

MANAGING UPWARDS

Editors and their bosses

While editors need to manage their staffs, it would be wrong to ignore the need to manage relations with their own superiors.

Rule one: Know as much as you can about your boss and keep her/him informed, avoiding surprises.

Rule two: Ensure that this person knows your goals and abilities, and the pressures on you.

Rule three: Build a relationship of trust and honesty, ask for feedback and come with solutions.

*(Adapted from Lilian Dunlap,
Poynter Institute)*

Problems

Here are some suggestions on how to deal with difficult bosses.

1 Analyse what behaviour bugs you – including the possible reasons for it, and for your reaction to it.

2 Do not react in the heat of the moment – respond later.

3 Discuss, don't accuse – talk about what works in the relationship, and explain what is not working for you, with a focus on specifics.

4 Think about this: is it more important to be right, or to get what you want? Sometimes your bigger goal will be to smooth the relationship, rather than win a particular point.

5 As a very last resort, talk to the boss's superior.

*(Adapted from Bryan Monroe,
San Jose Mercury News)
– Guy Berger*



Getting strategic

No editor can afford to be drawn into the details of production to the extent that you never lift the proverbial snout from the grindstone. Strategic management is the hallmark of an editor's job, and it is based on three considerations:

- Synthesising knowledge of where the company is at.
- Setting goals against this background.
- Developing and managing a plan to achieve these goals.

Triangulating for traction

Contextualising these components are the vision, mission and values of the enterprise.

These are the bigger-picture aspects and, while they need periodic revisiting to adapt to changes, they should usually be valid for a year or more.

There are various takes on the meaning of vision, mission and values, but consider them as designating ends, means and morals:

Vision refers to the kind of impact/status/results the organisation seeks to accomplish in the long-term.

Mission is the general means to get to this end, i.e. the purpose and core business that you're in.

Values provide the moral rudder for the mission – how you steer through various ethical choices en route to the vision.

All three beacons should inform strategic management at any given juncture.

They are especially helpful in an era with the industry in flux. The media “destination” is unclear in a world of increasing information supply, and the “means of transportation” to that destination is highly uncertain.

For instance, should your vision be that your media house should become a leading niche player across several platforms? Is your mission or core business about newspapering or broadcasting, or is it more fundamentally about informing people through news (i.e. about content, not platform)?

It's hard to be definitive about these issues. That's why having values on the

table is helpful. They're what helps keep you to a course. So, although no one knows where the media is headed, it helps to look back at whence you came, and in particular to draw on what you and your company stand for.

These values are likely, of course, to be aligned with those of journalism in general and of our society as set out in the Constitution. Take them seriously, they give guidance to shaping and interpreting your vision and mission.

Check your vision statement:

- Is it actually a bundle of platitudes or is there tangible meaning?
- Is it realistic and achievable?
- Is it something that everyone in your company can easily call to mind?

From strategy to action

A vision and a mission are not the same as having strategic goals or objectives.

But such goals should express these more general issues: they should flow from them and in that way help you to prioritise and focus.

To develop and manage according to strategic goals, five activities are recommended:

- 1 A self-critical situation analysis: internal and external.
- 2 Setting the actual goals (including narrowing down the list, but also not forgetting goals concerning risk management).
- 3 Developing a strategic plan with priorities, budget and programme.
- 4 Communicating around the process and the product (i.e the plan).
- 5 Monitoring and evaluating whether the goals are being met.

For each strategic goal there should be specific programme actions, each with the following questions answered:

- Who is going to do it?
- When will it be done?



Keeping it visible: the values statement of the Vision Group in Kampala is up on the wall of the boardroom.

- How long will it take?
 - How much will it cost?
 - What other resources will be needed?
 - What priority should it be given?
- Check your goals:
- Are they driven by vision, mission and values?
 - Are there too many for anyone to remember?
 - Do they have a shelf life?
 - Are they SMART: Specific, Measurable, Achievable, Realistic and Time-related?

Where are we?

Three tools are often used for a critical analysis of your situation:

1. PEST analysis assesses the wider context in terms of:

- Political factors
- Economic factors
- Social factors
- Technical factors

2. SWOT analysis looks more closely at your organisation:

- Strengths (internal)
- Weaknesses (internal)
- Opportunities (external)
- Threats (external)

Identifying a strength can often reveal ways to exploit an opportunity. And, if you spot an internal weakness which can exacerbate an external threat, you can then take pre-emptive action.

3. Risk analysis, which usually covers:

- Possible trouble in regard to law and regulations
- External economic and environmental risks
- Problems in governance and management
- Financial factors (fraud, cash flow)
- Operational issues (eg technology)

Prioritising the risks, in terms of both the likelihood of them happening and strategic goals they can affect, lets you identify early-warning indicators that will signal when something is going wrong and enable you to develop contingency plans.

– Guy Berger

TEMPLATE

A business plan

Here's a format for writing up a strategic editorial plan (aka a **"business plan"**).

