

Assessing Creative Media's Social Impact

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ASSESSING CREATIVE MEDIA'S SOCIAL IMPACT

Media has become an increasingly effective tool for social change or so we would all like to think – particularly those of us who fund film and other creative media. From The Fledgling Fund's perspective, it seems intuitive and logical that a well-made documentary film - especially one with a compelling narrative and well-crafted outreach plan, would serve as a catalyst to change minds, encourage viewers to alter entrenched behaviors and start, inform or reenergize social movements! Likewise, compelling photographs, short videos, radio and web-based media appear to be key tools in raising awareness and engaging viewers in social issues.

We are, after all, accustomed to the heavy hitting and ubiquitous world of advertising, another visual medium and one that pervades our culture. We assume that if ads can sell products, visual imagery linked to a social justice narrative can sell social action, or political conviction. Who can forget the power of the Aflac duck, which has boosted both brand recognition and sales¹ or Geico's lizard² and its cavemen who have raised the profile and sales of that auto insurer?³

In fact, however, The Fledgling Fund has found that it can be surprisingly difficult to make a firm connection between the power of a film or other media and social change. Nevertheless, we believe that films can and do have social impact, and obviously, would not be funding in this area if we thought otherwise. However, we also believe that the social impact of media, particularly documentary films, needs to be better understood and documented. The purpose of this paper is to explore in greater detail the use of documentary films that are linked to coordinated outreach efforts as change agents. To that end, we are focused on the following questions:

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Media has become an increasingly effective tool for social change or so we would all like to think - particularly those of us who fund film and other creative media.

- Are all documentary films in fact calls to action? Should they be?
 - What do we mean by outreach and community engagement campaigns and how can they leverage the power of a film in such a way that it can indeed serve as a centerpiece of a broader social movement?
 - How can emerging distribution models and web technologies enhance the social impact of media.
 - What examples, or case studies, do we have that illustrate how compelling documentary films can be effective tools for social change and what can we learn from them?
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- What can we learn from others who have studied and written about this issue?
 - And ultimately, what kinds of metrics can be used to assess impact?

Our goal is to both inform our own funding decisions and also add to the larger dialogue surrounding the impact of film and other media.

1 http://goliath.ecnext.com/coms2/gi_0199-2846151/Themighty-duck-Aflac-is.html#abstract

2 <http://www.post-gazette.com/pg/07002/750670-28.stm>



DOCUMENTARY FILMS AS CHANGE AGENTS

It is important to note that not all documentary films are intended to be agents of social change, nor should they be. Some, such as *Grey Gardens*, are simply lovely, moving stories whose primary purpose is to entertain and share a compelling story. However, given The Fledgling Fund's social change mission, we are focused in this paper on those documentary films that are intended to be agents of social change.

To provide some context perhaps it would be useful to place the documentary film within the ultra competitive media environment with many content choices. Few people choose to spend their money or their time in the theater viewing a documentary film. In 2008, for example, *88 Minutes* opened in New York City and made \$71 million during the opening weekend; *21* made \$24 million during the same period of time. At the same time, Academy Award nominee *War Dance* and Academy Award Winner, *Taxi to the Darkside*, both documentary films, made approximately \$100,000 and \$13,000 respectively on their opening weekends. Even those films enjoying box office success and heavy media publicity, such as *An Inconvenient Truth*, draw relatively few people. Only 4% of adult Americans actually saw this film.³ And as Matthew Nisbet notes in his introduction to "*Documentaries on a Mission: How Nonprofits Are Making Movies for Public Engagement*"⁴ it's interesting that the audience for this, and likely for similar films, was largely self selected. Viewers were already interested in the issue of global warming and their opinions were unlikely to change as a result of having viewed the film. The same comment could be made about many of the other "blockbuster" documentary films, a term that is somewhat of an oxymoron when compared with truly blockbuster films such as *Titanic* or *The Lord of the Rings*.

