Introduction
Overview

1. Fundamentals
2. Components & Types
3. Key Concepts, Methodology & Tools
4. Current State & Future Direction
5. Exercise
6. Q&A
“Less is more.

Content dictates form.

God is in the details.

All in the service of clarity without which nothing else matters.”
STEPHEN SONDHEIM

LOOK, I MADE A HAT

Collected Lyrics (1981–2011)
with Attendant Comments,
Amplifications, Dogmas,
Harangues, Digressions,
Anecdotes and
Miscellany

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Part One: Fundamentals
Topics

+ Definitions
+ Origins
+ Contexts
+ Value
Definitions:

What is “content strategy”? 
WAIT.
WHAT IS “CONTENT”?
What is content?

“Content includes the text, graphics, video and audio that make up an interactive experience.”

—Kristina Halvorson

“Content is contextualized data.”

—Rahel Bailie

“Everything is content.”

—Rachel Lovinger
Content is any asset, object or artifact, published in an analog or digital environment, that…

- **conveys** information
- **communicates** ideas
- **engages** the imagination
- **captures** interest
- **encourages** action
- **satisfies** a need
- **supports** a goal
- **expresses** an opinion.
How does content manifest itself?

“To be, or not to be. That is the question…”
Since we’re breaking this down into component parts…
What is strategy?

“A holistic, well-considered plan for obtaining a specific goal or result.”

—Kristina Halvorson
Back to the original question…
Content strategy helps you understand not only what content needs to be created and published, but why.”

— Kristina Halvorson, Brain Traffic, author of Content Strategy for the Web
Origins:
Where did content strategy come from?
A (really) brief history

Inverted Pyramids in Cyberspace (Jakob Nielsen)

©2012 Christopher Collette
A (really) brief history

Checklist for Content Strategy

1995
2000
2005
2010

©2012 Christopher Collette
A (really) brief history

Managing Enterprise Content

©2012 Christopher Collette
A (really) brief history

What is Content Strategy and Why Should You Care?

This may seem obvious, but the two things which matter most in virtually any aspect of media (including the net) are content and connections. These principles, which are deeply intertwined, form the foundation of all types of value yielded by media – whether for broadcast TV, a national magazine, a web site, a weblog, or a simple exchange of e-mail messages.

If you or your organization has any sort of media presence (especially online), it’s useful to consider your overall content strategy: what you intend to say, and when and how to say it, in order to connect and interact constructively and efficiently with the people you need to help you achieve your goals.
A (really) brief history

Content Strategy: The Philosophy of Data

Not that familiar with "content strategy"? That’s ok. It’s in my job title, and I struggle every time I’m asked what I do for a living.

Many people have no idea what it means, but even more people bring their own (wrong) assumptions to the conversation. Usually they think I have something to do with writing copy. That’s not entirely false, but it’s kind of misleading.

The analogy I’ve been using recently is that content strategy is to copying as information architecture is to design. I find this analogy to be especially encouraging because ten years ago, on the crest of the first wave of the web, it was about to break; people had no idea what "information architecture" meant or even.

The irony of this communication challenge is that the main goal of content strategy is to use words and data to create unambiguous content that supports meaningful, interactive experiences. We have to be experts in all aspects of communication in order to do this effectively.

So, why has it been so hard for us to communicate what we do?

Perhaps the problem is that, because content is so permeable, everyone thinks they know all there is to know about it. If you can read and write, you can make content, right? Nearly 80 million blogs may prove that. But the fact is, as interactive experiences become more complex, so does the nature of content. A superficial understanding of content isn’t going to cut it anymore.

Content strategy is the digital age’s need for content philosophers and explorers of the metaphysics of content, starting with the question “What is content?”

Everything is content

When we were developing a deep-metadata system for the website of a national entertainment magazine, my colleague and I came to the conclusion that not only is everything content; it is also a form of content.

How did the need for this deep focus on content emerge? It surely emerged in the heavily visually oriented field of web design. As website functionality has increased and user behavior has become savvier, sites have had to meet the demand for sophisticated interaction and more content to support it. But simply more content won’t do; it has to be accurate and relevant. It has to be meaningful.

