



**THE INFORMATION TRUST EXCHANGE**  
**Trust, identity, personalization,  
content and user sharing for the news industry**  
<http://www.infotrust.org>



## **PROOF OF CONCEPT ENGAGEMENT OUTREACH**

### WHAT IS THIS ABOUT?

Since early 2015, the Reynolds Journalism Institute (RJI) has underwritten five task-group meetings<sup>1</sup> for the Information Trust Exchange project. Our goal is to foster collaborative innovation in digital advertising, user privacy and value exchange.

During 2016, RJI is helping launch Proof-of-Concept demonstrations of user-data exchange standards that will improve advertising, address ad-blocking, respect privacy and promote value exchange. If you or your organization would like to be contacted to advise or participate in testing, please email Bill Densmore at [densmorew@rjionline.org](mailto:densmorew@rjionline.org) or call 617-448-6600.

### THE INTERVIEW PROCESS

**As a next step, we are contacting news, advertising and technology leaders to discuss the scope and potential of these demonstrations -- and potential for an industry-standard protocol for sharing user data.** We want our discussions to be open and fluid. In our contacts, and to suggest our areas of interest, we'll begin by considering some of these questions:

1. Would standards for user identity, and an independent infrastructure for sharing of user attributes, be preferable to the current ad-hoc industry structure?
2. What would you need the standards to support?
3. Would you be willing to engage with an independent not-for-profit organization serving as a clearinghouse for standardized and segmented user data?
4. Should user data be distributed, or centralized? Should identity and preference information for your users be stored by the non-profit, vs. on your own network?
5. Do you think that standards for sharing user identity and managing privacy should also enable the aggregated exchange of value (e.g. paying for ads, or subscribing to content)?

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<sup>1</sup> -- For subject-matter summary of each task group, see Appendix A



## Background / rationale

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Traditional publishers now clearly know that “first-party” user data is fundamental to their business going forward. Most, if not all, use analytics platforms extensively and have devised methods for aggregating user data themselves as their users engage with their products and platforms.

This data is leveraged in a variety of ways including: to improve products and services with an understanding of user behaviors; to improve advertising monetization rates by informing audience targetability and driving engagement through tailored recommendations and relevant content and in the context of paid models, to drive users through the customer acquisition funnel toward becoming paid subscribers.

Without robust first-party data, a publisher cannot hope to grow or manage their business.

However, even if a publisher aggregates, manages and takes full advantage of all this user data in beautifully structured ways, no publisher has sufficient independent audience reach to support scaling the revenue lines effectively on their own.

Additionally, very few publishers can afford the data science expertise and organizational depth to know what data to aggregate and how best to leverage the data toward driving product innovation and optimizing monetization. These skills and talents are not typical of a journalistically focused organization.

Making matters more complicated, off-platform distribution is now fundamentally required for audience scale. Production of quality content and its distribution (or audience engagement) are irreversibly disintermediated. The proliferation of platforms and distribution technologies has, at best, severely segmented the technical requirements for benefiting from user data and at worse, the market segmentation has made the aggregation of user data significantly more challenging to begin with.

Publishers (and platforms) need help.

Standardizing the structure for user data and facilitating a method for sharing user data across a network or exchange that respects the user's privacy could go a long way to increasing efficiency and optimization in the publishing business.

This project is focused on landscaping the current activities in the marketplace designed to:

1. Define the benefits of an industry standard approach to user data
2. Discover the efforts currently underway that seek to address the problem
3. Discern a role for the Reynolds Journalism Institute that positions the institute to play a part in perpetuating an industry solution



## ADDITIONAL NOTES ABOUT THE ITE PROJECT

### WHAT ARE WE SEEKING TO TEST?

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At a May 6, 2015 [roundtable discussion](#) in Chicago, there was strong agreement that a collaborative initiative setting open standards for network user-identity management and the tagging for use and sale of content would help journalism as well as elements of the news industry able and willing to participate. Lodging creation and governance with a *non-stock collaborative* was seen as having distinct advantages.

[Notes from](#) the Oct. 8, 2015 meeting of the ITE user data and privacy task group suggest “How Things Should Work” (underlining added for emphasis):

*It was suggested that publishers are unified in wanting to end the use of third-party cookies on their web services. As a result, an ITE prototype solution that creates the promise of a new method for customizing ad delivery – with an added benefit of opt-in user personalization – would likely be appealing.*

*Another participant appealed for the creation of “crisp” requirements for any prototype so they can be acted on “in a stepwise fashion.”*

A [Request for Proposals](#) for proof-of-concept demonstrations and working prototypes describes services that will produce the following user experience (set out narratively [here](#)).

1. ITE task group meetings concluded that proof-of-concept testing could be helpful to integrate services in three overall areas:
  - a) User data and exchange
  - b) Content description, tagging, sharing and selling
  - c) Authentication and identity management
  
2. RJI is prepare requests for proposals for proof-of-concept demonstrations or working trials, together or separately, for up to five elements of the ITE Framework:
  - a) USER ATTRIBUTES/SHARING -- Develop a taxonomy of user attributes and proposed terms for sharing them across the Exchange ecosystem.
  - b) CONTENT ACCESS CONTROL --- Assure publishers that service will control (or at minimum track) access to content and that, if value is to be exchanged, there is an accounting system.
  - c) CONTENT PACKAGING -- Custom assembly by/for end user on a topical and/or geographic basis, of information resources based on inferred or expressed interests/peferences.
  - d) LOGGING ACTIVITY -- Clicks involving exchange of value are universally logged in a process governed by the ITE and set up to return usage data to the end-user's designated service provider.
  - e) ONE BILL / ACCOUNT -- Demonstrations and trials must show the ability to aggregate discovery, access and billing of content across distributed sources.

