

WHITE PAPER

**Findings and Implications
from the Local Station Services
Research Project**

- Prepared for -

The Corporation for Public Broadcasting

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This White Paper provides a detailed review of the findings and implications from the Corporation for Public Broadcasting's (CPB's) Local Station Services Research Project, or LSSRP. An Executive Summary highlighting the key conclusions and implications reflected in this White Paper has been provided to station General Managers along with this more detailed report. Selected other research findings from the LSSRP are available from CPB upon request.

Report Organization and Highlights

Following a brief overview of the LSSRP research methodology, this White Paper is organized into six principal sections. These sections and primary findings described in each include:

- *Overall perspectives on localism and local services.* Overall perspectives derived from focus group research and interviews with public television local partners are summarized initially and re-visited throughout the report in connection with the discussion of specific local services. In particular, the LSSRP research findings highlight the fundamental value of localism and the critical role that it plays in driving the perceptions of public television viewers, members and partners. At the same time, the research findings underscore the lack of awareness within these groups regarding many station activities and services.
- *Station approaches to building localism and engaging their communities.* The LSSRP team found that stations with the strongest community identities follow a generally consistent cycle of community engagement that fosters the development of strong, strategic and sustained community partnerships. Examples of two such partnerships are summarized in the White Paper, and Appendix B provides additional information on station processes that make up the cycle of community engagement.
- *An assessment of local service economics.* This analysis identifies a “direct” deficit (i.e., based on revenues and expenses *directly attributable* to specific local services) of approximately \$80 million on local station services – with about four-fifths of the deficit attributable to local production. At the same time, the analysis suggests that local services could be viewed as self-sustaining if local services are judged to be responsible for 10 percent or more of unrestricted revenues.
- *Perspectives on local production.* The multiple facets of the LSSRP local production analysis include a quantification of local production activity, additional detail on local production economics and station strategies for reducing net production costs and increasing community impact, and considerations relating to viewer and station partner interests in local programming. Several implications relating to reducing production costs, identifying systemic process improvements, leveraging core station assets and communicating/appealing to stakeholders are derived from this analysis.
- *Perspectives on educational services.* This section illustrates the concentration of educational services revenue among a small group of

licensees, and identifies the challenges associated with stations outside of this core group expanding their role in education.

- *Perspectives on the digital transition.* A top line review of the current evolution of digital services illustrates the lack of system-wide attention to date to local station needs in this area, and suggests that this may represent a logical next step for the LSSRP.

Project Overview/Methodology

In 2003, the System-wide Planning Effort identified three major opportunities to strengthen the financial health of stations. Since that time, a series of initiatives have been pursued with the goal of addressing each of those opportunities.

However, when the 2003 findings were shared with General Managers, many also expressed concerns about their local service portfolio. These General Managers wanted detailed data that would inform their local service decision-making. The Local Station Services Research Project (LSSRP) was launched with the objective of beginning the process of providing such data, by:

- Helping to develop a *common vocabulary* for discussing the issue of localism and local service;
- Creating a *solid fact base* describing the range and effectiveness of local services and activities in order to inform future decision-making;
- Identifying service *benchmarks and best practices* in the system today; and
- Beginning to *engage the station community* on the issue of localism and local service.

In order to accomplish these objectives, the LSSRP encompassed both quantitative and qualitative elements:

- In conjunction with The Taylor Research & Consulting Group, focus groups were held with viewers and members in 11 markets across the system.
- Focus groups and in-depth interviews were also completed with targeted users of local services – educators and public television partners (including state agencies and non-profits).
- Finally – with the help of consultants from a collaborative team of Bortz Media & Sports Group and BMR Associates – an analysis of local service offerings and strategies was conducted at a variety of stations across the system, along with a comprehensive assessment of existing station-specific and system-wide financial and operations data.

The 11 focus group markets and case study stations included in the study (listed in Appendix A) reflected a broad mix of licensee types, budget size, geography and local service emphasis.

Defining Localism and Local Services

An initial challenge for the LSSRP team was to define local service for the purposes of our analysis. As the focus groups confirmed, determining the extent of local service is complicated by the fact that to a station's viewers and other constituents, *everything* the station provides and does is considered local to varying degrees. After considerable debate, the LSSRP made the following distinction between localism and local services:

- *Localism* is the largely intangible sense of local identity and presence reflected in the station's physical presence in the community, its ability to respond to local needs both on and off the air, and its role in "localizing" national content. (Beyond content and physical infrastructure, certain local activities that are not readily definable as "services" – such as local fundraising efforts – contribute to localism.)
- *Local services* include local production and other locally "manufactured" offerings including educational services, outreach, station websites and various other activities (such as contract production) that were grouped together under the heading of technical outsourcing.

As outlined in the remainder of this White Paper, LSSRP findings relate to both of these aspects of local station activities, as well as to the interrelationship between the two.

Understanding the Value of Localism

The focus groups and partner interviews conducted as part of the LSSRP provided useful insights into how PTV viewers, as well as local station partners, think about and value the services provided by their local station. In addition, individual station analyses yielded interesting perspective on the approaches that some stations are using to connect with their communities.

Focus group findings. In all of the markets in which focus groups were conducted, viewers and members emphasized the value of their station's localism. This was often expressed as a belief that their station was part of their community, was in touch with their particular needs, and responded to those needs. Focus group participants also spoke about the role that local production played in strengthening the local connection – even if they didn't always watch the local programs. Key findings from the focus group research include:

- Although most viewers and members recognize that stations get some or even most of their programming from elsewhere, they tend to view most of what their station does as "local" in the sense that it is either produced or chosen for their community. In addition, perceptions about the amount and quality of a station's local programming do seem to influence the level of local identity attached to the station.
- Viewers and members not only perceive their stations as local organizations, they place a high value on this attribute. This appears to be particularly true in communities with a strong sense of place.

- Viewers and members clearly understand that the fundraising undertaken by the station is local, and are aware that the support they provide goes to the local station.
- Viewers are generally aware that their stations produce local programming, but specific knowledge and viewing of individual programs is limited to a few programs and varies from market-to-market. Awareness of non-broadcast services is very low, even among the educators participating in the focus groups, and some viewers and members express concern that engaging in these activities may take station resources away from the programming that they believe should be the station's central focus.

The value of localism and local services to other “stakeholders.” While the manner in which viewers and members value public television's localism and services is of course important, comparing the focus group findings with the results of partner interviews and the LSSRP station analyses also highlighted the variations in how different “stakeholders” value localism:

- Station community partners value the broad reach that access to a station's air can offer, as well as the production expertise and the strong local reputation that public television stations possess.
- Interviews with station personnel confirm that institutional partners and supporters place a very high value on localism and local services. Localism is the factor that drives their funding of station services, and that enables stations to serve as an attractive partner/ally to the institution. Locally-focused educational services, narrowly defined, as well as technical support functions are often (but not always) a key feature of these institutional relationships.
- Educators value public television programming and segments that can be used as teaching aids, while also finding basic support materials (including websites and lesson plans) helpful.
- Research done in connection with the major giving initiative indicates that major donors consider a station's localism part of its distinctiveness in the marketplace and a factor that differentiates public television from certain other institutions vying for their support. To these supporters, local services are of specific importance and should be highlighted in station case statements.

Implications from research results. For stations, the differences across the general audience, members, major donors, educators and partners highlight the importance of using multiple, tailored – but thematically consistent – messages for different stakeholders:

- To the general audience (including members), who express confusion and concern that the dollars they thought were going to support programs might

actually go to support a different activity, focusing almost solely on the strengths of a station's programming may be the best approach.

- Major donors, however, are likely to be interested in a more holistic story, one that speaks to the station's localism in broader terms and reflects the range of services the station provides.
- As discussed further below, prospective station partners will want to understand the specific benefits of the proposed partnership, emphasizing how the relationship will extend their reach in a manner that creates awareness of and/or drives community interest in their activities.
- Finally, institutional providers of funding including state governments and universities will be more interested in the specific services a station can offer that are directly targeted to their needs.

Station Efforts to Engage the Community

Acknowledging the importance of localism, the LSSRP research focused specifically on how stations that have developed very strong community identities have gone about doing so.

A cycle of community engagement. The station case analyses found that stations with strong community identities follow a similar cycle of community engagement. This cycle includes six primary steps, as summarized below. (As mentioned earlier, additional detail on each of these steps is provided in Appendix B, along with a discussion of the organizational re-structuring that some stations have undertaken in order to facilitate their efforts.)

- The first step is always actively "listening" to the community:
 - ✓ The actual practices here vary, depending both on the station's particular objectives as well as (to a degree) on the resources available to the station.
 - ✓ At the most extensive end, WVIZ/Ideastream in Cleveland has undertaken an ongoing and comprehensive "listening campaign" that ultimately has reached 3,000 members of their community through a combination of quantitative and qualitative research, town meetings and other forums.
 - ✓ Listening can also be done on a smaller scale, through targeted interviews with community influentials and prospective partner organizations (as WTTW and KQED have done) or with serious and on-going ascertainment meetings (as WCNY does).
- The second step is designing and adhering to a strategic plan that uses a clear community need (typically identified through the listening effort) as its launching point, establishes clear goals (including measurable benchmarks

- that help to define success) and an action plan for achieving those goals, and sets forth a specific timeline for accomplishing its goals.
- The third step is “partnering with a purpose.” The most engaged stations we analyzed have consciously pursued strategic partnerships that enable the station to fulfill one or more specific goals:
 - ✓ Increase/extend reach (e.g., a newspaper partnership to broaden audience and awareness; a community organization partnership to facilitate/strengthen outreach).
 - ✓ Access new content (e.g., partnerships with organizations possessing content or expertise supporting content creation).
 - ✓ Allow for cross-promotion (e.g., a symphony partnership with joint promotion to member lists and in publications).
 - ✓ Access new funding (e.g., through joint grant proposals strengthening the “case” of both partners).
 - ✓ Support community institutions (e.g., develop content that fosters awareness and support of worthwhile community organizations – such as local arts organizations).
 - The fourth step is measuring the station’s success on an ongoing basis. Setting and tracking performance metrics is critical, and should include both internal and external measures of success. These measures can naturally be used for internal management decision-making, but also can be used to help make a stronger case for funding of specific projects (based on a proven track record of “making an impact”):
 - ✓ WHYY has created a 24-point metrics dashboard that measures key internal performance areas including development, audience reach, and community engagement on a monthly basis.
 - ✓ In developing its *Spark* series, KQED set out to measure the effectiveness of the series for its local arts partners in addition to tracking ratings and other internal measures. The station now has evidence of increased attendance at events and other indicators of impact that can be used in attracting other projects.

Whether comprehensive or “top line,” measurements of this type help to insure that a station is making decisions and allocating its resources in a manner consistent with meeting its strategic objectives rather than simply responding to one-time opportunities.

- The fifth step is to communicate effectively with the community about the station’s activities and the services it provides. Case station research suggests that “communication” does not necessarily imply station promotion in the traditional sense. Rather, as the examples presented below illustrate, the most effective form of communicating the station’s role in the community

is often through its association with a project or service that is having an impact – either in the community at large or within a certain segment of the market. Conventional or not, communication needs to occur off-air as well as on-air, in order to reach new audiences along with the station's existing base of supporters. Partnerships provide a critical, cost effective means for communicating off-air.

- The final step is simply to repeat this process on an ongoing basis.

It is important to emphasize that the use of this basic framework (and management's sustained attention to its importance) is possible for small as well as large stations. Moreover, it is essential that stations recognize the interdependence of the individual steps and make sure that each is being undertaken with the others in mind.

Finally, it should be emphasized that a substantial, sustained commitment is required in order to make the cycle of community engagement described above effective. Based on the LSSRP station assessments, there are tangible benefits to implementing and adhering to these processes, but they often are not realized immediately. (For example, WFYI in Indianapolis recently obtained a multi-million dollar grant from the Lilly Foundation in which Lilly specifically cited the station's efforts to engage the community as a basis for its support – this grant was the result of a long-term commitment to building a stronger presence in the community, centered on a multi-year partnership with the local children's museum.)

Examples of strategic partnerships. The cycle of community engagement described above is perhaps best illustrated by sustained partnerships that benefit the station, its partners and, ultimately, the community as a whole. In the course of the LSSRP analysis, selected station efforts that involve strong partnerships stood out in this regard – a few examples of which are summarized below and reviewed in further detail in Appendix B:

- ***KQED's SPARK.*** KQED launched *SPARK*, the station's largest new local programming initiative in many years, in the spring of 2003. For its second season (2004), the series featured 26 half-hours as well as extensive web and educational components. *SPARK* is co-produced with the Bay Area Video Coalition (BAVC), using independent producers, videographers and crew – with KQED retaining overall content control. Programs feature the Bay Area arts community, and KQED conducted extensive initial research within the arts community in order to identify programming concepts and, equally important, to determine how KQED could assist local arts organizations and help build support for the arts. This listening effort consisted primarily of a series of interviews by the eventual series producer with more than 100 local artists, representatives of arts organizations and arts educators – and appears to represent a listening model that is practical, effective, relatively inexpensive and replicable in other markets. (KQED is now undertaking a similar listening process to design and develop a new local programming initiative around science and environmental issues.)

