Sustaining the Mission
Television Strategic Investment Scenarios

Digital Distribution Implementation Initiative[1]

Contents

Sustaining the Mission

Public radio and television stations present deceptively simple identities – NPR and PBS – to the general public, identities that mask a complex array of licensee types, mission elements, funding levels and sources, and operating modes. Within that complexity, **public broadcasting is delivering unparalleled quantities of high quality public service**; most of it to large audiences compared to our mission competitors, but increasingly to specific audiences over a wide variety of digital distribution technologies.

This initiative addresses a need within the public broadcasting community – in particular, for senior management and governance personnel – to garner **guidance in making strategic investment decisions**. We know that we are under economic stress and we know that changes in our environment will not wait for that to resolve in our favor. Change is impatient and disruptive. How can we be proactive about our future? **This paper will argue that the more we seek to understand and manage change, the more likely we are to emerge with our mission intact.**

This paper describes a meta-analysis of the public and commercial media landscape, offers a look at the future five years out, and makes recommendations concerning the direction of our strategic investments, individually and collectively. **Ironically, to sustain our mission, it will argue that we must begin to make *repositioning* strategic investments – rather than those that sustain the legacy modes of carrying out our mission.** Indeed, it will argue that it will become increasingly difficult to make strategic investments in the legacy modes without jeopardizing public broadcasting's ability to reposition itself to meet the challenge of disruptive technologies.[2]

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[1] Funded by the Corporation for Public Broadcasting
[2] Here and in the rest of the paper, the term technologies means not just hardware and software but also new techniques or methods of doing business. The term and broad definition of technologies are from Clayton M.

Background

Public broadcasting is moving into a new space with new opportunities and challenges for which we must be prepared. This initiative, begun in 2002 to update earlier scenario-building efforts from 1991 and 1997,[3] has resulted in an interim pair of scenarios papers for public radio and television first published in February 2003 and now completed here. These scenarios are the product of the CPB-funded "Digital Distribution Implementation Initiative (DDII)" working group, formed to help coordinate and learn from the major public broadcasting digital distribution projects. The document was also reviewed in December 2002 by a multi-disciplinary group of more than 30 experts from inside and outside public broadcasting.[4] The thoughts expressed reflect the group's collective experience with the rollout of a variety of digitally distributed services.

Although the name of this initiative implies otherwise, **the DDII scenarios have more to do with the kinds of services that public broadcasting will provide in the future and the business models for providing them than they do with technologies used to distribute them**. The work reflected in these documents also closely mirrors recent efforts by Accenture, PBS, NPR and CPB to update the 1997 scan of the television industry and to revisit the assumptions made at that time. It is also generally consistent with an analysis of the public television economy conducted by McKinsey & Co. in 2003 that point to specific financial opportunities. **Implementation of the McKinsey recommendations for cost savings and revenue enhancement will provide much-needed capital for future strategic investments.**

In earlier efforts there was a greater emphasis placed on television rather than on radio, owing to television's earlier digital conversion. But now, m*uch has changed beyond the digital conversion of transmission.* Today, to borrow from Shakespeare, **the urgency in public television might be characterized as "*to be or not to be*."** In contrast, **public radio's urgency is more "*to be all we can be*."** As a result, both media have received close attention in this work.

Both of these urgencies suggest strategies that will require substantial change and a willingness to take risks in the furtherance of our mission. Although we are not without encouraging examples, we have a history of being risk-averse. ***We must recognize, however, that doing nothing also entails substantial risks.***

This paper discusses our legacy as broadcasters, one which may make it all the more difficult to contemplate a future in which broadcast delivery is no longer the only, or even the most important, means by which we provide our services. It presents a snapshot of today's media environment, anticipates the media environment five years hence, and suggests strategies for ensuring public television remains a vital part of that media environment.

Christensen, *The Innovator's Dilemma*, New York: HarperBusiness, 2000 (orig. pub., Harvard Business School Press, 1997).

[3] The 1991 work involved the Boston Consulting Group and the 1997 work involved Andersen Consulting (later renamed Accenture).