3. The demonstrations and trials should be intended to:

- Sanction and support one or more partners to proof-of-concept demonstrate or prototype trial a service permitting publishers to standardize an open taxonomy and method for sharing of user-permissioned demographic and preference “profiles” with each other and with advertisers.
- Sanction and support one or more partners to demonstrate a news-personalization service that would permit the public to have a single subscription to access information across multiple publishers and services. Gather user reaction.

The trials could demonstrate that:

- a. A user is supplied a personalized stream of news from thousands of sources.
- b. It tests open technical protocols for metadata exchange among members for user identity and content sharing/sale.
- c. The service is branded by one of at least three participating news organization “presenters.”
- d. The demo is able to log and analyze user activity and at least simulate content sharing and sale.
- e. The activity logging function provides a demonstration of the sharing of content among otherwise independent publishers and their users.

4. Here are the parties involved:

- a. **“User”** – A public user, potentially a newspaper subscriber, NPR listener or other reader, listener or viewer of news. Each user is has an affiliation – a subscription, a registration, a membership – with a “home base” called a “provider.”
- b. **“Provider”** – A provider of user registration/subscription / member services to the public. May or may not be an originator of content.
- c. **“Presenter”** – A provider of content (multimedia) – original or syndicated – to Users who are affiliated with some Provider.
- d. **“Personalization Service”** – One or more technology services which is able to engineer a unique information-delivery experience for individual users.
- e. **“Data/Privacy Service”** – One or more technology services which helps Users, either directly or through their Provider, to manage data about their information interests and preferences.
- f. **“User Access and Data-Sharing Service”** – One or more technology services which enables the sharing of data about (1) User authorization to view resources (2) User profile or preferences (3) Logging of access to resources.

5. Roles, experience:

This description summarizes the user experience and role(s) of the parties:

- a. At least three providers notify a set of Users that they are invited to try a new service which will allow them to manage their identity and privacy better, and give them access to highly-personalized and customized information.
- b. Each Provider determines how it wants to use User profile data as it is shared or created by or for the User. The provider unambiguously conveys this to the Users in plain-language Terms of Service and Privacy Policies and through informal communication.

- c. The user is requested to specifically opt-in by check box or otherwise to the profile data use. For trials, users are also invited to comment on the policies and suggest modifications or changes.
- d. A Personalization Service, in collaboration with the User's Provider, provides a user-interface experience to the User which permits the User to test and react to the particular methods of personalization
- e. Separately, a User Data/Privacy Service works with the Personalization Service to create a user profile, which – if the trial user has consented – can be studied to see to what extent it could be used to provide higher-quality advertising (or other service) targeting. This aspect of the trial should be conducted transparently.
- f. For test purposes, URLs and descriptions of content from at least three “Presenters” of content (other than the user's Provider) are included in the Personalization Service and accessible to users. The Presenter, working with the User Access and Data Sharing Service, establishes methods for identifying some content as “premium”.
- g. The prototype/test Users are given a set amount of credit toward purchase of premium content. The Presenters involved in the testing agree that they will not be paid during the trial; the purpose of the credit is to give the User a sense of relative value for content services, whether on a per-click or a subscription basis.

#### 6. POC test participation requirements

To participate in demonstrations or trials, all the parties need to prepare to help develop and then submit to ITE member rules. As to specific parties:

- a. **Users** should volunteer to be open to surveys and interviews about the experience.
  - b. **Providers** must identify a meaningful group of their users/subscribers/members to offer for testing and to communicate with them.
  - c. **Presenters** need to either install access-control and data-sharing software on their content servers, or allow the caching of test content on an experimental server.
  - d. **Personalization** service providers need to understand that they are operating as an agent of the Provider, with no independent rights in content or user data.
  - e. **Data/Privacy Services** need to practice “privacy-by-design” and acknowledge that the User is ultimately in control of “their” data.
  - f. **User Access and Data-Sharing Services** must be capable of assisting Presenters and Providers to configure their user and content services so as to be able to share data in standard formats and methods as the ITE Framework evolves.
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INFORMATION TRUST EXCHANGE  
TASK-FORCE ASSIGNMENTS

For a list of task-group participants, see:  
<http://newshare.com/ite-next/ite-task-group-MEMBERS-10-05-15.pdf>

Member/partner development (met Sept. 16, Columbia, Mo.)

- Verify assumptions about requirements for pain/gain both with consumers and media
- Confirm staff's estimates of funding required
- Facilitate preparation of grant proposal(s)
- Conduct presentations to target funders; assess and regroup

Authentication and identity management (Met Sept. 24, Cambridge, Mass.)

- Confirm business requirements for service
- Survey best and emerging practices for federated-authentication / SSO
- Select optimum combination of existing technology extended with ability to be extended for sharing of user data (preferences, attributes) as part of authentication and events.
- Facilitate prototype development and concept testing.

Content description, tagging, sharing and selling (Met Sept. 30, Portland, Oregon)

- Survey best practices for content type tagging, access and usage control and pricing among wire services, archival services.
- Create draft schema for content type and authorized-usage tagging.
- Describe preferred method(s) for content owner to dynamically "show" price in 1-to-1 sale and buyer to accept/reject, with variability as to type of content and use authorized/rejected.
- Share with data, authentication and member task forces for feedback
- Circulate informally for comment among cohorts and key publishers

User data and exchange / privacy (Met Oct. 8 in New York City)

- Survey best-practice for data fields among data-service-providers, publisher legacy subscription services and technology platform companies (if available)
- Create draft schema for user data formats
- Draft exchange sharing rules covering user authorization, data types and data usage.
- Share with Content, authentication and member task forces for feedback
- Circulate informally for comment among cohorts, including key platforms, associations, privacy groups and regulators.