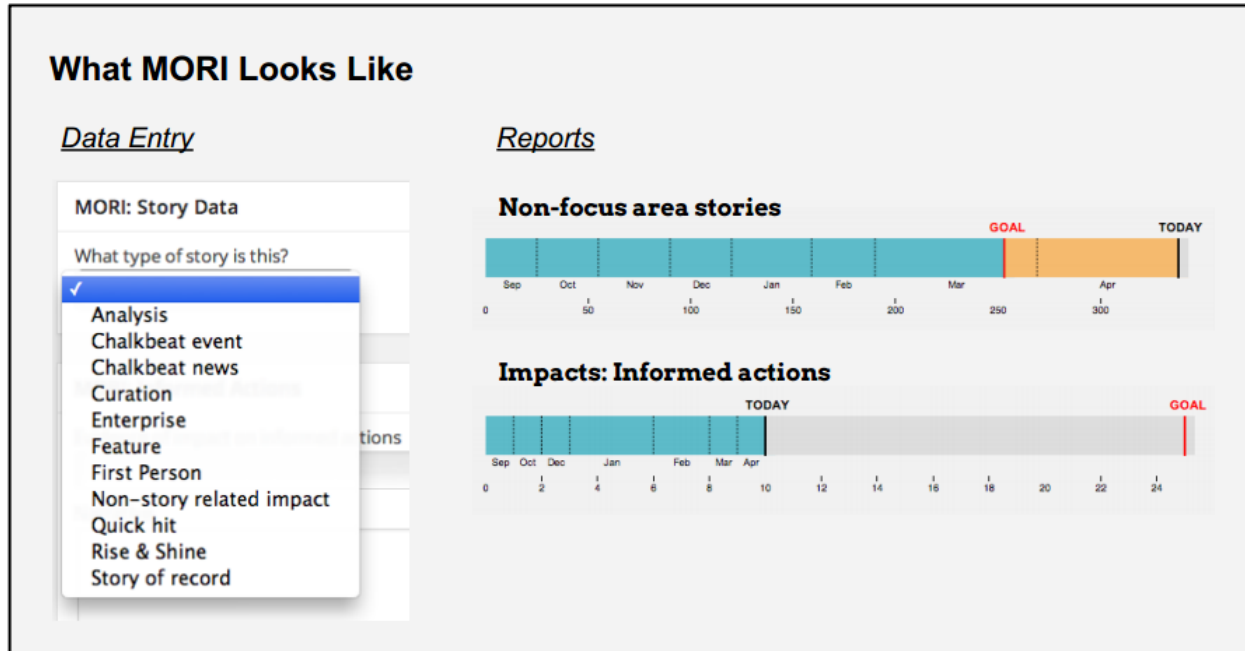
In addition to the qualitative data that our reporters are adding to MORI, we are pulling in quantitative data from third-party applications like Google analytics, Twitter, Facebook and Mailchimp. By using the "application programming interfaces," or API's, of these apps, we are able to create a customized dashboard of the analytics that matters most to us as an organization. We also add to our readership data with one qualitative measure: pickups, which our reporters currently hand-enter, pending a better technical solution.

Our analytics are broken down into four types of reports: content production, readership, engagement and impact. We also created a "stats query" to run customized data searches. To read more about what each report includes, refer to our Appendix.

Additionally, we are in the process of creating an algorithm that weights all these different data to create a regularly updated list of each bureau's highest-impact content.

MORI's Taxonomy

The final piece of work we had to do to build MORI was define our variables. We had already defined what we meant by "journalistic impact," but to help our reporters capture evidence of it, we created specific sub-categories to spell out what we meant by influencing civic deliberation and informed action. (To do this, we built on work done by Lindsay Green-Barber at the Center for Investigative Reporting.) You can find a summary of the sub-categories in our Appendix.