How then, can a documentary film, whether designed as a theatrically released film that does the festival circuit and a limited theater run, or one meant for public television or for cable release, or even one that uses an alternative form of distribution (i.e. online downloads or On Demand) have the kind of impact that changes minds, inspires action, and ignites social change? Perhaps we need to broaden our definition of the word "impact". David Whiteman, for example, argues that we tend to focus on traditional measures used by studios that are far more relevant to large budget films. We focus on box office receipts and the size of the audience, which are really measures of successful film marketing or promotion. Instead, we might do better to think of the film as one point on a continuum, with a life before broadcast and a life, perhaps quite a long life, after broadcast. In other words, the film making process itself may change perceptions and attitudes, facilitated screenings might lead to a greater awareness of the issue and an increased willingness to become involved in the issue and in the community. Increasingly, we also are seeing filmmakers and other media makers use web-based strategies to involve their audiences in the project's development. For example, Brave New Films uses a nation-wide network of volunteer videographers and researchers to compile their online social action campaigns. The beauty of this model is that each film already has a built-in network of viewers with their own individual networks with whom they can share the video. The "life" of the documentary can also be extended far beyond the traditional first year of festival/theatrical release or broadcast and its impact enhanced when it is linked with a strategic community engagement or outreach campaign.

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3 Los Angeles Times/Bloomberg Survey (2006, Aug. 3). Americans Worried about Climate Change, Bush Not Doing Enough. Available at <http://www.latimes.com/media/acrobat/2006-08/24711743.pdf>

4 <http://www.centerforsocialmedia.org/resources/publications/docsonamission/> Whiteman, D. (2004) Out of the theaters and into the streets: A coalition model of the Political impact of documentary film and media. *Political Communications* 21 (1): 51-70



THE ROLE OF EMERGING DISTRIBUTION STRATEGIES AND WEB TECHNOLOGY

Perhaps the most exciting development in the last several years is the emergence of new digital distribution options that provide multiple channels for distribution, allowing filmmakers to tailor their films for different audiences in diverse settings. Importantly, many of these new distribution channels allow for and encourage interaction and engagement of viewers that enables a film's message to be amplified and shared more easily than if the only modes of distribution remained theatrical, broadcast or community screenings. For example, digital film screening "theaters" ([Snag Films](#) is increasingly popular) transform into forums for discussion, sharing and debate as soon as the film has ended, or even during the screening. This allows filmmakers to harness the energy, compassion and excitement that films evoke, without the watering down that happens in traditional screening venues as audiences leave theaters. This forum serves not only as an organic community-builder around social issues, but also allows the filmmaker to track the impact that their film has had on viewers, and the impact they are making in their communities and the world.

For many filmmakers, offering their full film online is still not an option, given the method's limited monetization to date. However, these filmmakers are maximizing the social networking and community building power of the internet to drive their social action campaigns. After audiences view a film at a festival, community screening or other traditional venue, they are encouraged to visit the film's website. More importantly, filmmakers are using websites to build a community before the film has even been completed. Building excitement for a film before its release is increasingly a critical strategy to deepen the reach and impact of films. This "pre-release" community can also serve as a vital resource to filmmakers who are seeking ideas and feedback about themes, storylines and dialogue featured in the film. Engaging a pre-release audience in the storytelling deepens their investment in the film and, logically, increases the likelihood that they will see the film, and more importantly, take action.

The best of these websites include, at minimum, the following components in addition to the more general information about the film:

- Factual information about the issues raised in the film.
- Links to organizations, movements or communities that are working on the issues raised in the film.
- Concrete ways for people from all demographics to get involved in making a real change in their own lives, community and world.
- A forum for people to share their experiences of social change and action and comment on the actions and ideas of others.
- A place to sign up to receive e-mail communications about the issues raised in the film.

“The film's website and digital communication strategies can provide timely updates, which often encourage people to take action.”



Again, one of the most important resources that these websites provide is realtime and constant feedback for filmmakers. Instead of the traditional model where a film's action campaign was sent out to the world to be digested by audiences, and filmmakers rarely learned of the impact footprint, these complex and interactive websites allow filmmakers to monitor, adjust and re-engage audiences throughout the life of the outreach campaign. For example, on the most basic level, if a website is not getting as many hits as anticipated, a filmmaker can re-adjust to ensure that people are guided to the film's online resources. Or, if people are blogging on the website that they are angry or passionate about the issue, but few people are able to identify how to make change, the filmmaker can offer additional solutions online that will help keep the action campaign alive longer. Also, importantly, as so many films are about current and constantly evolving social issues, the film's website and digital communication strategies can provide timely updates, which often encourage people to take further action. For example, there may be new calls to action in which people can participate and add their voices to a chorus for change.

