

# MEDIA MONITORING TO PROMOTE DEMOCRATIC ELECTIONS



*An NDI Handbook for Citizen Organizations*  
*Robert Norris and Patrick Merloe*

# Media Monitoring to Promote Democratic Elections

An NDI Handbook for Citizen Organizations

Robert Norris and Patrick Merloe

**Library of Congress Cataloging-in-Publication Data**

Norris, Robert, 1954-

Media monitoring to promote democratic elections : an NDI handbook for citizen organizations / Robert Norris and Patrick Merloe.

p. cm.

ISBN 1-880134-33-0

1. Election monitoring--Handbooks, manuals, etc. 2. Mass media and public opinion. 3. Mass media--Political aspects. I. Merloe, Patrick. II. National Democratic Institute for International Affairs. III. Title.

JF1081 .N67 2002

324.6'5--dc21

2002009308

Copyright © National Democratic Institute for International Affairs (NDI) 2002. Washington, DC. All rights reserved. Portions of this work may be reproduced and/or translated for noncommercial purposes provided NDI is acknowledged as the source of the material and is sent copies of any translation.

## ABOUT NDI

The National Democratic Institute for International Affairs (NDI) is a nonprofit organization working to strengthen and expand democracy worldwide. Calling on a global network of volunteer experts, NDI provides practical assistance to civic and political leaders advancing democratic values, practices and institutions. NDI works with democrats in every region of the world to build political and civic organizations, safeguard elections, and promote citizen participation, openness and accountability in government.

Democracy depends on legislatures that represent citizens and oversee the executive, independent judiciaries that safeguard the rule of law, political parties that are open and accountable, and elections in which voters freely choose their representatives in government. Acting as a catalyst for democratic development, NDI bolsters the institutions and processes that allow democracy to flourish.

**Build Political and Civic Organizations:** NDI helps build the stable, broad-based and well-organized institutions that form the foundation of a strong civic culture. Democracy depends on these mediating institutions—the voice of an informed citizenry, which link citizens to their government and to one another by providing avenues for participation in public policy.

**Safeguard Elections:** NDI promotes open and democratic elections. Political parties and governments have asked NDI to study electoral codes and to recommend improvements. The Institute also provides technical assistance for political parties and civic groups to conduct voter education campaigns and to organize election monitoring programs. NDI is a world leader in election monitoring having organized international delegations to monitor elections in dozens of countries, helping to ensure that polling results reflect the will of the people.

**Promote Openness and Accountability:** NDI responds to requests from leaders of government, parliament, political parties and civic groups seeking advice on matters from legislative procedures to constituent service to the balance of civil-military relations in a democracy. NDI works to build legislatures and local governments that are professional, accountable, open and responsive to their citizens.

International cooperation is key to promoting democracy effectively and efficiently. It also conveys a deeper message to new and emerging democracies that while autocracies are inherently isolated and fearful of the outside world, democracies can count on international allies and an active support system. Headquartered in Washington D.C., with field offices in every region of the world, NDI complements the skills of its staff by enlisting volunteer experts from around the globe, many of whom are veterans of democratic struggles in their own countries and share valuable perspectives on democratic development.

### NATIONAL DEMOCRATIC INSTITUTE FOR INTERNATIONAL AFFAIRS

2030 M STREET, N. W., FIFTH FLOOR  
 WASHINGTON, D.C. 20036-3306, USA  
 TEL +1 202 728 5500  
 FAX +1 202 728 5520  
 E-MAIL DEMOS@NDI.ORG  
 WEBSITE HTTP://WWW.NDI.ORG

#### Board of Directors

Madeleine K. Albright  
*Chairman*

Rachelle Horowitz  
*Vice Chair*

Kenneth F. Melley  
*Secretary*

Eugene Eidenberg  
*Treasurer*

Kenneth D. Wollack  
*President*

Bernard W. Aronson  
 J. Brian Atwood  
 Harriet C. Babbitt  
 Elizabeth Frawley Bagley  
 Joan Baggett Calambokidis  
 Barbara J. Easterling  
 Geraldine A. Ferraro  
 Sam Gejdenson  
 Patrick J. Griffin  
 Joan Anderson Growe  
 Shirley Robinson Hall  
 Harold Hongju Koh  
 Peter B. Kovler  
 Elliott F. Kulick  
 Nat LaCour  
 Lewis Manilow  
 Constance J. Milstein  
 Molly Raiser  
 Nicholas A. Rey  
 Susan E. Rice  
 Nancy H. Rubin  
 Elaine K. Shocas  
 Marva A. Smalls  
 Michael R. Steed  
 Maurice Tempelman  
 Arturo Valenzuela

#### Senior Advisory Committee

William V. Alexander  
 Michael D. Barnes  
 John Brademas  
 Bill Bradley  
 Emanuel Cleaver, II  
 Mario M. Cuomo  
 Patricia M. Derian  
 Christopher Dodd  
 Michael S. Dukakis  
 Thomas F. Eagleton  
 Martin Frost  
 Richard N. Gardner  
 Richard A. Gephardt  
 John T. Joyce  
 Peter G. Kelly  
 Paul G. Kirk, Jr.  
 John Lewis  
 Donald F. McHenry  
 Abner J. Mikva  
 Azie Taylor Morton  
 Daniel Patrick Moynihan  
 Charles S. Robb  
 Stephen J. Solarz  
 Theodore C. Sorensen  
 Esteban E. Torres  
 Anne Wexler  
 Andrew J. Young

#### Chairmen Emeriti

Paul G. Kirk, Jr.  
 Walter F. Mondale  
 Charles T. Manatt

## ACKNOWLEDGEMENTS

---

This handbook was prepared by the National Democratic Institute for International Affairs (NDI) to assist civic organizations, journalist associations, political parties and others worldwide who are working to support freedom of the press, to ensure that political competitors are able to communicate their messages to the public through the mass communications media and to guarantee citizens the information necessary to make informed political choices. The handbook reflects NDI's 17 years of experience working with civic and political leaders to promote democratic reform and political integrity.

NDI wishes to recognize the efforts of those around the globe who have advocated for media freedom and developed mechanisms to monitor the media and inform citizens about the nature of information they are receiving. Like journalists, these activists often operate under difficult political circumstances and put themselves at personal risk by conducting their activities. NDI has had the privilege of working with many of these individuals on a wide range of issues, including media monitoring, and the lessons learned from these experiences are among those reflected in this handbook. NDI also recognizes the pioneering work of international nongovernmental and intergovernmental organizations in both advocating for media freedoms and monitoring the media. For reference, NDI has included in the appendices of the handbook a list of both international and domestic organizations active in these efforts.

Robert Norris, a long-time NDI advisor and former NDI field representative in a number of countries, and Patrick Merloe, NDI Senior Associate and Director of Programs on Elections and Political Processes, authored this handbook. The handbook draws largely on Bob Norris' experience in assisting Slovak media monitoring efforts as an NDI resident representative in Slovakia during the run-up to the 1998 parliamentary elections, and his experience in media monitoring efforts in Guyana, Uganda, Montenegro and other countries. The handbook also draws on Pat Merloe's experience in assisting media monitoring and broader election monitoring activities in more than 50 countries around the world.

Professor Thomas Lansner, who teaches International Media and Communications at Columbia University provided, on a voluntary basis, his expertise and time to assist in developing the methodology described herein. He also reviewed an early draft of the handbook. Holly Ruthrauff, NDI Senior Program Officer for Election and Political Processes, served as principal editor of this handbook and contributed significantly to its content. Suanne Buggy, NDI Program Officer, and Linda Patterson, NDI Program Assistant, also edited the handbook and contributed to its development. Other present and former NDI staff contributed to the development of media monitoring materials that preceded this handbook, including Almami Cyllah, former NDI field representative in Kenya and Haiti, and former NDI interns Nicole Lesniak, Joe Longobardo, and Marta McLellan.

