IRE members have learned invaluable lessons during years of refining their investigative skills. They generously share their wisdom so others may benefit.

Project
Bulletproofing

By Mark Katches
California Watch

Too many reporters and editors wait until the end of a project to begin the bulletproofing process. That can lead to stress, tension and angst. The process should begin soon after the story idea is conceived. Here are 20 discussion points and issues that, if weighed carefully and at the right time, can help ensure that everyone sleeps well when the story is finished.

Reporting phase

1. Vet the reporting methodology. Are you looking at enough years of documents or data? Are there questions of logic or ethics that need to be weighed? What steps need to be taken to ensure the story has enough context? Now is the time to begin asking these questions – before the records requests go out. If reporters rush ahead without thinking things through, it could lead to additional expense and time to get it right. It's especially important to hold good discussions early if the story may rely upon or require any unusual reporting techniques (i.e. stake-outs, use of laboratory testing, undercover or hidden camera work).
2. Identify key sources or targets, and attempt to contact them early. It's almost always better to open a dialogue sooner rather than jump out of the bushes at the end. And don't just fish for quotes during interviews with key subjects. Find out everything you need to know about their role. Really get to know them and how they think.
3. Share critical documentation with your editors. This is especially important for stories that are more nuanced or gray. An extra set of eyes early can help make sure everyone is on the same page when interpreting key points. I'm not suggesting an editor review every page of the thousands of pages gathered up – just the most important pages that could set the tone or lay the foundation for the story.
4. Find someone to play devil's advocate. It can be an editor, a trusted colleague, a spouse (or Mom or Dad for all you "watchpuppies") – anyone who is willing to challenge you.
5. Keep an open mind. The dangerous reporter forms conclusions too early in the reporting process.
6. Ask someone who really knows math to double-check the numbers. Many of us got into this business to avoid math. You can run, but you can't hide.
7. Write the nerd box early. Writing the nerd box or the "how we did it" sidebar is often one of the last things done. It ought to be one of the first. It's an excellent way to lay out your methodology in a clear manner. Don't just write it early. Make sure your editor reads it early. It could help identify any red flags.
8. Don't rely on outlier, extreme examples to tell the story. Look for examples that are representative of your findings.
9. Background all subjects who will appear in your story. Don't limit the background-ing to just the targets. You should background the sympathetic victims too – to make sure they're really sympathetic. That will help avoid any embarrassing distractions from surfacing after the story runs.

10. Give targets a chance to respond to all your key findings. If your investigative subjects pick up the paper and are surprised by what you are reporting, you haven't been fair enough.

Writing/editing phase

11. Consider how your sources or targets might try to poke holes in your story. Put your-self in their shoes, and make sure you plug these holes with more reporting.
12. Disclose caveats. Be upfront about any mitigating circumstances. It will only make your story stronger and more credible.
13. Tell readers what you don't know. This also boosts your credibility with readers.
14. Footnote all facts meticulously. Done right, this will raise the confidence level of everyone involved in the project – especially if there is a challenge after publica-tion. Few things are more troubling than the reporter who can't find key notes or documents when faced with a retraction demand.
15. Enlist a copy editor who is not afraid to ask tough questions. Encourage him or her to be brutal and frank.
16. Get a good lawyer. If you're on the fence about whether the story should be vetted by legal counsel, always err on the side of caution. The best First Amend-ment lawyers can be pains but are committed to helping you publish. And that's precisely what you need.

Final production phase

17. Triple-check all of your facts. Build in time for one last careful review.
18. Cross-check graphics and Web elements. Be certain that if any facts are changed in the final edits, that the same changes are applied to graphics, sidebars, second or third parts or Web-only features. It's surprising how often this gets overlooked at the last minute – leading to inconsistent names, numbers, titles and more. If one fact changes, ensure all other references are caught.
19. Make sure the reporter and principal editor are reviewing all of the headlines and cutlines. If there are nuances in the storytelling, it's important to make certain that the display text doesn't oversimplify the situation.
20. Speak up if there are any last-minute doubts. After taking all of these steps, the biggest mistake you can make is rushing into print when your comfort level is less than high.

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