We also needed to define the inputs we cared about: what were the key characteristics of stories that we wanted to track? In all cases, the result was not just a tool for helping us

measure our work in more finely grained detail, but a shared vocabulary that wound up helping us train reporters, make clear plans, and define whether or not and when we had "succeeded." The vocabulary falls into five categories:

(1) Storylines describe the theme each story addresses. We narrowed the universe of possible storylines down to five:

1. teaching and learning;
2. politics and policymaking;
3. bureaucracy and operations;
4. out-of-school context, or the environmental factors that students to school;
5. and educational tools, such as assessments and curriculum.

Describing our storylines made visible a key rubric we had always used to decide what to write about. Because we wanted our stories to help people make decisions that would help improve education, the stories we covered needed to focus on the key drivers of outcomes for children and families. The five storylines represented the five sets of forces that we knew were most connected to those outcomes.

We had actually begun defining these storylines before we created MORI, as a means of training our reporters to understand just what we meant by a Chalkbeat story. Now, in addition to using them as a training tool, we could use the storylines to plan, track our progress, and learn. How much attention did we want to give to each storyline? How much attention were we *actually* giving? Which storylines seemed to interest readers the most? Which had the most impact? MORI could help us hold ourselves accountable to accomplishing what we set out to do — and it could also help us learn how to do better the next time.

(2) We also decided to keep track of whether or not each of our stories was on one of our designated **focus areas** for the year.

Focus areas are topics we cover in-depth over a period of time, investing more resources into deeper reporting. Non-focus area stories, meanwhile, also fell under our storylines, but received fewer resources. We hypothesized that focus-area stories were more likely to lead to impact, but that non-focus area stories were important drivers of returning readership. MORI could help us test whether that guess was correct.

(3) We also decided to input a **target audience group** for each story. We have four target audiences:

1. education professionals (including teachers and principals);
2. decision-makers and influencers (such as policymakers and advocates);
3. education participants (parents and students);

4. and the general public (voters and citizens who aren't focused on education, but generally care about participating in their local government and so need to understand important elements of education policy and practice)

Tracking which audiences actually wound up reading our stories was a whole different problem, but we could at least approximate that tricky question by taking account of our intent. The data we collected would take us a step closer to solving the puzzle of which audiences seemed to generate which kinds of impact. And by forcing ourselves to set a target audience each time we wrote a story, we forced ourselves to think about who we were writing for — a process that we too often sidestepped before MORI.

(4) We also created a taxonomy of **story types** — a description of the kind of story, rather than who it is about or what topic or theme it covers.

We broke these into two primary buckets: offense and defense stories. *Defense* stories chronicled happenings that were already on the visible public record, like a press conference or school board meeting. *Offense* stories dug deeper, adding extra reporting and analysis beyond what could easily be found on the public record. We also published two other types of stories: aggregation and First Person pieces showcasing our readers' perspectives. A full accounting of our story types is in the Appendix.

The descriptions gave us a language for planning our days, weeks, months, even years. How many offense stories did we want to write? How many defense stories? Did this particular event warrant a simple "quick hit," or should we write a full-fledged "analysis" piece? With a common vocabulary for describing the universe of options available to us, we could communicate more easily about exactly what we wanted to do.

We could also investigate each type of stories' role in the news cycle. Were "enterprise" stories the most likely to generate impact, for example, or were analysis stories also important? Were we right that "offense" stories were more likely to generate new readers, whereas "defense" stories bred returning readers? Again, MORI would help us learn.

(5) Finally, we created a category asking whether the story was a **step-back story** and whether we **reported it exclusively.**

- Whereas most news stories are very rooted in the present, looking primarily at what is happening right now, we defined **step-back stories** as those that zoom out to provide a big-picture status quo of a topic. We assumed that step-back stories would have their own kind of impact, appealing to broader audiences and making them better candidates for distribution partnerships, but we wanted to see if that was true.
- **Exclusive** stories were stories that would not have been published were we not around to write them. They could be either offense or defense stories, drawing from the visible

public record or not; counting them would help us answer the counterfactual question of what the world would look like without our reporters.