- Executive summary (circa one page)
- Company profile
- Vision, Mission, Values and strategy
- Market context: PEST and SWOT analyses
- Risk assessment
- Strategic goals
- Activities to deliver the product and achieve the goals (covering platforms, standards, staffing, skill sets)
- Financial plan
- Monitoring and evaluation plan
- Appendices

Negotiating budgets



Kevin Ritchie

Managing Editor of *Saturday Star*, Former *DFA* editor (1993-2002) and manager (1996-2002)

The most important thing to know about budgeting is that it is the key to editorial independence.

Far too many editorial types tend to glibly leave the messy end of the business in the hands of the accountants and then we tear out our hair in despair when we see what has been wrought in our names.

There's only one way around it and that's to get stuck in. Otherwise, make peace with the tedious refrain "there isn't budget for it".

Financial management, as much as human resources management, is a critical function of any business. However, it's even more important for editorial departments because we are, in the parlance, "cost centres" made up of people producing "intellectual capital".

We don't generate revenue. We're just a big debit every month on the balance sheet, which is what you might hear when you go to management meetings.

It's all a bit disingenuous since what we do makes everything possible: we create the content (the product), which is then sold (to readers or audiences) and

TRY THIS

The budget: tips for triumphing

1. Ideally, an overall budget should be built, brick by brick, from the bottom, with the most junior manager submitting budget proposals to an immediate senior manager – in accordance with the overall business plan.
 2. Budget proposals are seldom agreed without amendment, so anticipate enough time for consultation and negotiation.
 3. Only if you understand and operate budgets well, can you make a serious case for increases. Be able to show how an investment today can lead to savings or extra income-generation in the future. By understanding how line items related to performance, you are also in a position to explain what cuts could mean for quality of output.
 4. A budget is a plan that defines limits within which people are expected to work. Because of the fluid nature of media production, editors should ideally be empowered to vary expenditure within the limits. Know where you can shuffle money across categories when need be, what happens to salaries earmarked for unfilled positions, and whether you can retain and reallocate unspent funds.
 5. Be on top of budget management. You need have-and-know procedures for spending, and systems for monitoring allowances, reimbursements and cash flows. The knowledge lets you implement cost controls or reallocations when needed.
 6. Consider broad transparency, and a degree of devolution, around the budget. In these ways, you can involve staffers in taking responsibility for the budget. It can help general performance if people are aware of what things cost.
- (acknowledgements to Radio and Television News Directors Foundation and John Prescott Thomas: Broadcaster's Media Management Manual).*
– Guy Berger

MY EXPERIENCE



There's an old rule in broadcasting: the producer says the glass is half-full; the engineer says it's half-empty; the accountant says the glass is twice as big as it needs to be.

– John Prescott Thomas, *Broadcaster's Media Management Manual*



then onsold again to advertisers.

Without us there's no product. But all this is still no excuse to bury your head in the sand when it comes to budgets.

Own the process, understand the arcane terms and terminologies, and gird yourself for the annual budget meeting.

Do this by planning realistically for what you hope to achieve in the coming year.

If there's an election coming up, if you plan to launch a new editorial product, if members of your staff are pregnant and due to go off on maternity leave, plan for it. Put freelance or contract staff in your budget, provide a bit of fat in the salary line to pay merit increases and retain key staff, plan to buy extra equipment. Put together whatever it is you need to reasonably do your job.

Don't be ridiculous either. Keep in mind inflation and other "cost drivers", and work out your needs accordingly.

At financial meetings, you will be faced with the commercial realities of the newspaper or radio/TV station that you work for.

This is where, in good media organisations, there is a debate, there are com-

promises. But that only happens if you're well prepared. If you're not, one of two things is going to happen: you're either going to get steamrolled or laughed right out of the meeting.

Be prepared up front for what you are prepared to give in order to take. Most importantly, know what is not up for negotiation.

At the end of it, you will emerge with an editorial budget which, in the best media organisations, is yours to spend as you see fit in order to produce the best editorial content in your power. You may not exceed the budget, not without grovelling, but nor may anyone from any other department interfere in how you spend it.

That is the key to your independence. Don't ask me, ask Harold Evans, the legendary editor of the London *Sunday Times* who against his better judgement accepted the editorship of *The Times* from Rupert Murdoch.

He never got his budget. Within six months, he was effectively emasculated; by the end of the year he had been fired.

That's how important budgets are.

Vital importance of Chinese Wall



Raymond Louw

Editor and
publisher of
*Southern Africa
Report*

The Chinese Wall, newspaper-speak for the invisible division between editorial and advertising, goes back to a time when it was holy writ that the departments were kept well segregated; when it was accepted as vital for editorial integrity and independence that the advertising department did not intrude.

If space salespersons suggested what news stories should contain or how they should be run, the concept of a newspaper acting independently and publishing news in the public interest would be destroyed. Readers would quickly perceive that the interest being served was not theirs but that of advertisers – and stop buying the paper.

So the need to maintain that Chinese Wall between the two departments was not only a matter of principle but of survival. Incidentally, it also applies to the barriers between management and the circulation department, and editorial.

The need to attract advertising spend, the lifeblood of newspapers, goes hand in hand with striving to gain maximum readers and thus increased influence. The advertising aim is so generalised and intertwined with gaining readers that its influence on editorial is limited. Indeed, the financial backing and resources produced spurs papers to improve their news gathering and other services to achieve greater reader approval.