[4] See Addendum B for a full list of participants.

Public Broadcasting's Legacy

Public broadcasting has an admirable history of broadcast service, extending more than eight decades for radio and nearly five decades for television.

Our broadcasts arguably achieve more aggregate voluntary usage each year than any other non-profit or governmental service – 11.5 billion *person* contact hours for public radio and 5.8 billion *household* contact hours for public television.[5] This is the equivalent seat time of people filling the Rose Bowl for some 73,000 football games! By comparison, the 16 museums of the Smithsonian Institution enjoyed some 40 million visits in 2000, according to its Secretary. **We have established ourselves as Gulliver in the Lilliputian world of public service organizations**. (We often forget to include the other organizations that share our mission – the arts, educators, museums, libraries, and the like – on our list of media competitors, looking only at other broadcasters, cable and DBS providers.) Overall, this "gross tonnage" of public service is increasing, as public radio's increases outweigh decreases in public television usage.

Our fortes have been great storytelling and serving as impresario of the arts to millions. We have tackled topics, issues and audiences that no one else will touch, often showing editorial courage. We present programming using award-winning production values and with outstanding technical quality. We've been able to schedule programming for optimal usage by what, among services with similar missions, is clearly a mass audience.

But our legacy also included a tradition of accommodation in public policy (funding, carriage and spectrum) that sometimes distances us from the marketplace. And it also includes a tradition of being self-contained independent operations for functions that make a difference to viewers as well as for things that do not (termed "baking your own cookies" below). Public broadcasters in other countries have demonstrated the ability to provide quality content and responsive local services, without approaching the investments in infrastructure that U.S. public broadcasting supports, and as a result have made substantially greater investment in relevant local and national services.[6]

The Media Environment In 2003

Consumers have certainly welcomed digital media into their homes, but not according to anyone's game plan. In general, quantity (more channels) has been favored over quality (better content). **Consumer control and choice are advancing** (for example, the kinds one gets using computers, DVDs or PVRs – Personal Video Recorders). The improved, but "good enough" picture and sound quality of DVDs have so far trumped the superior quality of high definition, wide-screen home theater.

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[5] One person listening or one household watching one hour equals one contact hour. The numbers shown for radio are Arbitron's Spring 2003 survey and include listening only by persons 12+ for CPB-qualified stations that meet minimum reporting requirements. The numbers shown for television are Nielsen Media's May 2002 survey and include viewing by persons 2+ for some 244 stations that met minimum reporting requirements for the 1998-2002 time period (about 100 were "BMS" for at least one of those years).

[6] See, for example, http://www.cbc.radio-canada.ca/htmen/annual_report/ (accessed 10/7/03).

PBS and a growing number of stations are making effective use of companion web sites to amplify and localize broadcast programming. Additionally, we are beginning to see visual elements being incorporated on NPR and some radio station companion web sites. However, we are only beginning to see examples of broadcasters developing the web as a new medium. For us, "being digital," to recycle Nicholas Negroponte's eight year old book title,[7] mostly carries legacy implications – prettier pictures, more convenient editing, etc.

We took credit earlier for substantially more "gross tonnage" of public service than our non-profit mission competitors. **However, things are busy in Lilliput.** With low barriers to entry using "disruptive" digital distribution technologies, the public service sector is building and implementing media content distribution capacity, often without our involvement.[8]

In recent years, due in great part to earlier scenario work, many public television stations have adopted strategies based on a mixed portfolio of DTV services: multi-channel broadcasting during the day, single-channel high-definition broadcasting at night, and a mix of other value-added services to various constituencies and customers using the "excess" data-carrying capacity of the digital broadcast signals. Some licensees have been successful in negotiating multi-stream digital carriage agreements with cable operators.