©2012 Christopher Collette
A (really) brief history

The Discipline of Content Strategy & Content-ious Strategy

1995  2000  2005  2010

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A (really) brief history

Content Strategy Consortium @ the IA Summit

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A (really) brief history

Content Strategy for the Web

1995  2000  2005  2010

Content Strategy for the Web
Today

Today

Today

CS Forum
2010: Paris, France
2011: London, England
2012: Cape Town, South Africa

CONTENT STRATEGY APPLIED
2011 & 2012: MINNEAPOLIS, MN

Plus more Content Strategy
topics at:

Today

Facebook
LinkedIn
Meetup
Twitter
Google
What business are we in?

Who are our constituents?

How do we create value?

Engagement

Competency

Alignment

Marigo Raftopoulous, “Business Strategy Fundamentals”
CS connects the business to users
Our working definition
Revised definition

**Content strategy** plans for the creation, publication, delivery, and governance of relevant content that possesses a **clear and measurable purpose** toward:

…supporting a **business objective**

or

…fulfilling a **user need**

across channels, environments, programs, and experiences.

*Extended/Adapted from Kristina Halvorson, “Content Strategy for the Web”*
Value:
Why every organization needs a content strategy
From web content strategy to enterprise content strategy
5 key foci are causing this shift

1. A fundamental **shift** away from analog toward digital distribution channels
2. An ever-increasing ability to **measure content engagement** through sophisticated analytical tools and metrics
3. A reconceiving of content as **product and strategic asset**, not simply as a message or a campaign component
4. Brands are becoming **publishers**
5. Content is **separating from its container** and is being created as “**content chunks**”

Part Two: Components and Types
Topics

+ Components
+ Types
Components
What

+ Topics are we going to cover?
+ Formats are we going to use? (text, video, charts...)

Components
WHY

+ Does anyone care?
+ Does this provide business value?
Components

HOW

+ Are we going to deliver the message?
+ Should we say it? (tone of voice…)

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Components

WHERE

+ Will we get the content?
+ Can we syndicate the content? (feeds, social media…)

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Components

WHEN

+ Will this be published?
+ Will it need to be updated?
Components

WHO

+ Is responsible for this content?
+ Will maintain it over time?
Good content (strategies) is / are...

- Relevant
- Accurate
- Informative
- Timely
- Engaging
- Standards-based

Types
# A skill continuum

<table>
<thead>
<tr>
<th>Technical</th>
<th>User experience</th>
<th>Marketing</th>
<th>Editorial</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ SEO</td>
<td>+ Information architecture</td>
<td>+ Branded and custom content</td>
<td>+ Publishing</td>
</tr>
<tr>
<td>+ Analytics</td>
<td>+ Structure</td>
<td>+ Social media and communities</td>
<td>+ Writing</td>
</tr>
<tr>
<td>+ Metadata</td>
<td>+ Taxonomy</td>
<td>+ Customer acquisition and retention</td>
<td>+ Story creation</td>
</tr>
<tr>
<td>+ CMS architecture</td>
<td>+ Curation</td>
<td></td>
<td>+ Content development</td>
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<tr>
<td>+ Content engineering</td>
<td>+ Digital archives</td>
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<tr>
<td>+ Semantic Web</td>
<td>+ Content modeling</td>
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Part Three: Key Concepts, Methodology & Tools
Topics

+ **Key Concepts**
  + Content Management Systems
  + Structuring Content

+ **Methodology & Tools**
Key Concepts
Content Management Systems

“META” description of data structure, operations and editing form

Structuring content

- Taxonomy
- Metadata
- Controlled Vocabulary
- Folksonomy
- Ontology
Structuring content

+ Taxonomy
+ Metadata
+ Controlled Vocabulary
+ Folksonomy
+ Ontology
Structuring content

+ Taxonomy
+ Metadata
+ Controlled Vocabulary
+ Folksonomy
+ Ontology
Structuring content: Taxonomy