These principles may result in a subeditor placing a story about an air crash on the page carrying the airline's advertisement – because ideally the sub-editor is oblivious of the advertis-



ing layout.

Increasingly, however, the ideal is being departed from when advertising is not clearly defined or when special supplements on commercial or business topics – probably suggested by the advertisement manager because of the adspend potential – contain editorial suspected of being hidden advertising.

Journalists are concerned about the growing encroachment on their skills and being turned into copy-writers. But papers such as the London *Financial Times* insist on the editorial being done by their informed journalists because of their critical approach.

Also suspected is the manner in which big-spending advertisers – or powerful groups in industry, business, religion or politics – try to influence editorial content.

However, all this is far removed from the reverse-advertising influence practised by Russian journalists (and others) who demand fees from companies for placing puffery about them in their papers' news pages.

(Southern Africa Report is a weekly subscription newsletter which does not carry advertising.)

MY EXPERIENCE

Being an editor-publisher



Matthew Buckland

GM of publishing and social media at 24.com, former GM of *M&G Online*

You often find a blurring of editor and publisher functions in smaller, start-up media operations. Budgets are tight; people are expected to multi-task and do a bit of everything, so these senior roles are played by one person.

Yet it's not just in start-ups that you see this phenomenon, but also in the broader media where margins are becoming tighter. In many ways the editor role, in the traditional sense, is in decline. Apart from a few exceptions, editors no longer have the power they used to wield but may find themselves making "pragmatic" compromises.

Editors are often directors or shareholders of the media company they serve, again blurring this role.

In this age it seems unreasonable not to expect the editor to be a commercial animal as well as being an editorial one, keeping one eye on copy but also watching out for the company he or she works for. Or is it?

The Chinese Wall separating commercial and editorial functions is there to prevent a conflict of interest which may or may not affect the independence of editorial content and approach. The counter-argument is that in face of no other option, you need to opt for the pragmatic approach. Separate editor-publisher functions are often a luxury in a small publishing company.

The problems are mitigated if there is a sophisticated understanding of the different tensions around these roles

and what they mean for a company. As long as there is a sense that content is supreme, an editor can act against the short-term commercial interests for a longer-term gain that enhances the paper's editorial standing.

In many respects we have a mature market. Many advertisers understand the editorial-commercial divide; some don't and may threaten to withdraw their advertising – but it doesn't happen often.

In fact at the *Mail & Guardian Online* we often published critical stories of our successful telecoms monopoly, Telkom. Yet they are one of the bigger advertisers. Interestingly, the more critical stories we published about them, the more advertising they took out with us. It was obviously not our intention to be critical for the sake of being critical: we also sang Telkom's praises where it was due – regardless of the advertising they bought.

Advertising is there to boost an advertiser's brand and secure return on investment. That's its sole purpose, as far as we were concerned.

For three years at *M&G Online* we were in start-up mode, so for a while I was both editor and publisher. It would lead to internal conflict, but never to the wrong decision. In my mind, the principle of writing about the truth in the public interest reigned supreme.

That was the long-term vision, which in time would result in our success. Losing advertising contracts here and there were short-term losses that did not bother me.

When we grew bigger we split the editorial and publisher functions: I took a solely strategic and commercial role. I'd question the editor on stories, but he always had the last say.

It would lead to internal conflict, but never to the wrong decision.

View from management



Mike Robertson

Media managing
director of Avusa

This chapter comes with a health warning. The company which I now head has, in its various incarnations, been responsible for the closure of four newspapers in the past 25 years. All could have been avoided had the editors and managers involved observed the five protocols listed below.

1. Establish the ground rules (A)

The relationship between editors and managers in the South African papers I worked on in the '80s and early '90s was for the most part adversarial.

Bitter wars were fought as editors sought jealously to protect their domain while management responded by squeezing editorial budgets and blamed editors for circulation, printing or advertising failures that, in hindsight, had nothing to do with journalistic inadequacy but rather managerial incompetence.

Soon after I was appointed editor of the *Sunday Times* in 1998 I heard a speaker from the *New York Times* explain how that title had moved to address a similarly adversarial situation. "Editorial excellence is essential for profitability. Profits sustain excellence," was the formulation they arrived at.

I latched onto it and, serendipitously, had a publisher in Brian Pottinger, himself a former editor of the title, who agreed we should adopt the same philosophy. Had we not done so, the *Sunday Times* and the other Avusa titles which subsequently endorsed the same thinking would never have achieved the editorial successes, circulation and readership

growth (1,5-million readers in the case of the *Sunday Times*) or the record profit growth recorded over the past decade.

2. Establish the ground rules (B)

The most important document governing the relationship between an editor and management is his or her letter of appointment. My letter of appointment to the editorship of the *Sunday Times* made it clear that:

- While the board of directors of then Times Media Limited was ultimately responsible for the editorial policy of the paper, as outlined in the letter I was given the authority to interpret this brief on a day-to-day basis without interference from management.
- While I was expected to work with the commercial managers I was appointed by the board and had the right to address its members on certain defined matters.
- The letter also outlined what the board expected in terms of news reporting, commentary and, given that the *Sunday Times* is a commercial paper, stated that the expectation was that the paper would broadly favour a free enterprise system.

