Symposium: The Futures of Public Media
Scenario Planning Follow-Up

Lawrence Wilkinson  |  Heminge & Condell
Tuesday, November 13, 2013
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To: PRRO attendees

From: Lawrence Wilkinson

Re: Scenario Planning Follow-Up

Thank you all for the chance to be with you at your meeting on the 12th; it was an honor and a pleasure.

I hope that you found the morning session useful in understanding scenario planning, the scenarios that PRI developed, and their relevance to your stations. A few folks suggested that they planned to share their thinking with colleagues back at home. If PRI and/or I can be of any help, please let me know. As I mentioned then, we’d be delighted to share any of the materials I used, the details that underlie each of the scenarios I summarized for you, and more background on the technique and how to facilitate conversations on implications. Indeed, in response to your kind queries, PRI is looking into making the material available on a Wiki and arranging a short set of (short) webinars on using the scenarios. The important thing is to continue the strategic conversation about the futures and their implications.

I hope too that you found the afternoon conversations useful in tabling a series of issues that the system needs to address. I know that much of the balance of your time together, on Wednesday and Thursday, was devoted to discussing those issues and their kin.

Attached are the notes that Page Anne Smith so expertly captured in our afternoon read-out of the overall implications for the system. While it’s not altogether complete, it’s a pretty terrific punch list of issues—challenges and opportunities—that it behooves us to face.

In the hope that it’s helpful (and because I promised the program committee that I would :), I’m going to summarize here my own very high-level reactions/take-aways (which are drawn largely from the afternoon read-out, but speak largely to stations)... before which an important caveat: these are my thoughts, not necessarily those of PRI or any of the generous folks who invested their time in creating the scenarios. I know better than anyone how limited my own perspective can be, so I welcome disagreement, refinement, redirection. In the end, the “right” implications are the implications that you decide work for you, and on which you’ll act. But for what it’s worth, I do believe that the issues that animate these implications are ones we have to address.
Implications

It was fascinating—and not surprising—that many of the implications you surfaced go to topics that are already being discussed and debated. At the same time, it was heartening how affirming they are of many of our longest-held values and priorities [here, and throughout, my distillation of your Post-It points]:

Rediscover, reclaim our reasons for being
  – Local-(re)claim our centrality in the communities we serve
  – Multicultural- amplify the voices of America

Redirect our efforts
  – Convening- as E.M. Forster said, “only connect.”
  – Curating- helping our users navigate the flood of “information” and “culture” that threatens to drown them

Re-imagine our future(s)
  – Preparing for fragmentation, speciation- choosing what we’re going to be best at... and becoming best at it.

... again, these are all issues that I’ve heard you all discussing for some time now; your discussions convinced me that we need to act.

These implications for “what we do” were accompanied by a set of operational implications—implications for “how we do it.” Some were almost painfully obvious, but certainly no less important for that:

• We need new kinds of staff, more diverse, with new kinds of skills for the new opportunities we face and for the tasks they require
• We need new platforms, new tools- which is to say (among other things) that we need to be organized—as stations and as a system— in new kinds of ways
• And we have to devise new business models, and new ways of funding those new business models

In every one of our futures, however radically different from today, there is a “public media”: communicating what’s important to our communities, clearly, trustworthily, in effective ways, on appropriate platforms, engaged with and supported by our constituencies in new kinds of ways. The questions are “will it be any good?” and “will we have any part in it?” I was delighted to see in the implications you all reported out what look to me like (at least many of) the steps necessary to earn us that role, and to maintain and increase the quality of public media:

1) While we’re not about to turn our backs on our legacy (broadcast) services, those services are largely mature; the future hangs on discovering and capitalizing on new opportunities. That mean that for the next several years we have to balance the now almost-instinctual practice of looking for efficiency—of cheaper ways to do what we’re
doing—with an equal concern for effectiveness. As I’ll argue below, I believe that efficiency (doing things right) still has an important place in our priorities. But if the future depends on new endeavors, our focus needs to shift to effectiveness—first to discovering, then to doing the right thing...

2) It follows as a corollary that we need to pick up the pace of learning. We can’t confidently research or reason our ways to these new offerings; we have to find them experimentally, by trial and error... which, we need to understand, means that we have to get comfortable with failure—since lots/most of what we’ll try won’t work. Indeed, we have to get good at failure, learning to fail fast, in ways that minimize expense and maximize learning.

3) Which brings us to why efficiency still matters: We all seem to agree that it’s unlikely we’re going to be the beneficiaries of any funding windfalls any time soon. So if we’re going to find the resources to fuel new development, it can only be by operating the things that we currently do much more cheaply, so that the savings can be reinvested in our futures.