IV. Management and Organizational Culture

Simply dropping MORI into our newsrooms was not enough to focus our team on impact. To do that, we also had to work to build a culture, systems, and tools that gave the taxonomy and tool meaning. One key was strengthening our ability to plan.

What Planning Looks Like in Journalism

One element of planning involved selecting our "focus areas" for the year, the areas of coverage to which we'd devote extra resources. We chose focus areas by looking ahead to the key decisions and debates the community would face in the coming year. Sometimes, these were obvious, as in the case of, say, the implementation of new academic standards that the community would have to grapple with or a pending legislative decision about whether and how to expand access to quality early childhood education.

Other times, the decisions weren't being widely discussed, but our journalistic judgment and reporting showed us that they were looming — as in the case of a new New York City administration facing questions about how to structure student enrollment in an environment of school choice. Those questions weren't discussed prominently, but as reporters, we knew they would be important in determining students' experiences. By mapping out the decisions and debates we knew the community would face within our storylines, we could select the areas where our reporting resources were likely to make the biggest difference.

Once we selected our focus areas, we needed to plan what we would do with each of them. We broke this into a series of questions, starting with a description of the impact we hoped for — in other words, an accounting of the specific decisions and debates we hoped to influence — and then working back to the kind of reporting and production (story types as well as events) we'd do for which audiences. We also mapped out a strategy for what we called the "conversation" part of engagement, meaning the work we could do to build conversation around the topic.

The planning process applied to focus areas as well as to the rest of our coverage, which should also be informed by our ideas about the day-to-day decisions and debates we wanted to inform.

We also created tools to do the work that fell under the banner of "engagement" — as we defined it, the work of maximizing our readers' opportunities to access, learn from, interact with, contribute to, and act on our journalism.

Influenced by Joy Mayer of the University of Missouri School of Journalism, we decided that this work needed to happen not just after a story was published, but also before and during

publication. Building on Mayer's work, we created an engagement strategy worksheet to suggest questions our reporters and editors could ask throughout the editorial process.

Engagement Strategy Worksheet

Reporting	Production	Distribution	Conversation	Impact
The reporting we do to produce content	The content we produce to share with others	How we share the content to create conversation	How we create conversation around the content we produced	What happens after a story generates conversation
Who's already talking about this and where? (online/offline?) How can you get creative about finding your sources?	What can you produce that will help people make informed decisions about education?	Who's your target audience for this piece?	Is there a conversation that might or should happen after a story is published?	What can the audience DO with your story or in response to it?
Is there an opportunity and benefit from letting the community know what you're working on as you report?	What can you produce that highlights our readers' voices, answers their questions and makes content more fun and interesting to interact with?	Who needs to see the content you're providing? How can you make sure readers will see what you produce and will interact with it?	If so, what should you do to facilitate or be part of that conversation?	What decisions do readers need to make that could be informed by this reporting?

Building Buy-In

But how could we be sure our reporters would embrace these tools? We built MORI with the input of our organization's editorial leadership, tweaking the tool in response to their feedback. We also deployed beta versions of MORI in our founding bureaus, New York and Colorado, in order to see what we needed to improve.

Still, when we prepared to release MORI organization-wide, we worried that our team might not embrace the tool with enthusiasm. Preparing for our first staff-wide MORI training, we tried to sweeten the process by creating custom MORI M&M's and giving a packet to every staffer.

We also planned our training carefully to emphasize that MORI was a work in progress, a learning tool rather than a punitive means of evaluating staff, and just one piece of the larger puzzle of our work.

Excerpt of our MORI training

MORI *isn't…*	MORI *is…*
• Perfect.	• Promising.
• An evaluation tool.	• A learning tool.
• All things to everyone.	• One piece of the puzzle.