In addition to listening, KQED established clear goals and plans to measure performance for the series in terms of its community impact, its value in supporting arts organizations, its benefits to the station, and its value in

cementing KQED's relationship with BAVC. So far, the series has met or exceeded audience and educational goals, and has directly impacted attendance and website visitation of arts organizations. Specifically, website visitation for participating organizations increased more than 60 percent on average in the two weeks following the Spark episode addressing the organization, while some participants cited increases of over 50 percent in call volume and/or attendance at events occurring during the month following the episode. Equally important, the "buzz" around the series has stimulated interest in similar efforts such as the science and environmental series mentioned above – and KQED now has specific "proof of performance" measures that can be provided to potential funders of these new initiatives.

Finally, from a funding perspective, *SPARK* is admittedly an expensive undertaking, with costs of roughly \$1.7 million per season (including ambitious educational and web components). Even so, the funding model is one that (on a smaller scale) could be pursued by other stations as well – with principal funding sources including major donor funds earmarked specifically for arts content and foundation grants.

- *Ideastream and the Cleveland Plain Dealer*. Ideastream and the Cleveland Plain Dealer (CPD) initially established a content-centered partnership in 2001, collaborating to address issues related to northeast Ohio's economic malaise. Over a period of four years, 13 long-form panel discussions have been aired on both television and radio as part of *The Quiet Crisis* project. In addition, Ideastream and CPD are collaborating on another series addressing youth-at-risk – known as *Tomorrow's Promise*. Key considerations relating to this relationship include:
 - ✓ CPD had developed this concept internally, but approached Ideastream in the belief that the use of Ideastream's television and radio outlets would greatly enhance the reach and impact of the initiative. (Ideastream's ownership of both a TV and a radio outlet were a key factor in CPD's interest in the partnership.)
 - ✓ Editorial aspects of the relationship are shared. Following initial concerns on both sides, the partners have found that they share a common public interest orientation. CPD does not believe it could partner with a commercial broadcaster in a similar way.
 - ✓ In addition to reach, CPD found public broadcasting's interested, involved and informed audience to be a good fit with its goal of reaching opinion leaders in the community.
 - ✓ Extensive *Quiet Crisis* content is featured in the CPD, and provides considerable exposure for Ideastream and its role as a community catalyst.
 - ✓ There has been no joint effort to secure funding for the project, and Ideastream has had only limited success in underwriting the programming. However, costs have been kept low (on the order

of \$25,000 for each of the two hour television broadcasts) by the substantial personnel contribution of CPD. More important, the success of the project has given Ideastream a “seat at the table” when major community issues arise, resulting in a number of indirect opportunities to effect change as well as attract new funding sources.

- *WHYY and the Philadelphia Symphony Orchestra (PSO)*. This partnership is of interest due both to its structure and the quasi-competitive nature of the relationship between the two organizations. Specifically, the two partners have established a formal contractual relationship that spans seven years and involves radio distribution by WHYY of all 35 PSO performances, a website and a lecture series targeted to Orchestra patrons. In addition, the agreement specifies joint efforts to secure funding for production of the programming, and involves mutual promotional obligations. WHYY receives full-page exposure for its arts/cultural service strand in the PSO handbill, as well as signage and other recognition at an annual Orchestra reception. The agreement was entered into with the understanding that the two partners compete for a similar donor pool.

Local Service Economics

The LSSRP was initiated with the objective of gaining a better understanding of the financial costs and benefits associated with local services. Two factors that have also limited past efforts to evaluate PTV economics posed a significant challenge for this project as well: (1) the limitations of the SABS database, with a comprehensive data set available only for one year (2003) and, to a lesser extent, the presence of inconsistencies/anomalies in data reported by individual stations; and (2) the unallocated nature of a large percentage of station revenues and the intangible benefits associated with many station activities.

Despite these challenges, useful insights were obtained through the analysis – including perspectives on the flow of funds in the system as a whole as well as a greater understanding of the economics of specific local services. Moreover, it is believed that this initial analysis can serve as an effective starting point for tracking of future trends – recognizing that the value of the SABS database will continue to increase over time as additional years of data offer the opportunity for detailed analysis of changes in system and station-level financial characteristics on a multi-year basis.

System-level local service economics. Based on 2003 SABS data, public television licensees invested a total of \$327 million in purely local activities -- including local production, outreach, web content, educational services and contract production. This represents approximately 18 percent of total system expenditures of \$1.84 billion during 2003. (If the costs of pledge, auction, non-PBS programming acquisition, program scheduling and a portion of general/administrative and broadcast operations expenses are added to the local service component, the total investment in activities associated with localism grows to \$485 million – or 26 percent of total system costs.)

Revenues directly attributable to the purely local activities mentioned above total \$247 million – indicating that on a direct basis, local services are provided at a deficit of about \$80 million. However, it is important to understand that direct revenues as reported in

SABS make no allocation of unrestricted income to any of the categories mentioned above. Given that unrestricted revenues totaled almost \$1.2 billion in 2003 (two-thirds of all system revenues), it is obviously important to factor these income sources into the assessment of local service economics.

Unfortunately, despite extensive conversations with station personnel on this issue, as well as a thorough analysis of SABS and other data, it is possible to draw only directional conclusions regarding the role that localism and local services play in driving unrestricted revenues. Primary directional findings include:

- Local services and specifically local programming do not, across the system, play a very important role in driving general membership revenues (which totalled \$343 million systemwide in 2003). The local nature of fundraising activities *is* clearly connected to membership support (but, as noted above, including these efforts as local also adds to the costs that one would attribute to local activities).
- Local services appear to be somewhat more important in attracting major gifts (which totaled \$47 million during 2003) – where the case is often built around local presence and identity; and
- Local services are an essential motivator behind all types of government support of public television, including funding at the federal, state and local level. In the aggregate, government funding amounted to \$792 million in 2003 (\$289 million in federal funding allocated to stations as revenue, and \$503 million in state and local support.)

Given these considerations, as well as the uncertainties regarding the indirect impact of localism and local services, the direct deficit attributable to local services was assessed in the context of the percentage of unrestricted revenues that is required to cover the deficit. Examined on this basis, if 10 percent of all unrestricted revenues were considered to be attributable to local services and localism, this would amount to about \$120 million – compared with an \$80 million direct deficit. *Thus, if it is judged that at least 10 percent of system-wide unrestricted station revenues are tied to local services, it would be concluded that local services are in actuality self-sufficient.* Even if general membership income is removed from this equation (based on the directional finding noted above), 10 percent of remaining unrestricted revenues would total \$84 million – offsetting the direct local service deficit and suggesting that local services essentially “break even.”

There is no way to determine with certainty that a specific percentage of unrestricted revenues come from localism or local services. Moreover, individual perceptions as to what a reasonable percentage to attribute to local services might be will vary, and the appropriate assumption would certainly vary when local service economics are examined on a station-by-station basis. Even so, looking at local services in this manner suggests that a persuasive argument can be made for the idea that local services (in the aggregate) pay for themselves – and that, at a minimum, they do not represent a significant financial drag on the system.

Finally, irrespective of their economics, local services (and, more broadly, being a local entity) play a critical role in a station’s ability to fulfill its public service mission. As

participants and catalysts in the communities they serve, stations have impacts that cannot be quantified economically. As such, whatever one concludes about local service economics based on the preceding discussion, some level of local service commitment is a necessary and integral part of a station's mandate.

Local service economics by category. Beyond the overall picture described above, it is instructive to examine revenues and costs by major category. Key system level measures in this area are summarized on the table below.

Direct Local Service Revenues and Costs by Category

Service	Millions			Total FTE Employees	No. of Stations Providing Service (2)
	Total Direct Revenues (1)	Total Costs	Surplus/ (Deficit)		
Local Production	\$107.6	\$173.3	(\$65.7)	2,113	174
Educational Services	\$84.3	\$74.0	\$10.3	615	160
Community Outreach	\$11.7	\$19.5	(\$7.8)	182	146
Web Production	\$6.0	\$14.2	(\$8.2)	180	133
Total System (3)	\$1,800.0	\$1,836.0	(\$36.0)	12,257	175

(1) Includes only revenues directly allocated to this function in SABS.

(2) Includes all stations who reported any revenue, expense or dedicated FTEs to this service.

(3) Includes depreciation, but excludes capital revenues and costs.

Source: 2003 SABS (includes data for 175 licensees)

This view of local services illustrates a number of findings, including:

- As might be expected, local production is the predominant local service activity from essentially any resource commitment perspective – including direct revenues generated, total costs, total FTE employees, and the fact that all but one reporting station engages in the activity. It is also the source of roughly 80 percent of the direct deficit incurred by local services as a whole.
- In the aggregate, educational services are a significant and directly self-supporting component of local service. However, perhaps surprisingly, these services (as captured in SABS) account for less than five percent of total system resources. Moreover, as will be discussed further below, the bulk of the revenue and costs associated with educational services are concentrated among a small group of licensees, most notably state-owned networks. (Note that the educational services category does not include the large state appropriations that fund the *distribution infrastructure* for educational services in many states.)
- Community outreach and web content represent small (though fairly pervasive) local activities that collectively operate at modest deficits when considered in the context of overall system economics.

Perspectives on Local Production

As noted above, local production is the most significant local service activity provided by stations in terms of resource commitment as well as recognition among audiences and other key stakeholders. In addition, it was also noted that local production is responsible for most of the direct funding deficit that stations incur on the local services they provide.

The following discussion considers local production from a range of perspectives, including:

- Overall levels of local production activity.
- Factors relating to the use of net unrestricted revenues to support local production.
- Station strategies for reducing the net cost and increasing the impact of local production.
- Viewer and station partner interest in local production.
- Audience appeal and awareness of local programming and other local services.

As described further below, a station segmentation was used to facilitate the LSSRP analysis of local production models.

Station segmentation. In assessing local production economics and strategies, the LSSRP team found it useful to segment stations based on their local service emphasis and related factors. The objective of the segmentation was to find common factors that affect station economic performance and/or local production models. Segments used in the analysis included:

- *Traditional NPS station.* Stations in this category focus on providing a local face to national content. These are typically small stations for which the NPS constitutes more than 10 percent of their budget and local programming accounts for less than 10 percent of their budget. (Average budget -- \$3.7 million; example station -- WSRE)
- *On-air connectors.* This category consists of stations at which local production is the primary local service, and accounts for over 10 percent of the station's total budget. (Average budget -- \$7.5 million; example station -- NPT)
- *Multi-platform connectors.* Stations that have a substantial local production resource commitment, while also focusing on developing content across multiple platforms. These stations are typically larger, are most often joint licensees, and dedicate significant resources to the web. (Average budget -- \$13.8 million; example station -- WVIZ)

- *National producers.* These very large stations share many characteristics of multi-platform connectors, but also produce significant national content. (Average budget -- \$47.2 million; example station -- WETA)
- *Institutional ally – education.* These stations are generally large, receive substantial institutional funding and commit significant resources to educational services. (Average budget -- \$10.2 million; example station -- GPB)
- *Institutional ally – other.* These stations also receive substantial institutional support, but are generally smaller and do not provide educational services. (Average budget -- \$3.6 million; example station -- KCWC)
- *Independent.* These typically small stations operate in overlap markets and seek to differentiate themselves from other stations in their market. They generally report very small outlays for NPS programming. (Average budget -- \$3.3 million; example station -- KBDI)

As indicated above, this segmentation was used primarily for purposes of assessing variations in the level of local production activity and whether these variations affect either the economics of local production and/or the local productions strategies employed by stations.

Quantifying local production activity. According to SABS, public television stations collectively produced approximately 45,000 hours of local programming during 2003. As indicated below, the level of activity as well as the amount of resources dedicated to local production varies significantly depending on the size and strategic focus of individual stations. However, a direct local production deficit is common to all segments.