4) Still, all of this experimentation will be costly—and risky. If we’re going to accomplish more (and different) with less—and if we’re going to provide a new level of engagement—then I believe we will need to collaborate much more aggressively. We need to find ways to share the risks and the expenses, and amplify the learning, with others. We will need to partner—at every level (and in every direction) within the system, and outside the system ...

5) Which means that, both as individual organizations and as a system, we need to invest in mastering “the technology of partnership.” We all know, from both personal and vicarious experience, that partnerships, joint ventures, and collaborations are hard. Most fail to achieve their goals; many, fail altogether. But there is a growing body of knowledge about how to build and operate effective collaborations. We need to master that knowledge—and indeed, to add to it. We can’t afford not to.

6) This spirit of cooperation will be key to getting at the final point I’ll raise here: it was both explicitly and implicitly clear that, in at least some of our futures, the architecture of “the system” and the relationships within it will need to change fundamentally. It seems apparent that there are important opportunities to share services (CRM/fund-raising back-office? technical?), even if it’s not yet clear exactly which ones and how. But even allowing for optimistic estimates of operational savings, it’s not clear that there will be enough money available to support all of the stations that currently operate.

Neither is it clear what the roles of the national organizations should be; nor what the right relationships—services, funding and fund-raising, governance—should be between
those organizations and the stations/local media organizations.

These are hard conversations to have for a variety of very powerful reasons, among them, it’s not clear just where—under which auspices—such a discussion can effectively happen (though the conversations at PRRO were encouraging that it can). In any case, it must.

The alternative is reorganization-by-default, a process that’s all too likely to be messy, distracting, expensive, and ultimately less-than-optimal... as we face futures in which “optimal” is just the ante.

As you’ll see in Page Anne’s notes, there were other well-articulated and important implications that surfaced; but these are the ones that rose to the top for me. At the same time, there were implications that didn’t formally surface (e.g., the need for a system-wide approach to the prospect of a spectrum auction that could, within 10 years, make WiMax ubiquitous... and pose an existential threat to AM/FM). But I know that they’re being discussed in other councils. The whole point of our day was to start a conversation. Let’s just be sure to include these other issues as we proceed.

Let me close by confessing that I know how over-simple, even glib some of these points may seem to folks like you who live with the complicated, messy reality of day-to-day operations, and thus how hard it is to build a head of steam to address them. But I’d argue that in fact, they aren’t so much over-simple as basic—fundamental... and hard. Really hard.

They’re hard conceptually; they’re hard executionally; and they’re hard emotionally. From the time I started in public broadcasting, in 1976, there have been three ways that those of us on the hook for an organization knew that we were doing well, three things we watched:

• Sticks- our reach as broadcasters... the broader the better

• Stones- our buildings and our staffs... if they’re growing, that’s a good thing

• “Bones”- our budgets... at every level, bigger, which meant growth, was better

These became habits, then instincts—preter-conscious markers that guide us, lenses through which we see and understand. They became ingrained in that way because for decades they worked...

But if we believe half of what we said to each other on the 12th, they’re no longer trustworthy. Indeed, as is so often the case, the solutions we came up with a generation ago look all-too-likely to be the problems we face in the next. It’s as though we have “un-professionalize” in order to be able to “re-professionalize” in way that’s appropriate the coming decades. And speaking for myself, I can attest that that’s a very uncomfortable realization.
But as they say out where I’m from, it is what it is. I always enjoy the chance to think with you all, but I was especially happy to be with you last Thursday. You all were creative and articulate in working through challenges and opportunities to serve a mission that I deeply admire. And more, you were forthright in facing the issues that came up. That—more of that—is what it’s going to take to get from here to a future in which we feel not beleaguered but empowered in serving our publics.

Again, I was honored and delighted to be a fellow-traveller. I look forward to being of any use to you going forward that you find helpful.

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SECTION I:
SUMMARY OF KEY IMPLICATIONS & CONTINGENCIES SUBMITTED BY ALL TRIBES

SERVICES
KEY ROBUST IMPLICATIONS FROM ALL TRIBES

☐ Need for engagement generally and in different ways beyond current. Wider subgroups of community; Deeper and broader with focus on local. Make sure local services are connected to global.

☐ Address the urban/rural engagement divide

☐ Need to collaborate due to less money. Find creative and effective ways to share burden. Regional, national and local levels within community with new partners.

☐ Be nimble, innovative, fast failers and fast learners.

☐ People want to self assemble their experience of pubmedia. So be careful to field services in ways that are easy and friendly to mash up. This will probably require new business models – esp for digital.