NDI wishes to express special thanks to the leaders of the Slovak media monitoring organization MEMO'98, including Marek Mračka, Rastislav Kužel, Anna Nogova and Andrej Bartosiewicz. NDI supported the efforts that led to the founding of MEMO'98 jointly by Slovakia's Helsinki Citizens' Assembly and the Association for Support of Local Democracy. The Institute then aided MEMO'98's monitoring and reporting on the media's behavior during the election period and afterward. NDI drew upon its experience in assisting media monitoring efforts in more than a dozen countries to help MEMO'98 develop a monitoring methodology based on best practices identified elsewhere. In Slovakia and other countries, NDI drew upon principles and analysis set forth in the 1993 study by Sandra Colliver and Patrick Merloe published by Article 19, the Global Campaign for Free Expression (London), entitled, *Guidelines for Election Broadcasting in Transitional Democracies*, and the Institute appreciates Article 19's cooperation and continuing contributions to media monitoring around the world.

The drafting, production and distribution of this document were made possible by a grant from the United States Agency for International Development (USAID). The Center for Democracy and Governance of USAID's Bureau for Democracy, Conflict & Humanitarian Assistance provided valuable encouragement for this project throughout its development. We hope that those who use this handbook will contact NDI with any comments, suggestions or requests.

**Kenneth Wollack**  
President, NDI

# TABLE OF CONTENTS

---

ACKNOWLEDGEMENTS . . . . . i-5

FOREWORD . . . . . i-11

CHAPTER ONE: INTRODUCTION . . . . . 1

CHAPTER TWO: INITIATING A MEDIA MONITORING PROJECT . . . . . 5

    Developing Project Goals and a Strategic Plan . . . . . 5

    Creating a Mission Statement . . . . . 6

    Analyzing the Legal and Regulatory Framework . . . . . 6

    Deciding What Outlets to Monitor . . . . . 7

    Deciding What Subjects to Monitor . . . . . 9

    Securing Funding . . . . . 11

    Public Relations . . . . . 11

CHAPTER THREE: PLANNING AND ORGANIZATION . . . . . 13

    Establishing the Organization . . . . . 13

    Developing a Public Relations Strategy . . . . . 14

    Developing a Timeline . . . . . 15

    Choosing a Headquarters . . . . . 15

    Recruiting Monitors . . . . . 15

    Team Structure . . . . . 17

    Additional Tasks . . . . . 18

    Planning and Rehearsal . . . . . 21

CHAPTER FOUR: THE BASICS OF MONITORING . . . . . 23

    Quantitative Measurements . . . . . 23

    Qualitative Assessments . . . . . 25

    Other Content-Based Findings . . . . . 27

    Data Collection . . . . . 29

    Data Analysis . . . . . 29

    Presentation of Results . . . . . 30

    Final Reports on Election Coverage . . . . . 32

CHAPTER FIVE: MONITORING INSTRUCTIONS . . . . . 35

    Television News . . . . . 35

    Radio News . . . . . 38

    Newspapers . . . . . 39

    Direct Access and Public Affairs Programming . . . . . 42

CHAPTER SIX: REPORTING YOUR RESULTS. . . . . 47

    Languages . . . . . 48

    The Internet . . . . . 48

    Press Conferences . . . . . 48

CHAPTER SEVEN: CONCLUSION . . . . . 53

APPENDICES . . . . . 55

SELECTED BIBLIOGRAPHY OF RESOURCES FOR MEDIA MONITORING  
IN THE ELECTION CONTEXT . . . . . 132

ABOUT THE AUTHORS . . . . . 133

SELECTED NDI PUBLICATIONS ON ELECTION MONITORING . . . . . 134



# TABLE OF APPENDICES

---

APPENDIX 1	
List of Organizations that Monitor Media Conduct in Elections or Assist Media Monitoring by Other Organizations . . . . .	56
APPENDIX 2	
Assessing the Legal Framework Concerning Media and Elections . . . . .	58
APPENDIX 3	
International Human Rights Provisions on Democratic Elections and Freedom of Expression. . . . .	60
APPENDIX 4	
Sample Organizational Timeline for Media Monitoring Project. . . . .	68
APPENDIX 5A	
Sample Nonpartisan Monitoring Pledge Form . . . . .	71
APPENDIX 5B	
Sample Media Monitoring Code of Conduct . . . . .	72
APPENDIX 6	
Sample Media Monitoring Forms . . . . .	74
APPENDIX 7A	
Sample Media Code of Conduct—Guyana . . . . .	92
APPENDIX 7B	
Malawi Electoral Commission: Procedures for Media Coverage of Parliamentary and Presidential Elections . . . . .	102
APPENDIX 8A	
Sample Media Monitoring Report—Slovakia. . . . .	109
APPENDIX 8B	
Sample Media Monitoring Report—Bulgaria. . . . .	116
APPENDIX 8C	
Sample Media Monitoring Report—Peru. . . . .	122
APPENDIX 8D	
Sample Media Monitoring Report—Togo . . . . .	128

## FOREWORD

---

**T**he will of the people—expressed in genuine, democratic elections—is the basis of authority of any democratic government. That authority cannot be established unless voters make a free and informed choice among the political contestants. The mass communications media provide information to most voters that is essential to the choice they exercise at the ballot box. Therefore, proper media conduct toward all political parties and candidates, as well as proper media conduct in the presentation of information that is relevant to electoral choices, are crucial to achieving democratic elections.

Monitoring media conduct—when done impartially, proficiently and based on a credible methodology—establishes whether this key aspect of an election process contributes to or subverts the democratic nature of elections. Media monitoring can measure the amount of coverage of electoral subjects, the presence or absence of news bias, appropriateness of media access for political competitors and the adequacy of information conveyed to voters through news, direct political messages, public information programming and voter education announcements. Media monitoring can help demonstrate that political competitors and the public at large should have confidence in the media, electoral authorities and the government that is responsible for providing genuine elections. Shortcomings in media conduct can be identified through monitoring in time for corrective action. Abuse of the mass media’s power to affect voter choices also can be documented, which allows the population and the international community to appropriately characterize the true nature of the electoral process.

In effect, media monitoring in the electoral context addresses the interaction of several fundamental human rights, including: the right to genuine elections; the right of voters to receive accurate and sufficient information upon which to make a choice among electoral contestants; the right of electoral competitors to express their messages in a campaign to win the support of the electorate; and the right of the media to seek and impart information. All of these rights are affirmed by the Universal Declaration of Human Rights and every other major international human rights instrument. The relevant provisions of several of these documents appear in the appendices to this handbook. These documents create international obligations among states, while the constitutions and laws of every democracy protect civil and political rights related to genuine elections and freedom of expression.

Of course, there is more to an election process than the role of the media. Media monitoring should be treated as part of broader election monitoring efforts. An evaluation of the nature of an election process should address numerous factors, including among others: the legal framework for elections; legal recognition of political parties and the qualification of parties and candidates for the ballot; delimitation of election districts; accuracy of the voter rolls; free-

dom of movement to campaign; incidence of election-related violence, intimidation and vote-buying; performance of the electoral administration; the integrity of the voting, counting and tabulating of results; and functioning of complaint mechanisms. This media monitoring handbook therefore should be reviewed along with other materials, such as: *NDI's Handbook on How Domestic Organizations Monitor Elections: An A to Z Guide*; *Promoting Legal Frameworks for Democratic Elections: An NDI Guide for Developing Election Laws and Law Commentaries*; *Building Confidence in the Voter Registration Process: An NDI Monitoring Guide for Political Parties and Civic Organizations*; *The Quick Count and Election Observation: An NDI Handbook for Civic Organizations and Political Parties*; and other materials.

While it is impossible to have democracy in a country without genuine elections, the democratic process extends beyond election day. Democratic governance requires an active and informed citizenry, and the media play a vital role in providing citizens with information they need to exercise their right to take part in governmental and public affairs. The skills developed in media monitoring to promote democratic elections can be applied directly in non-electoral periods. Monitoring the media can continue to be important for promoting integrity in the broader political process. Media monitoring efforts also can produce knowledge, skills and a network to advocate for law and regulatory reform, as well as for the promotion of professional responsibilities by journalist associations and for improvements in media self-regulation.

Experience demonstrates that media monitoring is effective when taken on by dedicated citizens, who pledge themselves to act impartially, work diligently, carefully analyze the data they collect and present it responsibly. This activity has been conducted successfully by a number of civic groups around the world. It has also been performed successfully by journalist associations, which have a special interest in ensuring the integrity of media conduct during electoral periods and beyond. International organizations sometimes monitor the media or, like NDI, assist others in accomplishing this work. Electoral authorities, media oversight bodies and others also sometimes conduct media monitoring. It is hoped that this handbook will be helpful to any such effort.