Today, however, terrestrial television broadcasting (both non-commercial and commercial, digital and analog) operates in a dynamic media landscape. Over-the-air television broadcasting has been overtaken or is seriously threatened in significant ways:

- As a last-mile distribution technology. Cable and DBS gatekeepers now stand between terrestrial broadcasters and the primary receiver in 85% of homes[9] -- though the National Association of Broadcasters has, with unknown methodology, estimated that 40% of the installed base of television receivers depends on off-air reception.
- As the dominant source of television content. A proliferation of cable-and-satellite-only channels now competes for audience share, and delivers an increasing amount of original programming. These channels are also becoming contenders in the emerging "asynchronous distribution" or Video on Demand (VOD) business, originally dominated by feature films. Some cable MSOs have begun offering on-demand access to premium channels (HBO, Showtime, *et al.*) with PVR-like features.
- As a magnet for advertising revenue. For the moment, free-to-the-viewer, advertising-supported terrestrial broadcasting still commands the bulk of commercial television revenues, but cable channels are on the threshold of overtaking broadcast channels in total viewing and advertising revenue. Terrestrial broadcasting's primacy in advertising revenue may erode swiftly as cable operators develop enhanced abilities to package and sell very precise spot and local

[7] Nicholas Negroponte, *Being Digital*, Knopf, 1995.
[8] See, for example, the J. Paul Getty Museum, http://www.getty.edu, which in early 2003 had 2 terabytes of media material accessible to the public.
[9] FCC 02-338, *Ninth Annual Report on Video Competition*, December 31, 2001. This probably somewhat over-estimates the penetration of multi-channel services due to a few consumers who subscribe to both DBS and cable. Older audience demographics and some anecdotal evidence indicate that terrestrial delivery may be more important to public television audiences than to the general population.

advertising. Set-top box memory may even give DBS operators the ability to target advertising to specific geographic or demographic markets.

Changes in media ownership have also altered the landscape. In commercial broadcasting, a handful of conglomerates predominate. Not only do fewer companies own more terrestrial broadcast licenses, they also own distribution infrastructures that cut across technologies and markets. They are able to spread the costs of program production and delivery across a number of venues, and maximize advertising revenue at the same time.

The *Wall Street Journal* proclaims that with 22.5 million broadband households by the end of 2003, "The Age of Broadband is here" and that, "It has critical mass."[10] A recent study by Arbitron and Edison Media Research found that 13% of Americans have used Internet audio or video in the past week (30 million people), 21% in the past month and 45% have said they have tried it at least once.[11] Despite the "dot com bust," residential broadband access has continued very strong growth, tripling since January 2001. Among Internet audio and video users, 50% of monthly users and 57% of weekly users have broadband access.

The Television Landscape In 2008

Using the Accenture-PBS-CPB environmental scan as a starting point, the DDII core working group made the following projections about our environment five years hence:

- Local stations will continue to serve mass audiences, but primarily through cable and DBS.[12] Off-air reception is likely to be of minor consequence as a last-mile distribution technology for mass audiences, but many licensees may find it useful as a delivery platform for specialized content designed for niche audiences, in some instances as a partner to public service entities who require access to distribution services.
- Viewers/users will choose programming from among increasingly customized and personalized options, using on-demand services provided by content aggregator-distributors.
- Ownership of both distribution infrastructure and program production will be even more concentrated than it is today.
- Television revenues will continue to shift away from the dominance of advertising (though it will remain an important part of the overall revenue mix), with increased reliance on subscription revenues at lower and lower levels of aggregation (*e.g.*, more often pay-per-view and less often pay-per-channel or pay-per-service-tier).
- Advertising revenues are likely to prove insufficient to support the current broad array of channels available to cable and DBS viewers, causing many to fold, and spurring cable and DBS operators to shift bandwidth to alternative revenue models.

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[10] Dennis K. Berman, "Profiting From the Broadband Revolution," *Wall Street Journal*, October 13, 2003, p. R1.
[11] Bill Rose and Larry Rosin, *Internet and Multimedia 11: New Media Enters the Mainstream*, Arbitron, Inc./Edison Media Research, 2003, http://www.arbitron.com/downloads/Internet_Multimedia_11.pdf (last accessed 10/6/2003).
[12] We anticipate that off-air analog reception will continue to serve a substantial audience for as long as it is available -- an audience of secondary and tertiary receivers in cable and DBS homes, of local channel viewers in smaller markets, and in the 10% or so of homes that do not subscribe to multi-channel services.

