Memo from Executive Editor Bill Keller to New York Times Newsroom Staff
(July 30, 2003)

Colleagues:

Soon after a rogue reporter precipitated a period of anguish in our newsroom, the self-correcting mechanism that has always been one of this paper's strengths kicked in. Dozens of our colleagues -- and a few distinguished outsiders -- gave long hours and serious thought to the way we operate, and produced a series of reports we are releasing today. Without their work, I would be starting my tenure as executive editor looking back, doing damage assessment. Thanks to them, I start my job with a plan of action that will help secure our integrity and credibility, and make us a better-run news organization.

Linked to this message (at www.nytco.com/newsroomreports) you will find the full text of the Siegal Committee report and two related committee reports, along with a plan of action.

The committees, in their report to the publisher, have recommended an array of measures to improve the way we run the newsroom and to protect our precious credibility. It falls to me as the new executive editor to respond, and I do so gratefully. After discussion with members of the committees, the senior editors of the newsroom have agreed to move quickly on a number of recommendations, and to set in motion a process that will lead to the adoption of additional reforms in the coming months.

The measure likely to attract the most attention is the creation of an ombudsman -- the committee preferred the term "public editor" -- who will serve as a kind of reader representative within the paper, and help us maintain our high standards of accuracy and fairness.

The Times has traditionally resisted suggestions that we join the few dozen American papers employing ombudsmen. We worried that it would foster nit-picking and navel-gazing, that it might undermine staff morale and, worst of all, that it would absolve other editors of *their* responsibility to represent the interests of readers. Indeed, some papers have found their experience with ombudsmen disappointing, and have dropped the system.

The Siegal Committee believes, and I agree, that we can profit from the scrutiny of an independent reader representative. A pair of professional eyes, familiar with us but independent of the day-to-day production of the paper, can make us more sensitive on matters of fairness and accuracy, and enhance our credibility.

Among newspapers that have employed public editors, there are many different designs. At some papers, the ombudsman is a privileged outsider who critiques the paper in columns and internal messages to the staff. At others, the job is more of an internal auditor, someone who reflects on the newsroom's work and presses for corrections or reforms, but does not have a public platform.

The Siegal Committee argues convincingly that we should invent a public editor with the authority to play both roles. The job we envision will include an internal and an external component. Within the paper, the public editor will review reader complaints, assure that they are addressed by responsible editors, and recommend corrections, editors' notes or other corrective measures. But this editor will also have license to write about issues of our coverage, and to have those independent, uncensored commentaries published in our pages, whenever he or she feels that is warranted.

I intend to appoint a public editor by the early fall, for a one-year term, as recommended by the Siegal Committee. After that we will assess whether this is a practice we want to continue or adapt.

At the same time, we will be reinventing a role that has been handled primarily by Al Siegal -- a masthead-level position responsible for upholding our high standards. Where the public editor will be primarily an auditor of the things we have published, the standards editor will be involved in the day-to-day production of our journalism, and will have responsibility not only for developing the rules, but for educating the staff on matters of accuracy and ethics.

The committee also proposed that a masthead-level editor be assigned to oversee recruitment and hiring, training and career development, transfers, promotions and evaluations. This is a third recommendation we gladly accept.

I expect these three jobs to be refined and filled within the coming weeks.

An extended list of the measures we have set in motion is attached, with the understanding that where appropriate we will be discussing their implementation with the Newspaper Guild. Among the changes we intend to undertake are these:

-- Ensuring that every member of the staff receives a performance assessment annually, carrying the process as far as possible this year and completing the cycle by the end of 2004.

-- Rationalizing our byline and dateline policies, to disclose clearly to readers who is responsible for an article, and from what location. Such a policy should be in place by early fall.

-- Assuring that each desk has a system for tracking errors and monitoring the performance of those who make them.

-- Reviewing and revising existing guidelines for the use of anonymous sources.

-- Restudying the centralized management structure for copy editors, with the aim of aligning them more closely with the desks they serve.

-- Improving the accessibility of editors and enhancing the internal exchange of information within the staff.

The Siegal Committee report, which we are releasing in full to the staff and the public, includes an independent examination of the Jayson Blair case, an aberration that became the catalyst for a more sweeping examination of our newsroom practices. This examination was prepared by three respected journalists from outside The Times. The narrative and most of the details will be familiar to those who have read our paper's own exhaustive account. That does not make it less painful to read. It confirms a litany of missed communications and lapses of oversight, and it reproaches us in strong language. While there is little in this independent analysis to make us proud, I am proud that we began the process of restoring order by facing our failures squarely.

The outside journalists who examined the case also answered the charge by some of our more partisan critics that the Blair case was a consequence of our determination to hire and promote a diverse staff. That charge, they make clear, is wrong. It is also an insult to our many talented minority colleagues. The fraud Jayson Blair committed on us and our readers was not a consequence of our diversity program, which has been designed to apply the same rigorous standards of performance we demand of all our staff. The problem is, in the Blair case, we failed to measure up to those standards at numerous steps along the way.

The Blair fiasco -- according to the outside participants -- was made possible in part by a climate of isolation, intimidation, favoritism and unrelenting pressure, and we are determined to correct that. Indeed, we have already gone a long way in correcting it. This does not mean that we will never make mistakes. There is nothing fail-safe in an institution that depends on human beings, and on trust.

The shock to our system -- to its morale and reputation -- has created an important opportunity. Most important, it has created a consensus for change.

The subject of management, and to some extent the practice of it, have been regarded with suspicion in every newsroom I've worked in. At its worst, it is seen as the stuff of gurus and nostrums and fads, a distraction that consumes an enormous amount of time and pays little mind to the organic nature of a daily news organization. We scoff at the jargon, and we recoil from the notion that we are bound by the same elementary rules that apply to other institutions.

But there is a hunger now at this paper for management: for more careful vetting of the people we hire and promote, for paying more systematic attention to how people perform and how they develop as professionals, for making evaluation routine and training relevant, for more scrupulous policing of accuracy and fairness, for greater clarity about our commitment to diversity.

This is not something we are inventing from scratch. Whatever our hesitation to talk about it, I would argue that we have had a “management culture,” and it has on the whole been successful. Look at the caliber of the people we attract, the quality of the journalism we create. This does not happen by accident. But management has too often been peripheral and unpremeditated, and lately it seems to have fallen into a state of serious neglect. And it has always seemed expendable at moments of big news. What we are out to do is raise our accountability for the management of our people, and acknowledge that it is inseparable from the making of our journalism.

Measures of the kind proposed in these reports cost time and take money -- time and money that could be going directly into journalism. The answer to that is twofold. First, we have a publisher who understands that this is not free, and that if management reforms are perceived as diminishing our journalism, then the institution will not accept them. We have a commitment that resources will be forthcoming to help this critical transition, and to get it right. Second, in the long run, the tools you recommend will redound to the benefit of our journalism -- just as the absence of those tools has hampered our journalism.

I told the Siegal Committee members the other day that they now become the executors of their own advice. So do we all. In taking on this responsibility, we can finally get back to the work we all came here to do.

Bill Keller

New York Times Newsroom Management Response to the Three Newsroom Committees (July 30, 2003)

RESPONSES
To the Recommendations
Of the Three Newsroom Committees

I. To Ensure Accountability, to the Public and to One Another

We will shortly create two new editing positions, to work in tandem:

A Public Editor, filling a function new to The Times and operating outside our reporting and editing structure:

- Would receive and answer questions or comments from readers and the public, principally about things we have already published.
- Would publish periodic commentaries in the paper about our journalistic practices and current journalistic issues in general. They would appear when the Public Editor thought they were warranted. (The location in the paper is to be determined.)
- Would be a person of unquestioned stature in our business, appointed for a fixed term. The position and the job description will be reviewed after a year.

This editor would report to the Executive Editor, and would have a guarantee of regularly scheduled access (and if necessary, unscheduled access) to the publisher.

A Standards Editor, within the masthead:

- Would oversee the setting of journalistic standards for the newspaper.
- Would be an internal guardian to whom staff members could take concerns about our current or planned journalism.
- Would oversee corrections and editors' notes.

- Would oversee training on our guidelines for ethics and integrity, and would monitor compliance.

- Would oversee training programs in accuracy, and would ensure that the individual departments arrive at consistent and effective programs for tracking accuracy.

The two editors would confer continually to ensure that outsiders' legitimate concerns were brought into our editing process and that the newspaper's reasoning was conveyed to the public. Together the two would decide whether our traditional remedies, like corrections and editors' notes, were adequate to a specific situation. If not, the Public Editor would have the prerogative of publishing a commentary.

Like the Public Editor, this editor would also have guaranteed access to the publisher.

In coming months, the Standards Editor will oversee the creation of a system for tracking accuracy rates and reflecting them in performance assessments.

By early fall, this editor will oversee the development of a set of consistent guidelines for the use of unidentified sources; for the awarding of bylines and other credits; for consistency, accuracy and transparency in datelines; and for the use of stringers.

The Standards Editor will create a continuing education program on journalistic ethics and media law for reporters, editors, photographers and designers.

II. To Ensure Opportunities for the Staff

We will shortly create the new position of **Staffing and Career Development Editor**, a senior member of the masthead. This editor's duties would include:

- Overseeing a transparent, fair and consistent system for recruitment, hiring and training; advising staff members on how best to attain their longer-range career goals; overseeing our department-wide program of performance assessments (details below); coordinating with department heads on internal assignment shifts.

- Continuing and enforcing the general practice of posting job vacancies.

- Continuing our goal of diversifying the staff at all levels of the newsroom and ensuring selection from diverse pools for jobs, promotions, training opportunities and team project assignments.

We will begin a pilot project for training and orientation of newly appointed newsroom managers by the end of the summer.

In August or September we will begin a pilot project of seminars in leadership development topics for department heads and deputies.

Management training programs will emphasize the values of openness, collegiality and mutual respect.

The Staffing and Career Development editor will set up a Web design cluster to make possible a greatly enhanced range of staff information services that can be updated continually and easily on the intranet — facebooks and handbooks, skills bank and career goal database, self-maintained when possible.

III. To Improve Newsroom Organization

A reorganization of the masthead in coming weeks will define clear roles for the members, including primary responsibility for coordinating projects, which would remain under the direct supervision of department heads.

In months to come, we will restudy the management structure for the copy desks and news design, with the goal of improving communication between the staff editors and the departments they serve, whether or not we retain the current centralization. A complicated analysis of budgetary implications and journalistic considerations will be required.

IV. To Improve Performance Management

We will adopt a shared set of journalistic and managerial goals so that our editors are held accountable not only for their skills as journalists but for their ability to lead people and manage resources. Their performance in these areas will be directly linked to their compensation and career progress.

We will ensure that every member of the staff receives a performance assessment annually, carrying the process as far as possible this year and completing the cycle by the end of 2004.

We will improve the assessment process for interns, more integrally involving the managers of the desks to which they are assigned.

V. To Improve Communications

We will make newsroom managers accessible to the staff through a variety of means, including departmental meetings and office hours, masthead editors' attendance at departments' brown bag lunches and meetings of top editors with a wide variety of newsroom groups, including scheduled meetings open to the full staff.

All of these events will let us share information and listen to issues and concerns. Evening sessions will be encouraged for contact with those on later shifts.

We will work to improve collegial understanding between the Washington bureau and the New York desks. Methods will include reciprocal and frequent visits by masthead editors and the top Washington editors, short-term job swaps by backfield editors and get-togethers of reporters whose assignments overlap.

July 30, 2003

The New York Times

Report of the Committee on Safeguarding the Integrity of Our Journalism

('The Siegal Committee')

July 28, 2003

CONTENTS

The Overview

Memorandum for the Publisher of The New York Times:

Eleven weeks ago your management team assigned this committee to determine "when, where, how and why our newsroom's culture, organizational processes and actions led to a failure of our journalism" in the Jayson Blair scandal, and to recommend "improvements necessary to assure the quality and integrity of the newsroom's methods of communication, collaboration and supervision."

We now offer recommendations* with these broad basic goals:

- To create a permanent climate of discussion and collaboration among desks and departments, structured as well as informal, both with and without the masthead-level editors, and with our rank and file. The purest aim is to make our journalistic quality exceed the sum of its parts. The practical result should be a guarantee that never again can a rogue journalist exploit our disconnectedness, or our failure to share warning signs.

- To instill at every level of the newsroom a respect for civility, openness to dissent and appreciation of reasoned pushback from subordinates — "speaking truth to power." Without these values — and some new mechanisms to put them in practice — we are vulnerable to a conspiracy of timidity or cynicism that lets malfeasance flourish.

- To implant a culture of performance evaluation and management training at every level and thus to reassure the staff that fairness and merit are at the heart of our decisions — on hiring, on advancement, on psychic and material rewards and, when inevitably necessary, on sharing the pain if our resources grow scarce. We favor devising mechanisms, formal and informal, for staff involvement in such decisions to demystify them and dispel a widespread sense of favoritism or cronyism.

**A note from the committee chairman:* This is the final report of our committee. We have tried to be a sounding board for the concerns of newsroom staff members about communication, collaboration and supervision. We did not engage in scientific polling, nor did we investigate the underlying facts of the many individual sentiments expressed by our co-workers about the way the newsroom has operated at times in recent years. That was not our mandate. Rather our task was to understand how people perceived the newsroom and its systems and to recommend steps the newspaper could take to change those perceptions — and, when necessary, the realities underlying the perceptions.

Our goal was to recommend a course of action that we believed would change the culture of the newsroom, to make it a workplace that was broadly perceived by the people who work here as fair, open, collegial and consistently committed to the highest values of journalism. — ALLAN M. SIEGAL

- To recommit ourselves fervently to diversity of all backgrounds and varieties in our newsroom — not as an expression of civic virtue but as a system for improving our reach into the society we cover. By every means available, we should demonstrate that diversity programs, carried out well, are consistent with high standards. We should dissociate our commitment from the aberration of Jayson Blair's career and prevent the journalistic failings of this one young African-American from legitimizing a backlash in our newsroom against minority journalists in general, especially those in internships or intermediate programs properly administered. We must convince the young, female and minority members of our staff — and others who may follow in their footsteps — that they will not be stigmatized.

- To make us conspicuously accountable to readers and the public, so that we may never again discover that readers, or the subjects of our coverage, did not think it worthwhile to alert us to error. We must also scrutinize the journalistic devices (bylines, datelines, stringer assistance, reliance on unidentified sources) that have become lightning rods for mistrust.

The Background and Our Methods

The scandal of Jayson Blair detonated on April 29 with the discovery that a troubled reporter had plagiarized a story from Texas, fabricated details and lied about his movements. Within two weeks we learned that he had done some or all of those things in dozens of stories over seven months, and probably in a few earlier ones.

Jayson Blair's deceptions tore away at the confidence we had in ourselves and thought we had earned, the confidence we believed we could place in our newsroom systems of hiring, assigning, supervision and accuracy checking. We heard from readers whose faith in us had dwindled. We heard the sneers of television comics for whom the loftiest reputation in all of journalism had become a laugh line. And we heard a cry of pain and rage from our own staff about the faults in our methods that had brought mistrust and shame on all of them.

When we appealed to the public to help us retrace our missteps, the answer was an outpouring of unrelated accusations — and our editors pursued them: many false, a handful legitimate and some too close for comfort. They were about the genuineness of our unidentified sources, the legitimacy of datelines atop our stories, the truthfulness of our bylines, and the propriety of our reliance on freelancers and stringers. Many of these complaints, both signed and anonymous, were from Times colleagues who said they had been afraid to speak out before — intimidated by the authoritarian style of top editors and by a culture that variously discouraged and neglected candid communication between people and departments working side by side. Clearly the story of Jayson Blair was no longer just about him, perhaps not even principally about him.

On May 12, the senior management of The New York Times assigned Al Siegal, an assistant managing editor, to form a committee to determine "when, where, how and why our newsroom's culture, organizational processes and actions led to a failure of our journalism" and to recommend "improvements necessary to assure the quality and integrity of the newsroom's methods of communication, collaboration and supervision." The committee has consisted of 25 Times people with 3 distinguished outside journalists serving as a sounding board on issues of central concern. (The membership is shown in Appendix A.)

Our members reached out to scores of Times people and to business consultants, educators and newsroom managers in other organizations. Early in its life, the committee decided that a reconstruction of Blair's history, while not our central assignment, would be a necessary backdrop for our analysis. Our three outside members took the lead in conducting detailed interviews with the dozen or more Times editors and managers most closely involved in the rise and fall of Jayson Blair.

The findings from those interviews form Part II of this report. That account declares that the Blair scandal represented "a failure of communication, command and discipline." The outside members conclude that "a series of management and operational breakdowns made it possible for a junior reporter … to get past one of the most able and sophisticated newspaper editing networks in the world."

"The recollections of Times staff members reveal a stunning lack of communication within the newsroom," the outside members' report says, "an environment of separation exacerbated by increased demands on understaffed desks. And behind the Blair story lay a misguided pattern of tough supervision and lenient forgiveness that led to retaining him, and in fact promoting him, when at several points he was demonstrating that he was not ready to join the staff of The New York Times."

Our Main Recommendations

Our main specific recommendations are listed in this overview section. Elaboration and reasoning for each recommendation appear in the chapters that make up Section I of this report. Some of our main recommendations amount to endorsements of work that is being done by other task forces currently operating in the newsroom and scheduled to report along with ours.