This handbook takes a step-by-step approach to organizing a media monitoring project. It covers considerations in deciding whether to initiate a project, the project's planning and organization, as well as media monitoring methodologies for various media and political subjects. The reader will find specific instructions for monitors in the text and discussion of reporting the findings of monitors. The appendices present examples of monitoring forms, nonpartisanship pledges and codes of conduct, relevant international human rights provisions and sample reports from several media monitoring projects.

It must be stressed that this handbook is not intended to set forth a definitive or exclusive way of monitoring the media. Rather it presents a synthesis of lessons learned in hopes of providing useful assistance to those preparing to monitor the media in a wide variety of circumstances, with varying degrees of experience and resources. The authors greatly appreciate the cooperation that many groups and individuals have provided over the years in helping them to better understand approaches to monitoring the media. Many of these groups are mentioned in the text or are listed in Appendix 1.

It is hoped that those involved in monitoring the media will find this handbook useful. NDI looks forward to learning from other democratic activists about ways to improve media monitoring and monitoring election processes more generally.

**Robert Norris and Patrick Merloe**

June 2002

## CHAPTER ONE

# Introduction

*"The only sure bulwark of continuing liberty is a government strong enough to protect the interests of the people, and a people strong enough and well enough informed to maintain its sovereign control over its government."*

Franklin Delano Roosevelt, Fireside Chat, April 14, 1938

---

**N**o democracy can thrive unless citizens have the information they need to make free and informed choices among those who seek their authority to govern. The mass communications media—radio, television and printed publications—provide the means by which most citizens receive information that is central to making political choices. In every country, therefore, a critical question is presented: How can citizens be certain that the information that they read or hear in the media is accurate, fair and comprehensive?

In nations with long traditions of democracy and a free press, a number of safeguards have evolved to protect freedom of speech, freedom of the press and citizens' right to information, all of which make it easier for citizens to be well informed if they choose to be. Likewise, in established democracies, professional journalists often have developed self-imposed rules of conduct that protect against bias.

These traditions and safeguards are less developed in countries where democratic systems are not yet established. It is therefore even more important for citizens in such countries to demand media professionalism and objectivity and to monitor media coverage of political parties, candidates, government officials and public affairs.

There are numerous reasons why the media may fail to provide adequate and accurate information to citizens about government and politics, including government manipulation of the press, self-censorship or a lack of journalistic standards. A media monitoring project can demonstrate the extent to which the media has been compromised by such issues, as well as the extent to which it is fulfilling its fundamental responsibility to the public.

A media monitoring project should begin by considering the possible factors that lead to improper or inadequate coverage of public affairs. These factors may include:

- Direct censorship;
- Intentional manipulation of the media by government authorities;
- Intentional manipulation of the media by other partisan forces;
- Intentional manipulation of the media by private interests;
- Media self-censorship arising from fear of recrimination from government or private interests or from actual threats of violence directed against media outlets or journalists;
- Prejudice;
- Corruption;
- Inadequate access to government or political sources; and

- 2
- Incompetence, including a lack of understanding of traditions relating to the rights and obligations of the media by owners, editors or reporters.

The *perception* that such problems exist is reason enough to launch a media monitoring effort. If the public, political parties, candidates or others lack confidence in the media, then a media monitoring project will serve an important purpose. Whether the ultimate findings of the project reassure a skeptical audience that they can trust the media or alert them that they should question the information they receive, a well organized media monitoring project will be a valuable contribution to the public interest.

At its most basic level, media monitoring to promote democratic elections consists of an independent, impartial observation of media behavior during the election period.

Although a lack of confidence in, or the perception of improper or inadequate coverage by, the media may be the cause for initiating a media monitoring project, the purpose of such a project is to document media performance in a professional, systematic and objective manner. At its most basic level, media monitoring to promote democratic elections consists of an independent, impartial observation of media behavior during the election period. It involves an analysis of a government's actions and/or inaction to ensure the media's rights to gather and impart information to the electorate. Media monitoring concentrates on whether the electoral contestants have access to the media on a non-discriminatory basis to present sufficient messages about their platforms to the citizens so that potential voters can appreciate the differences among them. It also concentrates on whether citizens receive accurate and sufficient information through the media so that they can make an informed choice at the ballot box.

Media monitoring examines whether news coverage of the electoral candidates, government and political affairs is sufficient and free of bias, inaccuracies and other factors that can undermine genuine political choice on election day. The analysis also can examine the media's ability to criticize the actions and/or inaction of the government and the ruling political parties. In addition, it can address the ability of the media to operate independently. In some countries, media monitoring has also examined the presentation of voter and civic education through the media to determine whether it is politically neutral and sufficient to address the population's need for information about the electoral process.

#### HELPFUL INFORMATION

**When approaching media monitoring, four principal issues should be considered:**

- How the government acts to ensure the news media's right to gather and impart information and ideas;
- How the government and the news media act to provide access to political parties and candidates so that they may effectively and directly communicate with the public during election campaign periods;
- How the government and the media act to ensure accurate and fair coverage of political parties and candidates in news and information reporting; and
- How the government and media act to educate the electorate about how and why to vote.

#### **Determining Who Controls the Media**

While the media have certain internationally recognized rights to freely gather and impart information, they also have responsibilities to citizens regarding the information they provide. These responsibilities become especially sensitive during elections.

Determining who controls the media is one of the primary factors that must be considered before ini-

tiating a media monitoring project. Because of the different rights and responsibilities of state-controlled and privately-controlled media, it is useful and important to examine those outlets separately.

### **State-Controlled Media**

Television, radio and newspapers owned or controlled by the state should be held to the highest standards of accuracy and fairness, objectivity and balance. Government in a democracy is by definition derived from the people, and the will of the people is the basis of authority for democratic government. State media therefore—like all state resources—are the property of the citizens. They must be used in the public's interest and not for the private or political interests of a person or specific political party. All state-owned and state-controlled media therefore have an important obligation to provide citizens with accurate, impartial and balanced coverage regardless of which political party or parties are in power. It is proper and even necessary for citizens' organizations, political parties and candidates to insist on media fairness, balance and accuracy and to call upon government authorities to manage public media in a way that safeguards citizens' rights to the information they need as voters.

### **Private Broadcast Media**

Some television and radio stations are privately owned, and the owners' right to freedom of the press should preclude government interference. Yet, privately controlled broadcast media should be held to high standards because of the influence of broadcast media over public opinion, and because of the public nature of transmitting electronic programs. These media have ethical responsibilities to the public to present accurate information and therefore should cover political candidates and public affairs in an accurate, impartial and balanced manner. In addition, the use of the airwaves, even by private interests, brings with it public responsibilities.

It is generally accepted that the airwaves are a public resource. Their use by private broadcasters is therefore subject to government licensing and a degree of regulation to protect the public's interests. The interest in protecting the public's right to

receive accurate and sufficient information about electoral contestants must be balanced against the rights of private broadcasters to operate free of unwarranted government regulation. This provides a basis for: requiring bias-free reporting; nondiscrimination in broadcast access provided to political contestants; and, at least where access to state-controlled broadcasting would be insufficient to meet the public's interest in receiving information about political choices, cooperation in providing free or state-funded broadcast time to political contestants.

### **Private Print Media**

Privately owned newspapers are usually treated differently by media monitors than state-controlled media and private broadcast media when considering media bias and access. In an environment that is free of unwarranted and improper government regulation, anyone with relatively modest means can print and distribute a newspaper with relative ease.

However, it is important to determine whether the government creates barriers that hinder press freedoms, for example through licensing requirements, restrictions or duties on the import and access to newsprint and/or printing equipment. Other issues to examine include the distribution mechanisms for print media, which are sometimes government controlled. Governments also can interfere with press freedoms through decisions about placement of government advertisements and/or use of subsidies—and the threat of ending or withholding such sources of revenue.

In many countries, there are a large number of private newspapers and magazines that present a wide variety of political views. Political parties may even print and distribute newspapers to present their views. Of course, questions always should be considered about how widely privately owned newspapers and magazines are circulated and what overall percentage of the population reads print media. Close scrutiny of whether professional obligations are being met is especially important where media pluralism is restricted in practice and a small number of print media have a large impact on public opinion.