☐ Real implications for talent pools – more diverse. Competition for talent will be extreme.

☐ Brand well and communicate it effectively. Applicable to all, and more important the further north/east you go.

☐ Need CRM – both literally and in the more figurative sense. We need to listen to know what audiences really want.

☐ Increase diversity in staffing so we don’t miss out on potential audiences
KEY SERVICES CONTINGENCIES FROM ALL TRIBES

NW –
  ▪ Service wins future - Branding matters across platforms.

SE –
  ▪ Figure out how to manage choke points/gatekeepers. Develop viable strategy for dealing with them.
  ▪ More niched programming, broad menu of services for walled gardens.
  ▪ Talent issued will be egregious

NE –
  ▪ Branding is key
  ▪ As things explode and boundaries become more fluid, become aggressively multi-lingual. Old definitions of community dissolve away.

FUNDING
KEY ROBUST IMPLICATIONS FROM ALL TRIBES

☐ National producers need to fund more and more of the programs they provide so less demand on local stations to contribute to their costs.

☐ Collaboration and diversification. Share the task of fundraising horizontally and vertically to raise money more effectively and efficiently.

☐ Diversify the number of funding sources and the ways we’re looking for them. Fish in more ponds.

☐ Concern about how we support digital.

☐ Figure out how to use big data to identify funding opportunities

☐ Find a shared way to know how to serve audiences better and have them help pay for it.

☐ Look at changing culture of philanthropy and amp up mission and impact in all our fundraising efforts.

☐ Think about brand in funding. If we’re a vehicle for other marketers (underwriting, social foundations), help them find us by having a clear mission driven brand.
KEY FUNDING CONTINGENCIES FROM ALL TRIBES

NW –
- Rethink program distribution, funding and membership models. This is our official future – so think about doing it system wide.

SW –
- Pressure on 3 points in current landscape.
- Relationship between program distributors – reverse the dynamic.
  - Find a way to share so resources can be more appropriately distributed.

NE or SE –
- Targeted marketing. More transactional. Not about the same metrics as in the west

SE –
- Reach out to gatekeepers so they understand us.
- Understand millennials

MONETIZATION/OWNERSHIP
KEY ROBUST IMPLICATIONS FROM ALL TRIBES

- High level: Direct program funding.
- Think about the number of national programs we’re trying to sustain as a system. May need to cull the herd.
- Proposition – An assumption that CPB/CSG will be gone in 10 years –
- To the extent that tax based support will be gone, it throws efficiency measures into high relief.
- Because it’s important to understand our stakeholders, find a system-wide shareable CRM system. Some stations have, and others have not – upgrade system as a whole.
- Consolidate back-end services system-wide: CRM, traffic, distribution, etc. Get best deal as a system for services we all use.
- Need to find new and diverse talent, so there’s a staff development challenge ahead, regardless of future. Tap into a diverse pool to do that.
- Examine station role in program creation. Co-ops, collaborative and co-production are more evident. Re-think show construction at the conceptual, development and distribution levels.
- Also think about what the show looks like. Is it an entity or a collection of segments?
KEY MONETIZATION/OWNERSHIP CONTINGENCIES FROM ALL TRIBES

NW –
- As content atomizes, fundraising will too.
- Micro-financing likely, and even more so as you move east.

SW –
- WiMax not materialized, demand hasn’t changed significantly.

NE –
- Imposition of paywalls. Subscription model helps us monetize the audience listening in new ways.
  - Because so much is happening outside the system, lots of consolidation and perhaps move toward one public network. If so, nationally produced programs would flow freely through the system and outside it.

SE –
- Digital must-carry – This is nothing telecom is likely to volunteer, but there are public affairs moves we could try to make that a condition for them getting that kind of power.

GOVERNANCE
KEY ROBUST IMPLICATIONS FROM ALL TRIBES

☐ Need strong leadership in public media that’s very accountable and transparent.
☐ Boards of local stations – have one or get one
☐ Finding the balance between local and national governance that will enable effective collaboration which will be important.
☐ Be smart and strategic about governance to make sure every dime is maximized.
☐ Be extremely clear about mission and impact – and it matters in governance as well. Communicate value to licensees.
☐ University Licensees: Caught in peculiar circumstances – See if shared efforts can change that reality.
☐ Consolidation raises different and interesting questions:
☐ How do we turn something that’s all about getting bigger into something that makes us better at getting smaller? (more local)
☐ Duplication of sticks and services – Shouldn’t there be a set of incentives that maximize the use of those resources across the country?
☐ National orgs (NPR, especially) needs to create a strong policy on programming to prevent that duplication and give stations clear ideas on what stations can plan to expect.
☐ Or consider getting rid of NPR membership model altogether???
☐ Think about the basis on which rights and responsibilities are highly valued by stations.
Amp up public affairs activities with regard to AM/FM. Play that game well in our own interests and be active in our own industry - because our competition certainly is.