We also emphasized the needs that we made MORI in response to — needs that we knew resonated with all the members of our team, from the challenge of making sense of what we had done and assessing whether we were successfully achieving our mission to the desire to find ways to help our stories have a bigger impact.

Finally, we made MORI as user-friendly as possible, creating a MORI Bible, a 71-slide Google presentation with step-by-step instructions about how to use MORI and a glossary and FAQ defining all the key terms and answering anticipated questions.

To our surprise, the training not only went well; the M&M's didn't seem necessary at all. Our staff not only bought into MORI but embraced it. Within a week, we were watching conversations unfold in our newsrooms about whether this or that thing constituted an impact. People were eager to tally up the results of our stories. Indeed, reporters and editors quickly began asking how they could sort the data by the stories they had individually produced, a feature we had planned to roll out more slowly.

Perhaps we shouldn't have been surprised. Reporters, after all, do their work for a reason; they want to have an impact.

IV. Questions We Still Face

We are still early on in our work building a news organization that strives for impact. MORI is still a new tool, and so are the vocabulary, tools, systems, and organizational culture we have built to support our work.

As a result, for all we have learned, like any good journalists, we ultimately have more questions than answers. Here are some of them:

(1) What is the right technology strategy for building the tools we need?

We have bigger dreams for what MORI can look like than we currently have technical capacity to support. These improvements won't just make MORI easier to use; they will also ensure that our reporters use it, because the improvements are changes that our reporters are asking for.

We also need help solving some technical challenges surrounding measurement, such as how to measure our stories' reach when they get distributed through social media, other media, and distribution partners.

(2) What kinds of stories are best for leading to journalistic impact?

We are eager to understand the dynamics that lead to the highest-impact stories, but we don't know what those are yet. We have lots of theories, but we'll need help analyzing the data we collect and making sense of it.

(3) How can we connect our editorial planning tools to our CRM software to maximize our distribution power?

With support from the Knight Foundation's INNovation Fund, we are experimenting with a new feature for MORI that would link the tool to our Customer Relationship Management software (CRM). The feature aims to allow us to link MORI's database of metadata on individual stories' target audience, story type, and story topic to our efforts to distribute stories to particular readers or groups of readers directly and through our network of distribution partners in each bureau.

We are eager to learn whether building a CRM can help us increase our audience and its level of engagement with our stories by honing our ability to get specific stories directly into the hands of people most likely to be interested in them.

(4) Can we get our team not only to strive for goals, but to learn from the data we collect?

So far, we have rolled out MORI to our teams, created editorial strategies and goals accordingly, and begun entering MORI data for all of our stories. But we are still working on finessing the reports that MORI produces, as well as the stats query tool that allows us to run our own unique analysis of the data.

In the next few months, as we hone these reports, our goal is to make them as useful as possible to our teams. One key metric will be how frequently our own teams use the reports to influence their decision-making process — voluntarily, as well as part of our management

process. We will be tweaking the kinds of reports MORI produces in response to that internal usage.

(5) Do we have the capacity we need to meet our potential?

We've been pleasantly surprised by the way our team has adapted to the workflow required by MORI. Early on, we worried that reporters would not want to enter story data and that getting them to do so would be a trial. That has not turned out to be the case.

However, we do still invest a significant portion of our staff's time in making MORI. We are adding a new associate engagement editor to help facilitate our analytics work. Although it would certainly be possible to learn from MORI without a person whose time is partly dedicated to that work, we expect that having the role will be extremely helpful.

(6) What are the right goals to set?

Currently, MORI allows us to set multiple categories of goals — production, readership, engagement, and impact. Each category includes many goals for the many different variables that MORI tracks. Going forward, we need to make sure that we're setting a reasonable number of goals and the right ones.

(7) Can you get MORI in your newsroom?

We want to share MORI with other news organizations, and we built it with this goal in mind. Many of the variables we've mentioned, including storylines, audience types, and story types, are easily customizable to meet the needs of other newsrooms.