- PBS and perhaps other organizations controlling sufficient public television content will have found ways to distribute some of that content directly to consumers.
- Cable, DBS and other multi-channel providers along with Internet broadcasting will provide noticeable competition to public television programming as will new media entries from mission competitors like museums, libraries, archives and educators.
- Cable carriage of PTV multicast programming will have been obtained not through "must carry," but "must convince." Cable and DBS will continue to press legal challenges in order to maintain their ability to program their systems as they deem appropriate. In markets with multiple public television stations but no collaborative programming strategy, some stations will find themselves shut out of vital carriage of program streams by multi-channel system operators.
- The steady erosion of audience and audience-based (and conceivably tax-based) revenue will continue to threaten the existence of a substantial number of licensees, at least as stand-alone operations. The public television system in 2008 will be more condensed than it is today in licensees if not in transmitters.
- A variety of wired and wireless technologies will be competing to deliver services to the household, most of them through two-way communications technologies with greater bandwidth or capability than over-the-air broadcast.
- Audiences will still value storytelling; however, despite the volume of material, critically notable content is likely to remain scarce.
- In the new mobile video/multimedia broadcast service carved out of the former high UHF television spectrum (700 MHz), the first stations will be just beginning operation, some perhaps with radio stations as partners.

The trend-line in television suggests to us the necessity of developing skills and services beyond our core legacy business of terrestrial broadcasting.

Our Capacity for Change[13]

As we progress toward this not-so-distant horizon, one of the important assumptions we need to make is that we have the capacity to change.

The case for fundamental change might be described this way: **Licensees need to broaden not only their delivery platforms but also their notions of whom they serve.** They must move from being duchies – relatively small, independent, self-contained operating entities – to federations that achieve strength and scale by creating alliances horizontally (with each other) and vertically (within the communities they serve). Without either a path or willingness to change, local licensees may well lose out to their commercial broadcasting counterparts, who have rapidly aggregated since deregulation in 1996. In most markets, public television licensees are competing with commercial affiliates that are owned by multi-channel providers and they increasingly compete, too, with media products and services that are for some consumers cheaper, simpler, smaller and more convenient.[14]

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[13] For an expanded essay on change, see DDII Dispatch No. 12 at http://www.technology360.com Also see "We need not bake our own cookies," *Current*, June 2, 2003, http://www.current.org/pb/pb0310cookies.html (last accessed 10/7/03).
[14] Christensen, *ibid*.

Both public radio and television are heavily involved in "baking their own cookies" – devoting resources to performing functions *at the station* which are transparent to viewers that could be better and less expensively done elsewhere. Inevitably, being able to operate self-contained comes at the price of reducing the resources available to serve communities or to acquire increased 'shelf space.' This keeps us from making the larger investments in content and mission we need to be truly significant in our communities. Ironically, increased collective investments in the back office should lead to greater individual investments in our communities. **Mustering the *will* to shed these demonstrably duplicative functions has never been easy, but the *means* of shedding them have never been easier than they are today.**

There are those who will also hold that that the past is prologue to the future. Much of the evidence *at the station level* indicates that the present is a lot like the past, despite substantial change *at the industry level*. In other words, because we have survived great industry changes over the past two or three decades without much fundamental internal adjustment, we can probably continue to do so. However, the facts do not appear to substantiate this view this time.

Even when station management is open to change, a licensee may resist or delay change for institutional or community reasons, or, when public broadcasting is only one aspect of an institution's broader responsibility, a licensee may simply be less aware of the need for change in the public broadcasting organization.

And, for many, it is personal. Whether it was the romance of being a DJ, producer, news anchor or RF engineer that initially inspired us, we were able to fulfill those dreams within a public service setting. Few of us were inspired to take up our present professions by dreams of being librarians, curators, arts administrators, or even teachers.

Change may be necessary and is certainly possible, but we can all agree it's very difficult. Alliances are key.