## CHAPTER TWO

# Initiating a Media Monitoring Project:

Developing a Strategy,  
Deciding What Media Outlets & Subjects to Monitor

---

Once a decision has been reached about the necessity of media monitoring, the work of initiating a media monitoring project can begin. The first phase of project development includes: developing project goals and a strategic plan; creating a mission statement; analyzing the relevant legal framework; deciding what outlets and subjects to monitor; and securing funding for the project.

## DEVELOPING PROJECT GOALS AND A STRATEGIC PLAN

The first step in initiating a media monitoring project is thinking strategically about the intended impact of the project and creating a list of project goals and objectives. This exercise will be the foundation for the entire project. Possible goals and objectives could include:

- Publicizing results with the hope of allaying concerns about unsubstantiated problems;
- Publicizing results with the hope of alerting citizens of the need to question their sources of information prior to an election;
- Convincing government authorities to enforce existing laws and regulations;
- Influencing journalists, editors and media owners to provide information that is more accurate, impartial and fair;
- Encouraging journalist associations to actively promote adherence to professional standards;

- Advocating for new laws to protect freedom of the press, citizens' rights to information and political contestants' rights to political expression;
- Educating other domestic civic organizations and international organizations about how media behavior has affected the pre-election environment; and
- Gaining skills that can be used to promote fair media practices beyond the elections.

Once the goals of the project are identified and prioritized, creating a mission statement and developing a strategic plan should be the next steps. A strategic plan should address: analysis of the legal framework and related issues affecting media performance in the electoral context; determining what media to monitor; deciding upon what subjects to monitor; deciding when to begin and the duration of the project along with a corresponding timeline for project activities; deciding upon the project's organizational form and name; adopting the monitoring methodology; determining the types of staffing needed; recruiting and training staff; developing a press and public relations strategy and plan; deciding on methods and procedures for developing and releasing reports; considering longer-range activity beyond elections; and developing an action plan for funding the project. The strategic plan will clarify many questions for project organizers and will set the foundation for funding proposals. These points are discussed below in more detail.



## 6 CREATING A MISSION STATEMENT

Some time should be spent contemplating how to present the project to the public. How will the project's goals be explained? What will the project accomplish? Why was the project initiated? Developing a mission statement that will accompany all of the project's public pronouncements can be an effective way to answer these questions for the media and the public. The accompanying text box presents an example of a mission statement from MEMO'98, a Slovak media monitoring project. It addresses some of these concerns, while allowing flexibility to adapt to changing circumstances.

### ANALYZING THE LEGAL AND REGULATORY FRAMEWORK

Before beginning a media monitoring project, it is necessary to understand the relevant laws and regulations. The project therefore should develop a

thorough analysis of the legal framework that is relevant to media performance in the electoral context, including the constitution, laws, regulations and international obligations and standards.

This analysis should also include any self-regulatory mechanisms that media owners or journalist associations may have adopted, such as codes of conduct to ensure professional standards and complaint review boards. The analysis also should identify any differences in the legal regime prior to, versus during, the official election campaign period.

One of the first steps in initiating a project is to hold a series of discussions with people who are familiar with the existing legal and regulatory framework, including lawyers, law professors, lawmakers, journalists, other civic activists and political party leaders, to identify relevant legal questions that could impede



## HELPFUL INFORMATION

***A mission statement succinctly presents the purpose of the project, for example:***

### **MEMO'98 Mission Statement**

1. To monitor and report on media fairness concerning the treatment of political parties, public policy issues and civil and political rights;
2. To improve the knowledge, legal awareness and information base of the citizenry, with regard to public affairs and governance;
3. To advocate citizens' rights to receive information from official sources, including but not restricted to all levels of executive administration on national, regional and state levels;
4. To advocate for freedom of expression, including the right to seek, receive and impart information and ideas pertinent to citizens being accurately and adequately informed about political and governmental processes;
5. To monitor and ensure transparency both of the ownership of private media and the process of appointment of the respective boards of the public media;
6. To advocate adoption of appropriate legislation pertaining to the media, the provision of information to the citizenry and the right to political expression;
7. To educate and train citizens, journalists, state administrators and local government officials to impart, seek and receive information;
8. To increase transparency of the decision-making process of both the state administrative and local governments, in order to provide for public discussion of bills, regulations and guidelines by public authorities on all levels;
9. To advocate citizens' responsibility and citizens' involvement in public affairs;
10. To aid and cooperate with other domestic and international groups and organizations with similar aims and intentions; and
11. To conduct other activities consistent with the above aims and intentions.

or promote presentation of accurate, fair and sufficient political coverage by the media. Appendix 2 contains a list of questions that should be considered to accurately assess the relevant legal framework. A thorough and comprehensive media monitoring project should attempt to understand all of these questions and assess the impact of such factors on the media's performance in the electoral period. (Also see Appendix 3 for relevant provisions from international human rights documents.)

An analysis of contextual issues should help to shape the design of the project, as well as provide background information for reports. It is important, however, that analysis of contextual matters not be confused with data presented on the monitoring of media conduct. A thorough monitoring project will separately address contextual, qualitative and quantitative issues.

The accompanying text box provides an example of a media monitoring project that addressed contextual issues that were imbedded in the country's legal and regulatory framework. To the greatest extent possible, this information should be provided as background for all media monitoring efforts.

## DECIDING WHAT OUTLETS TO MONITOR

In the context of an election, it is critical to understand whether voters are getting the information they need to make informed choices at the ballot box and whether political contestants are getting a fair chance to persuade voters to support them. To answer these questions, it is necessary to identify where voters get the information they use to make political choices.

In the context of an election, it is critical to understand whether voters are getting the information they need to make informed choices at the ballot box and whether political contestants are getting a fair chance to persuade voters to support them.

The obvious sources for information are newspapers, radio and television. Information also is available directly from political parties and candidates, family members, friends, colleagues and traditional opinion leaders in the society.

## COUNTRY NOTE

### Macedonia—European Institute for the Media Evaluating Contextual Factors

In 1994, the European Institute for the Media (EIM) launched a media monitoring effort in Macedonia. The organization published a report entitled "The 1994 Parliamentary and Presidential Elections in the Former Yugoslav Republic of Macedonia (FYROM), Monitoring of the Election Coverage in the Mass Media," which combined analysis of the legal and regulatory framework for the media with an ambitious effort to monitor the media's coverage of the elections. Monitors interviewed a wide range of people including media outlet owners, publishers, editors, reporters, etc. They reviewed the historical and regulatory background in the country. They looked at financing sources of media outlets, circulation data, programming, and licensing and distribution methods. They also looked at professional journalism standards, training and practice. They examined perceptions of political fear and self-censorship and government attempts to limit access and influence news. They also monitored coverage of political subjects both quantitatively and qualitatively. This project attempted not only monitoring coverage to see that news reported the campaign fairly and fully, but they sought to influence the media and the government to develop professional and open traditions. Other groups (for example, Open Society Fund) joined EIM in supporting a set of guidelines for election broadcasting.

**8** It is necessary to determine the relative importance of specific media outlets as sources of information. Because conclusive answers will not be available without a separate research project on this subject, common sense and intuition must be employed. The following are some possible sources to consult when addressing this question.

### **Polling**

By far the best source to consult is a professional research survey that analyzes where voters get information about politics and government. It will be necessary to determine whether such research has been done, or whether a polling company might be investigating this question. If not, the media monitoring project could consider whether it has the time and resources to conduct such a poll. Scholars may have conducted studies on this issue, so it is important to check sources at universities.

### **Ratings Data for Broadcast Media**

Ratings data for news and public affairs programming that concern the elections is another source to consult to understand where the public gets information upon which it makes political choices. It is important to determine whether the data are broken down by region, language or other relevant factors. Both advertisers and marketing directors of television and radio stations employ these data when trying to convince businesses to advertise on their outlets and when setting advertising rates, so this information may be widely available. Ultimately, it will be necessary to thoroughly examine these data and decide how they relate to the project's goals.