This report includes no separate chapter about diversity. The committee believes that issues of diversity pervade all our separate discussions: every aspect of newsroom life that we studied has a component concerned with making The Times a welcoming place for all demographic groups, a place of uniform high standards justly administered. We call attention to the discussion of "Hiring and Promoting for Diversity," in our detailed recommendations (Page 18). And we endorse the statement from Roger Wilkins, at the end of Section II (Page 53), "A Note on Affirmative Action."

Interdesk Communications

We should establish a system, formal but flexible, for desk heads and their senior assistants to meet with their counterparts regularly on issues of interest, including staffing. On occasion such meetings may include masthead-level editors, but probably more often not. While such meetings might not necessarily have reached the specific emotional and behavioral problems of a Jayson Blair, they would have created a climate in which mid-level editors of the metropolitan and national desks were more likely to approach one another informally and exchange notes and cautions.

The specifics of a newsroom-wide matrix of meetings are the assignment of the separate Communications Working Group headed by Andy Rosenthal and Craig Whitney, scheduled to report about the same time as our committee. Our committee endorses any solution they may propose to satisfy the previous paragraph.

Delegation of Authority

The top editors of the newspaper should work toward returning substantial responsibility for coverage to the desk and section heads and below — as a matter of efficiency and control, not merely morale. While an epochal news event or a major journalistic mobilization will properly involve top management, lesser assignments are wisely delegated to those who most intimately know the reporting staff. (A candidate list for the Washington sniper story last October would probably have omitted Jayson Blair's name if those assembling the team had included his direct supervisors.)

Public Accountability and Internal Safeguards

After the damage inflicted by the Blair scandal and the events that followed, we recommend a dramatic demonstration of our openness to public accountability. Outsiders have historically found The Times hard to approach — a complex organization with a high-turnover clerical staff and journalists often too harried to assist telephone callers. Within our staff, as well, Times people complain of an absence of pathways to senior editors that would allow for appeal if misguided stories seem headed into our pages.

We propose a dual solution — mutually complementary avenues of accountability to outsiders and insiders.

First, we recommend that The Times appoint a Public Editor — a person of unquestioned stature in our business who will devote full time (with suitable clerical support) to receiving, investigating and answering outsiders' concerns about our coverage. The Public Editor would not participate in the regular business of our daily journalism, would not be a member of the masthead and would thus have no defensive stake in published copy. This editor's availability would be widely publicized. He or she would publish occasional comments on our journalistic practices when public interest or other factors warranted. (A decision on the form and placement of those comments should be made when the job is created.)

The value of this new position and the appropriate scope of its authority should be reviewed one year from now, after the other recommendations of this report, about greater openness and collaboration in the newsroom, have been allowed to take root.

To address concerns about the prevention of journalistic problems before publication, we also recommend creating the position of Standards Editor, at the masthead level. That editor would serve as an internal arbiter of journalistic ethics and a sounding board available to staff members with misgivings about our current or impending content. In particular this editor would be the channel for discussion between separate departments of the paper when they disagreed about the propriety or accuracy of coverage. This editor would set standards of performance for the copy desks and reinforce their authority to push back in the case of unsound practices. The Standards

Editor would monitor corrections and make sure that the individual departments were tracking causes and patterns of error. The editor would conduct regularly scheduled ethics refresher courses.

The Standards Editor and the Public Editor would collaborate actively and continually to make sure that outside complaints, when valid, translated swiftly into action by the newsroom. As a member of the masthead, the Standards Editor would be empowered to deal with journalistic problems through the tools now available — corrections, editors' notes, corrective articles. If the Public Editor judged that these failed to do justice to an issue, he or she could write separately.

Both editors would report to the executive editor. This structure entails a risk that an executive editor could mute dissent. But we believe such a risk is outweighed by the benefits of internal discussion of our journalism and of the public's response to it.

To bolster the confidence of the staff and the public about these avenues of appeal, we recommend that both newly created positions be given the visible support of the publisher and a regular means of access to him, perhaps in monthly meetings or lunches to review current issues involving standards and accountability.

Recruitment, Hiring and Career Development

(Detailed discussion is in Chapter 1 of Section I.)

1. We recommend the appointment of a senior masthead editor — directly below the level of executive and managing editors — for Career Development.

In our talks throughout the newsroom, we detected a pervasive desire for such an editor, a seasoned journalist who could serve as a sympathetic advocate and counselor in career planning, freed from the time-consuming demands of newsroom administration and budget.

In close collaboration with the desk heads, the Career Development Editor, with a suitable staff, would oversee recruitment and hiring, orientation, training, longer-term career objectives, transfers and promotions. Without dictating a specific structure, we recommend that this editor assemble a rotating advisory committee on staffing, drawn from all levels and sections of the newsroom. Such a committee would help identify the needs of the departments and the newsroom as a whole, and would advise on matching prospective hires to those needs.

The Career Development Editor and the advisory committee would also create and administer a consistent hiring process for interns, intermediate reporters and editors, and mid-career journalists, and would ensure that the entire staff is used to vet applicants and identify the best talent. The editor would ensure a rigorous search for minority candidates and women. Using both the staff and the advisory committee, this editor would scout the company's regional newspapers for talent.

The editor should oversee a transparent, fair and consistent system for promotions and assignments. Such a system would include the posting of all job openings.

The editor should ensure that the commitment to diversity extends beyond hiring and is considered in all personnel decisions.

The editor should take responsibility for a uniform credentialing standard for stringers and freelancers eligible to contribute to The Times. Finally, this editor should oversee an annual report to the executive editor on progress toward meeting the goals of our recommendations.

2. Expand the recruitment of <u>experienced</u> journalists from a diverse pool as a necessary complement to the apprenticeship programs already in place.

This is a necessary objective not only in its own right but also to counteract damage done by the Blair scandal in stereotypically identifying minority journalists with apprentice-level programs. Mid-career hiring should be a primary goal not only of the Career Development Editor but of all masthead editors and department heads. Expanding upon the work already done by our News Administration group, we should develop a talent bank of résumés to track mid-career and more senior minority journalists at other publications.

3. Improve on the current process of orienting new employees.

We should create a more comprehensive program that immerses new employees in Times ethics, standards and practices, introduces them to the people and culture of the newsroom, and provides more training. This is equally important for those hired into jobs in the bureaus or overseas.

4. Consistently conduct annual evaluations of the entire staff. Within the available resources, link performance reviews tangibly with salary increases.

Performance management is the subject of a separate report, by a committee in Bill Schmidt's office. We endorse the objectives of consistency and uniformity.

5. Improve performance reviews for apprentices (interns and intermediates).

Establish a more systematic review — requiring comments from supervisors, mentors and colleagues before promoting interns to the intermediate level and intermediates to permanent staff.

6. Expand professional and managerial training for the entire newsroom staff.

Training is the subject of a separate task force report, centered in Bill Schmidt's office. We simply note that training enhances the staff's sense of transparency, fairness and opportunity — all characteristics called into doubt by the Blair scandal and by many assignment decisions in recent years.

Standards

(Detailed discussion is in Chapter 2 of Section I.)

1. Designate a masthead-level Standards Editor. This editor must have ready access to the publisher and his support.

This editor should serve as an internal watchdog and arbiter of journalistic ethics. This editor would collaborate with the Public Editor to be sure that readers' complaints about errors or unsound practices, when valid, would be swiftly translated into corrective action internally. The Standards Editor would also monitor corrections and make sure that the individual departments were tracking the causes and patterns. The editor would conduct regularly scheduled ethics refresher courses. He or she would also be responsible for carrying out the main recommendations of this committee that relate to standards, as follows:

2. Establish a uniform system for monitoring errors and tracking the performance of those who make them.

We are not prepared to spell out the best way to do this — The Chicago Tribune took six months to come up with such a system — but we propose that the current practices of our metro desk and Business Day provide a useful model. Reporters and editors must confront and overcome the problems that produce errors and must increase individual accountability.

Accountability includes comments in annual performance reviews in the case of persistent error patterns.

3. Develop and enforce a comprehensive set of guidelines for the use of unidentified sources.

These guidelines should begin with the understanding that anonymously attributed stories often lack credibility to readers, so that the use of such sources tends to undermine belief in the newspaper itself. We are not proposing to stop using them — only to do so more sparingly and carefully than in the past.

(It is notable that in our inquiry into the Blair scandal, several key editors gave differing answers on the number of corroborating sources we demand when granting anonymity, and on who at the paper must know their identity. All of those editors assumed there was a paperwide policy on such matters. In fact, there has been none.)

4. Create more coherent, consistent byline policies, and enforce dateline policies more consistently. The goal is for readers to understand who did our reporting, and when, and where. We should have nothing to hide.

Bylines should be freely given for substantial work by reporters, stringers, freelancers and clerical staff members, regardless of the section in which their work appears. Our "dateline integrity" policy, as described in the stylebook, is a good one in theory but is sometimes sidestepped in practice.

5. Vet the ethical behavior and credentials of stringers and freelancers more rigorously.

When deadline reporting conditions permit, we should rely only on those for whom résumés and clips have been checked; face-to-face meetings are encouraged. The masthead editor for Career Development should consider establishing a newsroom-wide database of stringers and freelancers. Many correspondents have asked this committee for a written policy on how stringers should be used — and when they should not be. After such a policy is assembled, compliance should be monitored by the Standards Editor.

6. Provide continuing education for every reporter, editor and photographer on our ethics policy.

We recommend establishing a regimen of seminars and other activities that produce active engagement with ethical issues on a regular basis. This includes the issues of news content, laid down in the Integrity Statement, as well as the conflict-of-interest issues laid out in our Ethical Journalism handbook. In fact, the documents should be merged between a single pair of covers.

Continuing education should also include media law updates — with attendance required or stringently encouraged, not merely optional.

7. Post The Times's practices, standards, guidelines and ethics rules on a publicly accessible Web site, with a published reference in our daily "Information and Services" box, and discuss them from time to time in the newspaper.

The Culture of the Newsroom
(Detailed discussion is in Chapter 3 of Section I.)

1. Reward courtesy and collegiality and penalize rudeness — from recruitment through retirement.

The way employees treat peers, supervisors and subordinates should be a criterion in evaluations, and tied to consequences. People should be addressed — in person, in e-mail and on the telephone — with respect, regardless of rank. Exit interviews should be conducted universally.

2. Encourage the setting of boundaries.

No job should require unreasonable working hours under normal news circumstances. A healthy balance between work and personal commitments should be valued. When the news requires work in off-duty hours, managers should convey an understanding that all staff members — even those with family or personal commitments — are dedicated to The Times, and outside impediments do not signify an absence of commitment.

3. Make managers accessible.

An open-door policy is not enough: Desk heads and masthead editors should ordinarily make themselves available to rank-and-file employees in office hours and staff meetings. All staff members must have avenues to communicate up, down, and horizontally, and to break through the silo mentality.

4. Promote the right to appeal.

Decision-making authority should be devolved down and clearly delineated, so desk heads and others know where to take each type of problem. Vigorous journalistic debate should be encouraged at all levels. Both the Career Development Editor and the Standards Editor should serve as an internal check on newsroom leadership, as well as an outlet for serious complaints and concerns (though not for idle gossip).

SECTION I

Findings and Recommendations

CHAPTER 1

Hiring and Career Development

Findings

The Times needs a policy promoting consistency and discipline in recruiting for the best job candidates, preparing those hired for their assignments, and promoting interns and apprentices. Recent efforts to attract talent have been wanting, partly because the weak economy discouraged aggressive searching. The recruiting committee that was disbanded a few months ago was too detached from the newsroom, and its scouting lists were not always current or complete. Some department heads say that top-down newsroom management discouraged them from searching independently.

While the paper has developed a pipeline for minority journalists through internship and intermediate reporter programs, we fall short in attracting and retaining *experienced* minority reporters and editors. The newsroom as a whole remains significantly less diverse than the nation, particularly at the management level and on the copy desk, with women and Latinos the least well represented.

Once people are on the staff, many are frustrated in attempts to build meaningful careers despite vast opportunities at The Times. In the past two years, this frustration has grown, with many journalists citing a star system in which favoritism flourished. Staff members say they are often pigeonholed and blocked from moving among departments. Some perceive subtle racial bias and gender bias.

In the wake of the Blair scandal, young reporters fear a long wait for opportunities. Some veterans, including returning foreign correspondents, believe they have been put out to pasture. Copy editors and graphics editors feel like cogs in a machine. News designers feel unable to vary their roles. Many backfielders (midlevel assignment editors or line editors) feel unappreciated and without avenues for advancement, and others complain of being unofficially promoted without recognition through title or compensation.

Often employees do not know what managers think of their work. The failure to produce regular evaluations in many newsroom departments leaves employees confused about what is holding them back and deprived of a chance to show they can change. The absence of tangible consequences for underperformance denies the newsroom needed resources, with some shouldering more than their share of the work.

While it is impossible to create a newsroom where all get what they want, particularly at a destination paper like The Times, people deserve honest assessments of their performance and a more transparent process for handing out assignments. Senior managers must be trained in strategies for helping employees develop and reach goals. A commitment to career development, and to diversifying the staff at all levels, is as important to a vital newsroom as excellence in journalism.

Recommendations in Detail

1. A new masthead responsibility.

Create a masthead-level editor for Staffing and Career Development, supported by an adequate staff, to oversee and coordinate efforts throughout the newsroom to:

- hire interns, intermediates and permanent staffers;
- transfer employees among departments in consultation with department heads;
- ensure that managers conduct fair and comprehensive personnel evaluations annually;
- screen stringers and monitor their use;
- and ensure that a diverse applicant pool is considered for every opening.

Department heads have primary responsibility for managing their staffs and should be given more authority over recruitment and deployment. But the Blair scandal underscored the need for a senior manager to track personnel decisions, and to bring order and transparency to The Times's often makeshift and opaque actions. This role will grow in importance as the newsroom continues to expand through ventures in television, the Internet, new sections and The International Herald Tribune.

The Career Development Editor should occupy a central place in the newsroom, serve as a channel for appeal of personnel-related decisions, and advise the executive editor on the relative urgency of departments' needs. Members of our committee are available to discuss our specific findings and recommendations when this editor is appointed, but here is a broad outline of a possible portfolio:

- Codify a consistent hiring process for interns, intermediate reporters and editors, and permanent staffers, including guidelines for recruiting and interviewing candidates (a list of suggestions is attached as Appendix B).

- Oversee ethical and credentialing standards for stringers and freelancers, with flexibility for news emergencies.

- Help department heads search for the best reporting, backfielding and copy editing candidates; prepare those hired or transferred for their new assignments; and promote interns/apprentices in the ways recommended below. Vet each proposed hire and ensure that the department head and at least three other senior editors (including women and minority editors) have endorsed the choice.

- Continue to employ a résumé-checking agency, as begun after the Jayson Blair scandal. Credentials, such as claims of graduation, must be thoroughly verified.

- Broker the transfers of employees among departments, while encouraging department heads to negotiate directly and ensuring that all concerned are well briefed on employees' history. Ensure that all job openings are posted, and that except in emergencies, newsroom personnel have an opportunity to raise hands even for short-term assignments such as wars, campaigns, or major sporting events.

- Ensure that diversifying the staff at all levels remains a priority, and that, department heads and other recruiters consider a diverse applicant pool for every job, promotion, training opportunity or medium-term assignment that becomes available.

- Ensure that our system of annual reviews (the subject of another committee's recommendation) addresses the possibilities and requirements for each staff member's next assignment, even when it may be years away. Maintain a database, available to desk heads, to track the special skills (such as foreign languages), areas of interest and future aspirations of employees.

- Act as liaison between newsroom supervisors and employee health or counseling services, to guide the reintegration of employees who have taken leaves, maintaining confidentiality while ensuring proper limits on assignments and workload.

- Create and oversee mentoring programs, and develop a broader menu of training programs for supervisors and others.

To support the new Career Development Editor in this demanding mission, we also suggest these changes to the hiring process:

- Replace the defunct recruiting committee with an advisory committee that includes department heads and rank-and-file employees, as well as members of the Career Development staff.

- Evaluate the staffing needs of News Administration and (separately) the Career Development editor. Some other newsrooms seem to devote more resources to these important functions.

- Emphasize to the newsroom that *everyone* is responsible for hiring, and encourage suggestions with a version of the business side's referral program, in which employees receive a reward (or a charitable donation) of up to $1,000 when someone they recommend is hired. Some of the best newsroom hires in recent years have been found by the rank and file: For example, of the 12 strong intermediate reporters hired in 2000 (and soon promoted), 6 were recommended by reporters and lower-ranking editors, 3 came from our newsroom recruiting group, 2 were spotted by department heads and 1 was hired by the executive editor.

2. Hiring and promoting for diversity.

Despite top leadership's often-stated commitment to diversifying the newsroom population, the representation of women and minorities, particularly among editors and in the upper ranks of management, falls short of percentages in the general population. The lag results in part from the attrition of minority staff members after three to five years, a problem recruiters call "a hole in the diversity bucket"

Attempts at diversifying the staff have generated discomfort among employees of both genders and all ages and ethnic backgrounds. Current policies are variously viewed as tinged with favoritism, preferentialism, and discrimination. There must be greater assurance that all are being treated fairly and equally.