Investment Scenarios: Sustaining Versus Repositioning

Consider now two fundamentally different strategic investment scenarios: one a strategy designed to ***sustain*** the legacy (broadcasting) business, and the other to ***reposition*** public broadcasting in new directions consistent with its historic mission. As with all allocations of limited resources, there are natural tensions between these scenarios.

The following are some examples of repositioning investments – those that take public television in a direction different from the legacy business of broadcasting mission-appropriate and professionally-selected programming to as large an audience as is possible:

Mission Elements	Early 90s Trend	Repositioning Investments
Arts & culture	•	portalwisconsin.org, KQED online
Digital collections & libraries	•	PBS American Field Guide (pbs.org/americanfieldguide), WGBH Forum Network (wgbh.org/forum), knowitall.org
Distance learning	•	Chalkwaves, Washington Higher Educ'n Telecommunication System
Homeland security & public safety	•	Kentucky Ed. TV emergency datacasting, KERA/UTMB medical/homeland security services
Institutional support	•	WSU Instructional Support Services (KWSU)
Life skills enhancement	•	The Wisconsin Gardner (wpt.org/garden)

While these investments may be made ***individually*** by licensees or ***collectively by smaller or larger groups of licensees, not all strategies will work unless sufficient scale is achieved to render them economically viable***.

Enhancements to the legacy business, for example, may include *individual* investment tactics or modalities or they may be *collective* investments. For many years, numerous individual public television licensees have been acquiring new distribution capacity in the cable and ITFS spaces. Acquiring shelf space will continue to be an attractive and appropriate investment strategy for individual licensees. Collective efforts (*e.g.*, Public Radio Capital) can also help to make these individual investments possible. As an example, over the last two decades, university stations in Michigan, Texas and Washington, and a number of state networks have developed non-broadcast distance learning services in partnership with education units or agencies.

Both sustaining and repositioning strategic investments may be implemented using different tactics or modalities. For our purposes, we will group these into three types of modalities:

- ***Toolkits*** – These are investments made in activities or "tools" that enable licensees to improve practices within their own organizations without the need for large-scale collaboration. *Most Toolkit investments tend to be modest and favor a sustaining scenario*. Toolkits generally don't threaten the status quo, are relatively inexpensive to implement, and have an established history of adoption in public broadcasting. Public television's research toolkits (*e.g.*, TRAC) over the past 20 years have imbued a best practices culture among a substantial number of licensees of varying size and type.

- ***Service Clouds*** – These are investments in collaborative activities or "clouds" (to borrow the Internet networking term), in which stations collaborate either to aggregate significant activities at some scale among themselves or to create another organization that can provide the required service or facilities at lower cost. *Service Clouds investments tend to be of moderate-to-large scale and may be equally effective in either scenario.* They date from the collaborative program exchanges first seen in educational radio in the 1950s, and later in television. The public broadcasting interconnection systems are "service clouds" and were high among the reasons that NPR and PBS were founded. A successful station-based service cloud servicing a wide variety of station functions is the five-station CoastAlaska collaboration.[15] Service clouds can significantly lower capital and operating expenses and often extend best practices. They can extend the life of a legacy business, and also point the way toward innovation and repositioning.

- ***Pioneers*** – Much more threatening and difficult to comport with our conventional wisdom, Pioneers are systematic investments designed to "plant a flag" in new and unfamiliar territory. These investments are usually made in an organization or in a manner that is independent of any licensee's legacy agenda. Pioneers address mission in new ways, and can often exist on a stand-alone basis. *Most Pioneer investments will also be of moderate-to-large scale and tend to lend themselves to a repositioning scenario though are also applicable to the sustaining scenario.* Pioneer investments will have a significantly higher failure rate than investments in the other modalities, so public broadcasting will need to place multiple bets in this area in order to have successes.

When making a plan for the near future (one to three years), individual public broadcasters are likely to want to preserve their operational independence and as much of the "gross tonnage" of local public service they currently enjoy. This would argue for *sustaining strategies*: a high investment in Toolkits that substantially improve local performance, a somewhat lower investment in Service Clouds, and almost none (collectively) in Pioneers.