KEY GOVERNANCE CONTINGENCIES FROM ALL TRIBES

NW –
- Governance should reflect strategic imperatives because we’ll be acting on moving into digital directions and connecting with audiences in different ways.
- Think about composition of board as well as staff.
- Recognize that as we’re making those moves, prepare for the loss of smart effective colleagues we can no longer support as priorities shift and they find more suitable missions to pursue.
- Board members need to be pubmedia friendly fans and fundraisers – especially in the Western quads.

SW –
- Given more consolidation, increased localism, competition for resources – we’ll need to reach out and partner with other orgs in communities. Easy to say, harder to do.

SE –
- This is a trigger for ULs – How do you get support and advocacy from your licensees?
- How effective is it to be a local operator in a world of walled gardens? In this scenario, it’s hard to be small.
- We would need to let go of what we have and join together to create some mass in order to compete.

NE –
- Revision of NPR governance structure – from AREPS to perhaps something bicameral, like House and Senate.
- Networks own stations in this future.
- University Licensees will need community boards that are well connected, and good at dealing with university leadership to survive.
- Board will be important across all buckets (funding, services, monetization / ownership) and for developing strategies to navigate the change.
SECTION II:
NOTES POSTED ON EACH TRIBE’S SCENARIO PLANNING CHARTS

This section lists the notes transcribed from photographs taken of the charts, and from the actual charts left in each tribe’s meeting room.

RED TRIBE

*Approximate Operating Budget: $8 Million+

**SERVICES: RED TRIBE ROBUST IMPLICATIONS**

- Flexible and uncapped content
- Integrate national/regional content programming
- Content creation that goes beyond broadcast that can be used within the school systems
- Cultivate talent
- Collaborate on technology to enhance service and keep us with audience demands
- (Local) community convener
- Accountability/Investigative Journalism with increases understanding
- Responsiveness to audience/donors (ala nonprofit)
- Understand audience better
- Be more essential – weather and traffic
- Community service – stay true to mission
- Focus resources and assure excellence
- Diminish ration of partnering w/ weaklings – Connect w/entities that bring as much or more to the table as the station does, for greater impact.
- Defining and Measuring Impacts
- Social media community platform
- Build service to the next generation (e.g., podcasts, Vocalo)
- The Promise of the “P” Keith Woods (Public) leading to more diverse voices and viewpoints
- Re-Engineer and embrace a workforce mirroring our community demographic.
- Build local board
- Strengthen branding of P.R.

**SERVICES: RED TRIBE CONTINGENCIES**

NW –
  - Analog?

NE –
  - What if #’s or % of people of color dropped as audience users/members?
**FUNDING: RED TRIBE ROBUST IMPLICATIONS**

- More reliance on major and planned giving
- Less “sticky” donor methods
- Engage donors on all levels and make it easy to give
- Relationship-building (over solicitation) major and planned giving
- Partnerships – Share risk/profit
- Community engagement vs. events
- New business models Re-Aggregate talent or create a 3B events “Public Media Stage” to raise $ for community shared coals (AIR gets 5%)
- Capture metrics to justify/preserve private funding (especially foundation/grant support)
- Expand pledge drives to alternate channels
- Grow sponsorship revenue via product and sales innovation
- Fund innovation goal of 10% of revenue for innovation create station venture fund
- Investments in data management and analysis
- Reinvent on-air pledge drives
- Look for operational efficiencies across system
- Revenue Leadership

**FUNDING: RED TRIBE CONTINGENCIES**

NW –
  - Is Freemium the new revenue future?

SW –
  - Cost to raise $ could Increase
  - What if we don’t get out of our “bubble” (left side) talking to ourselves

**MONETIZATION/OWNERSHIP: RED TRIBE ROBUST IMPLICATIONS**

- Direct program funding.
- Think about the number of national programs we’re trying to sustain as a system. May need to cull the herd.
- Proposition – An assumption that CPB/CSG will be gone in 10 years –
- To the extent that tax based support will be gone, it throws efficiency measures into high relief.
- Because it’s important to understand our stakeholders, find a system-wide shareable CRM system.
- Consolidate back-end services system-wide: CRM, traffic, distribution, etc. Get best deal as a system for services we all use.
- Need diverse talent
- Staff development challenge ahead.
- Examine station role in program creation.
• Collaboration and co-production.
• Re-think show construction at the conceptual, development and distribution levels.
• Also think about what the show looks like. Is it an entity or a collection of segments?