	Average new hours annually*	Average FTEs	Cost per hour (\$)	Underwriting revenue as % cost	Approach
On air connector	180	18.8	5,848	49	• High volume, lower cost
Multiplatform connector	158	23.9	12,546	29	• Moderate to high volume, higher cost • OTO/specials emphasis
Institutional ally – education	147	16.7	7,283	30	
National producer	112	20.5	20,279	41	• Low volume, low cost
Traditional NPS	75	4.4	3,398	42	
Institutional ally – Other	90	3.9	3,543	37	• Moderate volume, low cost • High level of external investment
Independent	121	4.0	2,002	53	

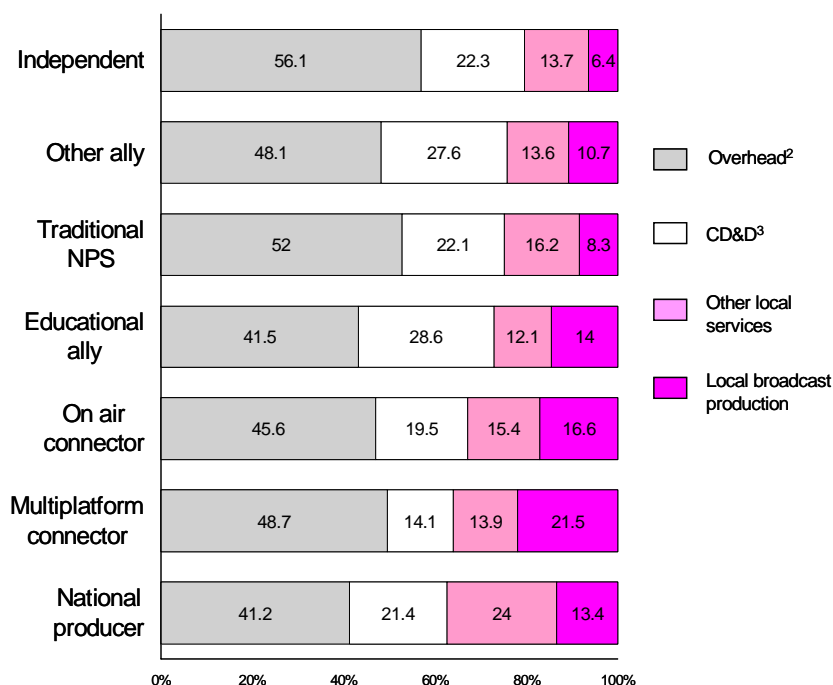
* Includes regularly occurring programs and OTOs. Excludes Pledge, breaks and "other."
Source: 2003 SABS

As might be expected, the relatively large stations in the National Producer, Multiplatform Connector and Institutional Ally – Education segments commit substantial resources to local production and incur the highest costs per hour produced. On-Air Connectors and Independents also produce substantial amounts of local programming, but incur significantly lower costs per hour and are able to fund a larger percentage of local production costs through program underwriting.

The use of net unrestricted revenue to support local production and its implications. Recognizing that all station segments incur direct local production deficits, the LSSRP team utilized the segmentation approach to evaluate the use of net unrestricted income to support local production. The chart below illustrates that the need to fund basic operations is closely linked to the availability of “discretionary” resources that can be applied toward local production deficits and deficits on other local services. For many of the smaller stations in the Independent, Institutional Ally – Other and Traditional NPS categories, net overhead and distribution costs amounting to 75 to 80 percent of net unrestricted revenues leave little left over to support local production deficits. For these stations, this either results in reduced emphasis on local programming or (as discussed further below) production models that help to limit direct deficits incurred on local programming. In contrast, larger stations often generate sufficient net unrestricted revenues to more efficiently “cover” overhead and distribution costs – leaving more “discretionary” dollars available to fund local production deficits.

Allocation of segments' net unrestricted revenue¹

Percent



¹ Revenue excludes CSG and restricted income

² Includes finance/HR, general management, admin/other and facilities

³ Includes transmission/distribution, operations, technical maintenance, and IT

Source: 2003 SABS

While larger stations have certain scale advantages over their smaller counterparts, the most significant conclusion from this analysis is that stations in all categories and of all sizes utilize a very large percentage (well over 60 percent) of their net unrestricted income to fund basic broadcast operations. As a result, comparatively small positive or negative changes in unrestricted income have a disproportionately large impact on the ability of all stations to provide local programming and other “discretionary” local services that are not fully funded by direct support. This relationship suggests that over the long-term the continued ability of stations to invest in local production and other local services is highly dependent on achieving one or more of three key financial objectives:

- First, succeeding in turning around recent trends of little or no growth in the major categories of unrestricted revenue;
- Second, improving direct support of local production and other local activities in order to minimize the required station investment to fund local service direct deficits (see further discussion below of potential strategies for achieving this goal);
- Third, and perhaps most realistic, reducing the cost of basic broadcast operations through systemic process improvements. This option highlights the importance of current CPB research addressing opportunities for such improvements.

Strategies for reducing the net cost and increasing the impact of local production.

Given the net cost of local production, as well as the sensitivity of this investment to trends in unrestricted revenue (see above discussion), it is not at all surprising that the research identified a range of approaches that stations are using to maximize the impact of their limited local production resources.

Considered in the aggregate, these approaches reflect a clear recognition of the value and importance of reducing local production costs in order to increase the community impact of local programming. While there is general consensus about the merits of a lower cost approach, its application is by no means “one-size-fits-all” – with some stations shifting from \$400,000 hours to \$200,000 hours, others seeking to reduce \$40,000 hours to \$15,000 hours, and still others pursuing joint ventures with partners in which the station retains editorial control but off-loads productions costs entirely to the partner. For all of these stations, however, the goal is to accomplish more within the same budget in the belief that increased volume (of quality programming) -- sometimes enhanced further by a higher repeat factor – can yield greater community impact. In some instances, notably Detroit among the stations we studied, this approach also appears to make individual programs and series’ easier to fund and can therefore have the added benefit of enabling the station to raise incremental revenue.

Examples of specific station strategies include:

- *External partnerships.* Stations including KNPB (Reno), Ideastream (Cleveland), WFYI (Indianapolis), KBDI (Denver), WHYI (Philadelphia) and KQED (San Francisco) are using partnerships with organizations possessing editorial, content and/or production expertise to produce programming more cost effectively. In some instances, sharing control over content development

- while retaining overall editorial discretion has enabled stations to off-load production costs entirely. In other cases, partner knowledge, facilities and/or production efficiencies help manage development costs. Selected content partnerships including KQED's *SPARK*, WHYI's relationship with the Philadelphia Symphony Orchestra and Ideastream's relationship with the Cleveland Plain Dealer were described earlier in this report. Appendix B includes additional detail on these and other external content partnerships.
- *Multi-station collaborations.* Collaborations such as *California Connected* and *FocusWest* share station content and resources in order to reduce the per station cost of developing high quality programming:
 - ✓ *California Connected* is a weekly series with high production values co-produced by four stations -- KCET, KQED, KVIE and KPBS. Other California stations may use the program without charge but must agree to common carriage on Thursday nights. The series is broadcast by at least one station in every market in the state. The multi-station collaboration and statewide distribution is attractive to major funders and provides a network quality regionally-oriented program that is considered a valuable "local" program by both the largest and smallest stations in the state.
 - ✓ The *FocusWest* partnership is a collaborative programming initiative launched in 2001 that now includes IdahoPTV (lead agency), KNPB in Reno, Wyoming PTV, KUED in Salt Lake City, and Oregon Public Broadcasting. Relying on grant funding, the partners have jointly developed a series of specials addressing public affairs and environmental issues of interest throughout the region. Each partner station has contributed segments to these productions. In addition, IdahoPTV packages and distributes a four-hour daily public affairs block to the partners. The service aggregates programs of regional interest and places emphasis on addressing minority issues and featuring minority voices – especially the Native American and Latino communities that are the region's principal minority groups. The service also includes national public affairs programming selected from the PBS National Program Service (e.g., *Frontline*, *Charlie Rose*, etc.). The eventual goal is to package and deliver a full-time DTV multicast public affairs service.
 - *Niche focus.* New Hampshire Public Television and WHA (Wisconsin) seek to maximize impact within limited resources by focusing content development in a primary niche (in these examples, public affairs/news).
 - ✓ As a medium-sized station in a multi-state overlap market, NHPTV decided to focus its local production activity on a nightly public affairs show. *New Hampshire Outlook* accounts for about 80 percent of the station's direct spending on local production. This well-watched, award winning program represented a large undertaking and risk when it was started. Board and community involvement has been key to the program's success. NHPTV's Board participated in the decision process fully and felt a large degree of ownership when the

program was launched (breaking into spontaneous applause upon voting in favor of the project). The process started with the Board agreeing that a nightly presence made sense. The station then approached the community and found that the regional nature of the state and the need to feel people had a voice were common themes. The organization had to be re-structured to create the capacity for the nightly show, mostly within existing resources.

✓ Wisconsin's content strategy is shaped as follows:

- They define themselves as public service media.
- If they had only \$1.00 to spend it would go to news and public affairs.
- Engaging the community is a focus.
- Kids are also important.

In an effort to integrate local service activities, a content committee, which includes representatives from programming, production, promotion and outreach, was formed and reports to the station manager.

- *Production efficiency.* WTVS (Detroit) recently made fundamental changes to its production philosophy, cutting the time and cost to shoot individual productions by implementing practices common to local commercial stations. The station's goal is to produce more fully-funded, inexpensive programs that bring useful information to the community. A recent change in production leadership helped WTVS achieve this goal. Results have been positive as a "culture of responsiveness" has begun to emerge and more low cost productions have been completed. The station can now produce quickly and inexpensively and is able to report its financial results in a timely and useful way. Moreover, production funding increased significantly in WTVS' most recent fiscal year.

While the LSSRP case stations concur that these strategies increase impact, quantifiable evidence of such an effect is lacking – station perceptions are based largely on anecdotal information. However, SABS data do provide some support for the notion that there are economic benefits associated with a lower cost model. Specifically, we examined each of the seven station segments to identify the top quartile of stations in terms of local production net costs (i.e., those stations reporting the lowest net deficit or, in a few cases, a direct "profit" on their local production activities). Across all seven segments, the average cost per hour was substantially lower among the top quartile of stations:

Average cost per hour (\$)		
Segment	Average	Top quartile
On air connector	5,848	1,259
Institutionally – education	7,283	4,021
Multiplatform connector	12,546	3,446
National producer	20,279	10,916
Traditional NPS	3,398	1,493
Institutionally – other	3,543	733
Independent	2,002	616

Responding to what viewers and station partners value. On some level, public broadcasters understand the tremendous power and influence inherent in the reach of the system’s “network” of stations. However, with the emergence of cable programming networks and the growth of the Internet, as well as PTV’s own commitment to digital television, there is a tendency among those “in the business” to view these other outlets as the future – and in some cases as the present.

The focus groups with viewers/members and interviews with local station partners provided a very strong reminder that analog broadcast reach, combined with the programming that it delivers, remain core assets. In addition, the research yielded insight into how these valuable assets can be used not only to fulfill station missions, but as a tool for enhancing the appeal of other, emerging distribution outlets.

Key considerations in this area include:

- ***Broadcast reach.*** While the system occasionally laments the shrinking gap between the reach of major subscription networks and that of broadcast distribution, this in no way diminishes the fact that, unlike any other public service institution, stations have the ability to directly reach into nearly every home in their markets. When the LSSRP team spoke to station partners, it was very clear that they recognize the power of our reach. Indeed, when we asked partners what they got out of partnering with public television, increased reach was the typically the first response. Partners also value the technical expertise that enables them to showcase themselves well on air, and they value the station’s reputation in the community, but it was reach that

was typically the primary motivator when they first considered the partnership.

The LSSRP analysis also provided a reminder that a station's reach doesn't merely provide access, it also results in usage. Because public broadcasters don't produce ratings on the level of the commercial broadcast networks, the significance of the viewership that PTV programming attracts is often underestimated. No cable network delivers more prime time viewers (on average) than public television's prime time lineup. Perhaps more importantly in the context of this study, the 0.5 to 1.0 ratings achieved by many local programs are sometimes disparaged – yet local PTV stations are the only outlets realistically available to local partners that are capable of consistently attracting this level of viewership (and, as noted below, this capability becomes even more valuable when licensees can add radio reach and listening to the mix).

- *Programming.* Trusted, quality content continues to resonate strongly with PTV viewers – and the powerful connection to the programs stations deliver was pervasive across all focus group participants and all markets.
 - ✓ In focus groups that were presented with open-ended questions about what their station offered and why they valued it, programming dominated all conversations.
 - ✓ In every market, when participants were asked what services their station provided, “quality programming” was one of the answers.

What this suggests is not that the other services stations offer don't matter or should be abandoned, but that the broadcast media is such a powerful instrument and provides such a strong connection to audiences that it overpowers all other services and activities.

- *The power of radio.* The LSSRP is first and foremost a public television study, but another strong reminder received from station partners and from stations themselves is about the value of that “other” air – radio. Station partners strongly value the reach and programming aspects of public radio as well as that of television, and also express appreciation for the greater frequency available through partnerships that include radio content. Some partners (e.g., the Cleveland Plain Dealer) made the decision to work with public broadcasting in large part because the relationship offered access to both a television and a radio outlet. This finding emphasizes the importance for joint licensees of using radio and television *together* to maximize their appeal to prospective partners, as well as to maximize the overall impact of the local services they provide. It also suggests that television-only licensees may want to explore opportunities to partner with a public radio licensee in their markets. As one station CEO expressed it, “If you don't already have a radio station, get one.”

Audience appeal and awareness of local programming and other local services.

The LSSRP analysis strongly confirmed the value of PTV programming, but also found that it is typically the “signature series” that generate that value. Programs including

Frontline, NewsHour, Antiques Roadshow, Nova and *Sesame Street* came up again and again in the focus group research.