After the Blair scandal, two perceptions – in the newsroom and among the public – need to be addressed: first, that Jayson was advanced because of his race; and, second, that his departure and that of Gerald Boyd, the paper's highest-ranking minority editor, will impede the advancement of young and minority journalists.

While our recommendations in their entirety are intended to help restore fairness throughout the operation, the following suggestions are specifically directed toward newsroom demographics:

- Expand the search for mid-level minority reporters and editors, with special attention to Latinos and to minority managers and copy editors. Some new strategies include:
    - At minority journalism conventions, recruit among panelists and other papers' managers, as well as at the job fair.
    - Scrutinize winners of major journalism awards and fellowships.
    - Involve minority staffers in the search more formally.
    - Send experienced staffers to professional development programs at places like Poynter and the Maynard Institute, and urge them to scout their fellow students.

- Make the paper and New York City appealing by having candidates meet with minority journalists at The Times during interview days.

- Enforce company policy requiring managers to consider a diverse pool of candidates for every job, including medium-term assignments. On the business side, this process has helped create a staff that on the whole is more diverse than the newsroom. A job should not be filled until a department head has assured the Career Development Editor that a good-faith effort has been made to assemble a diverse pool.

- For the benefit of our journalistic insights, a special effort should be made to move more minority staffers into story-assigning and other editing positions. Consider a process, like the one in place on the business side, to include women and minorities among those actively groomed as successors for ranking editing and management positions.

- Take extra caution not to confine women and minority staffers to limited categories of jobs. No position, not even a short-term assignment like war coverage, should be off limits to anyone for demographic reasons.

- As a regular part of the annual performance review, hold department heads accountable for efforts to diversify their staffs, with the assessment affecting the salary.

3. Widening the net

- Encourage desk heads to form small rotating advisory groups on staffing, including, when possible, a copy editor, a reporter, and a backfielder. These groups should canvass colleagues about standouts from their former newsrooms; scrutinize contest finalists; and respond with a polite note to every applicant, as well as a phone call to anyone who was under active consideration for a job.

- Although copy editors form a separate department for budgetary purposes, department heads should be more involved in hiring them as we broaden our recruitment process:

    - Seek copy editors with leadership experience in their previous newsrooms, and actively seek minority copy editors. (The copy desks are the least diverse places in the newsroom.)

    - Look for copy editors where we find backfielders — at conventions of newsroom managers, not just at copy editing conventions — and canvass new hires about who in their former newsrooms had the best ideas and the most skilled hands. We should hire copy editors who would also be comfortable working in the backfield — organizing the report, rewriting troubled stories on deadline, and conceiving, assigning and packaging stories.

    - During their weeklong tryout, candidates should be interviewed by the department head and the copy chief of the desk where they are most likely to end up.

    - Revive the copy desk administrators' languishing proposal for an intermediate program (an extended probation, plus training), starting with four to six members. In addition, create a training program for copy editing interns.

- Use the company's regional newspapers as a proving ground. Expand opportunities for staffers at those papers to visit The Times for short stints, like the city editor from The Tuscaloosa News who recently spent two months as a reporter in Metro and Business Day. The promise that a regional journalist could potentially move to The Times would in turn help those papers recruit.

4. Strengthening orientation.

The existing orientation process, which includes visits to the Page 1 meeting and an introduction to the publisher, should be expanded to inculcate new hires in Times culture and values. All bureau hires should work first in New York. For any newcomer, especially a copy editor, one-on-one lunches should be arranged over several weeks with 5 to 10 members of their new department, including its head. More detailed suggestions for orientation materials are provided in Appendix C, but here are a few ways to strengthen the welcome mat:

- Revive the employee handbook compiled in the early 1990's, keep it up to date, and make it a must-read.

- During the first week, give every employee a written or oral briefing on accuracy, fact-checking, and the importance of correcting mistakes and fairly handling complaints from the public. (This should accompany briefings on ethics, discussed in Chapter 2.)

- Bring back the New Faces poster and cocktail party.

- Establish a mentor program or buddy system, in which senior writers and other experienced journalists help guide newcomers through the first six months.

5. Improving reviews for apprentices

The intermediate reporter program ("8i") offers The Times a mechanism to hire from nontraditional career backgrounds or to take chances on promising but lightly experienced reporters, with a probation period up to three years (as opposed to the six months for mid-career hires). Few such hires have served the bulk of the three-year term, and Jayson Blair's ascent to permanent staff status, after 15 months, raised the question of whether early promotion is too automatic, or has become the de facto norm.

While flexibility is essential to lure candidates from fields outside journalism, management should not hesitate to use the full three years to evaluate performance when warranted. To retain talented 8i's without waiving probation rights, The Times should take advantage of its discretion to increase pay and the complexity of assignments on a merit basis. Decisions to extend internships or make intermediate reporters permanent must be more systematic:

- Performance reviews should be given every six months, written or vetted by department heads, with constructive feedback from assigned mentors, staff reporters who have worked with the candidates, and colleagues in the apprenticeship program.

- Accelerated promotions should require the recommendation of the advisory committee to the Career Development Editor and of the relevant department heads. Decisions should be made in consultation with several masthead editors, and ultimately endorsed by the executive editor.

6. Evaluating everyone, every year

Although Times policy says every employee is entitled to an annual evaluation, many employees at all levels have received few reviews in their tenure at the paper. Meaningful performance reviews are a crucial element in career advancement, and employees should receive them every year. While evaluating correspondents in remote or isolated assignments may pose particular challenges of tact and empathy, the goal should nonetheless be to review performance annually.

Compensation must be tied more closely to evaluations. While there may not be enough money to reward all who have received positive evaluations, no one should get a merit raise without having had an evaluation. Department heads should be held accountable for making sure evaluations are carried out; failure to do so should affect their bonuses.

We recognize that evaluations and performance management are the province of a separate task force, created before the Blair scandal and reporting at the same time as ours. We endorse what will surely be the recommendation of that group for meaningful assessments that genuinely affect careers.

With appropriate privacy safeguards, information culled from evaluations should be kept in a Career Development database, available to all desk heads, to track the abilities, skills, areas of interest and aspirations of staff members. Desk heads should consult this database, as well as past evaluations, when filling open slots for long- and short-term assignments.

7. Improving access to opportunities

Finding out what newsroom jobs are coming open can itself be a sizable reporting job. Often people learn that a prime assignment is available only upon reading the announcement that someone else has gotten the job.

The system for promotions, jobs and choice temporary assignments should be made transparent and competitive through job postings distributed to the entire staff through e-mail. We understand that breaking news sometimes requires quick deployment in which availability and geography are the primary criteria. But even most medium-term assignments, like coverage of a war or campaign, have a longer lead time. Editors should also post short-term openings to give employees a taste of jobs vacated by people on parental or book leaves. To make this process meaningful:

- Postings should include descriptions of the responsibilities that come with the job and the desired qualifications.
- When there is already a preferred candidate, managers should acknowledge this, but still encourage people to apply; this will allow employees to meet new editors and make their interests known.
- Editors should respond to everyone who applies, and explain to those who are passed over what skills they must develop to have a better chance next time.
- As discussed above, editors should choose from a diverse pool of candidates. If only a small pool of people come forward, managers should cast a wider net and look for additional applicants.

Even as we recommend wider competition and greater openness in filling temporary assignments, including those for breaking news, we urge that these decisions be negotiated between desk heads, with the Career Development Editor mediating competing demands. This would encourage honest communication between those most likely to know the strengths and weaknesses of the staff; the lessons of the Blair scandal are self-evident.

To help people diversify their experiences, The Times should establish an internal "fellowship program" in which reporters, editors and copy editors could spend a period of time working for a different section of the newspaper, voluntarily and when staffing permits. Such a rotation would help to erode barriers between sections.

8. Expanding training opportunities

The Times has not placed a premium on training. Those who want it say they receive little recognition for it and fear being perceived as less than capable for having asked. And like other newspapers, The Times often rewards good reporters and copy editors by promoting them to management positions, without preparing them with a new set of skills.

Reviews of past newsroom training programs are mixed. We believe training that is carefully tailored to this newsroom would be rewarding. To forestall any perception that training is remedial, programs should be mandatory, particularly for anyone given supervisory responsibilities.

As with performance management, we acknowledge the work of a separate task force in this field. We endorse its recommendations to establish meaningful training throughout the newsroom.

CHAPTER 2

Standards

Findings

Many people inside and outside our newsroom complain that we sometimes let quality control take a back seat to other priorities.

It did not take the Jayson Blair scandal to convince many of our copy editors that they — and their jobs as the last line of defense against error and more — had been devalued. Our use of bylines and datelines is inconsistent, occasionally dissembling. When the Blair affair and its aftermath forced us to explain our practices to readers, we sometimes could not, without risking embarrassment.

Unidentified sources are an unavoidable commodity in a newspaper that intensively covers criminal justice, diplomacy and foreign intelligence. But we use them far too casually, and before this crisis we had failed to agree even among ourselves about some of the standards we should have.

Stringers and freelancers need regular screening for ethics and accuracy. Our excellent Integrity Statement and the new Ethical Journalism code are too little understood, and the important principles behind them receive too little attention.

So does accuracy. Too few desks track the accuracy records of reporters and editors. Readers, journalism educators and media critics find us more open to acknowledging small errors than big ones.

The responsibility for quality control cannot be spread thin. It must reside near the top level of our organization, in a masthead-level Standards Editor who has the authority to overcome the imperatives that undermine it. This editor should occupy a central place in the newsroom and serve broadly as a sounding board for staff members' journalistic concerns.

Recommendations in detail

1. Getting it right

Accuracy is at the heart of the newspaper's covenant with readers, who trust us to be credible and authoritative. It is the foundation of the New York Times brand. We must put in place a system that will not only prevent a future Jayson Blair but keep the present and future staff constantly aware of accuracy as part of the newspaper's operating system and soul.

There is widespread commitment to detecting and correcting mistakes, with increased sensitivity since the Blair scandal. But practices and attitudes vary across and within desks. And mistakes continue, not only errors of fact but also failures of sound journalistic practice — the failure, for example, to seek comment from people cast in a negative light, and the use of anonymous pejorative quotations.

While all complaints that enter our system through the Reader Comment e-mail address or toll-free number printed (since 1999) on Page 2 are addressed, others are handled more haphazardly. No one does such work full time, nor is there any systematic way of tracking mistakes, how they originate and how they are handled outside of a couple of especially diligent desks — metro and Business Day.

Thus we do not sufficiently identify people with accuracy problems, nor do many performance evaluations take them into account. Without such attention, poor performers can slip into higher-profile assignments, where damage can be greater. Without such analysis, we cannot learn and correct the root causes of mistakes.

To make accuracy a higher priority, we should consider adding resources, both people and procedures, as we take the following steps:

- Every department head should choose and adopt a rigorous, consistent, transparent and uniform system for tracking corrections, the way they are handled and how they are made. Information on inaccuracy should be included in performance evaluations. (By this, we do not mean the raw "correction rates" that figured so haphazardly in press reports of the Blair scandal, but a conscientious analysis of the types of errors and the circumstances under which they are made.)

- Training in fact checking should be mandatory for reporters and editors, especially new arrivals. Many reporters and editors are unfamiliar with the guidelines and procedures currently in place, and with the simple tools placed at our disposal by the Internet.

2. Using unidentified sources

The Blair scandal exposed vulnerabilities we must repair. Our stylebook describes some dos and don’ts for anonymity and attribution. But the paper has no written or shared guidelines on when to require multiple sources, and how many, or when reporters must disclose the identity of their sources to editors before publication. Many of the principal editors we interviewed about the Blair affair were confident that they knew the policies, though none exist. Practices vary across the newsroom, and our enforcement of existing principles is surprisingly lax.

The stylebook says anonymous pejorative quotations should never appear, but they do. And we have no policy on the opposite side — the anonymous flattering quote that can unbalance a story just as grievously.

Granting of anonymity can be a crucial tool for obtaining and disclosing significant nonpublic information on national security and criminal justice, state and local government, business and many other areas. But this newspaper relies too heavily on the practice, and its frequent use damages credibility with readers.

The Standards Editor should develop and enforce a policy on the use of unidentified sources. This will take time, and in the meantime, reporters and editors should be much more selective about granting anonymity and much more vigilant about enforcing existing style guidelines, like stating the reason for anonymity as explicitly as possible.

Any policy committee will find a host of issues to tackle, but in our discussions, we came up with these specifics:

- Just as anonymous pejorative quotations must never appear in our report, neither should anonymous flattery. Unidentified sources cannot be allowed to speculate in our pages.

- In stories using unidentified sources that involve a disputed contention or allege wrongdoing by a person or institution, two sources, each with independent knowledge of the situation, should be used when possible. (If it is not possible, senior editors should seriously weigh the reason for an exemption.) Reporters must make sure the separate sources are not merely echoing each other and are not subtly interconnected.

- Desk heads should know the identity of their reporters' unidentified sources. So may the executive editor or managing editor upon demand: the source's anonymity compact is with the newspaper, not the writer.

- In describing an unidentified source, we must explain to our readers how he or she is in a position to know — why the source merits our confidence. We should be as specific as possible in describing how the source gained access to the information and why he or she has an interest in disclosing it.

- Reporters must be truthful in print about their sources. If a single source is used, the reporter cannot make him or her a plural. When someone gives information, the reporter cannot later say in the story that the source declined to comment or was not available.

- Reporters and editors should attend refresher seminars annually to discuss the paper's guidelines on anonymous sources (in addition to separate workshops on ethics, discussed later).

3. Being Honest in Bylines and Datelines

The Times has traditionally acknowledged that it owed readers a clear, accurate account of who reported a story and where and when it was reported. But current policies are widely misunderstood, inconsistently administered and sometimes bypassed in spirit if not in fact.

In the aftermath of the Blair scandal, as we tried to explain our standards to outsiders and our own staff, we concluded that much confusion had been sowed by our internally generated pressure on reporters to "get the dateline" at any cost. In such cases, violence has been done to the spirit of accuracy even as the letter has been achieved at unjustifiable cost.

Our stylebook says it right:

> Because believable firsthand news gathering is The Times's hallmark, datelines must scrupulously specify when and where the reporting took place. A dateline guarantees that a reporter (the bylined one, if there is a byline) was at the specified place on the date given, and provided the bulk of the information, in the form of copy or, when necessary, of notes used faithfully in a rewrite.

Byline policies should be liberalized, as follows:

- Bylines should be awarded to the people who really do the work. When substantial reporting or writing in any section is by a freelancer, a stringer or a clerk, the byline should reflect that. (The distinction between staff writers and stringers has been eroded by the emergence of feature sections and weeklies heavily dependent on stringer copy. Because of the wide variety of arrangements we have with such contributors, it would be unwieldy to distinguish in print between them and staff correspondents.)

- Eliminate the "with" byline ("By X with Y"). Readers do not understand the device, and it thus erodes confidence in our truthfulness. When two writers have made substantial contributions to a piece, the "and" byline should be used. If one of those writers is not in the datelined place, an italic note at the bottom of the story should explain each reporter's location. If one writer's contribution overwhelmingly outweighs the other's, the secondary contributor should receive an italic credit at the bottom of the story instead of sharing the byline.

- Italic "contributor" notes should be added at the bottom of stories for any journalist, staff or nonstaff, who has made a substantial contribution.

- We should review policies for picture credits and graphics and the contributions of our database editors with an eye to informing readers more fully.

Dateline integrity should be restored, as follows:

- When a correspondent travels, it should be to report for the newspaper. If deadline constraints mean that the reporter will make no significant contribution to someone else's work, we should skip the trip — the "toe touch" that serves only to justify a dateline artificially beneath the byline. (That kind of dissembling may tempt reporters to push the ethical boundary farther, as we have seen in a recent case, and to resort to a meaningless dateline.) The paper's top editors are the people who can best combat this — by dropping the traditional insistence on "getting the dateline" in situations when our staffer cannot actually do the reporting.

- Top editors should accept a “stale” date, several days old, on a front-page story, rather than send a reporter on a plane trip simply to freshen the date. (A fallback position would be to remove dates from datelines more than one day old — a change from the present seven-day limit.)

- Our committee found much of the staff confused by the word “today” under a dateline (when the adjoining local stories say “yesterday” to mean the same thing). That confusion is presumably also rife among readers. We should name the day of the week under a dateline, and eliminate “today.”

4. Tightening the Use of Stringers and Freelancers

The hiring of stringers has been haphazard, ranging from a thorough evaluation process to the friend-of-a-friend-of-a-friend method. Our biggest vulnerability is on a breaking story, when we are desperate for somebody, anybody, to help us out. A national editor said: “Stringers for spot news undergo little scrutiny beforehand, but if their work is substandard they aren’t used again.”

Stringers give our daily report additional scope and texture by doing a range of tasks. Some are researchers, some gather quotes, some supply story tips, some do phone and street interviews, some baby-sit court cases. Many write stories; they are honest-to-goodness-reporters looking for a break. Some reporters depend on them; others seldom use them. One Los Angeles reporter says he’d be “half as valuable” without his stringer. But a business reporter says: “I’ve had nine largely useless stringer encounters for every good one.”