### **Circulation Data For Newspapers**

For print media, data should be available that describes circulation and readership in some detail. These data will indicate which newspapers and magazines are read by how many people and where they live. Try to relate these facts to the project by exploring whether or not the data are useful. If, for example, the biggest selling newspaper is a tabloid that stresses sports, entertainment or other matters irrelevant to the election, then it should be excluded from the project despite the high circulation levels—unless it

runs some high-profile political coverage. Project organizers should use common sense in making such judgments after reading the papers and consulting local citizens to understand for what reasons these publications are purchased and read.

### **Other Considerations**

Language differences, literacy rates, voter registration records and other demographic data should play a role when deciding which media outlets to monitor. The significance of registration rates in determining a media monitoring program can be seen in the instance of a rural country with a low literacy rate and high registration. In such a country, monitoring of newspapers would not likely be a priority, while radio may be the most important media. Knowing the percentage of registered voters also will provide the monitoring program with valuable demographic information, such as whether the majority of eligible voters exhibit particular characteristics that could impact the influence of the media on their voting behavior. For instance, if 60 percent of the registered voters are below 30 years old, then they may be more likely to be influenced by newer technologies than by more traditional ones. Additional characteristics to look for include gender, employment, religion and education. Also determine the range of broadcast signals and whether there are significant populations that live in remote areas not reached by either print or electronic media.

Keep in mind that the goal in examining these factors is to understand where voters get the information they use to make choices at the ballot box. The most widely watched television programs, the most listened to radio shows and the most consulted newspapers are the targets. Resource limitations likely will require these choices to be prioritized.

### **Monitoring Political Coverage on the Internet**

Increasingly, the Internet is becoming a source of political information and may be a focus of media monitoring. The organization and nature of the Internet present specific challenges. However, the right to free political expression of persons who use the Internet to communicate ideas, including com-

petitors for political office, and the right of citizens to utilize the Internet to seek and receive information upon which to make free and informed political choices, correspond with the purposes of media monitoring. There are a variety of sources on the Internet to consider for monitoring purposes, including: news services that cover political subjects and other issues that are relevant to electoral choices; websites of political parties and candidates; websites set up to parody party and candidate websites, sometimes used to incite hatred and violence; websites presented by independent political analysts; and numerous other sources.

A media monitoring project could develop a list of websites to monitor regularly, using methodologies similar to those used for newspapers described in Chapter 5. Text, photos and other material could be assessed, as well as qualitative factors (such as positive, negative and neutral tone of material) and other criteria described in Chapter 4. In addition, Internet search engines could be used to locate the

names of political parties, candidates and other political subjects being monitored in order to see whether additional sources are providing relevant information about them.

In many countries, access to the Internet is restricted to small segments of the population; nonetheless, media monitoring projects should consider the relative importance of the Internet to the conditions surrounding specific elections. Obtaining computers, printers and funding for Internet use can be incorporated into budgets and proposals. It may also be possible to place an Internet monitoring team at a university or other place where access could be provided to the project free or at a reduced cost.

### **DECIDING WHAT SUBJECTS TO MONITOR**

Whether monitoring daily news shows or all programming, the primary focus should be limited to programs that have relevance to the upcoming elections. The daily weather report usually will be

## **COUNTRY NOTE**

### **Determining Which Outlets to Monitor**

#### **Mexico**

In 1994, the Mexican Academy of Human Rights (AMDH), in collaboration with Civic Alliance's (Alianza Cívica) election monitoring effort, examined opinion poll data and determined that, of the various Mexican mass media, television was the most influential in disseminating information that affected public opinion. The Academy determined in particular that two television channels stood out beyond others in this regard. Based on this analysis, the project then concentrated on the news program coverage of the 1994 federal elections by those two television channels.

#### **Montenegro**

The Association of Young Journalists of Montenegro reviewed academic research and opinion data prior to the 2002 elections and determined that television programming between 4:00 pm and midnight had the biggest impact on public opinion, while for radio the time of the biggest audience was 10:00 am to 4:00 pm. This helped the association shape its monitoring effort.

#### **Peru**

In Peru's 2000 elections, the broad election monitoring group Transparency (Transparencia) also examined academic and public opinion studies on media impact, selecting for its monitoring the six most widely viewed television broadcast and two cable channels, as well as the seven most widely read newspapers over a certain cost and six most widely read under that cost, which are mostly tabloids. The tabloids played an important role in carrying out negative, smear campaigns against opposition presidential candidates in that election.

**10** irrelevant to the project goals (although misleading forecasts about weather on election day could conceivably be aired with the intention of increasing or decreasing voter turnout). Sporting events are usually irrelevant (although appearances of political figures in the crowd, the use of party insignia on uniforms, etc., could be relevant). A story about the death of a celebrity would usually be irrelevant (although an implication of foul play by a political figure or incompetence in an investigation by a government authority might make it relevant).

It is coverage of the elections and issues that impact on a voter's choice at the ballot box that are the primary concern. These will depend on the specifics of the upcoming election, such as who or what will be on the ballot.

Usually, if a show or a story on the news is completely unrelated to political events, a monitor need not record its length or comment on its content. It is coverage of the elections and issues that impact on a voter's choice at the ballot box that are the primary concern. Of the relevant stories, it will be necessary to determine the specific subjects that will be measured. These will depend on the specifics of the upcoming election, such as who or what will be on the ballot.

### **Parties and Candidates**

Both political parties and candidates can be "political subjects" that are tracked in media monitoring. In most parliamentary elections, particularly in countries that use proportional representation to allocate parliamentary seats, parties are the real choices offered to voters. If there are several parties seeking seats in an upcoming parliamentary election, the coverage of these parties will be the main focus of the media monitoring project. When the prime minister or an opposition party leader or candidate is covered in the news, record these data separately, but include them in the total amount of time

devoted to the party he or she represents. If it is a presidential election or a mayoral contest, or any election with individual candidates, then coverage of these individuals will be the primary focus. This will be the case in elections for executive branch positions and in single-member-district elections for legislative bodies.

One problem that must be considered is whether or not to cover parties or candidates that have decided to boycott or are barred from participating in the election. There are circumstances in which such actors are important to the country's political process, and omitting them from the monitoring results would distort the political picture. In other circumstances, such parties or candidates may be unimportant political forces. The inclusion or omission of such actors is an important decision that should be explained to the public by the project. The decision, and the public explanation about it, should not be presented as taking sides on the merits of the boycott.

### **Referenda**

Referenda about important issues of governmental policy, often about proposed constitutions or constitutional amendments, are central to a country's political process. Campaigns to promote and to oppose such propositions are prime subjects for media monitoring. Practically all of the issues and methodologies discussed in this handbook apply and should be adapted to media conduct toward referenda.

### **Government**

Coverage of legitimate government activities presents a separate and difficult problem. News outlets should give citizens relevant information about important government activities. Yet, such coverage naturally gives the ruling party or coalition a distinct advantage in reaching voters with their message. Most incumbent governments are well aware of this opportunity and tend to exploit it by presenting new initiatives, opening new roads, talking more about public education, the environment or other issues important to voters during the run-up to an election.

It can be difficult to distinguish between important government activities and campaign events. Monitors must use clear criteria to make such distinctions. The project may decide to report on governmental coverage separately from coverage of political candidates. However, once the official campaign begins, it is proper to count all coverage of government officials as part of the coverage of the governing parties and incumbent candidates. It is possible to show the government data separately and present combined data as well.

### **Relevant Public Policy Issues**

Media monitoring projects may also examine coverage of public policy issues that are relevant to electoral competition. These issues can range from treatment of news about economic performance forecasts, to passage and/or implementation of key legislation on issues related to the environment, education, social services or electoral reform. Coverage of incidence of politically motivated violence can be significant in some countries as can information about national peace and reconciliation processes. It may also be important to monitor for incidence of inciting hatred and/or violence. Determining which issues should be included in or excluded from monitoring can be a complex process of weighing many subjective factors. It is also difficult to gauge the impact of such coverage on electoral choices. Monitoring such issues falls beyond the scope of methodologies discussed in this handbook.

## **SECURING FUNDING**

Media monitoring is a costly activity and a group must have adequate funding to undertake such a project. This section gives an overview of how a group might pursue funding for such a project.