For now, though, we have some work left to do before MORI can become a truly shareable product. One way to make that happen is to hear from other newsrooms. What would you change about MORI? What would you keep? Please consider this last word an invitation for feedback. We are eager to hear from you.

V. Appendix

MORI Data

<u>Inputs</u>

Story type: We currently have eight story types, which include enterprise, feature, analysis, quick hit, story of record, First Person, curation and Chalkbeat News. This is how we define each story type:

- <u>Enterprise</u>: These are stories that don't solely rely on press releases or news conferences. Instead, enterprise stories require a reporter to unearth his/her stories, also known as "scoops."
- <u>Feature</u>: A feature story is usually a human interest story that is not closely tied to a recent news peg and focuses on particular people, schools, or organizations.
- <u>Analysis</u>: Like enterprise and feature stories, analysis pieces dig deeper than story-of-record posts. But analysis stories are different in that their primary purpose is not to offer new facts, but to explain and put in context by offering original analysis.
- <u>Quick hit</u>: This is a post that is noteworthy but doesn't warrant a fully reported article.
- <u>Story of record</u>: Usually based on a press release, news conference, or meeting, story-of-record posts establish the basic facts of a new news development. They can include context and analysis (and all Chalkbeat stories should!) but their primary purpose is to summarize what happened and why it matters; the next-day story can get deeper into the implications. Synonym: first-day story.
- <u>First Person</u>: These are reader submissions that are based on the author's personal experience with public schools. First Person posts are grounded in specific examples and connect to school and education in a very clear way. They should either get a topic on the table that isn't being talked about but should be, or respond to an issue already in the news by offering a new voice and perspective that deepens the conversation.
- <u>Curation</u>: This is any post that rounds up reader or source reactions or article links. Examples are Rise and Shine, reader-generated content and Storify posts
- <u>Chalkbeat news</u>: This is defined as any piece of content that is us speaking directly to readers. *For example: company-related announcements like new hires or new bureaus, soliciting reader feedback about Chalkbeat and its coverage, requests for reader-generated content (the actual reader-generated content will be an aggregated post type, but the request will be Chalkbeat News)*

Another way we categorize our story types is by "offensive" and "defensive." Stories that fall into our "offensive" category are enterprise, feature and analysis. Stories that fall into our "defensive" category are story of records and quick hits.

MORI also tracks our events. We break them down into three categories:

- Chalkbeat engagement events: These are events that we hold to build a relationship with our readers. It could be a happy hour or hearing what readers want us to cover.
- Chalkbeat content events: These are events that are focused on stories or topics that we are covering. It could be a panel on the Common Core or it could be an interactive design-challenge to rebalance the state budget.
- Non-Chalkbeat content events: These are events that we aren't in charge of holding, but our staff may moderate or serve as panelists on.

Audience types: Chalkbeat segments our audiences into four groups and for each story we write, we check at least one of these four audience groups who might be interested in reading the story. This helps us make sure we are consistently reporting on stories that appeal to all of our readers.

- Education participants: These include parents and students
- Education professionals: These include people who work primarily in schools — i.e., principals, assistant principals, instructional coaches, paraprofessionals, and teachers
- Influencers and decision makers: These include lawmakers, school board members, policymakers, school system administrators and advocacy organizations (In New York, network staff would be included here.)
- General public: Voters and citizens — the type of people who aren't focused on education, but generally care about participating in their local government and so need to understand certain elements of education policy and practice.

Storylines: We believe that there are five storylines that are key drivers of outcomes for children and families. We believe every story we write should fall into one of these storylines.

