



Alternative View
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Off the Cuff or On the Record?

By Thomas Walek

The interview.

It is the essence of journalism: One-on-one. Reporter to source. Questions asked and answered. Article researched and written. The process is clear, but the devil is in the details.

Ignoring, for purposes of this paper, the subject and content of any given interview, the mechanics of an interview involve rules and guidelines that can dramatically impact the outcome. On the record? On background? Not for attribution? Quote check? These and other terms attempt to define the rules of engagement with a journalist. But what do these and other terms mean?

A clear and shared understanding of the ground rules for every conversation with a journalist is vital. A discussion between reporter and source may be useful and interesting to both parties, until it's discovered that the journalist believed it to be on the record and fully quotable, while the interview subject understood it to be a casual chat, not for attribution or off the record. And retroactive rules won't fix the problem.

Walek & Associates talked to news executives at leading U.S. media organizations to see where print journalists stand on the terms that are often used to define the interview. Those definitions follow. We then offer guidelines for sources being interviewed.

(Warning: Do not expect these rules to apply to social media, bloggers and new media or countries outside of the United States. More on that in a later "Alternative View.")



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OFF THE CUFF OR ON THE RECORD?

On The Record

First, an easy one: “**on the record.**” It’s the veritable Miranda rights standard for interviews. Anything you say in an interview or discussion can be used by a journalist: names, information, analysis, criticism...everything.

On the Record is a term that is widely understood and is the default basis of an interview or conversation between journalist and source unless different ground rules are established and mutually agreed upon from the start.

Observations regarding on the record:

“The information can be used with no caveats, quoting the source by name.” Deputy Editor, Associated Press

“Statements [that] may be quoted directly or indirectly and will be attributed to the source.” *Gatehouse Media Newsroom Handbook*

“Information can be published and attributed to the interviewee.” Managing Editor, *Institutional Investor*

Think of it this way: You say it and you need to be prepared to read it in the media.

Check Quotes

One variation of on the record is an agreement with the journalist to “**check quotes**” or “**check facts**” with the person being interviewed prior to the publication of an article. This approach is typically used by the source as an extra step to help ensure accurate information. Journalists may or may not agree to check quotes or check facts.

The reasons for declining to check quotes or facts include deadline pressures, the reporter’s belief that he or she takes accurate notes and will not make a mistake, or the idea that checking an article in any way represents compromised editorial independence. Bad experiences for a journalist also may be a factor, including that some sources use the quote-check process to attempt to revise or change the meaning of a quote.



OFF THE CUFF OR ON THE
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Not For Attribution

The next step is “**not for attribution**”. Often confused with off the record (see below), which is quite different. Here are a few insights on not for attribution:

“The information may be used in the story, but not attributed to the source.” *Gatehouse Media Newsroom Handbook*

“Information can be published but interviewee cannot be identified; instead, attribution is cited as “industry sources,” “money managers,” etc. – a vague description that in no way identifies the individual speaker. In such instances we usually ask the interviewee how he or she wishes to be described.”
Managing Editor, *Institutional Investor*

“Often confused with ‘off the record’ means “don’t quote me but...” The reporter may use the information, but not identify you as the source.”
Editor, *Pensions & Investments*

Not for attribution keeps the source’s name out of the press while giving the journalist freedom to use the information and insights provided.

From here, the screws tighten considerably regarding the use and sourcing of information gained in an interview or discussion. It’s also at this level that definitions become murky, to the point where they can be confusing and potentially dangerous.