+ **Genus**: Equus
+ **Subgenus**: Hippotigris
  + **Species**: Plains Zebra (Equus quagga)
    + **Subspecies**: Selous’ Zebra (Equus quagga antiquorum)
Structuring content: Taxonomy

- **Set**: African Safari
  - **Sub-set**: Animals
    - **Sub-sub-set**: Zebras
Structuring content

+ Taxonomy
+ Metadata
+ Controlled Vocabulary
+ Folksonomy
+ Ontology
Structuring content: Metadata

+ **Structural Metadata**
  + **Title**: Portrait of a Plains Zebra
  + **Description**: Zebra in the Wild
  + **Tags**: Zebra, Botswana, Safari, Plains, Africa
  + **Appears in**: African Safari (set)
  + **Created by**: Muhammad Karim
  + **Taken on**: June 29, 2009
  + **Taken with**: Canon EOS 4000 Digital
  + **Usage Rights**: GNU Free Documentation License
  + **Source URL**: http://en.wikipedia.org/wiki/File:Zebra_portrait.jpg

Rachel Lovinger, “Metadata in Practice” (2010); “Make Your Content Nimble” (2011); “Metadata Workshop” (2012)
Structuring content: Metadata

+ **Administrative Metadata**
  + **Title:** Portrait of a Plains Zebra
  + **Description:** Zebra in the Wild
  + **Tags:** Zebra, Botswana, Safari, Plains, Africa
  + **Appears in:** African Safari (set)
  + **Created by:** Muhammad Karim
  + **Taken on:** June 29, 2009
  + **Taken with:** Canon EOS 4000 Digital
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  + **Source URL:** http://en.wikipedia.org/wiki/File:Zebra_portrait.jpg

Rachel Lovinger, “Metadata in Practice” (2010); “Make Your Content Nimble” (2011); “Metadata Workshop” (2012)
Structuring content: Metadata

+ **Descriptive Metadata**
  
  + **Title:** Portrait of a Plains Zebra
  + **Description:** Zebra in the Wild
  + **Tags:** Zebra, Botswana, Safari, Plains, Africa
  + **Appears in:** African Safari (set)
  + **Created by:** Muhammad Karim
  + **Taken on:** June 29, 2009
  + **Taken with:** Canon EOS 4000 Digital
  + **Usage Rights:** GNU Free Documentation License
  + **Source URL:** http://en.wikipedia.org/wiki/File:Zebra_portrait.jpg

Rachel Lovinger, “Metadata in Practice” (2010); “Make Your Content Nimble” (2011); “Metadata Workshop” (2012)
Structuring content

+ Taxonomy
+ Metadata
+ Controlled Vocabulary
+ Folksonomy
+ Ontology

Marko Hurst, “Search Analytics for Content Strategists” (2009)
Structuring content: Controlled Vocabulary

+ **Structural Metadata**
  + **Title**: Portrait of a Plains Zebra
  + **Description**: Zebra in the Wild
  + **Tags**: Zebra, Botswana, Safari, Plains, Africa
  + **Appears in**: African Safari (set)
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  + **Source URL**: http://en.wikipedia.org/wiki/File:Zebra_portrait.jpg

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*Marko Hurst, “Search Analytics for Content Strategists” (2009)*
Structuring content

- Taxonomy
- Metadata
- Controlled Vocabulary
- Folksonomy
- Ontology

Rachel Lovinger, “Make Your Content Nimble” (2011)
Structuring content: Folksonomy

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+ **Appears in:** African Safari (set)
+ **Created by:** Muhammad Karim
+ **Taken on:** June 29, 2009
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+ **Usage Rights:** GNU Free Documentation License
+ **Source URL:** http://en.wikipedia.org/wiki/File:Zebra_portrait.jpg

Rachel Lovinger, “Make Your Content Nimble” (2011)
Structuring content: Folksonomy