- Teaching and learning: The work happening inside schools
- Politics and policymaking: (1) the body of work and decisions made by lawmakers, boards and other elected officials. (2) the advocacy efforts to influence the body of work and decisions made by lawmakers, boards and other elected officials. *Examples: Coverage of advocacy groups, legislatures and political dustups*
- Bureaucracy and operations: the body of work and decisions made by school district administrators (e.g. superintendent and staff) who work in them *Examples: stories about changes at your education department, services delivered to school, school choice*
- Out-of-school context: The environmental factors that students bring to school
- Education tools: Curriculum, textbooks, standards, and assessments

There are also two inputs that are checkboxes in the MORI story data box:
- **Is this an exclusive story?** This helps us keep track of how much "new" news we're sharing with our readers.
- **Is this a step back story?** Most news stories are very rooted in the present. They might look back or ahead, but they are mostly about what is happening right now. Step-back stories, in contrast, zoom out to provide the big-picture status quo of a topic. We write

these to help readers make sense of the big picture of what's going on with a particular topic.

<u>Outputs</u>

After a story is published, reporters can input impacts that the story has had. These fall into two categories: civic deliberations and informed actions. The examples we provide for each were inspired by a list of impacts developed by Lindsay Green-Barber at the Center for Investigative Reporting.

<u>Civic deliberations</u>: Conversations readers have based on our reporting. *Examples*: Examples: non-press organization cites our work in a reporter, public official refers to our work, award, Chalkbeat staff makes a public appearance or does an interview

<u>Informed actions</u>: Actions that readers take based on our reporting. *Examples*: legislative action, government investigation, state or district level change in policy or practice, class or school-level change in policy or practice, institutional action, lawsuit filed, formal protest or petition.

Finally, there is a field for reporters to add pickups that their stories have generated. We are currently trying to find a more efficient and comprehensive way to monitor all the pickups our stories receive, but for now, we rely on our reporters' help. We define pickups as cases in which our stories influence the news cycle because they have been picked up or cited by another news organization or influential group.

MORI Reports

Right now, MORI automatically produces four types of reports. A separate "stats query" feature allows users to run their own reports.

<u>Automatic Reports</u>

- <u>Content production report</u>: This report displays the number and types of stories that a bureau is producing. Here are some examples of what we display:
  - Bar graph that tracks our progress in meeting focus area goals
  - Bar graph that tracks our progress in meeting non-focus area goals
  - Two pie charts that display the balance between our non-focus area versus focus area goals and the balance between non-focus area and focus area stories we have produced
  - Bar graphs for each focus area that track our progress toward meeting goals
  - Pie chart that displays the balance between story types we have produced

- <u>Readership report</u>: This report displays how many readers are consuming our content. We display:

- ○ Line graph that tracks our actual monthly page views to our goal of average monthly page views for the past year using Alleystats, an analytics tool provided by MORI's development firm Alley Interactive.
- ○ Line graph that tracks monthly unique visitors for the past year to our goal of average monthly unique visitors for the past year using Google Analytics
- ○ Line graph that tracks our goal of newsletter subscribers per month to our actual number of newsletter subscribers per month
- ○ Line graph that tracks our goal of newsletter open rate per month to our actual newsletter open rate per month
- ○ Bar graph that tracks our progress toward meeting our pickups goal

- Impact report: This report displays the impact our stories have made. We display:
  - ○ Bar graph that tracks our progress toward meeting our informed actions goal
  - ○ Bar graph that tracks our progress toward meeting our civic deliberations goal

- Engagement report: This report displays our digital and in-person interactions with our readers. We display:
  - ○ Bar graph that tracks our progress toward meeting our Chalkbeat engagement events goal
  - ○ Bar graph that tracks our progress toward meeting our Chalkbeat content events goal
  - ○ Bar graph that tracks our progress toward meeting our non-Chalkbeat content events goal
  - ○ Line graph that tracks our progress toward meeting our total number of Facebook fans monthly goal
  - ○ Line graph that tracks our progress toward meeting our total number of Twitter followers monthly goal

Stats Query

- Stats query: This feature allows users to query our MORI database with specific questions not addressed in the above reports. Data users can query includes when the content was published, MORI story data, and impacts.