**GOVERNANCE: RED TRIBE ROBUST IMPLICATIONS**

• Empower NPR to lead
• Future of NPR Membership Model
• NPR Non-Member Organization?
• “Shadow Governments” of university licensees makes coordinated industry initiative very challenging. What to do?
• University Licensee relations (stations as department of university (but not separate nonprofit)
• Leadership – Diversify Leadership
• Standardize back office functions
• Scale to afford CRM
• GM is the Senior Fundraiser (keeper of the vision)
• Industry Trade Group (merged alphabet soup)
• Effective and educated community/stakeholder board. Strong leaders.
• Do we need as many local boards?
• Strengthen ties to community
• Embrace sense of place

**GOVERNANCE: RED TRIBE CONTINGENCIES**

NW –
  o Why have 500 stations? What value does that add?

W –
  o Governance and Governance

SW –
  o Share best practices
  o Consolidation
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GREEN TRIBE
Approximate Operating Budget: $5-$8 Million

SERVICES: GREEN TRIBE ROBUST IMPLICATIONS

- CRM – As programmatic / So that we understand our audiences
- More interactive – People tell us what the want
- Providing what audience wants
- Original local content
- Capture user interests to target services
- Appeal to more diverse audiences

FUNDING: GREEN TRIBE ROBUST IMPLICATIONS

- Culture of Philanthropy
- Sustained giving
- Specific project funding
- Greater emphasis mission and brand
- Role of Foundations
- Change the way we think/talk about impact
- National CRM
- Diversify funding sources

FUNDING: GREEN TRIBE CONTINGENCIES

NW –
  o Funding for providing services
  o Digital Approach - Raise funds from digital content

W –
  o System wide fundraising

SW –
  o Program distributors pay content providers

NE –
  o Targeted marketing

MONETIZATION/OWNERSHIP: GREEN TRIBE ROBUST IMPLICATIONS

- More administration – Implication of where we’re going
- More programs
- Fewer programs
- Direct program fundraising
- Subscription based funding
• Disconnect from membership model
• User generated content – who owns it?
• Producers pay content providers to air programs
• Quality

GOVERNANCE: GREEEN TRIBE ROBUST IMPLICATIONS

• Modes of accountability
• Reacting quickly
• Different sets of rules
• Get a board
• Strong leadership for public radio
• Smart about local board, strategic and out national governance
• Is local governance preferable?

GOVERNANCE: GREEN TRIBE CONTINGENCIES

NW –
  o Governance should reflect strategic imperatives
  o Consolidation means loss of management talent and smart people

SW –
  o More regulation
  o Less regulation
  o Enforcement
  o Burying the full cost of distribution
  o Less station accountability

NE –
  o Change governance at the local level
  o Community boards that matter at university licensees
  o House & Senate vs. A-Reps

SE –
  o Blow up what is & put together something new – local with a larger group
  o With consolidation, is local governance less responsive
  o University licensees
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PURPLE TRIBE
Approximate Operating Budget: $3-$5 Million

SERVICES: PURPLE TRIBE ROBUST IMPLICATIONS

• Rapid innovation & evaluation
• Developing robust content for our audiences
• Develop strategy for more meaningful partnerships and collaborations
• Find the global in the local
• Control & Access
• Collaboration with like services to strengthen delivery
• CRM so that we understand our audiences deeply and better than others
• Nimble accessibility
• Make our local stories relevant and accessible to a broader audience
• Technological choke points – how much pay for WiFi access

FUNDING: PURPLE TRIBE ROBUST IMPLICATIONS

• Collaborations with like stations, services, organizations
• Change the way we think/talk about impact
• Tax-based support continues to decline or becomes less significant
• Staff development
• More need for community engagement – events, social media
• Mission driven fundraising
• Ancillary commercial business venture system wide
• Entrepreneurial innovation in digital domain
• Program creators raise dollars separate from us

MONETIZATION/OWNERSHIP: PURPLE TRIBE ROBUST IMPLICATIONS

• Developing national programs with blocks for local stations to add content into the program
• Operate as an O & O
• Ownership – contractually with system
• Station role in program creation and innovation – share work, assume the risk, get “equity”
• Look at how show construction ME & ATC could really change

GOVERNANCE: PURPLE ROBUST IMPLICATIONS

• Ongoing dialogue with licensee – value
• Transparency (window)
• Constantly signal your value to your licensee
• University licensees rebranded/repositioned as innovation centers
BLUE TRIBE
Approximate Operating Budget: $1.5 - $3 Million