+ **Structural Metadata**
  + **Title:** Portrait of a Plains Zebra
  + **Description:** Zebra in the Wild; striped animals
  + **Tags:** Zebra, Botswana, Safari, Plains, Africa
  + **Appears in:** African Safari (set)
  + **Created by:** Muhammad Karim
  + **Taken on:** June 29, 2009
  + **Taken with:** Canon EOS 4000 Digital
  + **Usage Rights:** GNU Free Documentation License
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+ Ontology

Marko Hurst, “Search Analytics for Content Strategists” (2009)
Structuring content

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+ Metadata
+ Controlled Vocabulary
+ Folksonomy
+ Ontology

Marko Hurst, “Search Analytics for Content Strategists” (2009)
Methodology & Tools
Methodology: Audit

- Analyze
- Assess
- Evaluate
- Research
Methodology: Audit

Analyze, Assess and Evaluate:

+ Content inventory: quantitative
+ Content audit: qualitative
+ Competitive landscape content assessment
+ Gap analysis

Research:

+ Stakeholder interviews
+ Audience, user research, consumer insights
+ Persona development
## Tools: Audit

### GSAM Content Inventory / AMERICAS

<table>
<thead>
<tr>
<th>Section 1</th>
<th>Section 2</th>
<th>Section 3</th>
<th>Section 4</th>
<th>Page Title</th>
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<tbody>
<tr>
<td>GSAM</td>
<td>Separate Account Capabilities</td>
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<td>Global Liquidity Management E-Learning</td>
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<td>GSAM</td>
<td>Global Liquidity Services Portal</td>
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### Insights

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<td>GSAM</td>
<td>Portfolio Manager GIAAs</td>
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### John

**Informed Public: Socially Conscious Voter**

- "We should never have let the banks grow so powerful. The idea that a failing bank can cause a global economic crisis is untenable. In the future, the major banks need to be more socially and economically responsible."

John is a professor at Ohio State University with a PhD in early American history. His yearly income is around $100k. He is divorced and has two children. John is well informed politically and also exasperated by the apathy of his fellow Americans. He believes that everyone—individuals or corporations—should take equal responsibility for the state of society.

John enjoys lively debate with friends and often comments on and joins conversations in blogs. He has recently had his thoughts published in the Letters section of the New York Times.

**Age 41**

**Nationality: American**

**Mindset**

- He's disappointed with Goldman Sachs and the other major banks but hopes that the glare of publicity will force them into more responsible working practices in the future.

**Goals**

- Staying well informed about the state of the world's economy
- Keeping up with market trends
- Being able to back up his opinions in discussion

**Needs**

- Clear information about the current economic situation
- Thought leadership pieces to give background to the facts
- Information about future trends

**Influencers**

- Favored media sources (Daily Beast, New York Times, Onions, Huffington Post)
- Friends and colleagues
- Trusting information from Goldman Sachs

**Pain Points**

- Finding straightforward facts
- The firm's reputation
Methodology: Plan

Audit

Plan

Strategize
Structure
Define processes
# Methodology: Plan

## Strategize
- Messaging
- Editorial
- Brand Voice/Tone
- Success Metrics/Analytics

## Structure
- CMS template requirements
- Content management system architecture
- Roadmap
- Content Matrix
- Content flow schematic
- Content ownership & taxonomy

## Define Processes
- Production
- Content conversion/migration plan
- Governance model
- Editorial process workflow
- Content approval workflow
- Content distribution
Tools: Plan

**Content Workflow | Legacy Video**

Legacy Video: Pre-production & Production Estimation and Ownership Tool, continued

**Content Roadmap | Bird’s Eye View**

We have broken down the content roadmap into seven key phases:

- **ASSESS**
  - Survey the landscape and establish the content environment for the experience
- **ANALYZE**
  - Evaluate the intellectual properties of content elements against sets of criteria (business, user, competitive) and situations in context
- **DEFINE**
  - Create the macro and micro structures to categorize content; deploy/genesis content based attributes; develop detailed specifications for each asset (SEO, metadata), develop production plans
- **PRODUCE**
  - Develop and create the physical content assets/objects to make them Web-ready; assign all tags and metadata to each asset/object
- **INTEGRATE**
  - Upload content to content management systems; build the actual content environment; conduct first round QA
- **LAUNCH**
  - Realize the site experience in a live environment
- **MAINTAIN**
  - Use metrics and other tools to evaluate content success; begin content rollout, post-launch additional plans