In any case, the telephone tips we received after the Blair scandal suggested that the role of stringers is puzzling to readers and staffers. Under the direction of the Standards Editor and the Career Development Editor, the newsroom should:

- Develop a written policy on how and when to use stringers, and how and when they should receive credit.

- Issue a written guideline saying that a stringer’s work should supplement a reporter’s work, not substitute for it.

- Establish a system to screen stringers and freelance writers thoroughly. Résumés and clips should be on hand, and face-to-face meetings conducted whenever possible. We should consider creating a paperwide stringer database on the intranet.

- Enlist freelancers wholeheartedly in our ethics policies. Along with a freelance rights contract, they should sign a statement that they have read and fully understand our ethics policy.

- Underline the professionalism of our stringer corps by establishing that stringers and freelancers exist to supplement our reporting, not to carry out personal errands or to undergo inconvenience that staff writers wish to avoid (off-hours work, for example).

5. Inculcating ethics

We have an excellent new Ethical Journalism policy and an Integrity Statement dating from 1999. To imprint these standards on the consciousness of everyone who works here, and make conversations about ethics ever-present in the newsroom, we need a new training regimen (under the supervision of the Standards Editor):

- Orientation should include half a day on ethics, in which trainers and new hires discuss case studies drawn from real examples.

- At the end of this training, all employees should be required to sign a statement that they have read and understood our guidelines.

- Every journalist should undergo a compulsory annual refresher course based on hypothetical cases, many drawn from real newsroom examples. (Foreign correspondents might attend only once every two years, as part of their home leaves). Participants would be asked to resolve an ethical problem, perhaps in writing, and would discuss their conclusions – and the newspaper's actual response — in the session.

- The Standards Editor should periodically assemble an ethics advisory panel representing a variety of newsroom constituencies to refine our policies, consider real cases and discuss interpretive fine points.

CHAPTER 3

The Culture of the Newsroom

Findings

We must affirm the values of transparency, fairness and accountability throughout our newsroom. Treating people with dignity is not just the right thing to do, but also a path to journalistic excellence. A healthier, more positive work environment in which successful careers are just one component of full lives will support the goals of the paper's leadership — and this committee — of having a vibrant, diverse staff at all levels. Improving and expanding communication, as well as avenues for constructive criticism and complaint, will foster collaboration.

Too often, success at The Times is measured by direct influence over tomorrow's news report; the perception is that time not spent interviewing, writing or editing is time wasted. That attitude has left basic management tasks lagging. The appointments of masthead-level editors for Career Development and Standards can both symbolize our commitment to these issues, and ensure that they get proper attention.

We must acknowledge that great journalism is more than great journalists: it thrives in an institution that nurtures talent. While there will inevitably be exceptions, clear policies with deviations explained are better than a free-for-all governed by individual negotiation.

The commitment of The Times's leadership to diversity must be embraced from top to bottom and institutionalized as part of all journalistic conversations. The definition of "diversity" should be expanded to encompass the intersection of who we are and what we do: not just race, religion, age, sexuality and gender, but also subtler issues like where — or whether — people went to college, what they did before arriving at The Times, and whether they have or plan to have children. Diversity discussions should be transformed from narrow ones about discrimination to broad ones about improving our craft and honing our competitive edge.

Tone and culture of large organizations are dictated from the top, and we urge that the new executive editor and managing editor embody the principles outlined below, and demand that other newsroom leaders similarly serve as behavioral role models.

Recommendations in detail

1. Treating each other with civility

From the first contacts with recruits through the moment of departure for people who resign, we must treat people more respectfully. Rudeness, demeaning language or humiliation should be deemed unacceptable. While some exemplary journalists may be curmudgeons, and that need not exempt them from working here, we should seek and cultivate collegiality at all levels. This issue may seem remote at first from the lessons of the Blair scandal, but it is not: civil discourse is a necessary part of the openness that permits staff members to share their misgivings if we are about to make a faulty decision.

- Make courtesy and respect explicit criteria sought in job candidates and measured in evaluations. People who do not treat colleagues professionally should not advance in their careers and certainly should not become supervisors. Desk heads and more senior managers should be evaluated not only by their bosses but also by peers and employees, particularly on issues of civility.

- Establish a clear exit protocol that outlines how long a departing staff member can expect an e-mail address and other institutional privileges to last, and offers a short audience with the publisher as well as a lengthier session with the Career Development Editor or a subordinate. Exit interviews — held haphazardly until now, and mostly on the initiative of the departing employee — would help detect patterns of complaints about leadership.

- The Career Development Editor should create a vigorous action plan to respond to findings of the existing employee attitude surveys, and hold newsroom managers accountable for improving results year to year. The news department should consider modifying the paperwide survey to be more useful to the newsroom, or adding more tailored questions to ferret out issues in particular departments.

- Make the newsroom pages of The Times's intranet sites thriving, community-building bulletin boards.

2. Respecting boundaries between work and home

Being on call 24/7 does not mean working all the time. The best journalism is practiced by people who also do other things. Natural news cycles demand that we be able to ramp up — so we cannot constantly be running on overdrive. Availability and productivity must not be valued above quality and creativity; Jayson Blair was consistently complimented for being prolific, and was elevated to prominent assignments in large measure because with the national staff depleted, he seemed willing to work and travel around the clock.

- No job should be structured to require more than a regular workday routinely, or duty on days off; such requirements deprive the position of the most diverse pool of candidates, and deprive lower-level employees of opportunities to develop skills crucial for advancement.
    - The tone must be set from the top, and by each department head, that more work is not necessarily better work.
    - Evaluations should not blindly equate hours with dedication.
    - Managers who are regularly in the newsroom on nights and weekends, or who are too busy to handle responsibilities like evaluations and staff meetings, should be pushed to delegate, and/or be given more help.
- When the news requires work during off-duty hours, employees who try to protect their personal lives should be given the benefit of a presumption that they share the goal of producing the best-quality report — not suspected of trying to shirk responsibility. Correspondents understand that their positions demand flexibility and will regularly require sacrifices; in the experience of many, however, the balance between the importance of the assignment and the importance of the personal commitment has recently disappeared.
- Under the leadership of the Career Development Editor, desk heads should develop clear policies that allow employees to pursue flexible work arrangements, provided the work can be done well.

3. Expand access to supervisors and communication across desks

Contact with desk heads and masthead executives must be institutionalized both to improve communication and to combat perceptions of favoritism. An "open door" is not enough. Senior editors should consider getting to know the staff part of their jobs; roaming the newsroom is not only good for morale but also a way for them to find out what is really going on.

Our committee found a widespread feeling on the staff that high-ranking editors spend too many hours in meetings with one another, while other staff members rarely find opportunities to brainstorm collectively. Without prescribing a specific routine, we encourage people of various ranks to meet across desks, to share resources and to break down isolation and rivalries that are too often the rule. Our competitive instincts should be channeled toward competitors. Several people in metro and Washington report that they had serious, well-founded concerns about Jayson Blair's reporting on the sniper and war-related stories, but found no outlet to share their insights with the people supervising him in national.

A separate communications working group has looked closely at meetings and other communications systems. We endorse their efforts to open channels, and offer these ideas to help:

- Department heads and masthead editors, including the executive editor and managing editor, should consider having office visiting hours, on the university model.

- Every newly hired journalist should have a more-than-perfunctory meeting with the executive editor and managing editor. If the two top editors are open to holding small-group breakfasts and dinners with rank and file, these should be scheduled systematically to foster a sense of fairness.

- Department heads should meet regularly, with and without the executive and managing editors, not just to review enterprise lists but as a forum for broad managerial and journalistic questions, including negotiations over sharing personnel.

- We would encourage the publisher to expand institutionalized lines of communication to the newsroom so that he is not dependent for information solely on its top executives, or on people he knows personally. We would encourage sporadic one-on-one meetings with department heads, occasional lunches or dinners with small groups of rank and file, and frank, frequent statements encouraging e-mail.

4. Creating clear avenues for appeal

Saying "no" is an important journalistic skill, and candid debate on coverage should be encouraged regardless of rank. While the top editors retain the authority to make a final call, decisions should generally begin among lower pay grades — to avoid clogs, to encourage people to take responsibility for their work, and to preserve opportunities for reconsideration. While editors of course retain authority to make assignments, reporters' judgments on coverage should be invited.

- The roles of masthead editors — for breaking news, for projects, for personnel, whatever the executive editor decides — should be clearly defined so people know where to take various issues.

- While every masthead editor will thus be an avenue for appeal, and an outlet for well-grounded complaints, the executive devoted to Standards should serve as an internal check on the newspaper's journalistic leadership. Those in the newsroom who were aware of Jayson Blair's history but felt unable, unwilling or unwelcome in telling the people who needed to know could have used such a safe outlet. This editor must have true authority, independence, and routine access to the publisher as well as the executive editor and managing editor. As outlined in the introduction to this report, this editor will also collaborate with the Public Editor in bringing public complaints to the attention of the staff for prompt action.

- The Standards Editor should consider running an online forum where anonymous concerns of substance could be submitted. A continuing electronic Q & A could explain why things work the way they do.

SECTION II

The Jayson Blair Case

The Jayson Blair debacle represents a failure of communication, command and discipline.

No single person, no single mistake, no single policy is responsible for the embarrassment of plagiarism and fiction that stained the journalism of The New York Times in the spring of 2003.

Instead, the Siegal Committee's outside members found that a series of management and operational breakdowns made it possible for a junior reporter in his mid-20's to get past one of the most able and sophisticated newspaper editing networks in the world.

We interviewed a wide range of people who had a role in or knowledge of Jayson Blair's years at The New York Times, starting with his summer internship in 1998 and ending with his resignation on May 1, 2003. Citing health reasons, Blair declined to be interviewed by the committee's outside members.

The recollections of Times staff members reveal a stunning lack of communication within the newsroom, an environment of separation exacerbated by increased demands on understaffed desks. And behind the Blair story lay a misguided pattern of tough supervision and lenient forgiveness that led to retaining him, and in fact promoting him, when at several points he was demonstrating that he was not ready to join the staff of The New York Times. Only by examining all of these factors is it possible to answer the question: ***How could the Jayson Blair scandal have happened at The New York Times?***

And that is our intent. Our inquiry was not an examination of the editorial policies of the newspaper, its story choices or its news values. Instead the outside committee members examined what went wrong in the months and years after a clearly talented, intensively recruited 22-year-old minority intern from the University of Maryland named Jayson Blair walked in the door on West 43rd Street.

The outside members of the committee also endorse the policy recommendations of the Siegal Committee as useful steps to prevent anything like this from happening again.

Diversity

Blair came to The Times in a program that was then intended to increase newsroom diversity. Some critics have argued that this diversity effort was essentially what caused the Blair calamity. That is simplistic. It is true that The Times was and is — for strong reasons both of journalism and justice — committed to deploying a diverse news-gathering staff. We believe the paper must not turn from that commitment.

But diversifying the staff was only one of a collection of factors, discussed later, that propelled Blair upward toward journalistic disaster.

It is impossible to separate the diversity issue from the long-running industry problem of news managers who are insufficiently trained as personnel managers. That problem, in turn, was exacerbated by the absence of stable and reliable newsroom mechanisms for managers to communicate with one another about important personnel issues.

And despite the fact that at times there was the necessary rigor in the management of Jayson Blair, sometimes punches were pulled in dealing with this young reporter for two reasons: One, as one manager described it, was that holding him back while other interns (minority and nonminority) went ahead might be seen as discriminatory. The other was a whiff of favoritism in the newsroom, a sense — advanced by Blair himself — that he had friends in high places at the paper. These sentiments flowed from a perception that some reporters had come to be favored in a "star system" by the executive editor, Howell Raines, and from the fact that, like Blair, Gerald Boyd, who was then managing editor, is black.

Though diversity considerations are obviously embedded in the Blair story, they are far from the real culprits of deeply flawed structures, attitudes and processes.

Communication

A failure to communicate — to tell other editors what some people in the newsroom knew — emerges as the single most consistent cause, after Jayson Blair's own behavior, of this catastrophe. In the New York Times newsroom, silos had replaced sharing.

Throughout, information and assessments were compartmentalized. Intern evaluations appear to have been done with insufficient input from operating managers. Blair was promoted from intern to beginning reporter and continued to advance in part because concerns about his behavior were not sufficiently reflected in evaluations that emphasized the positive. He was given a regular tenured reporting job despite the misgivings of his immediate boss. He was put on high-profile national assignments with his new supervising editors receiving no notice of the serious problems that had marked periods in his previous four years at the newspaper.

The famous “stop Jayson now” memo did in fact interrupt his being allowed to write for the paper, albeit only briefly. And it was followed less than six months later by his ill-conceived transfer to the sports department. This allowed him to escape from the metro desk discipline under which he had been chafing and from which he had been lobbying to be released — even though his performance had improved under that discipline.

And then, almost immediately, came the fateful assignment to the national staff for sniper coverage, with no inquiry by national or any volunteered warning from other newsroom quarters about the young reporter, with a past that was at best erratic, catapulted into the biggest story of the moment. (There is no disagreement that national received no warning, either sideways from metro or top-down from senior managers who knew the history when they made the assignment.)

And that national berth for sniper coverage enabled him to slide into coverage of military families on the home front of the war in Iraq. Both assignments could be called relatively straightforward, but managing a reporter working alone in the field depends immensely on trust. It was on the home front stories, in March and April 2003, that Blair committed the egregious plagiarism and fabrications that landed like a bomb on The New York Times.

The outside members’ inquiry affirms, in broad outline, the detailed account published in The Times on May 11. Our purpose here is not to repeat or dissect that account. But our interviews enable us to highlight more sharply at least six moments in the history of Jayson Blair that we came to call “choke points”—moments when the looming disaster could have been cut short.

Those signs, so clear in hindsight, were not seen or not heeded. Good intentions abounded, but bad newsroom habits — compartmentalized information, uneven discipline and other flaws highlighted in this report — carried the day.

The Chronology

The trouble actually started before Blair came to The New York Times. Recent reporting by the University of Maryland student newspaper, The Diamondback, tells of performance and reliability issues during Blair's undergraduate career.

Some 30 former colleagues of Blair's on The Diamondback wrote on June 4, 2003, to current leaders of the college and to the campus newspaper's parent company that "Mr. Blair's disgraceful behavior at The New York Times resembled a recurring pattern we witnessed when he worked at The Diamondback, including his time as editor in chief from 1996-1997." The letter cites attempts to get faculty members and board members of Maryland Media Inc. to deal with Blair's problems.

Still, the university faculty gave him good reviews, and the Times recruiter who visited the College Park campus over three years uncovered none of the controversy. Lacking any of that information, The Times hired Blair as a summer intern on June 1, 1998. Thus the first **CHOKE POINT** passed, a lost opportunity when a more successful inquiry or different input from the university could have set the newspaper on a different path.

In fairness, it must be noted amid all the bad performance this account lays out, that in the beginning — and later — Blair did work that showed promise, and gave his editors reason to believe, as one editor wrote, that "he had the drive, moxie and talent to succeed at 43rd Street." An early supervisor told us, "He was exceptional in a very, very strong group of interns." Said another: "He was expected to be the best and the brightest. He had interned at The Boston Globe, The Washington Post. It was very competitive to get him here."

An assigned mentor said in his interview with our committee that even as he evaluated the first summer as a "strong start," he found problems of reliability, availability, of Blair's not being at hand when he was needed to review copy with his editors. But a positive evaluation prevailed, and along with three other interns, Blair was taken on again, returning for another internship on June 1, 1999.

Since he had indicated he needed the time between internships to finish his degree at the University of Maryland, it was assumed when he returned to The Times that he had graduated. In fact, he had not. (The paper now employs an outside firm to verify backgrounds.) Managers of the intern program have no firm recollection that he was asked whether he had graduated.

A bachelor's degree may or may not have been deemed essential to his returning. But if the paper had ascertained that he hadn't done what was expected, and hadn't voluntarily disclosed that, the discovery would at a minimum have signaled that this was an intern who bore special scrutiny, whatever the promise some saw. This was the second **CHOKE POINT**.

After his second internship, Blair entered a special Times program for "intermediate" reporters — a program that provides, under the union contract, for up to three years' probation for reporters developing through rigorous supervision and evaluation. He received two more generally positive evaluations.

But in the fall of 2000, Blair's mistakes rose dramatically. At a time when each department was being required to develop a plan to reduce errors, Blair committed more mistakes than anyone else on metro: seven in just over two months. While error rates are a blunt measure that doesn't account for context or interpretation, they are a hint, at least, of a problem. Mistakes earlier in his work at The Times had been written off to inexperience. His third evaluation since his internships, delivered on Nov. 30, 2000, raised issues of inaccuracy.

Just under two months later came a third **CHOKE POINT** on this road to disaster, and it was huge. Blair was promoted to the regular full-time staff of The New York Times.

Notwithstanding that some of his work during 2000 had won positive comments in evaluations, this step has all the earmarks of a social promotion. It took effect not quite 15 months after Blair entered the three-year program. The recommendation was made by a recruiting committee led by Gerald Boyd, at that time deputy managing editor.

Boyd has told the Siegal Committee that other intermediate reporters with less experience were being promoted at the time, and that there was no question Blair would be promoted at some point.