SERVICES: BLUE ROBUST IMPLICATIONS

• Unable to fund local service
• Reflect Diversity Community Conversations

SERVICES: BLUE TRIBE CONTINGENCIES

NW –
  o Anyplace anywhere service
  o National Public

W –
  o Less funding
  o Less audience
  o Less service – local news

SW –
  o Focused service
  o Focused demographic
  o Able to fund more local service

NE –
  o Mobile/? Media services and new technologies will require more staff and more $$
  o Movement from networks to producers
  o E – Mission cannot be performed without funding. Stations must move towards financial independence

SE –
  o Parochial Public
  o Off Air
  o Smaller markets left out of everything
  o All digital with gate crashers

FUNDING: BLUE TRIBE ROBUST IMPLICATIONS

• Diversity fundraising
• Ask people with big $$ to give to stations
• Redefine decades-old funding model
**FUNDING: BLUE TRIBE CONTINGENCIES**

NW –
- Fund drive
- Hook foundation corporate funds with program initiatives
- Less

SW –
- NPR lives within its means
- Find best net revenue spot – not growth in gross $$ alone
  - 1, 2, many Joan Krocs
  - 20 big program producers are free to raise $$ millions anywhere (national programs free)

NE –
- Cultivate smart, authentic voices
- Need to be viewed community institution/treasure
- Individual donations in digital spaces

SE –
- Advertising model fails
- Build a tribe to end-run gatekeepers
- Our business model is no longer relevant!

**MONETIZATION/OWNERSHIP: BLUE TRIBE ROBUST IMPLICATIONS**

- Individual distributed and branded programs eclipse networks
- Interaction with the audience
- Different network distribution model

**MONETIZATION/OWNERSHIP: BLUE TRIBE CONTINGENCIES**

NW –
- Not much change

N –
- Crowd source (more specific)

Center -
- Unique voices break through

SW –
- All local programs are free to all outlets
- All national content
- Stations have to provide decide local vs. network
o CPB funding goes down
o $0 less local less quality

NE –
o All local
o Talent goes direct to audience, so subsidize, expose, support indy producers short-term build in return long-term
o Develop program in collaboration with either commercial or noncommercial entity and have them pay the lion’s share.

E –
o $0 less local less quality

SE –
o Big public entities (NPR, big stations) cut deals with big private Amazon Apple
o Local to biggest audience in consolidated market
o CPB fees give public producers more $$$

**GOVERNANCE: BLUE ROBUST IMPLICATIONS**

• New expertise in board recruitment
• Deep community board relationship

**GOVERNANCE: BLUE TRIBE CONTINGENCIES**

NW –
o LMA Advisory board -> Governing board
o Collab/Merger
o Public – Commercial Partnership

SW –
o Board Governance mature
o Buy Broadband Pipeline

NE –
o Not local board members

E –
o Universities trained to see the whole service as more than the public relations value of the station

SE –
o Consolidate and sell off excess
SERVICES: YELLOW ROBUST IMPLICATIONS

- Strong rural area collaboration
- Increased collaboration
- Support for dual licensee collaboration
- Collaboration with nonprofit partners to meet Titans
- Program content sharing – regionally
- Regional partnerships for content sharing and collaboration
- More regional collaboration on: News sharing, events
- Provide research initiatives for stations that can’t afford it.
- More opportunities for mid-size and small stations to develop and beta test programs and services
- Formalize what public radio newspaper partnerships look like.
- Share to present local content.
- Trusted local news content
- Fund a content structure to be local, not national. Local Hour, StoryCorp, This I Believe, etc.
- Increased importance of localism.
- Co-developing content with local reporters
- Keep local flavor on-air where possible, but consolidate/collaborate back office.
- Bring all local journalism creators together – radio, TV, print, digital.
- Keep to the PRPD core values!
- Public access to delivery system
- Best possible programming to widest possible audience
- Work to improve ease of use for online/mobile listening.
- Support/aggregate incubate bloggers/podcasters
- Attract next generation of users
- How do we reflect and attract changing diversity of U.S. population?
- BRANDING: create public radio/media national branding campaign funded by stations on major gifts
- System provided turnkey engagement starters (StoryCorp visits) NW –

SERVICES: YELLOW TRIBE CONTINGENCIES

NE –
- MS NPR/Verizon public media
- SE – Loss of local due to consolidation
FUNDING: YELLOW ROBUST IMPLICATIONS