**Content Roadmap | Where We Are Today**

At this point in the project, we are well underway in the Define phase, with a number of activities and deliverables in process:

- Content Model & Display Rules
- Content Schema + Taxonomy Document
- Content Module Library
- Content Workflows

We’ve included definitions of each of these deliverables in the accompanying spreadsheet.
Methodology: Create

- Audit
- Plan
- Create

Structure

Produce
## Methodology: Create

<table>
<thead>
<tr>
<th>Structure (continued)</th>
<th>Produce</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ Content model: index editorial and technical functions of content elements</td>
<td>+ Production schedules</td>
</tr>
<tr>
<td>+ Content template map</td>
<td>+ Content creation</td>
</tr>
<tr>
<td>+ Metadata and taxonomy plan: finalize content attributes and relationships</td>
<td>+ Style guide</td>
</tr>
<tr>
<td>+ SEO (Search Engine Optimization)</td>
<td></td>
</tr>
</tbody>
</table>
Tools: Create

EDITORIAL STYLE GUIDE

WHAT'S INSIDE?

S&P Intranet Home > Toolkit home > Communication scenario: Announce the departure of a key staff member

Scenario: Announce the departure of a key staff member

Overview: Announcing a key staff member's departure from the organization or group is a communication activity equal in importance to announcing a new hire. Whether the individual is moving to a new position within the company or is leaving for an opportunity outside the organization, the official announcement provides clarity on the circumstances of the departure. In addition, it also serves to establish any changes in reporting structure resulting from the departure.

Before you communicate:

- Determine the audience for the announcement; senior-level departures should be communicated to all employees, other departures should be communicated to the departments and teams that will be affected by the departure
- Ensure you have all the facts necessary to assemble the announcement
- For voluntary departures, plan to release the announcement within ten days, or two full work weeks, before the individual's final day
- For involuntary departures (should an individual be terminated), plan to release the announcement quickly, preferably within two days of the individual’s final day with the organization
- Establish how the announcement will be distributed: email memo, posting to Standard & Poor's intranet, face to face meeting with staff, etc.
- Use the attached template and finished example as a guide
Methodology: Govern

- Govern
- Audit
- Plan
- Create
- Monitor
- Measure
- Maintain

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Monitor, Maintain, Measure

- Governance plan
- Quality control plan, including ongoing audit activities
- Analytics and metrics
- Editorial calendar
Tools: Govern

Content Sections by Audience

- Product information is the primary content consumed on each site, accounting for about 40-60% of total page views.
  - Most popular on Individual, Advisor, and Institution sites are Fundamental Equity and Fixed Income
  - On GLM, most viewed products are Money Market Funds
Part Four: Current State and Future Direction
Where is all this heading?

+ Forget the “web page”
+ Construct content “chunks,” not content “blobs”
+ Create orbital, future-friendly content
+ Embrace adaptive/responsive design
+ Make friends with APIs
+ Learn how to C.O.P.E.
Forget the "web page"
Forget the “web page”

“Permanently placing content on a web page … is becoming a thing of the past.”

– Trent Walton

“Thinking about where content will ‘live’ on a ‘web page’ is pretty 1999.”

– Lisa Welchman
Forget the “web page”

Forget the “web page”

Forget the “web page”

Construct content chunks, not content blobs
BGI Named One of the Best Places to Work in the Bay Area

Barclays Global Investors has been named one of the “Best Places to Work in the Bay Area” by the San Francisco Business Times. In the firm’s first year of entry in the contest, BGI placed fourth in the “Big Companies” category, which ranked companies between 501 and 3,000 Bay Area employees. Overall 400-plus companies entered the San Francisco Business Times contest.

The survey results were released in the April 7 issue of the Times, and an article on BGI compliments the firm’s emphasis on and support of employee education: “(BGI) translates into an environment where the long-term success and education of employees is integral to the firm’s ongoing success.”