The metro editor, Jonathan Landman, didn't think Blair ready for the full-time staff, but after registering his opinion, he didn't press the matter because he "thought it would be futile." He told our committee: "It was clear that Gerald [Boyd] felt pressure to promote Jayson and that he thought it was the right thing to do. The racial dimension of this issue and Gerald's obvious strong feelings made it especially sensitive; in that sense it is fair to say that I backed off a bit more than I would have if race had not been a factor.

"I think race was the decisive factor in his promotion. I thought then and think now that it was the wrong decision, despite my belief in diversity and my respect for our institutional commitment to it.

"I emphatically do not believe that it is necessary to promote weak or troubled people in the name of diversity."

Our review finds the promotion at best premature. Making Blair a tenured reporter 21 months before the expiration of the probationary berth squandered an opportunity. The program is intended to allow the paper to try out potential staff members. What was lost here was the opportunity to continue to work with him to see if the described "promise" could be brought forward and, failing that, to be able to dismiss him, without the lengthy and complicated procedures that are in place for regular members of the staff.

And thus another chance to change course slipped away.

Blair's performance was sliding in the summer of 2001. He was coming in late, missing meetings, taking long smoke breaks, resisting the directions of his supervisor, Jeanne Pinder. She began requiring him to meet with her every week to set goals, every day to monitor progress. This was the beginning of very intense management from metro desk editors that would continue through an uneven period of progress and backsliding until April of 2002.

The terrorist attack of Sept. 11, 2001, seemed to have particular impact on Blair. He claimed to have lost a cousin in the attack on the Pentagon and begged off writing any sketches for the newspaper's acclaimed Portraits of Grief.

Blair gave the name of his "cousin" to Associate Managing Editor Bill Schmidt, who was compiling a list of Times family casualties for Publisher Arthur Sulzberger Jr. Five minutes later, Blair called Schmidt and asked that the name not go forward. Only in May, after the Blair deceptions exploded, did Schmidt discover that the name was a fragment of the name of a man from Blair's hometown who had died at the Pentagon; Blair had lost no family member on Sept. 11.

Given the enormous impact of the terrorist attacks, and then the anthrax scare and the war in Afghanistan, editors at The Times ascribed many performance issues to the immensely stressful time, and were even more inclined to cut Blair some slack since, they believed, he had lost a relative in the attacks.

When Blair covered a benefit concert on Oct. 20, 2001, at Madison Square Garden, his report was so flawed that corrections appeared over two days. Efforts by his editors to raise the quality of his work sometimes met resistance and defiance, dramatically in a memo Blair wrote to Jeanne Pinder the day of the Oct. 20 concert. In the memo, he listed “my grievances of the week,” and signed off with the audacious “I am on your team — insomuch as it does not run afoul of what I need to do for myself.”

Another missed opportunity came in February 2002, when Blair got a particularly negative evaluation, which Metro Editor Landman forwarded to Boyd and Associate Managing Editor Bill Schmidt, who was in charge of newsroom administration. It carried a cover note that read, “There’s big trouble I want you both to be aware of.”

When he saw the evaluation, Boyd called Blair into his office. As he remembered it for the committee, “I said, ‘You have enormous promise and potential but your career is in your hands. I don’t know what you’re doing, drugs or what, and I don’t care. The issue is your performance, and unless you change, you are blowing a big opportunity.’ ”

But at the department level, instead of discipline or steps toward dismissal, what followed was a lengthy (and obviously tolerated) effort by Blair to find another place within The Times where he might encounter lighter supervision than he was getting in metro.

The outside members see in this period a fourth **CHOKE POINT**, a lost chance to derail the coming disaster. There was a problem, and The Times did not face up to the need for formal discipline.

The paper’s response, or lack of it, may have been exacerbated by the fact that in this period, Blair told a deputy metro editor and many others in the newsroom that he was coping with serious “personal problems.” Boyd told our committee that he encouraged Blair’s line managers to focus on job performance, and not try to become psychologists.

Blair was given a leave to deal with the problems. When he returned, so did his errors.

Two months after the earlier critical evaluation, Landman sent his widely quoted memo to Schmidt and Nancy Sharkey, the staff development editor. The memo declared: “We have to stop Jayson from writing for The New York Times. Right now.”

It has somehow come to be believed that the memo was ignored. That is not true. Blair was indeed stopped, if only briefly. The next day he was given a letter and an oral warning that he was putting his job in peril. That letter began a formal disciplinary track (which could have led to dismissal under union rules). The outside members of our committee believe the track should have been commenced long before.

Landman’s memo failed to circulate any higher in the news department. Raines told the outside committee members, “I regard it as highly unusual that I didn’t get it.” Others said it wouldn’t be surprising that the executive editor wasn’t told about performance problems of a low-ranking reporter.

Blair took another personal leave. When he returned to work in late April 2002, he was again put under very close supervision and restricted to less demanding nondeadline stories.

Sharkey and Pinder developed a written plan to manage Blair even more strictly, but Boyd vetoed giving it to him. In an interview with our committee, Boyd said he believed the proper way to deal with a performance problem was discipline. Presenting such a letter was “something we had never done,” he said, and because of that, Blair could claim it was discriminatory. Boyd added that he also thought it would be counterproductive.

Six weeks after his leave, Blair returned to regular duties. He continued lobbying to get away from metro.

In August, Schmidt raised the idea of transferring Blair to sports. Schmidt said he thought “it might be a good idea to move him to another desk, to another set of eyes,” and to give him a fresh start. Pinder told the committee that she told Landman “I wasn’t eager to keep Jayson,” but that “moving him was not a good idea: We were getting somewhere.” His performance had again improved, “but only as measured against his earlier performance. We in no way regarded him as completely rehabilitated.”

Pinder added: “I also told Bill Schmidt I wouldn’t if I were he. Bill said, ‘If Neil needs him. ...’ ” (Neil Amdur was then the sports editor.)

Pinder told Schmidt she was willing to talk to anyone about her experiences supervising Blair. No one called.

Amdur told our committee initially that he recalled no warnings about Blair's accuracy problems. But after being reminded of an e-mail message from Schmidt with Blair's most recent performance evaluation, Amdur recalled it. That evaluation was more negative than positive, and the e-mail asked, "If you see any slippage, or any signals of the sort of difficulties that have tripped him up in the past, you need to let me know as soon as possible." Amdur said he had had experience with other people who blossomed when they got to his department. He was happy to get Jayson Blair.

This transfer is another **CHOKE POINT** through which the Blair disaster slipped, freeing him from the short metro leash he was protesting, for less intense supervision in sports.

With this step, Blair was allowed to begin drifting away from the disciplinary track on which he'd been placed. There was no formal meeting to end that process, no conscious decision and no consultation with Jeanne Pinder, the person who knew the most about his situation.

One of the few sports stories reported by Blair required an elaborate correction. It quoted Pete Mahoney, associate athletic director at Kent State University. Mahoney told The Daily Kent Stater in December — and then The Times, for its May 11 reconstruction — that he hadn't talked with Blair. The May 11 account also said the story had used material from The San Jose Mercury News without attribution to that paper.

Blair apparently started working on the story in October and returned to finish it in November. It ran on Nov. 23, and The Kent Stater reported on Dec. 26 that its staff had made numerous unsuccessful attempts to reach Blair and Times editors. Neil Amdur was away from the sports department for a week and then preparing to take another position at the paper. He says he did not hear from Kent State.

But in any event the transfer to sports was to be short-lived. Two weeks after his formal arrival in sports on Oct. 20, Blair was assigned to the team of reporters covering the Washington-area sniper.

This, the sixth, was a **CHOKE POINT** of the first order.

The decision to send Blair to Maryland was made at a meeting of Boyd; Andy Rosenthal, assistant managing editor for news; and Jim Roberts, national editor. The intention was to beef up staffing of the sniper story because The Washington Post and The Baltimore Sun had beaten The Times on some coverage.

Boyd thinks it was he who brought up Blair's name. There is no evidence that Blair's immediate supervisors were consulted.

The explanations offered for Blair's selection to work temporarily for the national staff ignore his record and do not stand against what should have been routine newsroom procedure.

The explanations are, in essence, that Blair knew the Maryland area from his youth and his college years, knew police work from his New York Times experience in Manhattan's "cop shop" and was after all to be nothing more than the eighth person on an eight-member team, assigned to watch the Montgomery County Police Department.

Against that reasoning stand what was then his lengthening record of unreliability, the formal notice of discipline still not resolved, and the sensitivity of the sniper story.

Here the noncommunication among newsroom managers speaks resoundingly about how the Blair debacle happened.

Despite periods of extraordinary inaccuracies, disciplinary issues, unexplained absences, "personal problems" over four years (albeit with better periods and high praise mixed in) — despite all that, National Editor Roberts asserts that no one warned him about any of it as he was given Blair for the sniper team. No one in metro, which had been so diligent in monitoring and disciplining Blair, no one in the administrative and hiring side of the news department, not the managing editor who had spoken to Blair about his performance and played a prominent role in choosing him for the team: not one of these managers can be found to have uttered any word of warning to national until Blair's sniper work came under challenge.

Boyd defends the assignment to the sniper team as "finite," and well within Blair's proven skills. But he agrees that Roberts should have been informed of Blair's record.

This was an invitation to disaster. The invitation was accepted.

Attentive management would have required a history check. Minimally collegial management would have dictated conversation among several people who knew, conversation that would at least have put Blair's national work under greater scrutiny, if it did not scuttle the assignment entirely.

Raines told the outside members of the committee that as executive editor, he was eager to improve The Times's performance on the story and had therefore approved the addition of Blair and others to the sniper team. But he told us that at the time, he did not know anything at all about Blair's history of problems with accuracy and corrections. Asked if he would have approved the transfer if he had known, Raines said no.

What follows from that transfer is well known, and qualifies, in Boyd's words, as "mission creep." As the sniper story wound down, Blair was essentially left as the New York Times staff on the scene.

Much has been made of the fact that Blair's Oct. 30 story, "U.S. Sniper Case Seen as a Barrier to a Confession," got into the paper with five unidentified sources. Given his problems with accuracy and what we now know to be his fabrications, the idea that he would have been given that level of trust on a complicated Page 1 story is breathtaking.

The story that ended up in the paper put more emphasis than Blair had placed on the claim that the White House had ordered federal prosecutors to interrupt the interrogation of the sniper suspect John Muhammad. A federal denial was indeed published, and in The Times's May 11 reconstruction of the Blair case, the newspaper corrected Blair's interpretations of what had been going on in the interrogation.

But as for the unidentified sources, Times editors still disagree over the facts surrounding discussion of their identity in the editing process and thereafter. The committee was not able to arrive at a definitive account. And a simple fact overshadows that debate: Nobody in the active chain knew the history of the reporter they were dealing with.

Blair continued to cover developments in the sniper story.

On Dec. 22, the paper carried a Blair story that prompted Robert Horan, the commonwealth attorney in Fairfax County, Va., to call a press conference to denounce the report. Horan never did clarify what was wrong with the story, but on May 11, The Times corrected two errors of fact — that the evidence included a videotape from the Home Depot parking lot in Falls Church, Va., and that it included a grape stem with suspect Lee Malvo's saliva on it.

Boyd pressed Roberts to get hold of Horan about his complaints. It was then, Boyd says, that he told Roberts that Blair had had problems. Roberts recalls having first heard about Blair's history later, in January, from Landman. But the information did not set off alarm bells, and in The Times's

May 11 report, Roberts was quoted as saying, “It got socked in the back of my head.”

In the midst of this, Blair was given a merit raise — initiated by Schmidt’s office because at this point Blair didn’t really have a “home” department. In a review of newsroom salaries, Schmidt found that Blair was the lowest-paid reporter in his intermediate reporter promotion class; an increase was deemed appropriate. Like other steps in the Blair story, this one was taken without due regard for the longer-term circumstances of his performance.

When the Iraq war started, the national desk was, in the words of one editor, “stretched to the breaking point.” The editors got permission from Boyd to use Blair for stories other than the sniper case, where not much was happening.

The rest is, unhappily, history. The disciplinary track still unresolved, Blair was now allowed to drift through sports, into national, past the mousehole he was assigned to watch in Montgomery County, past judicial issues and onto solo work in the field — and journalistic disaster.

Blair was assigned home front stories about the war in Iraq, including, ultimately, multiple stories about the family of Jessica Lynch.

It now appears that Blair did not travel much to the places nor witness the stories he reported during that period. The Times’s May 11 account and its June 11 follow-up report say Blair fabricated quotations and descriptions, even events. He plagiarized other reporters’ work. He apparently worked via cellphone and e-mail to lead his editors to believe he was on the scene when he was apparently either on another floor of the Times Building or at home in Brooklyn.

On April 29, The San Antonio Express-News notified The Times that portions of Blair’s story about a missing soldier’s mother in Los Fresnos, Tex., were a near-perfect match to one the Texas paper had published. That call, and the investigation it generated, ended Jayson Blair’s career at The New York Times.

Since Blair’s resignation and The Times’s more visible openness to hearing about errors, the number of people who have complained about mistakes — and the number of corrections published — has increased dramatically. Like other newspapers, The Times depends on sources and story subjects to alert it to errors of fact that are not discovered by the newspaper staff.

It is discouraging that people who knew the facts did not call about mistakes in Blair stories. Even though some did not see the stories at the time, others did, and it is clear that some readers, at least, do not perceive that the newspaper welcomes the chance to set the record straight.

Hindsight

Our reconstruction of Blair's years at The Times reveals that he was given many second chances. In hindsight their number is difficult to understand.

The reason for each may have been a) genuine affection and hope for a potentially star performer; b) a desire to support minority initiatives; c) a perception that, as he was reported to boast, he had friends in high Times places, d) a conviction that each step, considered alone, was properly handled within the bounds of legality and staff policy, e) the attraction of Blair's ingratiating personality. Or it may have been some combination of all of the above.

But together, this misguided compassion led to acceptance of performance that was grounds for the shortest imaginable leash if not dismissal. Blair's work history was decidedly not grounds for promotion and assignment to the highest-profile events.

One manager told the committee: "This is a compassionate organization. ... We don't know how to fire people." While understandable, that approach does not work in the troubled environment that surrounded the management of Jayson Blair.

One characteristic of that environment was an unusually high stress level for much of the time Blair was in decline. Enormous news stories asked all-out efforts, and not only did those stories come one after the other, but Raines was emphasizing that The Times should dominate the big stories by outworking other news organizations. Given a downturn in the economy, at least some people who left the paper weren't being replaced. Even though The Times earned seven Pulitzer Prizes for 2001, the stress of that period was more likely to nurture internal competition than collaboration.

At the same time, under Raines's and Boyd's leadership, authority that once rested with department heads had been moved up in the organization, to the people whose names appear on the masthead.

In his interview with us, Raines characterized much of the newsroom tension and anger as a result of his efforts to be “an agent of change.” Others described the climate to us as a result of the hierarchical management styles of the two senior newsroom leaders. The Jayson Blair story played out as those forces collided.

Raines and Boyd both said they had no special relationship at all with Blair, who reportedly often left the impression with colleagues and editors that he was protected by them. Boyd took particular exception to reports that he was Blair’s mentor. Boyd told the committee: “Philosophically, I have never bought into the concept of mentoring. ... I didn’t feel I should take people under my wing and move them up the ladder. I incurred some criticism from journalists of color who felt I was not looking out for them. My view was that it was competitive and a matter of merit.”

From the vantage of the publisher’s office, Arthur Sulzberger Jr. told the committee that while he knew there were anxieties in the newsroom, the depth of the anger and frustration “stunned” him. He said that he had sought “agents of change” to carry out the Times Company’s multimedia platform strategy, but that the currents embroiling the news staff did not reach him until they exploded in fury at the staff meeting in Loews Astor Plaza Theater on May 14 and thereafter, leading to the departures of Raines and Boyd on June 5. Sulzberger said he “should have been listening harder to what was happening in the newsroom.”

“I blame myself for that,” he said.

With the luxury of hindsight, the outside members find the mistakes not difficult to identify.

The most heartening hope for cure is the quality of the Times staff members on the Siegal Committee. They are what one would expect: highly intelligent, motivated by a love for their storied newspaper and deeply pained that the Blair episode could have happened to them.

The report these journalists have submitted envisions changes to the culture and practices at The Times. If those changes had been in place and functioning, they would most likely have made it unnecessary for us to be brought together to help the newspaper's management answer the question: ***"How could the Jayson Blair scandal have happened at the New York Times?"***

■

The committee's outside members were given whatever access we sought within the newspaper, and interviewed all the staff members we chose. We imagine it was difficult for most men and women at The Times to discuss what had happened, including their roles and the roles of colleagues. We are grateful for the open spirit they demonstrated. That applies as well to Howell Raines and Gerald Boyd, who were not required to speak to us after they left The Times but did so through hours of intense discussion.

Louis D. Boccardi

Joann Byrd

Roger Wilkins

A Note on Affirmative Action

A statement from Roger Wilkins

The Need

The requirement that the staff of a news organization with the worldwide ambitions of The New York Times be diverse is obvious. The publisher of The Times recognized this in establishing a clear policy directing that the company pursue diversity aggressively.

The paper needs to be able to see a diverse world and an increasingly diverse nation with as many sets of eyes looking from as many differing perspectives as possible. In a purely neutral culture, gathering such a staff would be easy, but The Times's recruitment occurs mainly within the context of the American culture, with all of the extraordinary freight that it has accumulated in the 400 years since Europeans first set foot on this continent and encountered the people who already lived here.