In addition to the national programs, a handful of local programs contributed to focus group participants' sense of PTV's quality programming. Some examples included *This Week in Northern California*, WVIZ's *Feagler & Friends*, *Michigan Outdoors*, *New Hampshire Crossroads* and *California Connected*. Not surprisingly, the best local programs share two characteristics that CPB's Primetime study has identified as Audience Principles for primetime programming:

- These programs are *unique* in that they are distinct to their community, they act as a community voice, and they are matched to local interests.
- The programs are also *engaging* -- lively, relevant, and entertaining.

The focus groups (and ratings) suggest that when local shows hit both of these elements strongly, they rise to the importance and resonance of public television's best national programming – and contribute significantly to the sense of localism and local identity that were discussed above.

Unfortunately, not all local programs attain this status. In fact, when focus group participants were given a list of all the local programs in the market and asked to rank their viewing levels (frequent, often, rarely, never), we found that of the 50 regularly scheduled local programs, 80 percent or 40 shows were rarely or never watched by more than half the participants.

It is also notable that similar worksheets were provided to focus group participants on the other local activities that stations provided. Overwhelmingly, participants were unaware of these activities. Even when presented with lists of activities, almost none of the participants were familiar with the off-air services their station provided. This was consistently true in every market, and was even true among educators when they were shown lists of educational services. Not only was awareness low, but slightly over half the participants questioned the value or appropriateness of their station providing these types of services.

Implications for stations. Findings regarding local production lead to several conclusions relevant to local station operations:

- *Explore opportunities to leverage local production resources to lower costs and maximize impact.* If not doing so already, stations should evaluate the strategies being employed by several of the LSSRP case stations to lower local production costs and increase the impact of their local programming in the context of limited resources.
- *Support system efforts to identify process improvements that can potentially reduce the cost of basic broadcast operations.* Such improvements may provide the best opportunity to “free up” additional discretionary resources that can be used to fund local services and/or content acquisition.

- *Don't undervalue core assets.* Stations need to take credit for the national programs they provide -- to the audience, all programming is local because their station brings it to them. And, as discussed further below, stations need to recognize and make use of the power of their reach to potential partners.
- *If not doing so already, stations need to apply the same audience principles to local productions as those that should be guiding national programs.* Stations can take advantage of the Primetime research findings to think about local content in terms of its ability to fulfill the dual criteria of being unique and engaging. These criteria should of course be applied in the context of the target audience for the programming.
- *As noted previously, use multiple, tailored – but thematically consistent – messages for different stakeholders.* For the general audience, focus on programming. With major donors, provide a more holistic message that speaks to the station's localism in broader terms and reflects the range of services it provides. Finally, for providers of funding including state governments and universities, emphasize specific services a station can offer that are directly targeted to their needs.
- *Package distribution outlets to maximize the station's appeal and value to partners.* Because a station's primary broadcast service is such a precious commodity (both to the station and its partners), even very limited access to airtime can be a powerful incentive to partners. Several stations studied in the LSSRP have done an effective job of creating partnerships that achieve "frequency" via radio and the web, while driving initial awareness using a comparatively small amount of television time. Digital multicasting affords the added opportunity to provide increased television exposure. This "tiered" approach to partnering offers a means to meet partner objectives while lowering the cost threshold for partners and preserving the analog broadcast viewing environment.

Perspectives on Educational Services

After local production, educational services comprise the most significant local service category in terms of revenues, costs and FTE employees – and is the only local service category that operates at a direct "profit" for the system overall. But when evaluated on a deeper level, this category is a complex area dominated by a relatively small number of major providers.

The following discussion initially highlights the characteristics of the major educational providers, and then considers other stations offering educational services and the nature of the opportunities available to these stations. A list of the stations included in each category is provided in Appendix C.

The educational leaders. A total of 40 stations account for 80 percent of total education revenue. They dominate almost all sources of funding, capturing 90 percent of federal support, 80 percent of state funding, 80 percent of private funding and 77 percent of local government funding. Even among this group, the largest 20 licensees

are set apart from the rest – with an average of more than 15 FTE educational employees (compared to just over five for the remaining top tier stations).

The leading educational service stations offer a wide range of services, and in a number of instances are core participants in the evolution/deployment/management of educational media within their communities and/or states. They also tend to have other characteristics that make their success hard to replicate:

- *Licensee relationships.* Of the “top 20” educational licensees, 13 are licensed to either a state government, a university or a local authority.
- *Dominant funding source.* Within the “top 40,” 25 receive at least 60 percent of their educational services revenue from a single source, and most of the others rely on just two primary sources (e.g., funding from both state and local government).
- *Long educational history.* Nearly all of the “leader” stations without current, direct licensee-based educational businesses still have long educational histories.
- *Scale.* Most of the stations in this group (especially the top 20) are large enterprises, with average operating revenues of over \$25 million (\$18 million excluding WNET).

Although they are large organizations, for most of these stations, their educational activity still represents a major commitment. Overall, this group generates an average of over \$1.5 million in educational services revenues. Further, direct SABS-reported educational services expenditures total 7.6 percent of their total operating budget – and exceed 15 percent of the budget for many of the stations.

The middle tier. The 61 stations in the middle tier of educational service providers tend to be smaller overall enterprises than the leading educational stations, with average operating revenues of approximately \$8 million. Although they generate an average of about \$200,000 in educational revenues, these providers invest a smaller percentage of their resources in educational activities (typically 1 to 5 percent). These stations generally report a small deficit or occasionally a small profit on their educational activities.

Some key factors to consider about the stations in this group include:

- Based on a review of a sample of station websites, as well as discussions with the case study stations, educational services are typically not a major focal point for these stations.
- However, most of the stations in this group pursue a relatively diverse set of educational activities – including RTL, delivery of overnight instructional television, PBS TeacherLine and occasionally NTTI, and often some level of adult learning services (including telecourses and/or LiteracyLink content such as GED Connection and Workplace Essential Skills). Stations

exhibiting positive net income in this group often benefit from significant ITV/local government revenues.

- The service offerings of these stations are often opportunistic (i.e., stations follow grant money, sometimes so successfully that they become dependent on maintaining those grants because of the indirect support they provide to other staff or functions).
- A number of these stations appear to be exploring “incremental” opportunities to expand their role in education. Nine of the stations in this group are UnitedStreaming partners, Rocky Mountain PBS is offering an interactive learning service from PrivateLessons.net (and actively marketing this concept to other stations), and many appear to have added their “ready to work” services and/or entered community college partnerships relatively recently.

In sum, this group has historically exhibited limited interest in educational services (although this may be changing in some instances), and must overcome the challenges associated with the lack of a strong local presence in the educational community.

Remaining stations. Of the more than 70 remaining stations, educational services is typically a small, break-even business concentrated around Ready-to-Learn for most – while 15 stations report no revenues, expenses or staff engaged in educational services. (It should be noted that this group also includes a small number of licensees that appear to be active in education and/or have close institutional ties but allocate little or none of their institutional revenues directly to the educational services category. We do not believe the presence of these licensees impacts our overall analysis or conclusions.)

Overall, the stations with a modest educational commitment tend to be small (with average operating revenues of around \$5 million). Moreover, their educational service expenditures typically amount to less than two percent of their total operating revenues. As noted above, the largest source of educational services revenue for this group is PBS – reflecting the fact that their involvement in this area is dependent on access to Federal funding sources that enable services to be profitable or break-even on a direct basis.

Expansion in the educational services area by these stations appears contingent on the availability of Federal funding (e.g., for a service such as Ready to Work, which would represent a logical extension of their existing RTL initiatives) and/or the availability of one or more “turnkey” educational services options that would enable these stations to offer additional services with low risk and at low cost. Even with such options available, these stations may face challenges due to their lack of educational presence within their markets.

Educational services opportunities and challenges. As a general matter, it is important to recognize that each of the three tiers outlined above is faced with different options and challenges in the educational services category:

- For the major providers, there is a strong need to maintain their relevance and level of service to their major funding sources. This requires constant evaluating what emerging products, services, or distribution technologies can help the licensee remain distinctive. To this end, these providers need to

make the determination as to whether they can look within public television to find answers to their needs or must explore other options.

- Limited providers must understand the true costs of providing “off the shelf” services and they must set realistic goals in light of their limited resources. Specifically, management costs should be considered. Moreover, setting a realistic number of workshops, particularly if the staff wears multiple hats, is essential.
- In many respects, the moderate providers face the most difficult decisions. These stations must consider what role educational services play (and will play in the future) in their portfolio. If educational services are not able to subsidize other services, should they be a local priority? If educational services are going to be a strategic part of the local service portfolio, these stations must navigate through a range of similar, and sometimes competitive, offerings:
 - ✓ Do they use centralized services?
 - ✓ If so, from which provider(s)?
 - ✓ Do they customize for their community and to what extent?
 - ✓ If so, how do they manage the cost?
 - ✓ How do they communicate about their educational services and to which stakeholders?

Implications for station educational services. From a system perspective, there is value in continuing to support the extensive efforts of the major providers, as well as in continuing to provide turnkey options for the many stations with a very modest educational presence. However, the LSSRP research suggests that the system level growth opportunity (if there is one) in education seems to reside in the ability of the moderate providers to expand their educational role should they choose to do so. As such, a more specific focus on the needs of the moderate providers and the opportunities available to them may be warranted.

In addition to this perspective regarding the needs and incremental service options for the moderate educational service providers, the LSSRP project team is aware that some stations are exploring the potential associated with making a major commitment to education. Moreover, while most of the leading educational stations are very difficult to emulate, there are a few examples of stations that: (1) “don’t fit the profile” of the other providers; (2) have established a major position (or greatly increased their position) in education relatively recently; and (3) offer some insight into the process and factors required for stations that currently lack a major educational presence to develop such a position.

Based on the examples identified in this research and other analysis, key considerations for stations evaluating a major investment in the educational services area include:

- Having the right leadership and accepting the cultural differences associated with a major effort in education are critical. This includes bringing in staff with respected backgrounds in educational services (but not necessarily television or even media), and managing the education effort as a distinct business from that of the television station or integrated media operation. As Ideastream President/CEO Jerry Wareham noted, “the education area is our only remaining silo, and will probably need to stay that way.”
- With the right personnel in place, many stations may have the potential to be perceived as an “honest broker,” which is seen as necessary to establish a major educational role.
- While significant revenue potential exists in establishing a major role in education services, ongoing revenue streams are typically “break-even” opportunities when viewed on a direct basis. As such, the core education business will not necessarily alleviate funding issues in the overall television operation, and should not be viewed as a “solution” to a station’s resource challenges.
- That said, the experience of the example stations suggests that indirect benefits may be derived from a major presence in education. First, stations with a major educational presence often have a “seat at the table” in areas not normally accessed by public television. This may lead to opportunistic revenue sources, as well as position a station to access other types of public service contracts. Second, a role as a provider of formal education may benefit the station in terms of accessing business and foundation support – recognizing that these sources are often interested in funding education, but typically view public television as a “quasi-educational” entity.
- Finally, KLVX’ experience suggests the potential for enhancing a station’s web presence (and perhaps even its audience) through establishing a strong educational services role. This potential is further supported by the characteristics of many emerging educational services (that are often web-based), and ultimately could help stations to overcome some of the current limitations of their web operations in terms of attracting visitation and usage.

The Digital Transition

As indicated earlier, the focus of this phase of the Local Station Services Research Project was on developing a more complete understanding of the opportunities and challenges associated with existing services rather than on consideration of new services made possible by the digital transition.

Similarly, most system-level attention to the digital transition so far has been focused on digital infrastructure, and to some degree the development of content and services at the national level. Examination of the local service dimension of digital technologies has been left largely to individual stations.

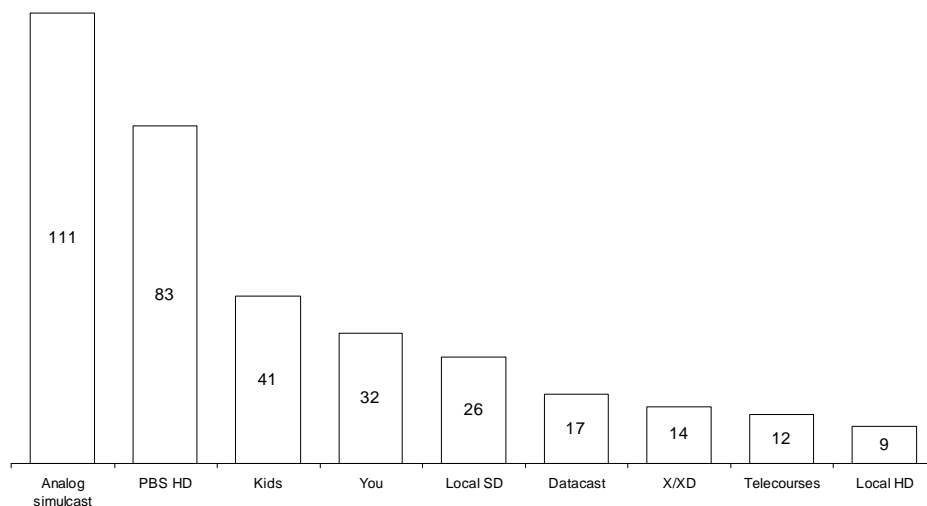
Current status. The public television system has accomplished a great deal with respect to the digital transition. Over the last five years, extensive fundraising, design and construction has resulted in 287 stations delivering a digital signal today and the expectation that 99 percent will be providing digital television by 2006.