### **Calculate the Cost**

The first step in securing funding is to calculate the estimated cost of the project. The project requires full-time staff, technical equipment, office space and supplies. Develop a simple budget to calculate the estimated cost. A discussion of staffing and a list of needed supplies for the project can be found in Chapter Three of this handbook. Budget consider-

ations should include the cost of printing and distributing reports and other aspects of a communications plan.

### **Identify Potential Funding Sources**

The next step is to identify potential funding sources, both in the local and international communities. Although local fundraising may be difficult in many countries, in-kind contributions might be possible. For instance, is there a local company or NGO that might be able to loan a computer, TV or VCR for the length of the project? Obtaining and keeping track of such contributions can be helpful in attracting other funders.

International sources of funding vary between countries, but typically they include foreign embassies, bilateral and multilateral development assistance agencies, intergovernmental organizations and international nongovernmental organizations. Speak to colleagues in the NGO community and compile a list of potential funders.

### **Shop Your Proposal**

Regardless of who are the potential funders, they will require a project proposal or concept paper. Draft a concept paper explaining your proposed activity, what you hope to achieve and what makes your group qualified to carry it out. Include a rough estimate of the cost of the project and be prepared to present a fairly detailed budget as well. The paper should be clear and concise. Next, schedule meetings with the appropriate representatives of potential funding organizations to share your ideas and find out whether resources might be available and how to apply.

## **PUBLIC RELATIONS**

Developing a comprehensive and professional approach to the press and public relations is a critical part of any media monitoring project. Chapters Three and Six contain information about staffing and considerations for approaching the press and broader public relations. The press and public relations secretary should develop an overall communications plan that is approved by the project's leadership, which will guide the project's activities in these areas.

## CHAPTER THREE

# Planning and Organization:

## When to Start, Timeline, Recruiting Monitors & Team Structure

---

**D**on't struggle too long with the question of when to launch a media monitoring effort. The answer is: NOW! It is never too early to begin a project, and there is unlikely to be a time when the project will not be useful to a country's democratic development.

Usually the idea of monitoring emerges in the context of an upcoming election. A project that begins well before election day has numerous advantages. The project will be more effective if it has sufficient time to establish its credibility, and monitoring will have more impact if results are available over a longer period of time. An early monitoring effort also can help those advocating for changes in media access and coverage by allowing time for necessary reforms. However, since it may take considerable time to organize and gain funding, it may not be possible to launch a project until the election approaches. (See Appendix 4 for a sample timeline for organizing a media monitoring project.)

The monitoring project will be valuable to characterizing the nature of the election process and how the media performs its crucial role in the pre-election period. Media monitoring efforts in a number of countries have continued to contribute after the elections to civil society's ability to ensure against media bias and to advocate for media freedoms. In several countries, media monitoring findings have been central to post-election reforms. (See, for example, the Country Note at the end of Chapter 4.)

A project that begins well before election day has numerous advantages. The project will be more effective if it has sufficient time to establish its credibility, and monitoring will have more impact if results are available over a longer period of time. An early monitoring effort also can help those advocating for changes in media access and coverage by allowing time for necessary reforms.

### **ESTABLISHING THE ORGANIZATION**

A monitoring project may succeed or fail in large part based on perceptions about individuals and organizations participating in the project. Not only must the monitoring results be accurate, impartial and professionally done, the project must be perceived as nonpartisan, objective and professional.

Media monitoring projects are faced with a built-in dilemma: if results illustrate that some media outlets are biased or fail in their duty to report on the elections accurately and fairly, those outlets may react by attacking the project's credibility.

The initial announcement of the media monitoring plan therefore is very important. With this in mind, some outreach will be necessary prior to beginning the project to assess how the project is likely to be

**14** greeted and whether there might be powerful interests intent on discrediting the project's reports.

If the media monitoring project's leaders or the civic organizations affiliated with the media monitoring project have solid reputations for impartiality and professionalism, the problem may be minimized. However, if the individuals or organizations are perceived as allied with certain political parties or political figures, then extra steps must be taken to establish the project's credibility.

*Not only must the monitoring results be accurate, impartial and professionally done, the project must be perceived as nonpartisan, objective and professional.*

One approach is to conduct the project in partnership with a second group that will enhance the perception of impartiality and effectiveness. A second approach is to invite noted individuals to conduct the project with a stated degree of autonomy. A third option is to establish a new organization. In any event, it is wise to consider establishing an oversight or advisory board for the project comprised of highly respected individuals with reputations for impartiality and professionalism, one or more of who knows the media profession as an academic or former practitioner. It is not always necessary or possible to form such a board, but it should be considered.

Leaders of the project and monitors also will be scrutinized, so care should be taken to establish credentials for impartiality and professionalism before going public. The monitors should be civic-minded people, who are not currently engaged in a particular partisan effort. Monitors should be asked to put their political biases aside. Express rules about impartiality and accuracy should be established and enforced. Monitors can be asked to sign a pledge to maintain complete objectivity and to lay aside their own partisan opinions prior to undertaking the pro-

ject. The project can also issue and publicize a code of conduct for its activities. (See Appendices 5A-B for a sample pledge form and code of conduct.)

### **DEVELOPING A PUBLIC RELATIONS STRATEGY**

Every media monitoring project should have a detailed public relations strategy that outlines what the project is, its goals, methodology and reporting plan. This strategy should be used to inform the public, political parties and candidates, electoral authorities, relevant government agencies and media outlets about the project. Meetings also should be set up with parties, electoral authorities, editorial boards and others to introduce the project. At an appropriate time, a press conference should be scheduled to publicly announce the launch of the project. Coverage of the monitoring project itself should be monitored to determine where friendly and unfriendly sources are in the media for future public relations activities. (See Chapter Six for a detailed discussion of public relations strategy and organizing press conferences.) In many countries, journalist associations, civic organizations concerned with freedom of expression and democratic elections, and representatives of the international community will be important allies for the project. Their support should be solicited as early as possible.

### **Creating a Name and Logo**

The first step in implementing a good public relations strategy is developing a name and an easily recognized logo. This will help sell your message and publicize your efforts. The importance of this initial task should not be underestimated as the name and logo will serve a wide-range of purposes, including attracting monitors, supporters and funders. A project website can also be a helpful way to promote the effort and make information regarding the effort easily accessible to the public. (See Appendix 1 for a list of media monitoring organizations along with their website addresses.)



## **DEVELOPING A TIMELINE**

As the media monitoring project develops, it is important to periodically review the progress of the project and plan ahead. Review and revise the project calendar on a regular basis. Look closely at how much time remains before the election. Keep in mind how much time will be needed for a rehearsal, how many reports will be issued prior to the elections, how long it will take to analyze data and prepare a report and how often results will be released.

Although there is no rule about how often reports should be issued, it is a good idea to have a sizeable collection of data well ahead of an election and to issue reports more frequently as the election nears. It is helpful to release data at regular intervals (e.g., every Thursday or every second Tuesday), so that the press and other interested parties can plan on when they will receive the information. It also is important for media monitors to issue reports beginning at least several weeks, if not months, before an election to allow citizens to understand the nature of the media's performance, to adjust their perceptions of the reliability of media-provided political information and to allow an opportunity for the media to correct bias and deficiencies in their coverage.

Once the pre-monitoring work has been completed, including: the analysis of the operational context for the media and the legal framework for freedom of expression; preliminary fundraising; recruitment of a good staff for the project; development of the methodology; establishment of a clear division of labor; and the procurement of adequate space and facilities, the project is ready to rehearse and begin monitoring. (Appendix 4 provides an example of a typical timeline for the pre-monitoring period.)

After the rehearsal is complete, continue with the monitoring and go forward as planned. If unforeseen problems are encountered, take time to resolve them, bearing in mind that it is important to develop a schedule that will be kept for the duration of the project. Once the project is announced and results are released, there will be little chance to change the methods. Be careful about setting expect-

tations on release of reports. For example, if the project announces that it will issue bi-weekly reports until six weeks before the election and then weekly reports until the election, this schedule must be met.

## **CHOOSING A LOCATION**

There should be a central office for the project that should contain all of the equipment, newspapers, tapes and necessary forms. The office should be centrally located, secure and have a reliable electricity source. This headquarters also should be the venue for training and other meetings. Having a central office is essential for ensuring that monitors report on time, conduct their activities and turn in their forms. If the media monitoring project is part of a larger election monitoring organization or journalist association, ample separate space should be set aside for the project.