- 5% provide 95% of $
- Increased dependence on targeted funding (i.e. for specific goals, shows, projects)
- Diversifying funding sources
- Rely on big donors in major markets to fund public radio – less reliance on fundraising.
- Funding is philanthropic, less transactional
- Grant opportunities
- Grant opportunities for smaller stations and music stations
- Keep local flavor on-air where possible, but consolidate/collaborate back office.
- More partnerships with local national producers
- System wide major gift matching
- Revenue battle between networks and stations (listener fundraising)
- Major philanthropy supports national and local production, not stations
- Diversify and build more donors, especially major donors
- Major gifts to help subsidize entire system
- Region-specific audience research and data
- Better coordination with stations
- Meet nationally to explore a post-membership drive era
- Mission directs us to provide free programming for all
- Funding thresholds based on local population demographics
- CRM, pay wall like NYT. After a few uses you have to be a sustainer to use digital.
- Finding digital online funding model
- Fed funding decrease forces change
- Reduced federal funding
- Forced consolidation by CSG
- CPB funding yes, no, how much?
- Finding Digital online funding model

FUNDING: YELLOW TRIBE CONTINGENCIES

SE –

- Loss of CSG, elimination of CPB

MONETIZATION/OWNERSHIP: YELLOW ROBUST IMPLICATIONS

- Consolidation & streamlining
- Figure out how to monetize the web for public media
- Charging for apps and selected services
- Co Development of funding sources
- Develop “big daddies/mommies” to fund public media online
- Market visits from network execs and programmers. All markets.
• Opportunity to support station programming on a national scale.
• Keep local flavor on-are where possible but consolidate/collaborate back office.
• System-wide consulting on how to produce live/community events that are profitable.
• Marketing support
• Develop creative common core to share universally
• Provide national expertise at local level for branding marketing
• Strong, affordable program distribution system.
• Growth of aggregators
• Future of content distribution to stations (PRSS)

**GOVERNANCE: YELLOW ROBUST IMPLICATIONS**

• 2-3 [network] Board seat(s) reserved for mid and small market stations.
• Audience/Community focused decision making
• Local control, local decision making
• Increase in community licensees, decrease in institutional licensees.
• National marketing plan with local modules
• Respect regional community groups. Embrace their connection to “Main Street.”
• Keep local flavor on-air where possible, but consolidate/collaborate [back office] states/regions.
• Difficulty getting licensee to buy into new business model.
• Collaborate w/NFCB to life entire system and establish better practices. Maximizing success with all resources.

**GOVERNANCE: YELLOW TRIBE CONTINGENCIES**

SW –

- Louisville Works
- Greater regions when local/regional/national
- Is there a critical mass for success?
- Should it be defined by system?

SE –

- Align with content delivery org (i.e. ISP)
- NPR/APM/PRI content available direct to listener
ORANGE TRIBE  
*Approximate Operating Budget: Below $1.1 Million*

**SERVICES: ORANGE ROBUST IMPLICATIONS**

- Make sure local differences survive
- Increased competition between NPR stations in same or overlapping signal areas
- Build local brand beyond “your NPR station”
- Focus on building brands of shows and talent
- Signaling our value
- Public radio gets into same mess that is commercial radio
- Services – no brainer – make exceptional content
- Scale of functions – strategic restructuring realign resources
- Stronger partnerships with content creators
- Robust user data
- No brainer – “meet audience where they are”
- Acquire talent – Recruit, develop, contract/share
- No brainer – market our brands better – market our distinctive USP
- Engage and nurture youth & diversity (12 – 32 years in 2013)
- LPFM
- Technology needs to serve the mission – not have new tech act as a distraction
- Share of dashboard
- Expand online distribution
- Technology evolves – has to serve us
- Changing method of being service providers
- Better multi-media content (photos, video) through station websites – but requiring different resource mix
- Distribution method – apps, streaming, mobile, something else?

**SERVICES: ORANGE TRIBE CONTINGENCIES**

**NW –**
- WiMax sinks due to increased car deaths
- Venture capitalists sink social media

**NE –**
- Digital on line
- Broadcast consumption drops dramatically
- More creative space for millennials to create public media content – gatekeepers not as influential

**SE –**
- Goodbye transmitters. What becomes of FM/AM? Oh yeah, and HD...
FUNDING: ORANGE ROBUST IMPLICATIONS

- No pledge drives
- No underwriting
- Events – in person activity as a revenue source
- Balanced funding streams
- CPB funding – Change in distro model, reduction, or loss
- NPR funding stabilizes
- Increasingly difficult financial environment in small or rural market stations
- Stock market crashes again
- Scale of functions back office – strategic restructuring – realign resources
- Lack of access to capital
- Small market and rural stations especially vulnerable

FUNDING: ORANGE TRIBE CONTINGENCIES

NW –
  o Business thriving MBA for managers increase managers’ skill sets.
  o Partial or complete pay walls are created