Public television is also delivering digital content, although the vast majority of this content is a direct extension of what we provide in analog form. In terms of making use of this digital investment, and translating it into value for our communities, the system is really still just getting started. Development of local digital content and services is still in a very nascent form, and finding approaches to funding this content is proving to be every bit as challenging (if not more) as sustaining funding for our existing services.

Local digital content and services can be considered in the context of three main types of applications:

- *High definition* – including both the delivery of high definition content developed nationally, as well as the production of HD programming at the local level.
- *Multicasting* – delivering multiple programming feeds, including packaged services as well as services assembled by individual stations. A PBS study completed in September summarizes the range and frequency of multicast services currently offered:

Number of Stations Broadcasting Each Digital Service, 2004



At the same time, Twin Cities Public Television's Minnesota Channel, FocusWest and a few other initiatives are examples of efforts to support the development and/or distribution of local multicast content in a manner that will be affordable to stations and local content providers.

- *Datacasting* – which has characteristics of both a service and a distribution platform. Datacasting today is still in a very nascent form, but a number of potential applications are being explored:
 - ✓ First, public health and safety applications have gained a considerable amount of attention. This includes such services as sending building blueprints to local fire and rescue teams, offering emergency preparedness training to nurses, or providing the capability to broadcast national data in the case of a major attack. Governmental entities are the primary “clients” for these applications, and (through APTS) a six-month project with the Department of Homeland Security was launched in October 2004. In addition, a few stations, notably Nashville Public Television, have been working with local governments to explore interest in these applications.
 - ✓ In addition, provision of K-12 services has been a focus. Datacasting would allow stations to provide content to schools via digital broadcasting. Such a service would be similar (and perhaps use content from) UnitedStreaming, Chalkwaves and AIMS, which today offer school districts an inventory of “bite-sized” content tied to state standards via broadband Internet connections. Use of datacasting would allow schools to avoid some of the bandwidth problems they have had with Internet-based delivery of these services, even with T1 connections. Alabama and Mississippi are two state networks that are exploring this option, while KERA’s Digital Network is attempting to launch this type of service (and also to support the public safety applications mentioned above) on a larger scale. They currently serve 90,000 students in two school districts and plan to roll out nationally. PBS’ Digital Classroom would also offer a comparable service, although delivery would not be limited to datacasting.
 - ✓ Finally, other research and development efforts are ongoing in this area, often led by university licensees or stations with close university ties. At Wisconsin, for example, the Evolving the Links project was designed to study possible digital applications. Similarly, at Texas A&M, KAMU is interested in exploring next generation applications together with the university.

Implications for digital services. As mentioned above, to date there has been limited concentrated system-wide discussion of how digital services can be put to the best and highest use – especially in the context of local station needs and objectives. Development of the Next Generation Interconnection System (NGIS) has raised some issues, and some stations have begun exploring solutions on their own. This may be the right moment, however, to explore the opportunities for digital content and service in a more directed way. While undertaking such an effort was beyond the scope of this initial phase of the LSSRP analysis, exploring digital options from a local station perspective appears to be a logical “next step.”

Conclusion: Acknowledging Local Value; Changing to Preserve It

Both literally and figuratively, public television is an industry in transition. The conversion to digital, a changing media landscape, increased competition from commercial media outlets and educational entities, declining membership and many other issues pose significant challenges. Terms like “relevance” and “survival” are used with growing frequency.

In this context, the LSSRP highlights the central role that localism and local services play (and must continue to play) in sustaining public television. Public television’s local presence, strong identity and pervasive reach are highly valued by viewers, members, educators and station partners. Moreover, when pursued effectively, local services and a strong commitment to community engagement are essential parts of establishing and maintaining a differentiated and valued position in today’s competitive environment.

At the same time, the LSSRP illustrates the threats to public television’s local presence – including limitations on the portion of unrestricted revenues available for local services, local production deficits, and challenges relating to membership and other funding sources. Its findings suggest that responding to these threats requires a commitment to change – change in station cost structures, change in approaches to community engagement, and a systemic view of localism as an opportunity rather than an obligation.

In short, the LSSRP should serve to strongly reinforce public television’s belief in the relevance of its local institutions – yet also sound a note of caution that adaptation is essential to sustaining the future value of these institutions and the system as a whole.

APPENDIX A. List of Participating LSSRP Case Study Public Television Stations

Participating LSSRP Case Study Stations

Georgia Public Broadcasting (Atlanta, Georgia)

Iowa Public Television (Johnston, Iowa)

New Hampshire Public Television (Durham, New Hampshire)

KAMU (College Station, Texas)

KBDI (Denver, Colorado)

KNPB (Reno, Nevada)

KQED (San Francisco, California)

WHYY (Philadelphia, Pennsylvania)

Wisconsin Public Television (Madison, Wisconsin)

WTVS (Detroit, Michigan)

Ideastream/WVIZ (Cleveland, Ohio)

APPENDIX B. Work Papers Detailing the Processes Undertaken By Selected Public Television Stations In The Areas Of:

- **Communication and Promotion**
- **Organizational Re-Design/Personnel Changes**
- **Partnerships**
- **Performance Metrics**
- **“Listening”**
- **Strategic Planning**

PROCESS SUCCESS FACTORS CASE EXAMPLES: COMMUNICATION/PROMOTION

Summary

- *Statement of Problem/Challenge:* Public television station promotional efforts are often inadequate/ineffective -- constrained by resource limitations, on-air break format and the “preaching to the converted” characteristics of PTV on-air promotion.
- *Logical Goals/Objectives:*
 - More effective and more frequent communication to the “converted.”
 - Finding approaches that provide access to the “unconverted.”
- *Key Success Factors:*
 - Radio relationships that facilitate consistent brand communication and (if possible) selective program-specific promotion.
 - Well-designed, sustained media partnerships (especially print) that create awareness within the community at large.
 - Well-designed, sustained cultural partnerships that provide messaging opportunities to specific target audiences.
- *Case Study Examples:*
 - Ideastream, WHYY, KQED relationships with radio station joint licensees.
 - Ideastream partnership with Cleveland Plain Dealer. (Possibly also WTTW/Chicago Sun-Times)
 - WHYY partnership with Philadelphia Symphony Orchestra.

Discussion/Case Example Detail

- Public television competitors (primarily cable networks) have smaller average audiences and overall reach than PTV, but promote their product and brands more effectively through the use of in-program breaks on their own air, cross-promotion on other networks owned by their parent companies, and via the use of purchased media. As executed by these competitors, none of these techniques is a realistic option for public television stations.
- In theory, as local, non-profit enterprises, PTV stations should be able to take advantage of the shared interests of local partners in order to overcome (or at least minimize the impact of) these competitive disadvantages. However, at present, use of partner-based approaches to attain promotional objectives is sporadic, and may not be structured in such a manner as to effectively build and sustain brand and service awareness over time. (Historically, most such efforts have centered around television critic/TV guide coverage of specific programming – sometimes local but most often national.)

- At the case example stations, strong brand promotion and/or even tune-in promotion are part and parcel of local media and cultural relationships. This is sometimes a result of specific “deal parameters” contained in a partnership agreement (i.e., WHYY) and other times a “quasi-intentional” by-product of a well-executed content relationship (i.e., Ideastream).
- In Cleveland, TV station WVIZ and radio station WCPQ explicitly cross-promote each other’s programming, encouraging viewers and listeners to tune in to content likely to be of interest to their respective audiences. Our interviews suggest that this seemingly basic strategy is not widely employed even among joint licensees.
- In both Cleveland and Philadelphia, locally produced radio content is a key element (perhaps the key element) in driving and sustaining awareness of the overall brand for these organizations, as well as in driving and sustaining awareness of their local service initiatives.
- In Cleveland, Ideastream is regularly credited and featured in the Cleveland Plain Dealer, as a result of the *Quiet Crisis* partnership between the two organizations. On at least two occasions, Ideastream and certain of its programming have received front page exposure.
- In Philadelphia, WHYY’s partnership with the Orchestra is a seven-year agreement that primarily encompasses content development and delivery, but also includes specific promotional obligations that each of the two partners must make available to the other. For WHYY, this includes full page exposure for its arts/cultural service in the Orchestra’s handbills, as well as signage and other recognition at an annual “sponsored” Orchestra reception.

Impact/Station Benefits

- Ideastream and WHYY both monitor community awareness of their brand, as well as perceptions of the services that they provide. In both instances, brand awareness has increased significantly over the past few years – although this is believed to be a function of several factors, not just the communications/promotional approaches highlighted above.
- Despite these efforts and the recent improvement, it is apparent that further progress is needed. Ideastream reports that 15 percent of the community is currently aware of Ideastream on an unaided basis – with an eventual goal of 30 percent.
- Ideastream research indicates that the community believes it is viewing and listening to Ideastream’s outlets more than in the past, and research suggests that it is outperforming peers on this measures. Again, however, this is a function of factors that go well beyond promotion.
- Finally, across both organizations, awareness of local content/services initiatives is significantly higher among radio listeners than among TV viewers, supporting

the assertion above that a radio partnership is important to the success of multi-platform concepts of this type and is particularly effective in creating brand and service awareness.

PROCESS SUCCESS FACTORS CASE EXAMPLES: ORGANIZATIONAL RE-DESIGN/PERSONNEL CHANGES

Summary

- *Statement of Problem/Challenge:* A number of public television stations seek to change their business/service models to adopt a multi-platform approach, and to increase local service in an increasingly “digitized” media environment. Other stations perceive new service opportunities (e.g., through entering the educational services market; through “re-forging the links” with their university; etc.) that they have interest in exploring. In both instances, however, existing station organizational structures and/or personnel may not be well-suited to pursuing these objectives.
- *Logical Goals/Objectives:*
 - Establish an organizational structure that is designed to function effectively in a multi-platform environment (if applicable), and that meets the particular goals/objectives of the station.
 - Put in place the infrastructure necessary to pursue new lines of business that may require different skill sets than are currently resident at the station.
- *Key Success Factors:*
 - A vision for the “end-game” structure that is consistent with the organization’s overall strategy and the services it intends to provide.
 - Attention to the “cultural” challenges created by structural changes.
 - Recognition of the long time frame (and the strong, sustained management commitment) needed to implement large-scale changes, and establishment of a transition strategy to move toward the eventual goal in an evolutionary fashion.
 - Recognition that some new services may require leadership/expertise not currently within the organization.
- *Case Study Examples:*
 - Ideastream and WHYY are in different stages of fundamental re-organizations, and have used somewhat different processes and defined somewhat different structures for achieving their objectives.
 - KAMU has re-organized to gain efficiency, as well as to tailor its organizational structure to fit the interests/objectives of its university license holder.
 - Detroit has re-organized to more effectively and efficiently create local content.

Discussion/Case Example Detail

- *WHYY*. Over a period of approximately four years (1998 to 2002), WHYY transitioned its organizational structure from the 1998 TV, radio, education silos to the current operating structure that is organized around content strands. The structure itself and the process used to accomplish the transition and sustain the new structure are briefly summarized below:
 - WHYY is organized based on service strands, rather than distribution platforms. Specifically, there are five principal service strands (Wider Horizons, News/Public Affairs, Arts/Cultural, WHYY Kids and WHYY Adult Learning Service). Each strand is managed by an Executive Director, whose responsibilities include both managing content development for the strand using all available platforms (i.e., TV, radio, Internet, and “civic space” – which subsumes anything off-air or off-line) and establishing relationships and “long-term deals” with partner organizations. WHYY acknowledges that the lion’s share of “real estate” within the organization continues to be devoted to the traditional TV and radio platforms, but emphasizes that each of the four pathways are viewed as equal in the WHYY production model. Further, as this approach implies, each of the pathways is “subordinate” to the market segments/content strands that drive the organization’s focus. Finally, within the new structure, WHYY producers are involved in all types of production (i.e., they may produce a radio show one day and a television segment the next).
 - WHYY’s transition was accomplished in two primary ways: (1) by “forcing” selected staff into broader and deeper roles, and (2) by fostering a related, but slower cultural evolution. The first part of this effort was achieved by identifying key “veterans” within the organization with high levels of credibility among the rest of the staff, and “investing” in the willingness of these veterans to experiment. Once these leaders set the example for the more integrated structure, we have been told that others followed willingly. To this end, it is emphasized that the organization’s labor union has now “accepted wholeheartedly” the new model – and appreciates the recognition given to the value of their members.
- *Ideastream*. In creating Ideastream in 2001, three organizational charts were created. The chart that took effect at the time of the merger maintained three largely separate “service providing” organizations (TV, radio and educational services) – with TV and radio reporting to the COO (the former radio station GM) who then reported to the CEO, while educational services reported directly to the CEO. Marketing, finance/administrative, capital campaign/major donor efforts and community development/outreach were combined. The transitional structure (in effect since early 2003) combines technical activities and begins to integrate content activities. The “mature” organizational structure, which is anticipated to go into effect in about a year (again, following a transition period of about four years), establishes an executive management team that oversees five fully integrated functional areas (Content, Connectivity, Education/Community Outreach,

Marketing/Development, and Finance/Administration). We also understand that Ideastream uses “content teams” on individual projects. The role and composition of these teams will need to be explored further.