OFF THE CUFF OR ON THE
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Off the Record

“**Off the record**” is a journalism cliché, something muttered between a source and a reporter. But just because people use the term doesn’t mean they understand it. Here are a few definitions of off the record:

“The information cannot be used for publication.”
Deputy Editor, Associated Press

“Information can’t be published.” Managing Editor,
Institutional Investor

“The source doesn’t want to see anything in print or online. This is not to be confused with ‘not for attribution’ or ‘on background’. Off the record means the reporter cannot use the information in any way shape or form.” Managing Editor, *Pensions & Investments*

“The information will not be used in the story unless obtained elsewhere and attributed to someone else.”
Gatehouse Media Newsroom Handbook

As noted, off the record is sometimes confused with not for attribution. But off the record means neither the source, nor the information can be used by the journalist. In some instances, journalists will refuse to go off the record. Sources being interviewed may attempt to use this rule of engagement when seeking to influence a journalist’s thinking or perspective on a particular topic, without being part of any article in a direct way.



**OFF THE CUFF OR ON THE
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On Background

“**On background**” is not a concept for those who favor the colors black and white. Somewhere in between “off the record” and “not for attribution,” on background means the material can be used only in a general sense, without clear or anonymous attribution.

“Quotes/paraphrases/statistics should not be used in print/online, but can be used by the reporter to frame questions for others and the general tone of the story, but not used as quotes/paraphrases to an individual.”
Managing Editor, *Pensions & Investments*

“The information can be published but only under conditions negotiated with the source. Generally, the sources do not want their names published but will agree to a description of their position. AP reporters should object vigorously when a source wants to brief a group of reporters on background and try to persuade the source to put the briefing on the record. These background briefings have become routine in many venues, especially with government officials.”
Deputy Editor, Associated Press

“Information can be published but not attributed, not even in the general sense described above. Often this is used when an interviewee is attempting to assist a reporter in understanding a particular situation (e.g., describing a corporate culture or industry practice with which the reporter may not be familiar).”
Managing Editor, Institutional Investor

“The information may be used in the story but not attributed to the source.” *Gatehouse Media Newsroom Handbook*

Often, a conversation with a journalist on background is an opportunity to educate them without the pressures of being quoted.



OFF THE CUFF OR ON THE
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Say What?

Confused? You are not alone. Definitions of off the record and on background are very close. As noted in a comment published in the *American Journalism Review* regarding the difference between “off the record” and “on background”: “Yes, there are (differences), but I’ve never quite figured them out. I tell reporters if they really want the source to understand, make it clear. But those words generally cause more confusion than anything else.”

Even among the largest, most influential media outlets offer interviewees little solid ground or understanding of the list of terms for interviews.

“*The Journal* doesn’t keep such a list because those terms can mean such different things to each source in every story. We believe that a better practice is to have reporters and sources not use labels but instead discuss in real terms the conditions under which each party is agreeing to participate.” Assistant Managing Editor, *The Wall Street Journal*

“*The Times* does not maintain any formal or official definitions of these terms. They can be confusing, and they mean different things to different people. In particular, it seems that while many journalists make precise distinctions between phrases like “off the record” and “on background,” often non-journalists don’t make the same distinctions or don’t understand them.” Standards Editor, *The New York Times*

“Sorry, I can’t help you. But that kind of thing is proprietary.” Executive Editor, *Bloomberg News*



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Conclusion – Do This

With these terms, definitions and inconsistencies in mind, here are some clear guidelines for handling interviews.

1. Establish rules of any conversation with a journalist up front, no matter where you meet.
2. Assume every conversation or interaction with a journalist is on the record.
3. Ask the journalist to “check quotes” or “check facts” with you before an article is published. Don’t expect them always to agree and don’t view this as an opportunity to change or rewrite a quote.
4. Use not for attribution when you want to talk to a reporter but don’t want your name or your company in the article. Remember, the information will be used.
5. If a reporter agrees to an off the record conversation, use it as a tactic to educate and, in some cases, advocate.
6. Make clear with the reporter that agreed rules of the interview apply to all forms of communication – print, web, blogs, broadcast, etc.
7. Best to engage in interviews with known and trusted journalists.
8. Make your Public Relations representative responsible for content and rules of all interviews.
9. Finally, if you don’t want to read it – don’t do it and don’t say it.



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