Significantly, however, the letter was silent on the kind of newspaper the editor was expected to produce, its mission, core values, the target audience and on any measure that would be used to determine whether the editor was performing his mandate or not.

When I later became CEO of the then Johncom media division, I discovered that all other editors' letters of appointment were silent on this subject.

All new editors' letter of appointment now contain an attachment instructing them to agree up front with their publishers to either endorse the mission statement of the paper they are to edit or to agree to a new mission statement in conjunction with their publishers.

If, as inevitably there will be, there are disagreements between editors and man-

agers about the direction a paper is taking, we return to these documents to help shape our decision-making.

By way of example the mission statement of the *Sunday Times* that Pottinger and I arrived at was: “To provide knowledge that enriches the lives of readers.” In hindsight we should have said “share knowledge” but back in 1998 reader interactivity was not viewed with the same importance it is now.

Reader research identified that KNOWLEDGE was the most important element that readers, who fell into the *Sunday Times*’ LSM 6-10 target audience, were looking for. They wanted information assessed and asserted by someone they TRUST. Being a Sunday paper they also wanted ENTERTAINMENT and a paper that could be read by the whole FAMILY. Those are the four core values of the Sunday Times. At other papers the values differ. COMMUNITY, for example, is the core value readers want from our Eastern Cape dailies.

The measures we use to assess whether editors are meeting the needs of readers in their target audience are:

- Circulation as measured by the ABC (Audit Bureau of Circulation).
- Readership as measured by Amps and Target Group Index (TGI).

In addition, every two years we conduct extensive research to ascertain whether the paper is perceived by readers to be providing the values they identified as core and determine whether new needs have arisen amongst the target market.

3. Codes of Conduct

Most South African newspapers subscribe to the Press Ombudsman’s code of conduct. In addition Avusa has its own codes and policies. They cover reporting on race, the acceptance of gifts and freebies, and editorial accuracy.

These codes are not only essential for good journalism but are important defences for editors against interference by managers or boards when, as is

increasingly the case, they come under pressure from politicians or business people unhappy that their indiscretions or criminal activities have been exposed.

4. Co-operation vs Interference

There are times when the strict walls dividing editorial and commercial need to come down. But it helps to define the parameters in advance so co-operation does not become interference:

- **Launch of new products, re-designs or re-formats.** My experience has been that when these are undertaken by either editorial or commercial in isolation they inevitably fail and cost a great deal of money. Our best results have been achieved when we appointed multi-disciplinary task teams and gave them the authority and responsibility to get on with the job.

- **Budgets.** The *New York Times* maxim mentioned above should be uppermost in both managers’ and editors’ minds when going through the budgeting process. Many newspapers are struggling and do not have large amounts of money to invest in editorial. At the same time, however, much of what passes for cost-cutting is simply short-sighted and bad management. My preferred option is to agree on an overall increase (fortunately we have not yet had annual decreases) with the editor or managing editor, and leave it to them to re-arrange their spending. I had this arrangement with Pottinger and was able to increase journalist’s salaries by over 30% in four years without ever exceeding the overall budget. The money came from savings in spending on stationery, transport and telephone calls, and by ensuring that when leave was taken it was recorded.

- **Printing.** Unless editors take the time to understand the limitations of the presses on which their papers are printed, they are doomed to be in constant conflict with their opera-

tions departments. Many SA papers are printed on old presses. Yes, management should, must and will invest, but such upgrading costs hundreds of millions of rand and is not achieved overnight. In the meantime, understand what fonts print better on the old presses and make more use of white space. Most importantly, agree on a production schedule that enables the paper to get out on time – readers might get annoyed that a paper does not have the latest sports results but they get even more annoyed when they cannot get it at all.

- **Deadlines and circulation.** Editors need to see the link between these. For example, if the *Sunday Times* is an hour late in going off stone, the last bundle off the press is delayed by an hour. That translates to about 10 000 fewer copies sold, as newspapers have a shelf life of only a few hours. If the paper is not available when readers go shopping, they are unlikely to go back to see if it has arrived.
- **Advertising measures.** Measures need to be negotiated as the economy grows or declines. But editors and managers should agree on both a minimum paging and a minimum editorial measure that will never be breached. For what it's worth, though, research indicates readers prefer smaller, tightly edited daily papers to the sprawling, insert-laden ones we tend to produce.
- **Ad sizes.** Newspapers have to compete with TV, radio and internet, all of which are introducing new devices to overcome advertising avoidance by viewers, listeners and readers. Unless we compete, newspapers will lose out to more innovative mediums and, as most newspapers in SA make money from advertising rather than cover prices, the results could be disastrous. Our approach is to be open to the more radical shaped-ads on pages where we carry essential information

(eg stocks and sports results) while sticking to conventional shapes on news pages. The final decision rests with the editor.

- **Sponsored features.** Ad departments constantly come up with requests to link commercial space with traditional editorial space. After years of rebuffing them we finally agreed to allow sponsorship, but limited to features such as stock prices, puzzles, the traffic, shipping, weather and sports results. In so doing, we believe we have not compromised the editorial independence of our journalists.
- **Surveys.** Nothing has done more to blur the lines between commercial and editorial than the manner in which newspapers are doing surveys. There is nothing wrong with a country survey as performed by the *Financial Times* or a Top Brands survey as conducted by the *Sunday Times* using Markinor research. But far too many surveys are commercial propaganda masquerading as independent editorial assessment. Readers are not fooled. For short-term commercial gain, titles that do this are undermining the integrity of their brands.