- *Ideastream Educational Services.* Following the Ideastream merger, the organization has substantially expanded its educational services activities, generating significant incremental revenues. Key to developing this new service area was the decision to hire a former school district superintendent to run the area, and to bring in an individual with distance learning/technology expertise to support the department head (this individual now runs educational services). Neither of these individuals had any prior background in television, although the department still provides ITV.
- *College Station.* Educational Broadcast Services houses KAMU-TV, KAMU-FM and TTVN (a videoconferencing network/WAN) at Texas A&M. Within EBS, TTVN accounts for more than half the total budget, with the TV and radio station sharing the remainder. EBS has recently been re-structured so that its staff of 35 is highly cross-functional, having responsibility for aspects involving both TTVN and the station operations. This has been done because EBS’ key “customer” (the university) is far more supportive of funding requests relating to TTVN (seen as a vital university internal resource) than for the stations (which it remains somewhat ambivalent toward). The organizational transition to this structure has been difficult, but the station has nearly completed the process, which has included integrating master control functions under the TTVN umbrella. More information on this will be obtained. Although TTVN is key to EBS in College Station, most major universities have similar units – just not typically connected with (and often competitive with) PTV. This raises clear questions as to the applicability of the A&M model to other stations (even university licensees).
- *Detroit.* Detroit has made a few organizational changes to more effectively and efficiently create local content. While not a large reorganization, changing two key personnel is paying large dividends in its local production activity. The attitude change that came in with the new VP of Production has resulted in quicker response time, lower budgets and more programming on the air. Changing the CFO has led to better and more timely reporting of expenses and a much more accurate and useful picture of the financial results for local production.

Impact/Station Benefits

- Functionally, transitions like those underway or recently completed in Philadelphia and Cleveland appear essential for stations that truly seek to function as multi-platform providers and to integrate both content creation and fundraising activities across platforms. Further, they enable the organization to communicate with a single voice to existing and potential community partners.
- Further, there are indications of operating efficiencies available through the types of integration described above as well. These will be explored further.

- Finally, in spite of the potential benefits, it is essential to acknowledge the cultural challenges and organizational commitment required if these types of changes are to be successfully accomplished and sustained. There is some indication that the transition at WHY Y has placed considerable stress on the organization, and KAMU management also emphasizes the difficulty of securing “buy-in” to these types of changes. Thus, while such re-structuring “looks good on paper,” caution (and considerable advance preparation of key staff) is warranted before proceeding.

PROCESS SUCCESS FACTORS CASE EXAMPLES: PARTNERSHIPS

Summary

- *Statement of Problem/Challenge:* Public television stations are often viewed as a difficult partner, arrogant and controlling with a “give me your money and go away” attitude. With localism as an important goal, public television stations are well-advised to seek strong local partnerships.
- *Logical Goals/Objectives:*
 - Increasing public television’s impact and effectiveness in serving its community.
 - Tapping into new resources (audiences, skills, money, connections etc)
- *Key Success Factors:*
 - Finding partners with mutual interest, shared values, complementary skills and resources, and cooperative attitudes.
 - Identifying community needs
 - Having organization leadership commitment in all partners
- *Case Study Examples:*
 - Ideastream (WVIZ) partnerships with The City Club, The Cleveland Orchestra, Rocky River Schools and The Cleveland Plain Dealer.
 - KNPB (Reno) partnerships with The Nevada Humanities Council, The Historic Preservation Office of the State Department of Cultural Affairs, Nevada Department of Education and The University of Nevada Reno.

Discussion/Case Example Detail

- Public Television can offer the power of television distribution, its ability as a storyteller and its reputation for respected content. Among the things it often needs more of, to fulfill its mission, are money, connections, other media outlets and formal credentials (e.g. as an educator). The best partners are those who need what public television has and have what public television needs.
- In addition to partners being complementary they must be compatible. Mutual trust, respect and willingness are characteristics of good partners. Trust gives each partner the ability to do what it does best. Respect goes beyond the moral and ethical implications of trust and is granted because of the partner’s’ abilities and values. Willingness depends not only on those active in the partnership but also on organization leadership’s support.
- Ideastream believes that by leveraging the resources and outreach capabilities of partners, it can move beyond media’s historic role of simply bringing attention to

- problems. It believes that by partnering it can help solve problems. Ideastream's Listening Project has been a key element in its pursuit of partnerships. By intently listening to its community it has identified what content and which partners to pursue.
- The City Club Forum is an hour-long program WVIZ started televising in the 1970s. In 1996, WVIZ management wanted to get involved in the production of the program, so the current partnership (among The City Club, WVIZ, and Adelphia cable) was formed. The City Club brings national reputation with high-quality speakers, and WVIZ offers the opportunity for that "product" to be distributed much more widely. This has made the program much more fundable.
 - The Cleveland Orchestra has a world-class reputation, through broadcast Ideastream brings their music to a much larger audience while fulfilling its artistic and cultural mission. While funding remains a challenge, the partnership is accomplishing something neither party could do alone.
 - Ideastream's partnership with The Rocky River School District brings together the school district's first-hand knowledge of the needs of the learners, and Ideastream's expertise in technology and its valuable "communication vehicles" like newsletters and the web site. As a result Ideastream's standing in the educational community has increased and more educational projects have been brought to the organization.
 - The Cleveland Plain Dealer and Ideastream have a partnership called The Quiet Crisis. It refers to the problems Cleveland faces and is a collaborative effort to find solutions. This cross-media partnership is very powerful. It has resulted in a large increase in newspaper exposure for Ideastream.
 - KNPB in Reno is a relatively small station that has increased its impact through partnerships. It is seen, in its community, as a very good partner. The recent focus group interviews of KNPB's partners were very positive. The partners appreciated the good fit, the good people and the good reach that KNPB brought.
 - The Nevada Humanities Committee provides grants to groups involved in humanities-based projects. It has been working with KNPB for a number of years on humanities-related programming. This relationship began with the development of "The Nevada Experience," original programming related to Nevada history. Now, the Nevada Humanities Committee is funding a program called "Book Talk"—a roundtable book discussion with people from around the community. The Committee feels that public broadcasting is very important for them because it allows for greater visibility—a way to provide the humanities program to people in outlying areas.
 - The State Historic Preservation Office first became involved with KNPB roughly two years ago. During the past two years, the Historic Preservation Office of the State of Nevada Department of Cultural Affairs has partnered with KNPB on three projects: 1) *The Riverside—The Art of Renovation*, A program on renovation of The Riverside, a historic hotel in Reno. 2) *Historic Nevada* A series of short pieces featuring historic buildings throughout the state that have

received funding through the Commission for Cultural Affairs and 3) Non-broadcast video for schools: An offshoot of The Riverside project created for distribution to schools. The video provided an in-depth look into the construction of the hotel built in 1927, focusing on architecture and how the hotel design came about.

- The relationship between KNPB and the Nevada Department of Education began many years ago. Currently, they work together on the NTTI (National Teacher Training Institute) and individual teacher workshops. In addition, the Department of Education provides funding to help KNPB with a yearly meeting for Nevada teachers.
- The University of Nevada's partnership with KNPB on the Family Storyteller project began about seven years ago. The broad goal of the Family Storyteller project is to increase the literacy and language skills of children ages 3 to 7, and their families—in particular, among low-literacy or at-risk segments of the population. The university had very specific motivations for working with KNPB: its broadcast technology and its vision of community education that dovetailed with the university's own plans.

Impact/Station Benefits

- Ideastream is all about partnerships. The City Club, Cleveland Symphony and school district examples showed how Ideastream's reach and broadcasting expertise when combined with partner's content, brought more quality content to the community. The Cleveland Plain Dealer partnership showed how community impact can be increased through broadcasting partnering with a powerful print media organization.
- KNPB's partnerships show how a small station can increase its impact through partnering. Its partners brought funding and expertise that complemented KNPB's expertise and increased its service to its community.

PROCESS SUCCESS FACTORS CASE EXAMPLES: PERFORMANCE METRICS

Summary

- *Statement of Problem/Challenge:* Many public television stations lack concrete measures of the performance/impact of the services they offer. In addition, many stations that do track certain performance measures lack an established process for monitoring trends in those indicators over time. Certain of these measures could, if available, facilitate station efforts to attract community support.
- *Logical Goals/Objectives:*
 - Identifying performance metrics that serve as meaningful tools for measuring the “internal success” of the organization.
 - Identifying impact metrics that serve as meaningful tools for measuring the “external success” (i.e., influence on the community) of the organization.
 - Establishing a process for tracking trends in these metrics over time, and for ensuring that success in achieving goals created for the metrics is an element of how the organization evaluates itself and its management.
- *Key Success Factors:*
 - A well thought-out strategic plan that defines the organizational vision/mission, the success factors necessary to achieve the mission, and the measures that will indicate the organization’s progress on these success factors.
 - Regular progress reports, and integration of performance metrics with the annual budgeting/planning process.
 - Measurement of performance relative to peer organizations in the station’s market, as well as relative to other public television organizations.
 - (Possibly) Linking management compensation to achievement of performance metric goals. (This is done in Philadelphia, but could be culturally problematic in many locations – perhaps including Philadelphia.)
- *Case Study Examples:*
 - Ideastream has established a series of specific departmental/functional, financial and impact goals, and tracks progress toward these goals on a quarterly basis.
 - WHYY has created a series of 24 performance metrics, and has also developed a set of criteria that must be met by any partnership/content initiative that its strand executives intend to pursue.

- KQED, for its SPARK arts program series, established a specific set of objectives that were measured by a combination of qualitative/subjective measures.

Discussion/Case Example Detail

- Ideastream established a strategic vision predicated on the belief that community engagement leads to partnerships, positive perceptions and audience use/growth. These in turn increase loyalty and translate into financial success.
- In general, Ideastream performance metrics are drawn directly from the “process flow” represented by this strategic vision, and can be grouped into three categories:
 - *Community engagement measures.* These include an annual survey to measure content impact, perceptions and brand awareness, as well as tracking of the number of partner collaboration agreements. In addition, the number of teachers trained, the number of participants using partner outreach, and the number of new multiple media projects are measured. (Note particularly the measurement of participants using *partner* outreach; also, note that the sheer number of partnerships and projects may only be of marginal value as an indicator of success/performance.)
 - *Audience use and growth measures.* AQH and cume audience are measured against peer markets, as are web visitors and page views. (Goal is to achieve peer market comparability.)
 - *Financial metrics.* Focus was initially on membership, sponsorship and reserves, but appears to have expanded to include major donor and foundation support. Metrics are evaluated in relation to peer markets and annual goals, and are segmented by TV and radio.
- In its strategic planning process, Ideastream has also established a number of “infrastructure” goals designed to support both the above objectives and the evolution of the Ideastream organizational structure, and regularly tracks progress toward these goals. These primarily include administrative and technical elements, such as the development of a financial planning and modeling system and the transition to a technical infrastructure that enables fully digital multimedia programming and content production.
- As noted above, WHYH has similarly established a set of 24 metrics, details of which have not yet been provided. Notably, this station’s management team is compensated based in part on the organization’s performance against these metrics. Additionally, WHYH content strand executives are individually responsible for generating a specified percentage of “restricted” funds to offset the content costs for their strand, and (as noted earlier) must demonstrate that a proposed partnership meets a specific set of criteria.

- With guidance from listening to the arts community KQED developed the following goals for *SPARK*:
 - Improve the quality of life for Northern Californians by fostering civil discourse on the arts.
 - Build new audiences for the wide variety of arts and artists in the Bay Area.
 - Increase access to the arts for audiences who might otherwise be unable to participate.
 - Utilize the convergence of television and Internet technology to build a single point of entry into the Bay Area arts, linking artists with each other and audiences to arts organizations and existing resources.
 - Increase the capacity of KQED and BAVC to fulfill each institution's goals: KQED's goal to produce quality local programming in partnership with other premier Bay Area institutions and BAVC's charter mission to provide state-of-the-art resources for the independent production of public broadcast programming.
 - Support the goals of organizations seeking to strengthen art education in the schools..
 - Provide Bay Area content to the national public broadcasting system.
 - Develop and disseminate a national model for building a cross-platform delivery system for television, radio and web-based content.

