Note: Fact-checking guidelines were generously provided to WCIJ in June 2009 by the Center for Public Integrity. WCIJ is modifying these guidelines as it develops its own procedures. The Center for Public Integrity has given permission for WCIJ to share these guidelines with other news organizations.

Wisconsin Center for Investigative Journalism
Fact-Checking Guidelines
for writers, researchers and fact-checkers
updated Sept. 18, 2012

Fact-checking generally is conducted by a person other than the reporter who wrote the story.

WCIJ reporters are expected to gather, during the normal course of reporting, materials that will be needed for fact-checking.

Identify each fact that must be documented. ("Is that a fact?")

- Proper names – generally, any word that is routinely capitalized
    - Persons. Verify and document both spelling of name and proper title. Best sources: Web site of employer; interview (note that spelling was confirmed).
    - Organizations: Subject to the *AP Stylebook* (see "company names" and "organizations and institutions"), use the style that the organization has adopted, as far as capitalization, internal spaces, periods after letters. Best sources: the organization's own Web site or spokesperson, or for businesses Hoover's Online (http://www.hoovers.com).
    - Product names and other trademarks: Verify and document spelling and ID/description. Best sources: manufacturer's or trademark owner's official Web site; International Trademark Association (see http://www.inta.org/index.php?option=com_trademarkchecklist)
  Nexis is **not** always a reliable source for spelling names – mistakes can get picked up and recirculated.

- Numbers – must be documented, in virtually every case
  Ordinarily, we will identify the source – ideally, the primary source – of the information, if it is not self-evident. Best sources: government reports, Center databases ("according to the Center's analysis"), other reports, including from research organizations, media/journalists, academics, etc.

- Scientific, technical or other specialized terms. Document the definition or explanation (which usually should be spelled out for the reader as well). Best sources: standard or authoritative reference sources, including Web sites.

- Quotes.

- Details: Verify each. If we report there are three federal lawsuits, confirm there are three suits. And that all three are federal.

- Everything else
  If a statement could theoretically be proven true or false, it should be documented. Some exceptions:
    - Introductions or other summaries – these are "documented" by the text they summarize, which in turn is documented.
    - Common knowledge – e.g., "… Washington, D.C., the nation's capital."

On a printout, or within an electronic version of each story, assign a number to each fact. This number will then correspond to supporting documentation, maintained electronically or in a paper file that accompanies the story throughout the editing and fact-checking process.

- Save all clips and other sources in electronic form – e.g., interview notes and Nexis clips in MSWord format, Web pages saved to the Center's servers, paper documents scanned as PDFs. Do this contemporaneously – otherwise, you may not be able to identify the source you originally relied on. Or your source may disappear from the Web.

- At a minimum, include in the documentation the name of the electronic file where you have stored the source document, the URL/URI from which you obtained it (if applicable) and, for multi-page documents, the page number referred to.

- If the identity or source of a document is not evident on its face (e.g., a report lacking a cover page), provide this information in the footnote.

- If feasible (e.g., in MSWord documents), it is helpful for you to highlight the specific passage in the document that you quote or rely on.

- If you wish, you may hyperlink from the footnote to the cited document (in a P:\ drive folder). However, realize that these links may not be stable in the long term, if the folder containing the document is moved or renamed.

Annotating – what documents to include

- Provide interview notes for the entire interview, if possible – the fact-checker should see the context as well as the specific quotes. OK to omit names from interviews on background or not for attribution.

- E-mail or faxed exchanges with interview subject or spokesperson for an organization.

- The Center's data analyst, with assistance from other staff members as requested, will ordinarily verify numbers generated from Center databases. For other "Center analyses" based on a dataset of more than minimal size, supply the source(s) for the underlying data/inputs and (if feasible) a spreadsheet (or similar tool) that generates the output from the input.

- If you rely on secondary sources, you should provide two independent sources. If this is not possible, attribute in copy to your (single) source.

Fact-checking with sources

- In addition to our internal fact-checking system, reporters are encouraged — whenever feasible — to have knowledgeable sources or subjects review the story before publication, particularly sources who are likely to be hostile to the findings. **Do not email drafts; rather, read the story over the phone.** Advise the source that you would like feedback on the accuracy and fairness of the story. Under all circumstances, the Center retains control of its editorial content. Journalists are not permitted to grant sources the authority to approve quotes prior to publication.

Specific problems:

- <u>PLAGIARISM</u>.
  - If you use more than a few words verbatim from a source, use quotation marks and give attribution.
  - If you paraphrase from a single source, still give attribution – especially to credit the publication/outlet that broke the story you're citing. Paraphrasing requires that you rely on your source only for the facts, not the wording.
  - Facts obtainable from multiple independent sources need not be attributed in copy. Paraphrase and supply at least two documented sources.

  Keep your sources and clips strictly separate from your writing. If you cut and paste clips, make sure the source is noted and that you clearly mark them as direct quotations – especially if someone else will also be using your research.

- Avoid ambiguous or blind quotes. E.g., "Although the candidate has accepted record amounts of contributions from K Street lobbyists, he claims that he isn't 'beholden to the denizens of Gucci Gulch.'"

- Distinguish date of event vs. date of source. Newspaper stories are typically dated one day after the breaking news events they describe.

- Distinguish year elected vs. year took office.

- Double-check phone numbers and Web links by using the live electronic version of the file, to guard against typos or outdated information being published.

- Pay special attention to criminal cases and other charges of wrongdoing. Distinguish allegations (esp. in pending cases) from charges proven in court. Note the outcome of cases (acquitted, convicted) and subsequent developments (pending appeals, reversals on appeals, etc.).

- Enforcement actions by government agencies are often settled by imposition of penalties without admission of wrongdoing. In such a case, do *not* say: "XYZ Corp. paid a $10 million fine for dumping toxic waste." Do say (perhaps): "XYZ paid $10 million to settle the charges without admitting fault."

- Include fair response. Try to seek reaction early enough that the subject has a meaningful opportunity to respond. Indicate the timeframe within which you need a response. Indicate in copy if the subject could not be reached, did not respond to messages, or declined comment. If the subject does respond, present their response fairly; if it is in writing, consider publishing a Web link to the full response.

- Avoid language that suggests bias, including partisan bias. Those on each side of an issue often develop phrasing to promote their own "spin," but the Center should be careful to use neutral language. Suggestion: read the copy while trying to adopt the point of view of a "partisan" to see that it doesn't tacitly conflict with that point of view.