5. Communication

Editors are both journalists and managers. To fulfil the latter role it is essential they communicate clearly to staff and to management. However, every time we do a climate survey one of the primary concerns expressed by newsrooms is the lack of communication. International publishers report similar findings.

I don't have a solution other than to stress two points: an e-mail is not communication, and remember to keep staff abreast of not just editorial developments but also what's going on in the commercial side of the business.

Put in guidelines & communication



Sandra Gordon

Media entrepreneur
and publisher of
The Media
magazine

Poor definition is the root cause of confusion between the roles of editor and publisher.

While most dictionaries define the former as a person in charge of a newspaper or magazine, in reality publishers are in charge, too, and tend to call the shots because they are responsible for the bottom line. So the stage is set for tension and acrimony.

There are two main sources of complaint: commercial interference is often given as the reason for dissatisfaction among content gatherers, while publishers remain tight-fisted in the face of constant demands for increased spending on editorial.

This is where the tension usually manifests itself. However, more often than not, it is a result of lack of clear vision from the very top and of poor communication between the role-players during crucial moments – most notably as deadlines loom and stress levels reach epic proportions.

A financial examination of traditional media indicates that most media business models rely on income from the sale of subscriptions and copies plus advertising and sponsorship revenue.

Here are two common examples of the dynamics that have to be managed

on a regular basis:

1 **Sales people** report to publishers; they are seen as the breadwinners and are often pampered because of this role. They are prone to offering clients free editorial in return for advertising.

The editor then clashes with the publisher, maintaining the brand's editorial integrity is at stake. Who capitulates? The publisher could lose revenue and his sales person commission, but the editor stands to lose her reputation and sully that of the product.

If management sets strict editorial guidelines (a credo is preferable) and communicates these to all stakeholders including the clients, this clash can be avoided.

2 **Editors** run hard-hitting headlines often detrimental to corporate advertisers who then threaten to pull their advertising. A case in point was South African Airways, which resented certain newspaper exposés of the parastatal and its management. The newspapers stood firm under their policy of the public's right to know.

Sales are dropping and advertising revenue is following suit, yet the editor wants more investment in content. The editor should be given access to top-line financials with the assumptions, and the publisher should keep the editor in the loop as the year progresses.

Tough judgement calls are an everyday occurrence in media. With clear editorial and sales guidelines, and regular communication between publishers and editors, a great deal of the horrific dynamic that leads to frayed tempers can be avoided.

Sales are dropping and advertising revenue is following suit, yet the editor wants more investment in content.

Surveys and supplements



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The complex relationship between advertising and editorial is, at root, simple: advertisers are keen to be associated with quality content that is independent and critical, but which also portrays their products in a good light; commercial media rely on advertising revenue for economic survival.

Our research shows that, as print publications battle for profitability within the business cycle, there is growing pressure to appeal more directly to advertisers, to tailor-make products and deliver audiences in a host of new ways.

This has led to the creation of new structures within media organisations which plan thematically driven surveys and supplements paid for by advertisers, but which read like normal editorial content. Indeed, the rapidly growing client magazine sector is almost entirely geared toward publishing products that are designed to represent the interests and serve the clients of major corporates.

These developments, which reflect a global trend, have tended to blur the line between editorial content that is independently generated in traditional journalistic fashion and content that is "paid for" by a third party.

At times, newspapers have carried content in a "paid-for" supplement that



is at odds with items carried in the main news section.

An example of this was in The Star in 2006 when a news story portraying the squalor of downtown Johannesburg was contradicted by stories carried in a paid-for supplement later that month that touted the blooming gentrification of the same inner city.

Clearly, editorial integrity is under threat from new forms of advertising (such as supplements) as well as from new forms of media product (such as client publishing). This has implications for the credibility and quality of the product, and for journalistic professional and ethical practice.

Strategies to combat this encroachment on editorial integrity include firm guidelines over advertorial and paid-for content usage. These guidelines should include the clear signaling of content that is not generated by the newsroom, and also a requirement that reader and public interest must be an important factor in producing such content.

In addition, there should be a strengthening of media ethics knowledge within both news and advertising/marketing departments.

(Advertising in the News. Paid-for content and the South African print media – Adrian Hadland, Lesley Cowling and Bate Felix Tabi Tabe.

Download from: www.hsrcpress.ac.za/product.php?productid=2190)

Paid content in magazines



Ann Donald

Former *Fairlady*
editor and owner of
Kalk Bay Books

Case study 1

A market research focus group, discussing a magazine, was asked to select articles they had particularly enjoyed. One participant picked out a page on a treatment for a skin condition from which she suffered.

It was clearly marked “advertorial” and carried a packshot of the product. In all other instances, it looked like editorial. The woman had no idea it had been paid for, and thought the product picture was simply helpful.

The editorial team was taken aback: the reader had not understood that “advertorial” indicates “paid for”.