In some countries, more than one city is critical to the electoral and political process, and it is not possible to monitor broadcast and print media from one location. National media can be monitored along with local media in the country's main city, but separate monitoring centers might be required for other locations. In circumstances where a significant number of cities would qualify, it might be best to conduct projects separately and release reports locally, while making them available in the national office. Otherwise, local data or reports should be incorporated into the periodic national reports.

## **RECRUITING MONITORS**

One of the first challenges in establishing a media monitoring project is determining how to attract and retain a dedicated staff. This will be an ongoing and critical task.

All monitors must understand that they should commit themselves to the project for its duration. Project leaders should discuss with monitors their plans for the entire term of the project. Leaders should ask prospective monitors questions in this regard, such as: Do monitors have vacations planned? If they are

students, when are their exams? Are there weddings or conferences they must attend? Are other jobs likely to interfere at particular times? Are there family obligations, such as crops to harvest or other tasks that are likely to interfere with monitoring activities for significant amounts of time? While any person may need reasonable time away from the project, leaders must be able to anticipate scheduling issues and should avoid staff availability problems.

### **Volunteers or Paid Staff?**

There is a benefit to using volunteers as media monitors. Aside from budgetary issues, the use of volunteers helps instill a tradition of civic involvement that will provide long-term benefits well beyond the completion of a particular project. Those motivated by concern for their country rather than by financial considerations may be more likely to be energized by the project and become long-term civic activists who will fight to ensure that their country becomes a strong democracy.

The continuity and credibility of the project depends, to a large measure, on the consistency of the standards kept throughout the project's life.

However, there are also good reasons to pay media monitors. More than most civic projects, monitoring the media requires trained and dedicated people who can spend significant amounts of time on the project. These monitors will not be easily replaced should personal or professional matters interfere with their involvement. The continuity and credibility of the project depends, to a large measure, on the consistency of the standards kept throughout the project's life. It might be unrealistic or unfair to ask volunteers to devote so much to a project with no remuneration. It may therefore be wise to pay modest fees to the monitors to ensure the continuity and integrity of the project.

### **The Recruitment Process**

Whether or not monitors are paid, they can be recruited in the same way people are recruited for other political or civic efforts:

- Making personal contacts among those already interested in monitoring the media;
- Contacting university professors to ask for names of interested students;
- Posting signs on campus and calling meetings to explain the project; and
- Advertising in newspapers or on the Internet.

Also, it may be an option to approach other civic groups and offer to include them as sponsoring partners. Once a few dedicated monitors are enlisted, they can seek help from their friends or colleagues, which is a valuable way to complete the monitoring staff needs.

### **Motivating and Retaining Volunteers and Paid Staff**

As noted above, credibility of the media monitoring project depends on the consistency of standards of impartiality and professionalism. The best way to ensure this consistency is through retention of well-trained, dedicated and highly motivated staff, both volunteer and paid. Those who join the monitoring project do so based on an understanding of the project's mission, and their motivation is likely to be based on advancing that mission. Thorough training will reinforce that commitment. Clear assignments and instructions for completing them successfully are also important. Attention should be paid to be sure that monitors have the materials that they need when they conduct their assignments and they should be thanked for their efforts.

Showing appreciation is not only the right thing to do; it is essential to retaining good staff. The project director and team leaders should assess volunteer and paid staff levels of satisfaction and determine if the project can take reasonable steps to maintain and improve it. Providing staff with t-shirts, hats, buttons and stickers with the project's name and logo can play an important role in establishing staff

cohesion and morale. Allowing staff to attend press conferences, giving them copies of all reports so they can see the results of their work and holding celebrations to mark achievements are also important.

*Showing appreciation is not only the right thing to do; it is essential to retaining good staff.*

### **TEAM STRUCTURE**

Once a core team is together, there is the task of training the staff and the monitors to do their jobs professionally and impartially. Sufficient time should be taken to ensure this is done correctly. Initial planning and care are likely to determine success or failure for the entire project. Following are some suggestions about staff positions, duties and how these positions might evolve.

#### **Project Director**

As the project is initiated, an ideal project director may be apparent based on past experiences. It also may be necessary to recruit a director from outside, or it may be possible to identify someone for this task as monitors are being recruited. It often becomes immediately apparent who on the core team is the most dedicated, who is spending the most time on the project, who is most engaged in discussion about the project's purpose and activities, who seems to win respect from the monitors and who understands the project best. This person could be the project director.

It is important that the project director be given ample authority to decide on the structure of the project. The project director also should be ultimately responsible for discharging or overseeing the project's many organizational tasks. These include: dealing with budgeting and payroll matters; scheduling monitors to view specific programs; designing, distributing, collecting and analyzing report forms; entering data into a spreadsheet program; producing charts and graphs; writing reports;

organizing press conferences; preparing oral presentations of data and responding to the press; and labeling and storing report forms and tapes of programs and copies of newspapers for the files. The project director should be responsible for finding the people to get all of this done and providing them with adequate supervision and guidance. Additionally, the project director should be at public presentations either as the lead spokesperson or as a secondary spokesperson, and be available to answer technical questions on methods and results.

#### **Team Leaders**

Depending on what outlets and programming will be monitored, groups should be broken into teams. Television and radio require slightly different methods of monitoring, and print media requires a drastically different method. It is therefore advisable to employ one, two or three different leaders who understand these respective methods and who can train monitors and help gather and analyze results. Team leaders also can compare the forms filed by the monitors. When discrepancies occur, the leader can consult with the monitors and/or reexamine the story to decide on the correct evaluation. Team leaders also can train monitors in monitoring methods to ensure a unified approach, while also ensuring that each program is monitored on time. Finally, team leaders should be responsible for recording individual programs and making sure that all the forms are returned by a specified date.

#### **Monitors**

The number of monitors needed will depend on the number of "monitoring events" to be covered. Each broadcast program and each edition of a newspaper that is monitored is counted as one monitoring event. Monitors will have to be recruited, trained, and tested in simulation exercises and assigned to teams to cover and analyze each monitoring event. Monitoring a half-hour news program can take up to one and one half hours per team to tape, set up, review the broadcast two times for accuracy and complete monitoring forms for subsequent analysis. Monitors can be assigned to cover more than one monitoring event but must remain alert and diligent.

**18 Data Analyst and Data Input Assistants**

A good computer, good spreadsheet software and a proficient computer assistant are important to make data accurate and understandable for the audience. The data analyst will need assistance with entering data every day. Depending on the size of the project (number of media and monitoring events), one or more data input assistants will be required. In the days prior to the release of a report, the analyst will need time and support to produce the graphic presentation of data.

**Writer**

In addition to the analyst, a good writer will be needed to explain graphic presentations and integrate the graphics with other information into a written report and/or statement for public release. All of this will require input from team leaders and monitors to make sure that the final interpretations and conclusions are accurate and relevant.

**Press and Public Relations Secretary**

The first duty of the press and public relations secretary will be formulating contact lists of mailing addresses, e-mail addresses, telephone and fax numbers for all media outlets, reporters and editors of local and international media, advocacy, human rights and civic groups, political parties and candidates, international organizations and embassies, media regulatory bodies, electoral authorities and elected and appointed government officials. Most of these people should be invited to press conferences, and all should receive press releases and

copies of reports. The press and public relations secretary also will be responsible for preparing for the press conferences and distributing reports. (See Chapter Six for a more detailed discussion of public relations strategy and conduct of press conferences.)

Every monitoring project must have an official spokesperson. The spokesperson must be carefully chosen to establish and maintain the credibility of the project.

**Spokesperson**

Every monitoring project must have an official spokesperson to conduct press conferences and represent the project in meetings with editorial boards, civic and political leaders and representatives of the international community. The spokesperson must be carefully chosen to establish and maintain the credibility of the project. While the spokesperson may not be involved in the everyday activities of the project, it is vital that she or he have a strong understanding of the objectives, methodology and findings of the monitoring project.

**ADDITIONAL TASKS**

Following are descriptions of other jobs that need to be done on an ongoing basis. Either the project director or a designated staff person should be assigned to each.