With the a dramatically altered media environment five years out, it is clear to the working group that our investment strategy should more strongly favor the *repositioning strategies* outlined above. Regrettably, decisions about investing collaboratively in new rather than traditional places within the station's legacy business are likely to take on the familiar form of tension we now see in "local versus national" investment decisions. However, this characterization could be a terrible distraction; **if we want our mission to survive locally or nationally, we must provide leadership in developing processes that provide "public broadcasting" products and services that are more responsive to the needs of our constituents, and cheaper, simpler, smaller and more convenient to use**. Technology initiatives now underway – e.g., PBS Next Generation Interconnection System and Enhanced Interconnection and Optimization Project – will make collaboration much easier than ever before.

A *repositioning* strategy would include increased investments in Service Clouds, in which capacity is created at a collective level to which licensees can outsource activities that do not provide direct and/or apparent benefit to local constituents. These kinds of investments do not inherently threaten the independence of licensees; in fact they could

[15] See DDII Dispatch No. 14 at www.technology360.com for details on this collaboration.

provide an anchor for continued local ownership and a renewed emphasis on editorial, rather than operational independence.

Equally, if not more important in the *repositioning* strategy are investments in Pioneers. These endeavors may help public broadcasting keep a "seat at the table" in new technologies and services, one or several of which could emerge as "killer apps." They also can and indeed some will fail!

Conclusion

As we contemplate repositioning our industry, it is helpful to keep in mind that **services can, like the Smithsonian example mentioned earlier, be successful and have substantial impact with significantly lower usage numbers than we have historically enjoyed as broadcasters**. The recent "once in a decade" publishing phenomenon, Alice Sebold's novel, *The Lovely Bones*, took four months to reach two million copies in print, something public broadcasters can reach in hours.[16] Success in the repositioning environment might more resemble that of our mission competitors or the publishing industry.

Ultimately, regardless of how we weigh *sustaining* versus *repositioning* investments, public broadcasting is facing profound change. We will not look the same in ten years regardless of the actions we take or refrain from; nor will the environment in which we work. This transformation will be uncomfortable at best, catastrophic at worst, and will require creative leadership. **The more we seek to understand and manage change, the more likely we are to emerge with our mission intact.**

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October 21, 2003

[16] Daniel Mendelsohn, "Novel of the Year," *New York Review of Books*, January 16, 2003, pp. 4-8.

Addendum A – Diverging Fortunes of Public Radio and Television

Public television is undergoing a mandatory transition to digital terrestrial television transmission (DTT), at a capital cost approximating its annual revenues. Meanwhile, standards for digital terrestrial radio transmission have been approved, but the transition is voluntary (though it may achieve a *de facto* mandatory status if consumer adoption should prove rapid and pervasive).

There is evidence that, even if public television could agree on a multi-channel strategy that cable MSOs and DBS operators would find compelling enough to support with voluntary carriage, we couldn't afford it, and would not agree on a cohesive programming strategy.

In public radio, both listening and private support vectors have moved upward. Although overall radio listening is eroding, public radio's listener support and share of the radio audience have about doubled since 1990. With expanded coverage, public radio seems to have significantly more headroom than television. Public television viewing is steadily declining, as is the viewing of commercial broadcast networks. Membership numbers are directly correlated to viewership, and so also are in continuing decline. Income from most other sources is declining as well.

With the significant exception of NPR, content production in both media is largely the province of stations and independent producers, and most distribution is done by a handful of entities.

There has been a significant growth in the number of public radio stations in recent years in markets large and small. Licensees have acquired additional stations in their markets in order to provide differentiated formats and programming services. However, there has been no significant trend toward nationwide ownership groups.

Public radio stations, program producers, and national program distributors have ventured into synchronous and asynchronous Web streaming and, in a more limited way, into satellite radio.

Given these circumstances, public radio should have the capacity to make substantial investments in both the sustaining and repositioning scenarios. Public television does not have that capacity now. Unless it shifts its current spending toward functions that have a direct bearing on how viewers value its services, public television will be able to make only limited investments and will have to choose either the sustaining or the repositioning scenario in which to make them.

Addendum B – Participants

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