To add to the confusion, various words are used in different magazines: “promotion”, “advertising promotion” and “advertising feature” all obfuscate the source of the content.

For clarity, any page carrying paid-for content should be marked “advertisement” and should be different from editorial pages in design and writing style to ensure readers know the information is not editorially endorsed.

Case study 2

A fashion editorial spread draws from various boutiques, designers and retailers for clothing. A patterned dress is needed for one shot. There is a beautifully crafted dress from a small designer with no budget for advertising. And, from a large retail chain which advertises regularly in the title, there is a run-of-the-mill dress copied from a European garment sourced by the chain’s buyer on a “buying” spree on the continent six months earlier.

The fashion editor, highly regarded

for her style and taste, has to choose. Against her creative judgment, she selects the humdrum dress. The reader, who relies on the magazine for independent fashion advice, doesn’t know there was ever a choice. When she sees the small designer’s dress in another magazine, however, her loyalty may shift to the title that offers her quality information.

The big retail chains calculate the amount of “free editorial” they receive in return for their advertising spend. When it drops below an acceptable level, the editor may be pressured to encourage the fashion editor to be more accommodating.

Fashion and beauty editorial pages influence readers’ buying decisions, so advertisers badly want the apparently independent editorial endorsement. Because they place extensive advertising, they have power to call the shots for “endorsement”. And, because there are so many more magazines to which they can transfer their spend, publishers bend every which way to accommodate them. This is the coalface at which editors lose their jobs.

Know the line

A key function of any editor is to know where the line lies between editorial and advertorial – between readers’ interests and advertisers’ interests.

The advertisers’ intention is to persuade the reader their product is being recommended – editorial endorsement is trusted by readers who believe the editor is looking out for their interests. The publisher’s intention is to make more money by keeping the advertiser happy. The editor should understand exactly when these two interests are compromising those of the reader.

Ultimately, chasing advertising revenue at the expense of editorial quality and integrity will harm the title’s circulation as readers become disenchanted. Then everybody loses.

It's not just for editors

Across print, broadcast and online, editorial independence can be taken to cover some or all of four distinct realms.

1. Editors

The editor should have the clear right to make final decisions on day-to-day editorial matters. Such power flows from the fact that no editor should ever have to take responsibility (legal or otherwise) for content that is decided outside his or her authority.

The principle therefore secures the independence of an editor from arbitrary owner intervention, and is a bulwark against pressure from advertisers, sponsors and government.

Former *Telegraph* (UK) editor Max Hastings once had to assert his editorial independence against Conrad Black, the

paper's then proprietor and now a famous felon. He argued: "Conrad, if you are not happy with the paper, you would be wrong to keep me here even if I was working seven days a week. But if you think the paper is being competently run, then surely it's up to me how I do it?" (Hastings later resigned when his boss interfered in the appointment of staff).

Editorial independence for editors is intended to prevent any undermining of the position. While modern proprietors should be concerned with a triple bottom line for the business (financial, social and environmental performance), the editor also has to give special attention to journalistic performance.

Sometimes editors may also want to reserve a final say over advertising content, due to clashes with editorial ethics and the way certain ads can tarnish the medium as a whole. Even Rupert Murdoch agreed that Harold Evans, when editor of *The Times* (UK), could retain veto rights in this area.

What editorial independence does is put a parameter around the expectations of owners and managers vis-à-vis editors. This was recognised by bosses like the MD of BDFM, Mzimkulu Malunga, who told a Sanef workshop in 2004: "Editors need to be protected from bloodhounds like ourselves."

2. Reporters

Editorial independence is not independence purely for the "editor". It also applies, with some qualifications, to the need for reporters to be independent of their editors, especially if their editors cross certain boundaries. This right relates to the professional autonomy and responsibility of each rank-and-file journalist, and puts a check on abuses of editors' power.

Without this right, there is the danger of micro-management and disempowerment, as in the 2006 blacklisting of expert sources at SABC – a practice that the Sisulu Report found to have impacted "negatively on morale, initiative and an appropriate sense of ownership by

CHECKLIST

Are you independent?

Editorial independence for editors means having authority over all or most of the following:

- Day-to-day content (legally responsible)
- Appointment of staff
- Protection of staff from pressures
- Editorial quality
- Advertisements that tarnish brand
- Political reportage
- Source selection and usage
- Gifts and favours
- Conflicts of interest
- Pressures from advertising staff
- Surveys and advertorial
- Use of budget

But it is also limited by or subject to:

- Letter of appointment
- Vision, mission and values of the company
- Policy guidelines and stipulations (preferably written)
- Business/commercial responsibilities
- Reporting lines

executive producers, producers and presenters". SABC editorial protocols say that each staffer is responsible for output at their level, within a framework of consultation upwards, but in actual practice the power resided at the top.

The World Radio and TV Council, cited in the Sisulu Report, recommends an administrative distinction "between two levels of management: day-to-day business, on the one hand, and general policies and long-term decisions, on the other hand". According to the Australian Broadcasting Corporation, subject to normal editorial management and controls, programme-makers are responsible for exercising editorial judgement.

At the same time, editorial independence for journalists has to be within parameters laid down by their editorial seniors (and reporters should only take instruction from them – never from managers, boards, owners or advertisers).