Essentially that culture taught that white men were the only people qualified to carry out the serious business of the world. Even down to the seventh decade of the last century, that culture was producing many newsrooms across the nation that were lily-white and all-male. The preferences and prejudices that produced such results have been blunted but have hardly disappeared in the brief 35-year period since then. Thus the countercultural forces of affirmative action and diversity programs are still necessary to assemble the kind of news gathering staff required to produce excellent journalism.

The Implementation

Essentially an affirmative action program develops innovative ways to search for qualified but nontraditional candidates for jobs, courts them aggressively, trains them effectively and manages them and the other members of the newsroom staff in ways that assure their retention as valuable employees. Retention is important because the Times newsroom is an American place and is thus touched — as are virtually all American places — by our culture, including some remnants of hostility to minorities and women.

Affirmative action done badly helps no one and injures both the company and the cause of enriched American opportunities. Thus diversity searches should be designed to discover candidates whose chances for success at The Times appear to be as great as those yielded by the newspaper's normal recruitment policies. Further, though retention of effective female and minority employees must be a priority of a strong affirmative action program, unsatisfactory employees, no matter how they got their jobs, should be dismissed according to the newspaper's normal policies.

An effective program would almost be assured if the paper were to put into place the kind of personnel system recommended by the Siegal Committee. Civility, training of newsroom executives in personnel management and transparent personnel transactions would go a long way toward assuring that the diversity policy enunciated at the top of the company was made real in the daily life of the paper.

APPENDIX A

THE SIEGAL COMMITTEE
Membership

Allan M. Siegal, assistant managing editor
Chairman

Jill Abramson,
Washington bureau chief
Diane Cardwell, metro reporter
David Chen, metro reporter
(temporary assignment,
Beijing)
Susan Chira, editorial director,
book development
Suzanne Daley, education editor
Jeff Gerth,
Washington correspondent
Jonathan D. Glater,
business/financial reporter
Steven A. Holmes, assistant news
editor, Washington
Dana Jennings,
assistant editor, The City
Kirk Kraeutler,
assistant foreign editor
Glenn Kramon,
business/financial editor
Jonathan Landman,
metropolitan editor
Alison Mitchell,
deputy national editor
Gretchen Morgenson,
business/financial columnist
Mireya Navarro, metro reporter
Sheila Rule,
senior editor, recruitment
Richard Sandomir, sports reporter
Lew Serviss, copy desk head, metro
Nancy Sharkey, assistant
to the managing editor
Jodi Wilgoren,
Chicago bureau chief
Greg Winter,
business/financial reporter

Outside Members

Louis D. Boccardi,
Former president and C.E.O., The Associated Press
Former chairman, Pulitzer Prize Board
Joann Byrd,
Retired editorial page editor, The Seattle Post-Intelligencer
Former ombudsman, The Washington Post
Member, Pulitzer Prize Board
Roger Wilkins,
Clarence J. Robinson Professor of History
and American Culture, George Mason University
Former chairman, Pulitzer Prize Board
Former member, editorial board, The New York Times
Former columnist, The New York Times
Former member, editorial page staff, The Washington Post

Coordinating Members

Fred Andrews,
retired senior editor; former business/financial editor
Ellen Kavier,
managing editor's office
Joan Motyka,
director of employee relations,
Human Resources Department
Dennis Stern,
vice president, Human Resources

APPENDIX B

Proposed Guidelines for Screening Job Candidates

The Career Development Editor should establish written guidelines for recruiters and others to use in reviewing all job candidates. These might include:

- Phoning at least three people who have worked with the candidate but are not among his or her references (provided those calls would not threaten the candidate's current job), to ask about not just ability but also personality: Is the candidate reliable, collegial and a listener receptive to constructive criticism?

- Requiring a reporter candidate to submit unedited copy; requiring a backfield candidate to submit examples of stories before and after editing, or to take an editing test (much as copy editors do).

- Asking about longer-term aspirations and looking for indications that those aspirations are realistic. (For example, ask a Business Day candidate for clips proving that she or he can write a story that has nothing to do with business.)

- Looking, as other industries and consulting firms do, for evidence that a candidate can be a leader. (Such a candidate might have been an assigning editor, class president, editor in chief of the student newspaper, team captain, head of a business or community-service group, or student orchestra leader.)

APPENDIX C

Recommended Orientation Materials

An inspirational, entertaining and instructive multimedia package should be sent to every newcomer, from summer intern to intermediate reporter to mid-career journalist. In addition to the revived and expanded employee handbook, it should include:

- Important written material like the Integrity Statement and the Ethical Journalism code. (Employees should be required to confirm in writing that they have read both.)
- Guidelines on libel and privacy, prepared by the legal department.
- Explanations of the annual performance evaluation process.
- Schedule of newsroom deadlines.
- Guides to employees' specific departments, including staff lists. (Much can be taken from the better departmental Intranet pages.)

REPORT AND RECOMMENDATIONS OF THE WORKING GROUP ON TRAINING AND PERFORMANCE MANAGEMENT

Kathleen McElroy
William E. Schmidt
Jennifer Preston
Mike Smith
Steve Marcus

July 24, 2003

Background and Context

The men and the women who serve The New York Times as department heads and newsroom managers graduate to those ranks on the strength of their skills as journalists. As an institution that has historically defined itself by the quality of its journalism, it is not surprising that success has been described almost entirely in terms of what an editor brings to the page.

What is also true, however, is that editors at The Times are managers collectively responsible for the performance and professional lives of hundreds of highly competitive and talented journalists and a budget of many millions of dollars. Yet the newspaper has not always done what it should to prepare its people for these important managerial responsibilities. We have not always offered the training programs to nurture and develop newsroom leaders. Nor have we truly held our editors accountable for managing their resources and developing their people, even though existing newsroom policy does seek to link an editor's compensation, in part, to performance. Beginning in 1998, the executive editor was given the authority to reduce a senior manager's bonus payout by as much as 25 percent if an editor is deemed derelict in meeting budgetary goals, demonstrating a commitment to diversity in hiring decisions, fostering a spirit of open communication or delivering annual employee evaluations.

The events of the past few months have underscored the critical importance of not only bringing practice into line with these policies, but of the necessity of embracing a set of goals that reflect our core values and create a newsroom culture that fosters civility, trust, creativity, openness, teamwork, diversity and career development. We need to ensure that from here forward all editors will be measured – and rewarded – not only by their merit as journalists but also on their skills and ability to lead their people and manage their resources. Indeed, as we strive to give department and section heads more authority, it is vital that we make a commitment to give them the tools, resources and training they will need to succeed. It is also vital that we renew our commitment to delivering annual and honest performance evaluations at all levels as a necessary first step toward building a real culture of performance management and career development in the newsroom.

This report is the work of a group charged by the publisher in May to examine the newsroom's policies and practices regarding training and performance management, as part of the larger examination of newsroom culture, standards and quality control growing out of the Jayson Blair scandal. To that end, the group, chaired by Associate Managing Editors Bill Schmidt and Kathleen McElroy and composed of Jennifer Preston and Mike Smith from News Administration and Steve Marcus of HR, has interviewed newsroom leaders, members of the company's Human Resources staffs and outside consultants. It has also reviewed practices and management training curricula at other newspapers, as well as the work of professional organizations like ASNE and the Poynter Institute.

That there were managerial shortcomings within the newsroom were obvious well before the deeper fissures exposed in recent weeks. The last employee survey suggested that many employees lacked a high level of trust in managers, and did not believe the current system would truly recognize merit and help them advance their careers. Not unpredictably, the departments that scored the highest on a trust measure were those departments whose staff members received more frequent and regular performance evaluations, telling them where they stood.

Past efforts to achieve any kind of sustained management culture have sometimes foundered. Like the military – whose mission-oriented culture it resembles – this newsroom (and many others) has historically been skeptical and impatient with the sorts of managerial systems commonplace elsewhere Editors ritually complained that training and other managerial obligations distracted them and their deputies from getting the paper out each day. Even now, only a portion of the staff receives regular performance reviews, and many veterans at the paper have never had a performance assessment during their career.

In the wake of recent events, many in the newsroom have now spoken out about what they see as the need to train and assess editors as managers, and build new systems to foster career development. But however earnest and worthy these reforms and recommendations, we believe one thing is inarguably true: few of these well-intentioned efforts will succeed unless the executive editor and senior newsroom leaders are ready and willing to define, adopt and enforce a set of goals reflecting our core values – and then hold managers accountable. One other truth also stands out: these goals we set for ourselves must be reasonable and achievable and realistic, and take into account our distinctive and creative culture.

Attached are five recommendations and various appendices dealing with aspects of managerial performance. The central recommendation is a draft identifying four proposed criteria for journalistic and managerial performance. We believe we need to settle on some mix of such criteria to establish a baseline of shared expectations for all newsroom managers, as well as provide a uniform standard for assessing the performance of our top people. In addition, there are other recommendations that deal with ways to reinforce and support the development and administration of a true leadership and learning culture in the newsroom, on a realistic basis. Among other things, they discuss various training and learning initiatives – including pilot training programs we believe should be implemented as soon as possible – as well as the nexus between managerial performance and managerial compensation and the importance of investing masthead authority in developing a management culture.

One of the core values of The New York Times Company is a commitment to produce content of the highest quality and integrity. By opening up communication in the newsroom, by building trust, by holding managers – and others – to exacting performance assessments, by offering training, skill development and opportunities for growth to all of our employees, we will serve that mission, because our journalism will profit from asking our editors to be more effective leaders.

RECOMMENDATIONS

1. While journalistic skill is the first and foremost standard to measure the performance of our editors, we need to emphasize that managing people and resources is critical to supporting our mission to produce quality journalism and to create a newsroom culture that values civility, diversity, openness, teamwork, trust and career development. As a first step, we recommend that we adopt a set of broad journalistic, leadership and managerial expectations across the newsroom, as basis for assessing our editors (see draft of proposed criteria, Appendix A).

2. All editors who manage people and resources need to be held accountable to these expectations. To that end, we must construct a clear and transparent system for annually assessing managers, so that a manager's performance in these key areas is directly tied to his or her compensation (both salary and bonus) and potential for promotion and advancement In the case of the most senior managers – department heads and above – we should also consider adopting at some point in the near future a 360 style of assessment, so that key editors can benefit from the opinions and assessment of their colleagues below, beside and above them.

3. The executive editor and the managing editor must be fully committed to the development of a leadership and managerial culture within the newsroom. To that end, a masthead-level editor with the rank of Assistant Managing Editor and whose portfolio includes resources and personnel should be invested with unambiguous authority to oversee the implementation of the programs and systems necessary to achieve these objectives**.**

4. As an immediate demonstration and affirmation of our commitment, we need to implement as soon as possible <u>a realistic and achievable agenda</u> of initiatives, including some which are already works in progress:

    a. Begin our commitment to leadership development and management. training by launching pilot training and orientation sessions for newly appointed editors <u>by the end of the summer</u>, along with the publication on the intranet of a management handbook. We should also build on work already begun with the Duke Leadership Development program, including skills seminars for department heads in late August or early September. (See Appendix B).

.

b. Take immediate steps to ensure that every newsroom employee will receive a written performance evaluation by the end of this year, and hold all newsroom managers strictly accountable to this schedule (See Appendix C). Such reviews – which must be fair and honest and linked to annual salary reviews – are central to an effort to remove any perception of favoritism in regards to assignments and promotion and to build a meaningful career development process.

5. New ambitions and new programs come at a cost. It is imperative, therefore, that we undertake a careful review of the tools and resources – both financial and human – that will be required to support the infrastructure necessary to achieve these new management ambitions. This is doubly so within a newsroom where resources are already stretched by new and growing demands on our journalism. In this regard, the review should explore ways by which the newsroom can expand its cooperation and share resources with the Human Resource departments of both the newspaper and the corporation.

APPENDIX A

DRAFT PROPOSAL:
JOURNALISTIC AND PROFESSIONAL CRITERIA
For Assessing the Performance of Editors and Newsroom Managers

1) **Demonstrate Journalistic Skill**
    - Exhibit strong and competitive news judgment, imagination and an ability to generate ideas, on and off deadline.
    - Adhere to core journalistic values, including an unswerving commitment to accuracy, integrity, clarity, balance and fairness.
    - Demonstrate initiative and creativity in pursuing the news, including a commitment to extend our journalism across multiple platforms.
    - Think strategically about the report, not only by staying ahead of today's news and today's newspaper but by working constantly to improve the pages we produce.
2) **Manage People Effectively**
    - Demonstrate an ongoing ability to assess, develop and nurture journalistic talent, as an editor, coach and mentor, including providing ongoing feedback and fair and constructive annual performance reviews. Work with staff members on their own career goals and development.
    - Demonstrate leadership and team-building skills within a department, as well as within the newsroom as a whole, including a willingness to share ideas and resources with other departments and editors.
    - Engender trust by behaving with fairness, tolerance and a positive sense of humor – including an intuitive understanding of the Rules of the Road – in communicating and dealing with other staff members, whether they are one's superiors or subordinates.
3) **Manage Resources Efficiently**
    - Demonstrate an ability to manage a department or section by adhering to budget, meeting deadlines and delegating authority.
4) **Embrace Diversity**
    - Demonstrate an understanding and appreciation of diversity in the workplace, and ensure that diversity is a consideration in all hiring and development decisions.

APPENDIX B

Leadership Development/Training

As we move to adopt new managerial expectations for our editors, we must also implement leadership development and management skills training for everyone responsible for managing people and resources. We also recommend that we follow up any formal training with mentoring and coaching initiatives so that our editors can get the support they need, on an ongoing basis, to put what they have learned into practice.

Despite the obvious need for training and leadership development, voiced in surveys and in recent interviews with our managers, we recognize that our first hurdle will be overcoming varying levels of skepticism within the newsroom toward "managing" and traditional training efforts. But we are confident that we can produce a program that will resonate across the newsroom by listening to what our managers say they need and how they want it delivered. Newly appointed editors are now helping us create the curriculum for their training which we expect to begin next month. We also intend to set up an advisory group to guide us on all learning initiatives.

Indeed, in a survey last year, more than a dozen managers told us that coaching employees, managing conflict and developing and motivating staff are their top learning priorities. The survey was distributed by a group of editors, led by Susan Chira, who were studying training and development. We intend to build on that group's work and follow many of their recommendations, which include using some of our own editors as instructors and using some of the newsroom's current best practices as examples.

As we move forward, we also intend to draw on the Human Resources staff of both the newspaper and corporate, as well as the faculty from the Duke Corporate Education Program. Senior managers from the business side are now working with Duke on leadership development. In the last two months, two Duke faculty members have been meeting with masthead editors, department heads and deputies to help design a leadership program for the newsroom.

Our long-term goal is to offer training and learning opportunities to all newsroom employees. We would like everyone to eventually make learning and training part of his or her job. A commitment to learning and continuing education will not only help us create the newsroom culture we want, it will help us support individual career development goals and prepare all of us for the challenges and the opportunities ahead as we extend our journalism across multiple platforms.

For now, we propose starting with a set of realistic and achievable initiatives that will help get us going in the right direction.

Leadership Development and Management Training Initiatives, 4th Quarter

- Offer a one-day session next month to newly appointed department heads, section heads and deputies to introduce them to the performance management process and to give them the management and communication skills they will need in their new role. In addition, the curriculum will include helpful and important information about staffing, budget, labor relations and the production process. The classes would also help everyone understand how they can meet the leadership and management expectations outlined in this report. We have already engaged members of this group to help identify what it is they need to know and how they want it delivered.

- Use the people and the resources of the Duke Corporate Education Program to begin helping our editors understand and meet the sorts of expectations outlined in the proposed draft of leadership expectations. A series of two-hour skills seminars will be offered in late August or September on various topics (ie., managing conflict) for groups of up to12 editors at a time. Discussion is also under way for a possible retreat/off-site with faculty members from Duke and members of the masthead and department heads in mid-October.
- Develop a management guide on our intranet that would provide a lot of important information and resources for new and seasoned managers. The guide would include a directory of the people in our organization (budget, labor relations, legal, employee assistance) who can help address specific concerns and problems.
- Offer an orientation program to new and recently appointed editors that includes introductions and meetings with colleagues in other departments, a briefing on space and production, tours on the news desk and Continuous News and visits to our production plant, NYTTV and Digital operation. We recommend forming a group of recently appointed editors and seasoned supervisors to help put together a schedule that will quickly bring a new editor up to speed and assist them in building a network of colleagues inside and outside their department.
- Create an advisory group of newsroom editors, managers and reporters from various levels in the organization to help guide our training editor on various leadership and training initiatives. The goal would be to produce a management training and leadership curriculum by 2004 for all editors who manage people and resources. In addition, members of this group would also attend various training and leadership programs outside The Times to help determine what programs (i.e. Poynter, API, Northwestern University) can best fit our needs. This group would also attend training and leadership development programs now offered to the business-side in order to help us determine which classes are applicable to newsroom employees.
- Ensure the funding in the 2004 newsroom budget of a slot for full-time newsroom training coordinator, a role that is now being filled by Mike Smith.