SW –
  o CPB gone in 2 years. Next generation of listeners don’t replace current givers
  o Reduce listener revenue due to slow economic recovery
  o Federal funding called into question

NE –
  o CPB Shifting CSG Priorities

E –
  o New funding sources
  o Philanthropy must grow “Institution”
  o Philanthropy
  o Major gifts emphasis
  o More foundation support – closer to other arts/culture nonprofits

MONETIZATION/OWNERSHIP: ORANGE ROBUST IMPLICATIONS

- Will monetization (widespread) conflict with mission – to serve all who can hear us?
- Current events curriculum – defined: using audio archive to create material that would be used in the classroom
- Pay walls
- Consolidation collaboration
• Public media “Prime” membership – defined: subscriptions that provide additional benefits (ex., pledge free audio stream.
• Scale of functions back office
• Strategic restructuring realign resources
• Capitalism rules
• Know your audience (via CRM?) Create content the audience wants / is willing to pay for.
• Collaboration between NPR/stations/independent producers
• More partnership to generate more value in all parts of content distribution
• Growth opportunity for talent is at local level. In AIR’s 2013 producer survey, local stations rank as #1 source of increased income (ahead of networks, syndicated programs, & PRX)
• Localism

**MONETIZATION/OWNERSHIP: ORANGE TRIBE CONTINGENCIES**

NW –
  o New Network (circle) Local stations <-> community networks (libraries, churches, schools) <-> talent

NE –
  o Collaboration/consolidation to gain leverage with gate keepers

SE –
  o Pay walls

**GOVERNANCE: ORANGE ROBUST IMPLICATIONS**

• Scale of functions back office – strategic restructuring, realign resource
• Shared back office services among stations to free us head count for content
• Consolidate strong and not so strong stations
• More modeling of good collaborative behavior by willing licensees
• More licenses held by stand alone community groups – as compared to institutional licensees, joint licensees
• Slow velocity of institutional decision-making versus stand-alone radio licensees
• Retain multiple “groups” in system to retain regionalism
• Member owned? Are contributors as invested in the service as we are?
• Simplified fees schedules
• Having NPR take stronger interest in ensuring long-term viability of small-market & rural affiliates
• CPB direct programming or programs dictate funding?
• CPB develops rural incentives for market based strategies
GOVERNANCE: ORANGE TRIBE CONTINGENCIES

NW –
  • PRC buy 80% of university licensees

SW –
  • University licensees sell FM band out of public sphere.

NE –
  • Professionalize stations where needed. Decide on mission, focus on mission

SE –
  • Fewer licensees
The Futures of Public Media... 2013-2023

Explosively different, reintermediated (curated in a variety of different ways)

NW QUADRANT NICKNAME: "Book of Mormon" or "Kinky Boots"
Media morphs; public media keeps up:
- Wi-max is here
- Public media serving metastasizing niches of user
- Public stations consolidate (with CPB support), as in, players multiply: Complexity
- Brand matters... increasingly, show/talent
- Sharing and "shareability" rule
- Form(s) of service... and support... evolve
- But not as fast as tech allows
- So constant experimentation, new entrant pressure... loss of "false signals"

SW QUADRANT - NICKNAME "Brigadoon"
Back to the future (or, stuck in the present):
- Doing with less
- The importance of Local grows...
  - Even as players and platforms consolidate...
  - Standardize offers...
  - Driving costs (with resources) down
  - Embrace of "multiple media"
- Number of funding sources grows...
  - Even as individual sources shrink
- The usual suspects
  - Lots of partnerships: national & local
  - Among the usual (kinds of) players

SE QUADRANT - NICKNAME "Little Shop of Horrors"
Tech- and (public) media - struggle to keep up with changing demand:
- Less (public) media overall...
  - Stations/channels/platforms - public and commercial - consolidate
  - In an archipelago-like media environment, Titans emerge...
- With advent of Wi-Max, the concentration of tech power has created:
  - New "check points" in media value chains, and
  - New approaches... "more granular"... But inside "walled gardens"?
  - New players... some in positions of control

NE QUADRANT NICKNAME: "Anything Goes"
All that is solid melts into air:
- Technology opens access
  - Wi-Max trumps broadcast
  - Old players and new
  - Local, national, global... lots of them
- Pace of change accelerates... half-life of success shrinks
- Public media still mission driven, but distinct only to the extent that it can demonstrate outcomes
  - Traditional forms of support (pledge) dry up
  - Freemium, crowdsourcing, etc. take the fore
- Branding is key... and even more granular... and personal

Demand and Consumption
Rarified into the marketplace, new forms of demand

Landscape evolved but recognizable (evolutionarily different from today)

Heminge & Condell