3. Editorial as a whole

Overall, editorial independence also includes independence of editorial decisions from the exclusively economic imperatives of a media institution, and in particular from those staffers who are responsible for generating revenues for the business and not the integrity of editorial content.

Editorial independence was once described by Andreas Whittam Smith, the founding editor of the *Independent* (UK), as simply a promise to the audience "that everything you find in the newspaper represents the editorial team's own agenda and nobody else's; neither the advertising department's, nor the owner's, nor any political party's, nor any business interests".

4. In regard to non-industry forces

Independence from sources, even when copy is checked with a source, means that the decision about what to run with rests with editorial. It also means independence in regard to influences like gifts or favours that could compromise editorial.

To enhance credibility about editorial

independence, best practice involves transparently acknowledging any possible conflict of interests, such as stories about the owners themselves or about associated companies.

Limits of editorial independence

Former *Sowetan* editor Mike Siluma once wrote: "You can't expect someone to bankroll a publication and walk away without worrying what will be published. That's not the real world". This signals that most editors are not sovereign figures.

In South African history, perhaps the only case of an employee managing to oust his boss was the late Donald Woods, crusading editor of the *Daily Dispatch*. With his staff, he appealed to the company chair who immediately retired the problematic manager. In some foreign cases, like *Stern* magazine in Germany, an advisory board of seven editorial staffers can veto the appointment or dismissal of an editor-in-chief.

Usually, editorial independence does not operate in terms of conflict or power, but neither does it exist in a vacuum. It means only free rein within the bounds of the media house's values and policies. There is no licence by editors to violate journalistic ethics and the law. Or their employer's interpretation of these.

This can lead to the kind of letter that Harold Wodson, editor of the predecessor to the *Daily News*, received from his superior about his Rotary Club activities: "It is not advisable for anyone holding an important editorial position to be prominently associated with outside public work ... An editor should retain a complete independence concerning the activities of any body or institution whose activities are likely to become the subject of public controversy or discussion."

The context is well described by John Douglas Pringle, editor of the *Guardian* and the *Observer* in Britain and twice editor of the *Sydney Morning Herald*, who wrote: "Once an editor has accepted an appointment, he must be prepared to accept the right of the proprietor to

decide finally (on policy etc): he may prevaricate, but in the long run he must either resign or give in. After all, we live under a capitalistic system and a newspaper is a property like any other. The proprietor or the managing director of a newspaper can hardly be denied the right to dictate policy.”

Editor-employer relations

Editorial policy sets the parameters for the relationships between an editor and employer – and frames the terms around which differences can occur.

Usually, relations are convivial because employers tend to hire editors whose views accord with theirs. The result is that most editors are able to say that they never receive editorial directives from on high.

The common position has been set out by Victor Norton, who once edited the *Cape Times*: “My freedom of decision is guaranteed in a clause in my contract that reads: ‘Provided they do not involve any departure from the established and recognised policy and practice of the *Cape Times*, you will conform to all instructions and directions from time to time given by the chairman of the board of directors on behalf of the company.’

“In addition, the traditions of the *Cape Times* establish very carefully and forcibly that the expression of opinion is the function of the editor. In more than 20 years close association with the *Cape Times*, I have not known this requirement to be infringed or questioned, in the letter or the spirit, overtly or covertly, by any director or any officer of the *Cape Times*.”

Where tensions nevertheless arise, most editors have to “accept the fact that in the final argument about policy or anything else the proprietor’s views must prevail”, as stated by newspaper historian Flather.

In some cases, the editor then makes a decision to part ways. Here’s William Monypenny, appointed editor of *The Star* in 1899, who later fell out with the owners over the political line of the paper: “It

is because I am fully conscious of the generous licence the proprietors of *The Star* have accorded to me in difficult times that I have felt bound in honour, now that our difference of opinion on a question of first importance has come to a crisis, to withdraw of my own accord and not to place them in a false position by continuing to oppose them from a platform which they themselves have provided me.”

Some people may think guarantees of editorial independence are not worth the paper they are written on when it comes to the crunch. But this cynicism ignores the fact that it makes possible a discussion about disagreements which involves more than subjective positions or unfettered proprietorial power. It can also be useful if a relationship breaks down to the point of going to court.

Playing it straight

Many proprietors do recognise and respect the value of editorial independence. They can eventually fire an editor, yet as journalism educator Franz Krüger has pointed out: “Far-sighted owners and companies will understand that respect for editorial independence and ethics is in their long-term commercial interest.” This position is what helps underpin the credibility of the medium, and dispel suspicions that owners operate via a secret agenda.

This was the case when Peter Bruce, then editor of the *Financial Mail*, endorsed an opposition political party during elections in 1999, in conspicuous contrast to his ANC-leader boss Cyril Ramaphosa. That Bruce survived a firing showed that his employers did not regard him as their puppet, much as they publicly disagreed with his position.

Where tensions may arise is when proprietors only learn of controversial decisions after publication or broadcast.

But some editors have chosen to take a risk in this regard. Former *Rand Daily Mail* editor Lawrence Gandar preferred to surprise his bosses rather than seek their permission in advance. He once

changed the *Rand Daily Mail's* support for the United Party to the Progressive Party without informing the board chairman, because he feared this would give him an opportunity to veto his policy. He was prepared to accept sanction afterwards, even if this meant losing his job.