Impact/Station Benefits

- Ideastream is achieving growth in nearly all performance metrics, although it is "behind plan" on overall financial objectives. TV financial performance has lagged, while nearly all other revenue sources are either on or ahead of plan. Substantial growth has been realized in nearly all community impact metrics except TV viewership, although (as mentioned above) several of these measures are not particularly meaningful in and of themselves (in our view).
- Based on limited data, similar results appear to have occurred over the last few years at WHYY.
- For KQED's Spark series, each targeted goal was measured. With respect to the general television audience, Spark, which was broadcast on Wednesdays at 7:30 pm and again Fridays at 11:00 pm, garnered an average .9 rating. The education objectives were all met or exceeded. (The target for teachers trained during first season, for instance, was 375; actual was 466.) Also, KQED completed an independent evaluation of all educational services. It measured user satisfaction and, for *SPARKed* users, asks respondents to rate their level of satisfaction for 20 factors on a 6 pt. scale. A typical factor, "Content was relevant to my teaching/learning goals" garnered an average 5.56 rating ("strongly agree"). Results of the evaluation are now being analyzed but it is clear that most respondents were very happy with their experience. The lowest average rating was a 4.49, for the factor, "Equipment necessary is available to me." In terms of impact to participants, a formal evaluation was conducted in October of last year, surveying artists and organizations that participated in the first 18 programs aired during the first season. In addition to audience measurements

the evaluator surveyed program participants and analyzed web activity for both the series website and program participants' websites. Result highlights included:

- Increased ticket sales and attendance at events, with many attendees referencing the programs and/or website as their source of information;
- Increased press coverage;
- An average 61% increase in activity on participants' websites during two weeks following appearance on the program;
- Specific examples of new networking and connection opportunities, including at least one new commission;
- An average weekly increase in *SPARK* website activity from show's launch through the first 18 weeks, suggesting growing interest among the broader population (including 8-9% of site visitors coming from outside the United States).
- Validation and increased name recognition in the arts community for the participants, particularly the lesser known groups and individuals. (Being on KQED elevates their status in the local arts world.)

While some measures of performance are qualitative and subjective (validation, for instance), participants were almost universally pleased with their participation and the relationship with the station and, according to survey respondents (81% of program participants), the series created quite a "buzz" in the arts community.

Finally, in the second season a viewer feedback effort is underway. Using an on-line viewer survey, (see <http://www.kqed.org/spark/surveys/audience.jsp>), direct mail surveys to known viewers and other audience measurement data, as well as phone interviews with randomly selected survey respondents, KQED expects to complete the data collection phase of the viewer feedback study in June and be ready with the analysis in July or August.

PROCESS SUCCESS FACTORS CASE EXAMPLES: "LISTENING"

Summary

- *Statement of Problem/Challenge:* Historically, most public television station leaders' efforts to learn about the needs and interests of the community were very informal, relying on general knowledge and personal contact with others in the community or, at best, a legitimate effort to comply the FCC's mandated "Ascertainment" process. In communications studies it is a well-documented truth that active listening is a critically important element of effective communication at the personal level. The same holds true for public service media organizations. Cleveland's Ideastream, building on Connecticut's Mapping the Assets/Connecting the Assets projects and other efforts, has engaged in the most ambitious listening endeavor in public television. Another example is the listening process KQED uses when they want to explore creating a new local programming/outreach initiative.
- *Logical Goals/Objectives:*
 - Gain a deeper understanding of what the community needs and wants from a public service media organization and what it will support
 - Establish on-going listening processes that inform management decisions and build deeper connections with members of the community and partnerships with community institutions
- *Key Success Factors:*
 - Leaders actively engage their organizations in a formal process to listen and learn what needs and interests are most important to the people they want to serve
 - Data is collected and synthesized in a way that can be used in making strategic decisions
 - Members of the community play some role in assisting the station in its decisions about how to address community needs and interests
 - Performance criteria and evaluations are used to measure results
 - Formal listening processes become an ongoing part of the planning/doing/measuring activity of the organization.

Case Study Example—Ideastream

New organization. Ideastream is the name of the new entity created by the merger of WVIZ and public radio station WCPN in 2001. The Ideastream case has been well documented and well publicized within the community of public television stations, and rightly so, because of its innovations in organizational structure and in how it approaches its relationship with the greater Cleveland community.

Listening launched. Beginning in the summer of 2001 Ideastream launched the most ambitious attempt in public television to learn what a community wants and needs. The project's primary goal was to seek information that revealed:

- The public's assessment of its community, its assets, its challenges, and its viability as a place to live;
- The public's level of social involvement, trust and community volunteerism;
- The public's ideas about the role public media might play in convening the community around issues of common need and interest.

Methods used to reach a broad and diverse sampling of the community included 12 town hall meetings; surveys conducted by phone, web, and mail (to members); surveys of staff members, advisory board; and surveys distributed at other community events (senior citizen resource fair, for instance). More than 300 people attended the town hall meetings and Ideastream received a total of more than 7,700 survey responses.

Decisions and actions based on results. Ideastream used the results of the Listening Project in their strategic planning. In the standard strategic planning framework, this became a primary component of their environmental scan and SWOT analysis. Three new multi-platform program initiatives were launched based upon what was learned:

- *A Quiet Crisis* addressed a variety of issues related to jobs, the economy, and the area's future;
- *Accents* addressed issues of family, community values and diversity;
- *Making Change* addressed what individuals can do to engage in economic development and strengthening their community.

Each initiative strives to serve as a catalyst for community engagement and each includes multiple media platforms, promotion across all media, and editorial programming partnerships with community organizations. Ideastream up some degree of editorial control compared with traditional broadcaster practices.

Evaluation and more listening. As a follow-up study, Ideastream conducted "Listening Project 2" utilizing user surveys for Ideastream programs and services. Survey results indicated that respondents believe:

- They are more active in their communities because of their connection with Ideastream programs and services;
- They are listening to and viewing more on both 90.3 fm and WVIZ; (greater increase in radio than TV);
- They are more aware of Ideastream and its projects;
- They endorse the Ideastream mission and vision;
- The value and impact of public broadcasting in the Cleveland community is stronger;

Ideastream will continue to use formal listening processes to help inform future decisions.

Case Study Example—KQED's SPARK

SPARK is a 26-part weekly half-hour television series, enhanced with web components and educational resource materials. The series was launched by KQED in March 2003. The series is produced by, for and with the arts community in the San Francisco Bay area. The manner in which KQED set out to engage the arts community and subsequently measure the results and impact of the series illustrates an advanced approach to listening to the needs and interests of the target community for the project. The series is now in its second season.

Design team and process. KQED's strategic planning process led them to consider increasing local programming and other services related to local arts groups, artists and events. While KQED has re-organized to some extent around content creation and delivery, most major new initiatives start with a base of either TV or radio and then augment with web elements, educational resource development and other components. The *SPARK* project design team included staff from several functional areas of the enterprise, including TV, radio, web, and underwriting. Research was conducted to identify a broad range of major and minor arts organizations and artists. Baseline demographic data was collected for the organizations including total numbers of people served the previous year and a breakdown by age, ethnicity and other factors. Project leaders then initiated a series of conversations with many organizations and individuals to determine their interests and needs, and asking how they thought KQED could help them achieve their goals. Fifty-two organizations and artists were selected to participate in the first season's productions.

Listening to the arts community was a major part of the initial formulation of the project concept. An independent producer familiar with the Bay area arts community was engaged to conduct research and development and create a proposal for series funding. A large part of her job was to interview more than 100 artists, representatives of arts organizations and arts educators. The focus of the conversations was to learn what KQED could do to help the organizations and individuals pursue their missions and goals and help build new audiences and support for the arts in the Bay area. Following the interviews and after developing a draft proposal, KQED convened a meeting of artists, organizations and educators to get feedback on the preliminary proposal and further engage them in the project design process.

Based upon these conversations and other research, a set of goals was developed for the series. Conversations with the Bay Area Video Coalition led to a co-production relationship with the station for the series. The person hired for the R&D effort was later engaged by the project as series producer, providing continuity in contacts with the arts community and facilitating an on-going dialogue.

KQED began to see the artists, arts organizations and educators as real partners in the process. That attitude manifests itself in productions/broadcasts timed to help promote a participant's upcoming event (gallery opening or theater debut for instance). In turn, the participating organizations promote the show using their own network connections. Executive Producer Louise Lo reports that the ratings for the series are erratic, ranging from a .5 to about 1.8. She says one factor seems to be the extent to which their "content partner" promotes the show. A commissioned evaluation near the end of the first season indicates that the program participants are quite pleased and can point to increased web traffic on their own sites (up an average of 61% in the two weeks following the broadcasts) and (anecdotally) increased ticket sales and attendance at their events.

The same listening process used to identify and engage and work with the arts community for *SPARK* is now being used again to design and develop a new initiative around science and environmental issues.

As a listening model, the KQED approach seems practical, effective, relatively inexpensive and replicable in other markets. A key success factor was persuading

people in the arts community that KQED was serious about wanting to help them achieve their goals. That represents a significant change from how public television stations have traditionally approached program production design.

Content partners. As noted above, through an evolutionary process that began with actively listening to artists, arts institutions and arts educators, the arts community became engaged and ultimately became essential partners in making and promoting the series, establishing the *SPARK* website as an arts portal for Bay Area and developing highly successful, standards based curriculum elements for classroom use.

Co-production partner. *SPARK* was created in partnership with the Bay Area Video Coalition, a major player in the independent video arena—a group with which KQED has sometimes had a less than cordial relationship. During the R&D process, which included "listening" to more than 100 artists, representatives of arts organizations and arts educators, KQED had conversations with BAVC ("BayVac") and those conversations led to a co-production arrangement. About half the field segments (at least two per show) are shot with independent directors, videographers, and other crew engaged by BayVac, and KQED staffs the other half of the shoots. In many cases the production team is "integrated" using some people engaged by BayVac and some KQED staff. While KQED retains ultimate content control, BayVac played a key collaborative role in the design and style of the production.

Internal partner. To make the production approach work the way it does required close collaboration with NABET, the engineering and production bargaining unit at KQED. While the series was still in the conceptual stage, conversations were held with union representatives and, more broadly with union members who would be involved in the production. By involving the union employees early in the process, they became partners in figuring out how to make the production plan work for a series that required "pushing the envelope" in terms of union/non-union crews, jurisdiction on field shoots, etc.

Website offers "listening" opportunity. With one of the heaviest trafficked web sites in public broadcasting, KQED has an excellent "listening" tool at its fingertips. They have (and use) the capacity to measure unique web site visitors, page impressions and duration of time spent by each person visiting the site, as well as the ability to track trends and patterns for website activity. Reports on website activity become a value way to gather and use concrete data that helps inform management decisions on many issues.

PROCESS SUCCESS FACTORS CASE EXAMPLES: LONG-TERM STRATEGIC PLANNING

Summary

- *Statement of Problem/Challenge:* The more volatile the environment and the more limited resources are, the more important it is for public television stations to develop, implement, evaluate and regularly update long-term strategic plans. Many stations either don't have an on-going planning/implementation process or the process doesn't lead to desired results for a variety of reasons. Many stations—perhaps most—lack objective data to inform strategic decisions. Consequently, those stations find it difficult to plan effectively for what local services to provide and what role local services should play in an overall strategic framework.
- *Logical Goals/Objectives:*
 - Improve the planning/implementation/evaluation process
 - Gather and use more objective data upon which to make decisions
- *Key Success Factors:*
 - Leadership is committed to an *on-going* planning/ implementation/ evaluation process—committed to *follow-through* at every stage
 - Decisions are made within the framework of the plan
 - Decisions are based on objective data where possible
 - Stakeholder groups are involved and engaged and kept informed

Case Study Example—Iowa Public Television

Several stations in our 11-station group exhibit the success factors listed above. KQED, WHYI and IdeaStream are good examples. We focus on Iowa as a case example because they represent a mid-size organization that has much in common with a large number of other station organizations. They are just completing a comprehensive planning process that exemplifies what stations with major budget challenges and institutional constraints can accomplish.

IPTV is an autonomous agency under the umbrella of the State Department of Education. The licensee is a board of governors appointed by the Governor and state education officials. IPTV is a state network with studios in one location outside Des Moines. In addition to a significant level of local (statewide) programming and a full NPS schedule from PBS, IPTV has a robust educational telecommunications program for K-12 and college students and teachers. IPTV's operating budget is \$18 million, about 1/3 of which comes from the state. The IPTV Foundation has primary responsibility for fundraising from the private sector.

Leadership commitment

As IPTV completes digital transition, it faces the challenge of shrinking revenues and expanding costs. IPTV management, governing board and foundation all committed to developing and implementing a new comprehensive strategic plan for the digital future. In the past, plans have been made but follow-through on implementation and evaluation have been lacking. Using a traditional planning outline as a guide, IPTV ascertained that expanding local (statewide) programming and partnering with other like-minded institutions should be a high priority. The governing board and foundation board have been informed and involved from the beginning of the process in mid-2003 and are committed to seeing the plan completed and implemented beginning July 1 of this year.

Decision-making with Plan framework

In developing strategies and sub-strategies to pursue four quantified goals, the Planning Leadership Group (management team) created a "strategy assessment criteria" template that ties the proposed strategy back to the mission, goals, relevant SWOTS, etc. It goes further in asking for specific partnership opportunities, sources of support, probability of revenue from further distribution and/or ancillary products, likely magnitude of impact for resources committed, performance measurement criteria, etc. Then, using a numerical rating system each proposed strategy is prioritized by the management team and by the joint governing board/foundation board planning committee. Once the strategies are approved and incorporated into the plan the performance measures defined in the assessment criteria become the metrics by which performance will be monitored on a quarterly and annual basis during the period of the plan. (The five-year plan will be rolled forward one year each year.) This methodical approach to strategy development and prioritization represents a major step forward for IPTV. Even so, it relies to a large extent on subjective, qualitative judgment and can be improved with the greater use of relevant objective data.