APPENDIX C

The Performance Evaluation

Our current definition of management in the newsroom is closely tied to annual performance evaluations. While this definition may not reflect our more ambitious approach to management, as outlined in our proposed leadership and managerial goals, we need to begin with regular performance evaluations because they are the basic building blocks of the well-managed newsroom and the career development process.

It is important, therefore, that we reach some consistency across departmental lines about how we manage our evaluation process. While we've had an evaluation system in place for several years now, its application has been most uneven. Some departments complete many or all of their evaluations. Others do almost none. Editors must understand that the reviews, in order to be meaningful, must be honest and directly confront problems as well as single out accomplishments. The editors must realize, more fundamentally, that the reviews are not an end in themselves. Rather, they are part of a larger ongoing process that involves setting goals, giving honest and direct feedback and providing individual career development, a priority for the whole newsroom.

Given our recommendation that all newsroom employees receive a review by the end of the year, and our patchy record trying to do so, we must construct a teaching and coaching apparatus that helps editors succeed. This might take the form of a small team of people who would coach editors on how to write and deliver the reviews, as well as making sure they are done on time. To that end, we should consider borrowing or using HR staff, including the "internal consultants" who now provide help and counsel to business-side departments on various managerial matters, including performance reviews.

The performance management process, including the annual review, is ideally a shared responsibility of employees and managers. Employees should be encouraged to participate in the review process by writing their own self-appraisal, pointing out highlights of their work as well as inventorying their own career aspirations or requests for specific training opportunities. Newsroom managers who do not complete their roster of performance reviews each year should be held accountable. Current newsroom policy does say that managers risk a share of their annual bonus payout if they fail, among other things, to complete their staff evaluations.

In the case of excluded managers, including departments heads, we must draft a new assessment form that will measure people on the sorts of competencies and expectations outlined in Appendix A, and include a system that will clearly link these assessments to the annual salary review. Such accountability should be built into the reviews for all desk editors above the level of assistant editor and, within our obligations under the collective bargaining agreement, group O level editors as well.

When done properly, and administered regularly and effectively, the performance review process shares some common characteristics:

- The writing of the reviews is delegated among deputies and assistants. In most departments there are too many reviews for one manager to undertake alone.

- The writing of the reviews is best done at home or free of daily newsroom demands so that it's possible to focus on the staff member being reviewed

- Staff members are asked for a self-evaluation that includes highlights of the year, and goals for the coming year, both in terms of their own career aspirations and specific development needs. This lets the reviewer know what is most important to the person being reviewed.

- There are no surprises in the review. Ideally, an employee receives regular and ongoing feedback about his or her performance throughout the year, and the annual review only recalls or summarizes what has already been discussed.

- Evaluations are written to the person being reviewed, not about them, and contain specific and concrete examples to illustrate the points being made.

- There is a clear link between the review and the annual salary review process, whether the person being evaluated is a member of the Guild or is excluded. Salary recommendations should reflect – and be informed by – the outcome of the annual performance review.

- The written review is ideally accompanied with a face-to-face discussion with the employee.

- The review should reflect the consensus of all managers in a department. To that end, managers should solicit and reflect as many other points of view about an employee as possible

COMMUNICATIONS GROUP REPORT

Committee members: Gloria Bell, Charles Blow, Jane Bornemeier, Laura Chang, Bill Dicke, David Dunlap, Vanessa Gordon, Clyde Haberman, Thomas Holcomb, Doug Jehl, Ed Marks, Kyle Massey, Rich Meislin, Joan Motyka, Joan Nassivera, Robert Peele, Tom Redburn, Warren St. John, Alison Smale, Dennis Stern, Jim Wilson, Grace Wong; Andrew Rosenthal and Craig Whitney (co-chairs).

Good management is an essential part of producing a superb news report, but good management is not possible without good internal communications. That, we believe, is an essential lesson of what we have just been through.

Three subcommittees of our group have produced separate reports, attached. They include recommendations on what we can do to improve communications vertically (both up and down) and horizontally (across desks and departments), and suggestions for reviving or creating mechanisms to help actually accomplish these improvements.

Some of our recommendations require the creation of new jobs. Some will cost money in other ways. We believe that the investment is absolutely indispensable and will quickly bring tangible returns.

In addition to what we say in our report, we believe the new Executive Editor and Managing Editor should review the recommendations being made by other groups on management training and on how to improve newsroom retreats.

Here is a summary of our recommendations:

- A position dedicated to improving newsroom communications should be established (or clearly identified), perhaps within the Newsroom Administration office, reporting directly to the Managing Editor or the Deputy Managing Editor.
- The Executive Editor and Managing Editor should meet regularly with newsroom leadership groups that are larger than just the masthead. They should also consider having occasional meetings open to the entire newsroom. The top editors should bring a clear

agenda to these meetings and be prepared to take questions. The agenda should not always be limited to coverage or staffing of stories, but could include such things as telling the staff how the business climate affects the newsroom budget and its hiring opportunities, or bringing the staff up to date on important developments like the IHT project.

- Individual masthead members should have clear roles and real authority. One masthead editor should have as a primary duty coordinating and keeping an overview on projects, especially those that involve more than one desk or department.
- Department heads should get the message from senior management that it is crucial to know and care what the people they manage think, and to know how and when to delegate authority. Informal and constant communication between editors and reporters and between departments should be actively encouraged. Newsroom managers who need training in communications and other management skills should be offered such training, adapted to the needs of the newsroom, and all new managers should get it as a matter of routine.
- Effectiveness in communicating with the staff should be a criterion for the evaluations of all newsroom managers. Their evaluations should include assessments of their effectiveness by the people they manage, not just by their supervisors.
- Times Talk should go back to being on paper, and Ahead of The Times should appear more regularly, with additional staff if they need it.
- A Q&A feature should be added to the newsroom navigator homepage – a place where anybody can submit questions about how things work or how to get things done and get an answer. The postings should be updated continually.
- The Intranet pages of each department or desk should be as up to date and complete as the Business Desk's pages are, with information like vacation schedules, telephone numbers, reporters' beats and editors' functions, etc., electronically searchable, too. This will take attention and staff.
- The electronic Facebook should be expanded to include some of these same details, and all of them should be up to date.
- The centralized system under which copy editors are now organized and administered should be re-studied.

Recommendations from the Vertical Communications Sub-Committee:
Members: Charles Blow, Jane Bornemeier, Bill Dicke, Joan Nassivera, Alison Smale, Dennis Stern, Jim Wilson, Grace Wong

These are conclusions based on interviews in several departments around the paper. We have tried to make them as generic as possible, specific only where necessary. Similarly, specific departments are referred to only where the example seems telling, either as an illustration of what should be improved, or of a practice that fosters a happier and more productive working environment. The guiding principle here comes from the words of one reporter interviewed: "Make this place as transparent as possible in any way possible. Everything about the Times gravitates towards disconnection, misunderstanding and a lack of community."

1. COMMUNITY BUILDING

Several easy ways for everyone to know each other better, and make the ever-expanding newsroom (yes, sheer size IS part of our problem!) seem a friendlier place.
--Bring back New Faces, both as a cocktail gathering and a poster with pictures and background of new staffers
--Ahead of the Times is important to building newsroom community, and Times Talk should return to print form, a small expense for the benefit it can bring
--Publish birth, memorial and departure notices in a timely fashion
--Consider holding more retreats, not just limited to middle/upper management
--Within departments, try to hold some kind of social gathering on more than an annual basis. This can be as simple as drinks after work (late, if necessary, to include the night backfield and copy editors) and as elaborate as large parties at a restaurant or home
--Without waiting for the New Faces party, welcome new arrivals in a more definite fashion in individual departments. Currently, we have cakes and champagne and speeches when someone leaves. But a welcome, not necessarily elaborate, is perhaps even more important. Similarly, new correspondents/beat reporters should be introduced where possible in person to backfield and copy editors before taking up new assignments.
--Job posting should be more employee-friendly (electronic forms); orientation should be geared to a new hire's actual position and work hours and there needs to be an effort to bolster and expand the mentoring program.
--Without wanting to turn us into a management seminar, there should be more management training for e.g. department heads.

2. COPY DESK ORGANIZATION

The central organization of copy editors perhaps makes sense from a management point of view, but it certainly increases the feeling of alienation of copy editors from backfield editors, department heads and onward up the line. Copy editors work in certain departments, in many cases for years, their evaluation depends on slot and department backfielders, but merit raises and professional advancement depend on Charlotte Evans, who has done a terrific job of holding together copy desks in times of short hires and much copy. But the fragmentation means some copy editors view themselves as subcontractors and temps who have no outlet for their concerns. They feel that department heads don't know their names. There is little chance for copy editors to gather socially. On the other hand, copy editors recognize that the current system enables them to avoid getting pigeonholed, and enables them to network with editors across the building. Many would like the evaluation system to address career development better; some copy editors feel that copy editors get plucked into backfield against their wishes.

--Metro has regular 5 p.m. copy desk coffees organized by Lew Serviss; this seems to help copy desk community, and to provide a forum for information to flow from backfield/department head to Service and then to copy editors.
--In return for overtime, at least one copy editor could be invited at least once a month to backfield enterprise lunches. Similarly, in the photo department, a lab technician or photo assistant should be included in monthly meetings between photographers and editors.
--department heads should make more effort to reach out to copy editors, through lunches, drinks etc. By the same token, Charlotte agreed that she too would try to have more contact, but it is indeed hard with a staff of 160 people.
--Senior management needs more contact with Charlotte, who has a number of interesting ideas and insights which have clearly gone unshared for too many long months.
--In the long term, the management of copy editors could be reorganized, or at the very least tended to with greater care. This is the way many people join the Times; it is a huge staff, and it affects every department at the paper. (The same may well hold true for news designers, who work well with departments but whose assignment is centrally controlled.)

3. DEPARTMENT HEADS AND DEPUTIES

Department heads and their deputies are the vital link in vertical communication. It helps to imagine newsroom communication as one funnel on top of an inverted funnel, with the department heads and deputies at the neck of this construct. Whichever way you turn these fused funnels – up or down – it is plain that communication flows only if the department heads and their deputies do not act as a dam in either direction. They must carry the concerns of copy desks and backfields upwards, and must relay the knowledge gleaned at meetings with executive editor, managing editor and masthead members downward. Obviously, some discussions in both directions may be confidential. But maximum openness should be the goal. There is also no sensible way to make this a formal process – it is simply as essential as breathing. Because this is so, the ability of department heads and deputies to perform this crucial function should be emphasized in the training suggested in section 1. above, and part of their annual evaluation.

To facilitate communication without adding unduly to heavy workloads, department heads or deputies, who were often former reporters or correspondents with little idea of production, could:
--alternate staying late at least once a month, seeing the production process right through first national and city editions (this could then extend into drinks with those backfielders and copy editors who can stay). The night side feels disenfranchised with management. This would enable department heads, deputies and perhaps even occasionally reporters, to see the ripple effects of changes, last minute decisions and late copy.
--hold regular staff meetings, with a clear topic. Bizday was cited by several people as an example of a department where such meetings regularly help build a sense of involvement.
--include copy editors, graphics, pictures and news designers on relevant departmental memos.
--hold an office hour once a week where anyone can drop in, by appointment or casually, depending on the volume of visitors
--open up enterprise lunches, reporters' breakfasts etc. where useful not just to copy editors, as suggested above, but also to news designers and art directors.
--make sure to comment on and praise contributions from all over the department, in addition to doing evaluations.

4. EVALUATIONS

It would probably be easier to compare the very different reporting and production processes of Sports, Culture, Foreign and the Regional Weeklies than the evaluation practices in each department. In short, this is anarchy; some departments are scrupulous and detailed in their evaluations, others are scrupulous and more perfunctory, in at least one major news department, evaluation has been virtually non-existent for three years.

The masthead, department heads and probably deputies should be subject to a 360 evaluation. Given the time involved in doing these properly, it may not make sense to extend this practice to more people, although certainly it should be weighed.

Everybody has a right to expect an annual evaluation from a superior, and a right to be able to comment on the evaluation, either in writing, or in a personal meeting.

5. NEWS DESIGN/ART DEPARTMENT

The sheer size of the Art Department – with its many art directors, art productions, graphics, maps, news assistants and news designers, all spread out over many floors – makes communication difficult. This is most obvious between news designers and art directors. While individual news designers are respected, many of them feel that the job is not perceived as valuable – that they are seen as technicians or paginators.

Art directors generally get a week or more notice on large projects. Often, news designers are unaware of this until the day of production. This creates an unnecessary rift. Graphics and Pictures designate someone for the weekend; perhaps the weekend art director could oversee earlier dissemination of information to news designers.

6. MASTHEAD

Individual members of the masthead need clear roles and authority so that not every decision needs to go to the executive editor, or managing editor. This would be helped by the EE and ME meeting regularly with a leadership group that is more than the members of the masthead. The regular Page One meeting could be opened on an occasional basis to reporters, copy editors and others. Currently, people attend a Page One meeting when they arrive at the newspaper, then never go again. Opening it up would demystify the process for all interested parties, particularly for those involved in production.

AMEs are vital to communication. They could hold office hours, rotate lunchtime duty so someone is always available and could even be attached to specific departments. We felt the Frankel era system of attaching specific AMEs to specific departments had problems, but perhaps it would be good for each department to regard a particular AME as its channel for communication, without everything – assignments, project approval etc. – being channeled through that AME.

There was disagreement about what role, and how big a role, should be played by Arthur. Some subcommittee members felt that he should be as much out of the newsroom as possible. Others felt, however, that communication has to include Arthur, that he should be reachable via an electronic suggestions box, and hold regular sessions with newsroom groups.

Above all, communication at this level has to be a conversation between mature and confident individuals. A backfielder or reporter should be able to approach an AME without a department head feeling any insecurity, let alone repercussions.

Recommendations and Thoughts

The Communications Subcommittee
Considering Communications Practices Across and Within Departments

Committee Members:
Vanessa Gordon, Clyde Haberman, Tom Holcomb, Doug Jehl, Kyle Massey, Ed Marks, Joan Motyka, Tom Redburn.

The primary reason we care about communication is that we want to get more good stories into the paper, ahead of the competition. And we want to keep bad stories out. Our systems are set up to accomplish those goals, but they sometimes break down. They can also be at war with each other: the carefully constructed procedures aimed at preventing bad stuff from getting into print can also stop good stories in their tracks. And when we create shortcuts (like allowing certain reporters to file directly to the masthead rather than their own departments), we sometimes see breakdowns.

At the same time, too much information about matters large and small is locked in too few brains. At the very least, this leads to reporters and other desks being called with redundant questions. More important, it can lead to a feeling of disenfranchisement. The human side of the equation – in the form of improved morale and better management -- is a critical factor in our desire to improve communications.

So how do we improve this process? As we establish a new team at the top of the newsroom, it is clear that management of our communications from the masthead on down, across departments and within desks needs to be given extra attention. Here are some suggestions, organized under three headings: organizing and delegating, sharing information, and encouraging cross-pollination.

I. ORGANIZING AND DELEGATING

1. The Masthead

Designate a masthead editor, with real authority and the trust of the executive editor and managing editor(s), whose primary duty is to coordinate big projects.

This senior editor would serve as a traffic cop in generating, pursuing and solving the inevitable conflicts involved in cross-departmental enterprise without becoming the direct manager of those stories, and in helping push them to completion while maintaining quality control over the final version. This job should be separate from the person responsible for cross-departmental coordination of the daily news report and big running stories.

In theory, we have such a system; in practice we don't. When we fail to get a good story published in a timely fashion, it is often not because a reporter did not start pursuing it but because our system threw obstacles (sometimes for good reasons, many times not so good ones) in the way that prevented us from carrying it through. This often happens because department heads try to protect their own turf, hang on to the reporters under their control even when they are involved on cross-departmental projects or working with a team in another department, or simply because the time needed to consult with and bring together all the responsible parties contributes to endless delays.

2. Department Heads

Department heads should be encouraged to share more information with backfield editors, about assignments, plans, strategy and stories in the works, so that information can be shared more readily with reporters and with editors from other departments.

The sharing of information within departments and between departments often relies on the involvement of the department head, as repositories of all knowledge and decision-making. Too often, though, editors and reporters say, this is inefficient. Matters as simple as one Washington or foreign reporter learning what another reporter has planned on a related beat can require the involvement of the department head, because he or she is the only one who knows. The same is true in matters of coordination between departments, which can require conversations between department heads even on relatively routine coverage. Those left out of the loop are often the backfield editors, including assignment editors. As one editor put it, those whose job is to make the trains run on time often don't know when the train is coming, what's in the train, or who's driving it.

Also, some editors have suggested that there be regular interdepartmental meetings of deputy department editors, in addition to those of department heads, to set up another good channel of communications.

3. Departmental meetings

Regular meetings beyond the daily turnaround gatherings are useful.

On some desks, including Washington and Foreign, department heads rarely meet with their backfields, except during the daily turnaround meeting. On others, meetings are held more frequently. On the Metro desk, a breakfast for reporters or a gathering of backfield editors is held each week. The Metro copy desk also met monthly with writers and backfield editors to share ideas and concerns. On the business desk, Glenn Kramon holds semi-annual meetings to communicate with the entire staff, plus an additional session at times with the copy desk and a conference call with correspondents outside New York. He also conducts a weekly backfield lunch and talks to reporters on an individual basis constantly. On most Wednesday afternoons, the national backfield holds a projects meeting.