Policies help

What can make for a smoother relationship between editor and employer is where editorial policies are spelt out in detail, rather than being vague and open to radically contrasting interpretations.

For the SABC as public broadcaster, an extensive set of policies is supposed to guide any editorial decision. They give substance to what is meant by public broadcasting and also define the bounds for coverage of politics, issues of public taste, use of offensive language and stereotypes, privacy and disclosure around HIV/Aids status. These policies are meant to bind all editorial practitioners at the broadcaster.

Most newspapers have simpler policies which provide for more flexibility and autonomy, but which also are less useful in terms of regulating disputes that may arise.

In the SABC's case, accountability for adherence to policy is spread across several agencies: Parliament, the board, the regulator Icasa and the Minister of Communications (as representative of the "shareholder"). Lacking here is a system enabling accountability to the public such as through regular stakeholder forums or general imbizos.

Reporting lines

For privately owned media, there are usually single reporting lines for editors. Said former *Cape Times* editor Victor Norton: "My contract requires that for part of my functions which require the expenditure of money I must act in concert with the general manager and, failing agreement with that officer, the disputed proposal must

4 BOTTOM LINES FOR EDITORS

Bottom line = criteria for measuring organisational success AND sustainability

1 Journalistic performance = content quality and its impact on society.

2 Financial performance = the lasting economic impact of the organisation on its economic environment, which is more than just the internal profits made.

3 Social performance = impact on people, such as whether the organisation has fair and beneficial business practices towards labour, the community and region/country.

4 Environmental performance = impact on the planet, or whether the organisation benefits the ecology or at least curtails its environmental impact by managing its consumption of energy and non-renewables and reducing waste.

be referred to the board of directors.” According to Harold Evans at *The Times* (UK), Murdoch gave him a guarantee of equal status to the chief managing executive of the newspaper “in regard to equality of access to the proprietor on matters of editorial budget and space; and a recognition that that the management had no business making editorial representations to the staff or anyone other than the editor”.

The issue was contested in South Africa in 1995 when editor of *The Star*, Richard Steyn, resigned rather than report to a publisher instead of direct to the board – which is now the dominant institutional arrangement.

The difference between the two was significant for *The Times*’s Evans, who feared it could lead to the power of editing being handed over to managers who could then dictate the kinds of stories on which the editorial budget should be spent. It is not the case that editors without regular recourse to the board are potentially weakened vis-à-vis management; there is no intrinsic reason why they should lose editorial control as a result of this.

Business responsibilities

Over time, the idea of an editor standing aloof from the business fortunes of a media house has faded.

In the 1960s, Lawrence Gandar hated long meetings about *Rand Daily Mail* circulation and advertising, instead feeling “it was marvellous to be able to concentrate on your job, in your sphere and do your best without spending tremendous time on other things”. But the ethos has shifted since then.

According to one newspaper executive in the US: “Once upon a time, editors may have had the ability or the luxury to take no interest in the workings of other departments. Now, editors are learning that they must.”

In that country, the concept of the “total newspaper” in the 1970s began to see editorial, advertising, circulation, research and promotion functions being co-ordinated around marketing concerns.

LA Times publisher Mark Wiles took it further from the mid-1990s by trampling over the romanticism of journalism. His thrust was that editors should think like business people and the staff

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remember their obligations to shareholders. Previously involved in marketing “Cheerios” for breakfast, he was dubbed the “cereal killer”, a man focused on cost cutting, share price and the “product” driven by focus groups. But journalistic morale fell sharply, circulation stayed stagnant, and eventually Wiles moved on.

A similar outlook was exhibited by Martin Newland, appointed in 2003 to a short-lived stint as editor of the *Daily Telegraph* (UK): “You can’t afford to be precious any more about splitting editorial and commercial. Nowadays 40-50% of an editor’s time is marketing and commercial ... We are a business. Our journalists are proud that we make a profit.”

Doug Underwood, author of the book “When MBAs rule the newsroom”, has raised strong cautions not just about editors’ centre of gravity shifting from audiences to revenues, but also the practical challenges this causes.

The “editor-manager”, he writes, “is expected to carry on in the best traditions of journalistic excellence, but is expected to share the responsibility for the newspaper as a ‘profit centre’.”

The scope and tension of the responsibility causes stress, Underwood argues, because it requires editors to be “immersed in readership surveys, marketing plans, memos and management training, and budget planning goals – the new trappings of a business where marketing the newspaper has become the top goal of newspaper managers and where attention to the bottom line has replaced many of the tasks that once occupied editors’ time.”

While notions of a “Chinese Wall” between editors and non-editorial sides of a media house are unlikely to ever return, questions remain about the proper priorities and use of time by the people who should in fact have been appointed to oversee the editorial mix.

– Guy Berger

(This section on editorial independence draws on research by Kevin Ritchie).





Reporting used
to be like hunting
and gathering
of food.
All you had to
do was to get the
information
and bring it back.
After food
became plentiful,
interest went to
processing and
packaging.



— Phillip Meyer, academic