Data-driven decisions

Historically, IPTV has relied on readily available data such as audience ratings, column inches in the print media, and user/participant evaluations of some educational telecommunications services, along with a large measure of subjective judgment in making strategic and operational decisions. Management recognizes the need for gathering more relevant data, synthesizing the information collected and sharing the results with decision makers, and then actually using the data to inform the decisions they make. In the short run IPTV cannot justify significantly expanding the amount of money it spends to generate such data. However, they are developing processes to methodically capture, synthesize and report viewer/caller feedback, gather economic and demographic information from existing sources and similar low cost approaches.

Stakeholder involvement/engagement

An early step in the planning process was to identify what individuals and groups could have a significant influence on IPTV's ability to pursue its goals. These key stakeholders included staff, board members, viewers, members, legislators, PBS/CPB leaders and

others. A communications plan was developed for each of the most important stakeholder groups. Both the governing board and foundation board are actively involved in creating the plan. One activity was a joint boards retreat devoted to the strategic planning process. The communications plan for staff members includes extensive information sharing and multiple ways in which staff can formally and informally participate in the process. For instance, for each proposed strategy a team of four to six people is doing the work to develop it. Approximately 28 staff members are working on the strategy teams.

Other Examples

As mentioned in the Summary above, other stations in the 11-station study group excel in long-term strategic planning. The common factors among stations such as KQED, WHYY, and Ideastream are:

- In each case, the leadership of the organizations have made strategic planning and implementation a continuous process; the planning/doing/evaluating activities are at the core of how these organizations conduct business. One of the most common reasons strategic plans fail is because the leaders fail to follow through with implementation and performance measurement. The leaders of these organizations have learned that lesson and are fully committed to follow-through.
- These organizations all invest very substantial time and resources seriously listening to their constituents in the their communities. In the framework of strategic planning this is a critical part of their environmental scan and SWOT analysis. (See "Listening" case examples.) Not every station can invest in the same depth of information gathering and analysis, but most can adopt some of the processes they use and improve the quality of their own planning a great deal. Ideastream, IPTV and others have designed several tools and templates that would be useful to any organization seeking to improve its planning and performance measurement processes.
- The best practitioners of strategic planning not only collect data, they actually use the data effectively in management decision-making, in setting performance metrics and then actually measuring performance. While the logic of this practice may seem self-evident, many organizations that collect a great deal of data fail to synthesize the data and use it effective as a practical management tool.

Impact/Station Benefits

One universal finding among our study stations that excel in strategic planning is that providing local programming and related services is at the core of their existence today and in the future.

Station leaders who have committed their organizations to a vigorous and on-going process of planning/doing/measuring report important benefits: Among them are:

- A greater sense of connection with the community

- Greater focus and clarity of purpose among key stakeholders—staff, board, volunteers, etc.
- A more effective basis for determining who to partner with and what to expect from the partnership relationship
- A firm belief (needs to be verified) that the organization is more effective in serving its mission and more likely to be financially successful because of how they approach strategic planning, implementation and evaluation.

As IPTV and others have learned from past experience, there is one particularly onerous potential pitfall related to strategic planning. When management leads a planning process that requires the commitment of substantial time and resources from staff and raises expectations, it had better follow through with implementation in a timely manner and make certain all key stakeholder groups remained informed and involved in the implementation. When expectations are not met and staff gets the impression that "nothing ever changes" it is demoralizing, undermines management's ability to lead and makes it very difficult to engage again in a new strategic planning process at a later date.

**APPENDIX C. List of Public Television Stations Offering Educational Services,
Categorized by Level of Resource Commitment**

Stations Reporting Major Educational Services Resource Commitments

Larger Educational Services Stations

Category by Size	Call Letters	Location	Licensee Type
Medium	KCPT	Kansas City, MO	Community
Medium/Large	KERA	Dallas, TX	Community
Medium	KLRN	San Antonio, TX	Community
Large	KQED	San Francisco, CA	Community
Large	KTCA	St. Paul, MN	Community
Medium	NOVA	Falls Church, VA	Community
Large	OPB	Portland, OR	Community
Medium	WBRA	Roanoke, VA	Community
Medium	WCET	Cincinnati, OH	Community
Medium	WCVE	Richmond, VA	Community
Large	WETA	Arlington, VA	Community
Medium	WGTE	Toledo, OH	Community
Medium	WHRO	Norfolk, VA	Community
Medium/Large	WHYY	Philadelphia, PA	Community
Medium/Large	WNED	Buffalo, NY	Community
Medium	WNEO	Kent, OH	Community
Large	WNET	New York NY	Community
Medium	WPTD	Dayton, OH	Community
Large	WQED	Pittsburgh, PA	Community
Medium/Large	WTVS	Detroit, MI	Community
Medium/Large	WVIZ	Cleveland, OH	Community
Medium	KLVX	Las Vegas, NV	Local Authority
Medium/Large	KOCE	Huntington Beach, CA	Local Authority
Large	AETN	Conway, AR	State
Large	GPB	Atlanta, GA	State
Large	IAPT	Johnston, IA	State
Large	KET	Lexington, KY	State
Medium/Large	LPB	Baton Rouge, LA	State
Medium/Large	METV	Jackson, MS	State
Medium/Large	MPT	Owing Mills, MD	State
Medium	NETV	Lincoln, NE	State
Medium/Large	NJN	Trenton, NJ	State
Medium/Large	SCETV	Columbia, SC	State
Large	WPTV	Madison, WI	State
Medium/Large	KAET	Tempe, AZ	University
Large	KBTC	Tacoma, WA	University
Medium/Large	KPBS	Wichita, KS	University
Medium	KUED	Salt Lake City, UT	University
Medium	KULC	Salt Lake City, UT	University
Medium	KWSU	Pullman, WA	University
Medium/Large	WOUB	Athens, OH	University

Middle Tier Educational Services Stations

Category by Size	Call Letters	Location	Licensee Type
Large	CPTV	Hartford, CT	Community
Medium	HPTV	Honolulu, HI	Community
Large	KCET	Los Angeles, CA	Community
Large	KCTS	Seattle, WA	Community
Small	KEDT	Corpus Christi, TX	Community
Medium	KLRU	Austin, TX	Community
Small	KNPB	Reno, NV	Community
Small	KOOD	Bunker Hill, KS	Community
Small	KPTS	Wichita, KS	Community
Medium/Large	KRMA	Denver, CO	Community
Small	KSYS	Medford, OR	Community
Medium	KTEH	San Jose, CA	Community
Medium/Large	KVIE	Sacramento, CA	Community
Medium	MAINE	Lewiston ME	Community
Medium/Large	PPB	Fargo, ND	Community
Small	WCFE	Plattsburgh, NY	Community
Medium	WCNY	Syracuse, NY	Community
Small	WDSE	Duluth, MN	Community
Medium	WEDU	Tampa, FL	Community
Medium	WFYI	Indianapolis, IN	Community
Medium	WGBY	Springfield, MA	Community
Medium	WITF	Harrisburg, PA	Community
Medium/Large	WLIW	Plainview, NY	Community
Medium	WLVT	Bethlehem, PA	Community
Small	WMEC	Chatam, IL	Community
Medium	WMHT	Schenectady, NY	Community
Medium	WNPT	Nashville, TN	Community
Medium	WQLN	Erie, PA	Community
Small	WSKG	Binghamton, NY	Community
Medium	WVIA	Pittston, PA	Community
Medium	WVPT	Harrisonburg, VA	Community
Medium	WXXI	Rochester, NY	Community
Medium	KLCS	Los Angeles, CA	Local Authority
Medium	WLRN	Miami, FL	Local Authority
Medium	WSJK	Knoxville, TN	Local Authority
Medium	WTVI	Charlotte, NC	Local Authority
Medium/Large	APTV	Birmingham, AL	State
Medium	KAID	Boise, ID	State
Medium	SDPB	Vermillion, SD	State
Medium	WSBE	Providence, RI	State
Medium	WVPB	Beckley, WV	State
Small	KACV	Amarillo, TX	University
Medium/Large	KBYU	Provo, UT	University
Medium	KMOS	Warrensburg, MO	University
Small	KTXT	Lubbock, TX	University
Medium	KUAT	Tucson, AZ	University
Medium/Large	KUHT	Houston, TX	University
Medium/Large	NHPTV	Durham, NH	University
Large	UNCTV	Research Triangle, NC	University

Medium	WBGU	Bowling Green, OH	University
Small	WCEU	Daytona Beach, FL	University
Small	WDCQ	University Center, MI	University
Medium	WGVU	Grand Rapids, MI	University
Medium	WKAR	East Lansing, MI	University
Small	WKYU	Bowling Green, KY	University
Medium/Large	WMVS	Milwaukee, WI	University
Medium	WOSU	Columbus, OH	University
Medium/Large	WPSX	University Park, PA	University
Medium	WSIU	Carbondale, IL	University
Small	WSRE	Pensacola, FL	University
Medium	WTIU	Bloomington, IN	University

Smaller Educational Services Stations

Category by Size	Call Letters	Location	Licensee Type
Small	KAKM	Anchorage, AK	Community
Small	Kawe	Bernidji, MN	Community
Small	KCOS	El Paso, TX	Community
Small	KEET	Eureka, WA	Community
Medium	KETC	St. Louis, MO	Community
Small	KIXE	Redding, CA	Community
Small	KMBH	Harlingen, TX	Community
Medium	KVPT	Fresno, CA	Community
Small	KWBU	Waco, TX	Community
Medium	VETV	Colchester, VT	Community
Small	WCTE	Cookerville, TN	Community
Small	WFWA	Fort Wayne, IN	Community
Medium	WJCT	Jacksonville, FL	Community
Medium	WKNO	Memphis, TN	Community
Small	WLJT	Martin, TN	Community
Medium	WMFE	Orlando, FL	Community
Small	WNIN	Evansville, IN	Community
Small	WNIT	Elkhart, IN	Community
Small	WPBS	Watertown, NY	Community
Small	WTCI	Chattanooga, TN	Community
Large	WTTW	Chicago, IL	Community
Medium	WTVP	Peoria, IL	Community
Medium/Large	WXEL	West Palm Beach, FL	Community
Small	WYIN	Merrillville, IN	Community
Small	KGTF	Mangilao, Guam	Local Authority
Small	KSMQ	Austin, MN	Local Authority
Medium	KSPS	Spokane, WA	Local Authority
Small	WLAE	Metairie, LA	Local Authority
Medium	WNYE	Brooklyn, NY	Local Authority
Medium	WPBA	Atlanta, GA	Local Authority
Medium/Large	OKLA	Oklahoma City, OK	State
Large	WIPR	San Juan, PR	State
Medium/Large	KAMU	College Station, TX	University
Small	KCWC	Riverton, WY	University
Small	KENW	Portales, NM	University

Small	KNCT	Killeen, TX	University
Small	KNME	Albuquerque, NM	University
Small	KOZK	Springfield, MO	University
Medium	KTWU	Topeka, KS	University
Medium/Large	KUON	Lincoln, NE	University
Small	KUSM	Bozeman, MT	University
Medium	KVCR	San Bernardino, CA	University
Small	WBCC	Cocoa, FL	University
Small	WCMU	Mt. Pleasant, MI	University
Small	WEIU	Charleston, IL	University
Medium	WFSU	Tallahassee, FL	University
Small	WFUM	Flint, MI	University
Medium	WGCU	Ft. Meyers, FL	University
Medium/Large	WHA	Madison, WI	University
Medium	WILL	Urbana, IL	University
Medium	WIPB	Muncie, IN	University
Small	WQPT	Moline, IL	University
Medium	WUFT	Gainesville, FL	University

Stations Reporting No Educational Services Expenses

Category by Size	Call Letters	Location	Licensee Type
Small	ALASKA	Juneau, AK	Community
Small	KBDI	Denver, CO	Community
Small	KRCB	Rohnert Park, CA	Community
Small	KWCM	Appleton, MN	Community
Small	KYUK	Bethel, AK	Community
Large	WGBH	Boston, MA	Community
Large	WPBT	Miami, FL	Community
Small	WYBE	Philadelphia, PA	Community
Medium	WYES	New Orleans, LA	Community
Small	KOCV	Odessa, TX	Local Authority
Small	WTJX	Charlotte Amalie, Virgin Islands	Local Authority
Medium	KCSM	San Mateo, CA	University
Small	KRSC	Claremore, OK	University
Small	KRWG	Las Cruces, NM	University
Small	KUAC	Fairbanks, AK	University
Small	WNMU	Marquette, MI	University
Small	WTBU	Indianapolis, IN	University
Medium	WUSF	Tampa, FL	University
Small	WVUT	Vincennes, IN	University
Medium	WYCC	Chicago, IL	University