Mechanisms to include reporters in such discussions also vary widely from department to department. Science, for example, holds a weekly Tuesday meeting of editors, reporters, graphics and photo. At times of big running stories, like the war in Iraq, Washington holds periodic staff meetings to discuss coverage, but there are rarely regular large or small-group meetings involving reporters and editors, even those who cover the same subjects. In Foreign, meetings involving groups of correspondents, are rare. One result, reporters and editors say, is too little brainstorming and sharing of information even within departments.

What works best? Some recommend weekly memos in which reporters describe their plans. Some recommend brief weekly meetings. But in Foreign and Washington in particular, there was a widespread view that too little information is shared, and too much falls through cracks.

4. **Clustering of reporters**

While arrangements vary from department to department, steps should be taken to encourage better coordination among reporters.

In some departments, like Foreign and Science, there is no clear subdivision of reporters who report to particular editors, as is common on other departments and at other newspapers. The lack of coordination often impedes the sharing of information.

In Washington, for example, some reporters are assigned to particular backfield editors, while others are supervised by the Washington editor or Washington bureau chief. In Science, health reporters report to a health editor, but other science reporters work with the department head, a deputy and the assistant on a catch-as-catch-can basis. In Foreign, there is no subdivision whatsoever.

Some reporters said they would object to being asked to report to a backfielder rather than the department head; some editors were strong advocates of a cluster system. Most said that whether such arrangements worked depended on the strengths, weaknesses and personalities of the reporters and editors involved.

5. **Cooperation and collegiality**

Preserve the basic rule that editors from one department should clear in advance contacts with reporters from another. It prevents double-assigning and other conflicts. This rule shouldn't squelch interdepartmental discussions; it just keeps them aboveboard.

Editors from one desk too often call reporters from another without prior clearance, despite the general understanding that such contacts should be coordinated. Reporters too often descend on another's turf, physically or otherwise, without so much as a heads up. No one suggests rigidity, and over-protectiveness of turf and domain can also pose big problems. But most reporters and editors say a basic understanding and adherence to ground rules would help, and promote cooperation and collegiality.

6. **Performance reviews**

Each department should evaluate its employees' performance regularly, and these reviews should be a forum for employees to give their own assessments of their work, and to share their aspirations and concerns with their superiors.

Katherine Bouton said that the magazine's formal evaluation system was a meaningful way to communicate. "The staff really seems to like it," she said, "and it gives people a chance to talk directly to their superior -- to say what's on their minds." The evaluations at the magazine are annual, as are evaluations in Metro and BizDay. On other desks, some employees haven't been evaluated in years. Jim Wilson recently e-mailed all of his employees asking them what they did and what they wanted to do. The answers simply helped him understand them and at times changed his views about how people had been pigeonholed.

II. SHARING BASIC INFORMATION

1. Story lists

Enterprise lists, daily lists, story lists, budgets and breakdowns should be made as widely available as possible. Our recommendation is that as much information as possible -- excluding investigations, major long run projects, and other sensitive stories where a higher level of internal secrecy is necessary to avoid leaks – should be placed in a central computer cache on the Intranet.

The noon lists and frontings from each department should be widely available to newsroom staff. Enterprise lists should also be made to reporters as well as editors, and we need to find a better way to referee disputes and forge collaboration on these stories. Include stories from departments like Investigations (when the editors consider it safe to do so), Technology, Education, as well as the Magazine and the Week in Review, which now tend to be circulated less widely or not at all.

On some desks, some stories never appear on the weekly enterprise lists, circulated by each department on Mondays, in part because if they included all stories, the lists might be unwieldy. The enterprise lists are not circulated as widely as the daily lists, and reporters rarely see them. The weekly enterprise meeting no longer serves as a vehicle to discuss these stories, so conflicts and collisions between departments sometimes take place. Laura Chang, the deputy science editor, noted: "Just the other day we had to kill a freelancer's piece on West Nile virus because national had assigned an overview to a staffer without letting us know.''

2. Assignments and beats

Basic information about assignments and beats, department by department, should be available newspaper-wide, via an improved face book, reorganized phone book, or other means. Changes of beat and assignment should be announced promptly, and the information distributed widely.

Whether this information is distributed via e-mail or made available on the Intranet, the consensus was that more is probably better. Departments' home pages may be the best venue for this.

As Laura Chang writes: "It's critical to know who should be getting what information. The newsroom is now so big that even veterans don't always know who is doing what job. The online directory is unwieldy and slow; the printed phonebook was dropped to save money. Resurrect it. Or at least, for the sake of smooth daily production, print and distribute a list of names, extensions and emails for the critical people in each department: backfielders and their functions; nightside editors, layout, photo, clerks, etc. Even when you do know who should know what, you can be bolloxed up by vacations or absences. People should be rigorous about noting their absences on their phone or email. But it would also help if each day each major desk sent a note about critical absences to the other major desks. (Another job for overworked clerks, or in the case of our desk, a nonexistent clerk. But that's another subject.)"

3. Intradepartmental communication

Each department should have an orderly and uniform Intranet site with lists of staff members, beats, extension numbers, e-mail addresses and other pertinent information.

One model might be Ken Meyn's excellent site for BizDay, http://web.nytimes.com/xpedio/groups/dpubdocs/@news/@bizday/documents/document/tb001020.html. These sites could even offer a bulletin board for freewheeling discussion among staff members.

At the very least, desks should have a formal mechanism for informing their staffs about comings and goings, job openings and other vital information.

Jonathan Landman sends e-mail messages to his entire staff with updates on changing beats, jobs and openings. He also e-mails regular notes that offer encouragement, address problems or note achievements by colleagues. Katherine Bouton said that "really honest and open job postings" are a real leap forward, making employees across the board "feel more a part of the paper." The entire staff of Graphics, led by Charles Blow, gathers for all comings and goings so that nobody will be surprised by a new face -- or an absent one.

4. **Playbacks**

Final versions of stories should be routinely e-mailed to reporters and editors involved, a practice that too often breaks down. But these playbacks should not substitute for consultation between editors and reporters during the editing process.

As rigorous as our editing process can be, one place communication sometimes breaks down is getting a final version of stories back in the hands of reporters and editors after they clear all hurdles on the backfield, copy desk and news desk. Foreign regularly e-mails playbacks to its correspondents, but doesn't always do so to Washington correspondents writing for foreign space. Other departments don't do this at all.

Another suggestion emerged, to mixed reviews: re-establishing the practice of "Good Night,'' in which reporters check in with the desk before leaving whenever they have a story running that night and encouraging reporters to stay in the office or in close contact during the editing of their pieces.

5. **Whereabouts lists**

All departments should maintain and make available an updated whereabouts list, along the lines long practiced by Foreign and recently emulated by Washington.

A whereabouts list not only helps editors and reporters reach colleagues swiftly, but also helps to plan coverage. Cellphone numbers alone are an inadequate substitute. This practice has too often been neglected. The National desk, for example, does keep an accurate list of reporters' phone numbers on the list, but their actual whereabouts are seldom updated; sometimes the information is months old. A reporter could be on the way to Texas or on a maternity leave and only one or two desk editors would know.

III. ENCOURAGING CROSS-POLLINATION

1. **Switching desks**

Editors and reporters should be encouraged to work on different desks, on a temporary basis, to get to know how other departments work and to know more colleagues.

One model might be the Foreign desk practice of dispatching new correspondents to temporary duty on BizDay. These exchanges can help to create informal networks on communication and understanding that cut through more formal channels.

2. **Washington bureau**

The historic tensions between the Washington bureau and New York, though perhaps inevitable, need to be addressed.

Visits to Washington by the executive editor, the managing editor and other masthead editors have become too infrequent. It would be a good idea for the national editor, the foreign editor, the business editor, the science editor and others to make periodic visits. The Washington bureau chief and Washington editor need to continue to spend time in New York as well. At the backfield level, periodic weeklong swaps of editors would help each understand the pressure the others face. At the reporter's level, more lunches and other get-togethers that bring together reporters from Washington and New York whose assignments and interests overlap would be helpful.

The fact that Washington produces a large number of daily stories but does not control its own space requires some sensitivity on both sides. A sense in Washington that the National, Foreign and Business desks sometimes give preference to stories from their own reporters and correspondents contributes to some of the tension. A sense in New York that Washington all too often dismisses suggestions as off-base, politically tone-deaf, etc. rather than engaging in a dialogue doesn't help, either. Washington is also perceived as being oblivious to production issues: sending stories longer than scheduled and later than necessary.

3. **Brown-bag lunches**

Masthead editors should be invited to regular lunches with different departments to share information and simply to serve as listening posts for the concerns of staff members.

4. **Brainstorming**

More effort, at many levels, should be made to discuss coverage beyond the next day's horizon.

The newspaper is very good, editors and reporters say, about focusing on big, breaking stories. It also has a good record of assembling talent on big projects. But, as one editor in Washington put it: "We all know what to do when the space shuttle crashes, but most days aren't like that.''

In Science, Washington, and Foreign, reporters and editors alike say there is too little brainstorming, and when it does take place, there is too little follow up. In all three departments, conversations between reporters and editors are usually about a particular assignment or story, not the broader landscape.

There was no consensus on how best to approach this. But some ideas included a goal of regular (at least monthly) unstructured conversations between reporters and department heads; periodic brainstorming sessions involving small groups of reporters and editors, within departments and between them (sometimes on a particular topic, or with an outside guest, and sometimes not); and periodic meetings bringing far-flung reporters together, along the lines of the recent National correspondents' meeting (which was the first in more than three years).

5. Coordination with the copy desk

On National and other desks, there is not much communication with the copy desk. Partly this is because of hours; the slot works late and often doesn't arrive until after the turnaround meeting, and the weekly project meeting is also early. But the communication gap is also cultural; the desk seems to be oddly part of and not part of each department. Copy editors often have little interaction with backfielders, until it is time to fill in for one, often at the last minute. This, plus the separate structure of the copy desk, leads to a feeling of disunity. Copy editors who might want to move to other jobs feel as if they have little chance, and backfielders feel that they don't know enough about the people who are the last line of defense in editing articles.

Sports addresses this issue by having regular discussion groups between copy editors and reporters. And in his first months as sports editor, Tom Jolly had coffee, individually, with everyone in his department.

Such simple gestures are useful. But the structure of the copy desk should also be re-examined. The desks of various departments were combined a few years ago, and this probably solved some problems, but it has also created a few.

6. Deadline U

Deadline U. should be revived, with an emphasis on shorter formal programs and more time for questions and answers, mingling, etc., afterward.

Aside from the actual benefit from valuable programming, Deadline U should also have mingling time built into the sessions. Maybe some of the sessions could even happen at nicer locations, either inside or outside the building, with wine and cheese to oil the gears.

7. Internal communications

Times Talk and Ahead of the Times should be more informative and timely, writing about issues of real relevance to the staff, like the IHT or the redesign, or the news philosophies of the new management. Ahead of the Times should come out more frequently.

Newsroom Communications Committee
Mechanisms Subcommittee

Subcommittee members: Gloria Bell, David Dunlap, Thomas Holcomb, Robert Peele, Richard Meislin, Warren St. John.

There are a number of mechanisms — some old, some new — that can be used to improve communication between and among sectors of the newsroom. But an overriding need is for the top managers of the newsroom to embrace this type of communication as an important aspect of day-to-day life.

This means providing enough resources, human and otherwise, to insure that identifiable people have the responsibility to keep current the information and the tools to get. And it means providing enough time of senior managers themselves to insure that the staff receives information that is candid and credible.

Here are some of the ways we see of improving our means of communication.

Newsroom Q&A

One mechanism the subcommittee favored was a "Newsroom Q&A," an Internet-based channel that would allow anyone inside The Times to send queries or comments , named or anonymously, to a representative designated by the masthead to answer them. Anonymous queries could be sent through a Web-based form; named questions could be sent either that way or by e-mail.

A selection of questions and answers of general interest would be posted regularly on a redesigned Newsroom Navigator page, a rough prototype of which is attached. (See also http://newssurveys.nytimes.com/newnav2.html.) The Newsroom Navigator was seen as an ideal place to do this, since it is the first thing most people in the newsroom see when they launch their Web browsers.

The Q&A postings would have to be refreshed regularly to keep interest in the newsroom high. (Romenesko wouldn't thrive as it does if it weren't frequently updated.) For that matter, the Q&A postings could include links to things being said about The Times in other publications as well.

A selection of the most important or interesting Q&A's could also be printed out on paper and distributed in the lobby, for our less tech-oriented colleagues, or perhaps made a part of a reinvigorated Ahead of The Times.

For this to succeed, gathering answers and maintaining the Q&A portion of the Navigator page would have to be an assigned responsibility, not just done on the fly. Answers should be prompt and free of corporate-ese, and the people providing them would need to have the credibility to make them authoritative.

The New York Times Intranet

The newsroom portion of Times Intranet was seen largely as a missed opportunity as a communication tool. Its usefulness varies widely from department to department, depending on how seriously a particular department head takes the task of keeping it updated and making it useful to the staffs.

Here, too, the fact that no individual has overall responsibility for maintaining newsroom-wide standards or quality was seen as a disadvantage. Many desks' pages are warrens of defunct links and outdated information, and the idea that the intranet site can be a source of useful information hasn't caught on.

The Business Desk's pages, maintained conscientiously by Ken Meyn, are a model of what the site might provide: useful information like vacation schedules, staff telephone numbers, reporters' and editors' coverage areas, names and e-mail addresses of editors who might be interested in one's story outside the department, departmental announcements of awards, births and more.

But there must be a consistent level of attention to providing useful, current information if we are to get people to view the Intranet as a useful information source. And there need to be people involved in the newsroom Intranet who have a good sense of how the Web is best used as an information tool, which requires interest, instinct and training. As most Web publishers have found, if people don't see an advantage to going to a particular Web page regularly, they simply stop going.

New Faces/The Facebook

In addition to the desire expressed by another subcommittee for a return of the "New Faces" cocktail parties, there was an interest expressed by this subcommittee for a return of the "New Faces" posters. And there was also a sentiment that the existence of the electronic New York Times Facebook be more widely promoted. Both of these would help address the common situation of passing another member of the newsroom day after day without knowing who he or she is.

There was an interest in having the utility of the Facebook improved, to permit easier searching for a colleague when only minimal information is known. And there was a suggestion that it be linked to organizational listings for the various departments, so that a beat listing, for example, could be accompanied by a photo of the reporter in question.

A member of the committee also suggested that employees be able to choose their own photos for the electronic Facebook — many of the pictures are old enough, or different enough from the real person, to be unrecognizable by an employee's mother.

Ahead of The Times

Ahead of The Times, which appears unpredictably, is well-liked, but it was at its most useful when it was published regularly — initially (memory has it) once a month.

Because it's on paper, it can be tucked away conveniently and read when a free moment arises, and is more accessible to the substantial number of people in the newsroom who are less technologically attuned. It's focused on the newsroom, straightforward and un-jargony, and almost always has one or two tidbits that one didn't know before. There was also widespread sentiment for a return of the "Memo From Joe['s successor]" feature, in which the executive or managing editor put forth his or her view on a topic of importance to the newsroom — journalistic, cultural or otherwise.

There was discussion by the larger committee of merging Ahead of The Times into Times Talk, but this would presumably mean its appearing less often, which might outweigh the benefits. (Perhaps, though, the same people could be made responsible for producing both.)

Times Talk

There was considerable sentiment that Times Talk, in its new electronic-only form, did not satisfy the newsroom readership. It is the type of publication that suffers on the Web, where reading longer-form articles tends to be task. It is attractive to look at, and has some fun animated illustrations, but was viewed by many as having sacrificed ease of use to design. There was a unanimous feeling that Times Talk would benefit from a return to paper, which would let a person have it on the desk or stick it in a briefcase to read at leisure or in transit, rather than having to hunt for it on the Web while at one's desk.

Perhaps more important, the focus of Times Talk was seen as having evolved too far from the newsroom toward that of "corporate tool." Those who remembered it in its previous paper incarnation yearned for more articles of the "How I Got That Story" variety.

Making Communication Improvement a Responsibility

Finally, we recommend the creation (or identification) of a position, perhaps attached to the Newsroom Administration office but reporting directly to the Managing Editor or the Deputy Managing Editor, to be in charge of improving newsroom communications.

It should be filled by a person who enjoys the trust of the staff and of the senior management of the paper. The function would be to provide liaison between the newsroom management and the newsroom staff and keep information flowing in both directions. The incumbent (perhaps the responsibility should rotate every two years) should be drawn from the ranks of senior reporters and editors. He or she would be entitled to have regular access to the top newsroom executives, and to attend page one conferences and other meetings dealing with issues of concern to the staff. The job should be posted as an excluded position. Its occupant should have an office for private meetings.

Duties would include many things that may now already be performed by News Administration: answering staff questions (or telling people where to go to get the answers) about everything from payroll, benefits, career planning, and conflict of interest issues, and ensuring that morale problems or urgent journalistic issues not otherwise communicated to top management are quickly brought before it for action.

One of the functions of the position would be to monitor the Q&A boxes and other forums recommended by the communications group. When appropriate, the incumbent would use the Intranet, Ahead of The Times, Times Talk and other internal communications media, existing or future, to make the answers readily and easily available to the entire staff.