**HELPFUL INFORMATION****A weekly list of monitoring events might look like this:**

State TV nightly news, 7:00 p.m. to 7:30 p.m. daily	7 events
Independent TV nightly news, 7:30 p.m. to 8:00 p.m. daily	7 events
State Radio news, 12:00 p.m. to 12:30 p.m. Mon - Sat	6 events
State Radio news, 6:00 p.m. to 6:30 p.m., daily	7 events
Newspaper #1, daily	7 events
Newspaper #2, Mon - Sat.	6 events
Newspaper #3, daily	7 events
Total monitoring events each week:	47 events


**COUNTRY NOTE**
**Slovakia—Scenario for Monitoring**

In Slovakia, MEMO'98 taped the TV Markiza news program at 7:00 p.m. each evening and STV news at 7:30 p.m. Radio Twist and Slovak Radio had two daily newscasts, at noon and at 6:00 p.m. Both of these were taped. Newspapers were purchased every day and kept in the office. They purchased one television set, one video cassette recorder, two radios with timed-recording capabilities and other equipment.

Monitors were divided into five teams: one team for television, one for radio, one for newspapers, one for data analysis and report preparation and one for press relations. Team leaders scheduled monitors to view or listen to each news broadcast and to read each newspaper. Forms were completed by monitors and turned over to their leaders throughout the week.

On the following Sunday, a new week would begin, and the analytical team compiled the data from the previous week. On Monday, the press team sent out an advisory alerting the press to the time and location of the weekly Thursday press conference. All quantitative time data and qualitative data concerning positive, negative and neutral ratings were entered into computer spreadsheets, and were then used to produce pie charts and bar graphs. These graphs would be used to write a summary of conclusions for the written report.

Team leaders then reviewed monitor "comments" and identified trends that were described in summary, with specific examples for the report. Such comments tended to focus on a lack of balance within a story or on biased language, inappropriate film footage or other unfair practices. Over time, these comments revealed clear and disturbing trends in the way particular news outlets presented the news; especially a trend on state-owned STV to refuse time to opposition subjects to explain their side of the story. The report was completed by Wednesday after the end of each monitoring period and presented in a public press conference on Thursday. The first report covered one week, and others tended to cover two-week periods or to present cumulative data as the elections neared. (See Appendix 4 for a sample monitoring timeline.)

**Scheduling Monitors**

Once a decision has been reached about which media outlets will be monitored and how often each outlet publishes or broadcasts relevant coverage (topics discussed below), the programs and publications should be divided into logical categories that represent monitoring events.

Each event can be entered onto a simple grid under the appropriate day and posted on the wall with a box to indicate the assigned monitors. At least two monitors should be assigned to each event to ensure against monitor bias. Once report forms are turned in, a check mark can be entered next to the monitor's name on the scheduling grid. Team leaders and other staff will have con-

tact information for monitors who fail to turn in reports on time, and they will need to fill in gaps when needed.

Managing monitors is an important and demanding responsibility that requires an organized person who will be sensitive to the concerns of the monitors and understand that all events must be covered every week. Missing even one news program or skipping one newspaper can throw off the entire results of the project and reflect badly on the project's credibility and professionalism. It is a good idea to keep a log of monitor schedules and activities. The project director and/or team leaders need to know which individuals can be counted on to be prompt, reliable and consistent. Also, if monitors are being

Missing even one news program or skipping one newspaper can throw off the entire results of the project and reflect badly on the project's credibility and professionalism.

paid based on performance, a record of who did what is needed.

### Developing Forms

Monitoring forms for each type of monitoring event, as well as data compilation and analysis forms, must be developed and filled in meticulously. The types of data to collect on such forms are discussed in Chapters Four and Five, and sample forms are presented in the appendices.

### Record Keeping

In addition to keeping logs of monitor activities, a good monitoring project should keep meticulous records of all relevant materials. These materials should be kept in an organized and secure manner on designated storage shelves or cabinets.

The project's records should include the following materials:

- Labeled copies of all videotapes of television programs organized by time and date and news outlet;
- Labeled copies of all audiotapes of radio programs organized by time and date and news outlet;
- Copies of all monitored newspapers organized by publication and date;
- Copies of all forms turned in by monitors filed separately by date and news outlet;
- Copies of all other forms used for tabulation and collation of monitoring results organized by date and news outlet;
- Copies of all brochures, press releases, reports and other materials released by the project; and
- Records of all media coverage (newspaper clippings, audio and video tapes) of the monitoring project.

### Obtaining Supplies

The following is a suggested list of supplies that will be needed to conduct a monitoring project that includes television, radio and newspapers.

**Televisions and Radios.** After scheduling monitored events, decide how many televisions and radios are needed. If events occur simultaneously on different channels, more than one or two sets will be needed. Also, monitors may require sets to view tapes while other sets are recording programs. This can ensure that all monitoring events are appropriately covered.

**Newspapers.** A subscription to all monitored newspapers, or a system for purchasing them on a daily basis, is necessary.

**Video and Audio Recorders.** Video and audio recorders will be needed to tape events. Extra recorders may be necessary so that tapes can be viewed or listened to while other machines are taping programs. Recorders should have a function to set timers to record programs automatically. If this is not possible, reliable staff will be needed to turn on the recording devices at the appropriate times.

**Tapes.** Calculate the number of audio and video tapes needed for the duration of the project and purchase them well in advance. Make sure to purchase tapes that are of a reliable quality.

**Earphones.** Earphones may be needed to allow monitors to work without disturbing others in the office, depending on the provisions and space of the monitoring room.

**Video Camera.** A video camera can be used to tape practice news conferences and other events to help train those who will be speaking in public or to the press.

**Computer(s), Printer(s) and Software.** Computers, printers, and software are necessary for data entry, analysis, and for creating reports and other documents. Secure computer backup of documents is also required where possible.

**Copy Machines.** Copy machines, or access to them, are needed for copying forms, reports, etc.

**Stopwatches.** Stopwatches are needed in ample supply to record the times for the news stories.

**Rulers.** Rulers are needed in ample supply to measure newspaper story size.

**Pens, Paper, and Other Basic Supplies.** Pens, paper, paper clips, staplers, and other basic office supplies are needed in ample supply to conduct the project.

**Shelves, Cabinets, and Other Storage Materials.** Shelves, cabinets and other storage materials are needed to store videotapes, audiotapes, newspapers, forms and reports.

**Refreshments.** Food and drinks (tea, coffee, water, etc.) help to make sure that monitors devote the necessary time to their jobs and, depending on local customs, are needed to offer to visitors.

**Projector(s) and Transparency Paper.** Projector capacity is needed to display charts and graphs at press conferences, either projected directly from a computer or via overhead projections of “transparencies.”

**Sound Equipment.** Sound equipment, such as microphones and speakers, are needed for press conferences and other public events. In some cases the facility where press conferences are held may provide this equipment.

### **Accounting and Finance**

Monitoring projects must keep meticulous accounts of funds received and all expenses paid for salaries, supplies, telecommunications, report distribution, insurance, rent and all other matters. It may be necessary to hire a specific person, such as an office manager, or combine these responsibilities with another person’s tasks. It is also wise to obtain the services of a certified public accountant to set up accounting procedures and to periodically review them.

### **PLANNING AND REHEARSAL**

It is very important that all of the project participants—especially those who will be speaking publicly—are able to confidently address the impartiality, accuracy and credibility of the methods used by the project and be able to use this information to defend the project against critics and skeptics. For this reason, it is necessary to practice analyzing and releasing findings before going public. Every media monitoring project should practice monitoring techniques, analysis of data, report preparation and public presentations during a dress rehearsal period before the actual monitoring begins. Try to anticipate the questions that will arise and practice the responses until all the relevant staff can confidently express themselves and defend the methodology of the project.

Every media monitoring project should practice monitoring techniques, analysis of data, report preparation and public presentations during a dress rehearsal period before the actual monitoring begins.

As part of the rehearsal, consider seeking the advice of outside experts. This will not only help design good methods, but it also may add further credibility to the project. There are numerous international groups that deal with media standards or have conducted media monitoring projects, and they might be willing to visit your office, attend a practice press conference or provide consultations by phone, e-mail or other means. The press sections of international observer groups and embassies might be able to give useful advice as well. (See Appendix 1 for a list of organizations that could be contacted.)