“Sometimes, a small-firm feel can exist in a company with more than 2,500 employees worldwide,” reports the Times. In addition to highlighting BGI’s small-firm feel despite its global reach, the newspaper pointed to BGI’s emphasis on hiring candidates with the right cultural ‘fit’: A highly diverse, global investment firm, with constant communications between San Francisco, Tokyo, Europe and Australia, BGI can’t risk handing a key job to someone who isn’t driven to work in the context of a team.

To be considered for the San Francisco Business Times award, at least 15% of BGI’s San Francisco employees responded to an online survey that considered factors such as work/life balance; listening to employees; people investment, recognition, awards; core values, including integrity; treating each other with respect; and culture. Editors of the Times, using quantitative ranking data from survey administrator Quantum Market
Separate content from form

“Content dictates form.”
—Stephen Sondheim

“The more structure you put into your content the freer it will become.”
—Rachel Lovinger

“We need to make smarter content, not smarter containers”
—Stephanie Rieger
Content “chunking”
Create orbital, future-friendly content
Create orbital, future-friendly content

“Get your content ready to go anywhere because it is going to go everywhere.”

– Brad Frost

“Content is no longer entrenched in websites, but floats in orbit around users.”

– Cameron Koczon
Embrace adaptive/response design
Embrace adaptive/responsive design
“Adaptive web pages [digital experiences] are cooked up from relevant content chunks and ingredients, using the specials sauce of metadata.”

- Lyza Danger Gardner
Embrace adaptive/responsive design

WAQA Studios, “Does my business need a mobile website?” (2012)
Employ mobile-first design principles

MOBILE LAST (DEGRADED, SHOE-HORNED, SHORT-SIGHTED, CRAPPY)

MOBILE FIRST (PROGRESSIVELY ENHANCED, FUTURE-FRIENDLY, AWESOME)

Make friends with APIs
API: Application Programming Interface

The ability for two software components to talk to each other in a common language that they both understand.
Learn how to C.O.P.E.
Learn how to C.O.P.E.

Create
Once
Publish
Everywhere
Learn how to C.O.P.E.

NPR’s Content Management Pipeline - Demonstrates COPE (Create Once, Publish Everywhere)

Daniel Jacobson, NPR, “Create Once, Publish Everywhere” (Programmable Web Blog, 2009)
Teachers' Expectations Can Influence How Students Perform

by J.C. SPRIGG

Listen to the Story

Morning Edition

In my "Morning Edition" story today, I look at expectations - specifically, how teacher expectations can affect the performance of the children they teach.

The first psychologist to systematically study this was a Harvard professor named Robert Rosenthal, who in 1966, did a wonderful experiment at an elementary school north of San Francisco...
Antietam: A Savage Day In American History
The Battle of Antietam was the bloodiest single-day battle in

Teachers' Expectations Can Influence How Students Perform
Teachers interact differently with students expected to succeed.

Rushdie Decrees 'Mindset Of The Fanatic' That Sparks Ant... "Something has gone wrong in the Muslim world," says the

Kilpatrick Corruption Case A 'Classic Greek Tragedy'
The former Detroit mayor faces
Teachers' Expectations Can Influence How Students Perform

by Alix Spiegel - September 17, 2012
Morning Edition [ 8 min. 31 sec. ]

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The idea was to figure out what would happen if teachers were told that certain kids in their class were destined to succeed, and so Rosenthal took a normal I.Q. test and dressed it up as a different test.

"It was a standardized I.Q. Test," he says, "Flanagan's Test of General Ability, but the cover we put on it, we had printed on every
Part Five: Exercise
Exercise

+ **Destination**: whitehouse.gov

+ **Exercise**:
  + Analyze 1-2 content features, focusing in how well those content chunks satisfy **organizational goals and user needs**
  + Review one piece of content and evaluate it against the **R.A.I.T.E.S.** construct.
  + Develop **recommendations** for improving the site’s content
Part Six: Q&A
Thank you!

chris@collettico.com
christopher.collette@weil.com
@collettico