FILM PROMOTION VERSUS COMMUNITY ENGAGEMENT AND OUTREACH CAMPAIGNS

During the past decade, a number of organizations have emerged as experts in the field of community engagement and outreach, designing and implementing creative and strategic campaigns around films. Outreach campaigns do not all look like. They can be short or long term, local, national or even international in their scope. Based on our research, however, successful outreach campaigns have a number of things in common: clear objectives, a specific action plan, appropriate resources over the length of the campaign, and leaders who make a real attempt to measure progress towards their goals. Tactics can include TV and print advertising, the use of digital and consumer driven media, repurposing footage, social issue partnership development, celebrity involvement, facilitated discussions, an educational strategy, penetration into new venues, and clear calls to action. As described above, a hearty online presence through the film's website is imperative for films seeking to engage audiences in sustained and meaningful social action. In addition, filmmakers should be expanding this digital outreach to social networking sites such as Facebook, Myspace, Youtube and Twitter to draw in new audiences that may have not seen or even heard of the film before. Each campaign will have a different set of "moving parts" and will thus be customized and unique. However, from our point of view and based on our research to date, the most effective outreach and community engagement campaigns move beyond the goal of increasing audience size and sales and seek to use films as vehicles of social change. A strategic campaign can move people from awareness to action and in some cases help to build or strengthen broad social movements which in turn can lead to social change.

While there are many examples of successful outreach campaigns (See Appendix for a sample list), there are three that come to mind as particularly informative: [Blue Vinyl's My House is Your House Campaign](#), [National Legacy Outreach Campaign](#) and [The New Americans Campaign](#). Each of these projects illustrates how effective community engagement and outreach campaigns can magnify the social impact of documentary films.



BLUE VINYL: THE MY HOUSE IS YOUR HOUSE CAMPAIGN⁵

The film *Blue Vinyl* and accompanying *My House is Your House* campaign by Working Films has been hailed by filmmakers and activists alike because of the real change it created in individuals, institutions and the marketplace at-large. Judith Helfand, the film's co-director, has a strong record of linking her films to creative activism and strategic grassroots organizing. *Blue Vinyl* exposes the toxic life cycle of PVC plastic, starting with the innocent-looking blue siding on Helfand's parents' home in Long Island. *Blue Vinyl* has been dubbed the "green building movement's first cult classic" and has been instrumental in translating and explaining the toxic lifecycle of PVC – from its production to its disposal.

The campaign, which cost about \$420,000 over six years, had as one of its components, the development of organizational partnerships and a clear plan of action. Early on, when the film was still being researched, the producers reached out to the Coming Clean collaborative, an umbrella of organizations at the forefront of health and environmental justice advocacy in the United States. Through a series of feedback screenings of the 18-minute trailer, the rough-cut, and finally the 94-minute final project, members of the Coming Clean

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collaborative informed the film's narrative, assuring that the film's messaging dovetailed with their organizing campaigns. In addition, the filmmakers partnered with Working Films, a national nonprofit co-founded by Helfand, that links documentary film with education, activism, and grassroots organizing. Working Films convened and facilitated a two-day strategy summit, bringing together the producers with Coming Clean activists, environmental health advocates, green builders, and scientists to share insights in response to the fine cut of the film and develop an outreach strategy aimed at building and advancing the PVC-Free movement.

The summit meeting was designed to identify the key issues the campaign needed to address including target audiences, and a timeline of opportunities that linked the distribution of the film to the ongoing work of the organizations in the room. The five strategic constituencies identified for the *My House is Your House* campaign included: Sundance and HBO broadcast viewers, professionals in the design and building industry, colleges and universities, affordable housing providers and household consumers. For each, a plan was devised to leverage the film's impact from its premiere at the 2002 Sundance Film Festival to its HBO Broadcast and beyond.

From the start, the campaign has achieved clear results. At its Sundance premiere viewers signed and sent over 1500, “Greetings from Sundance”, postcards to Intimate Brands (the parent company of Victoria's Secret and Bath and Body Works) that, in conjunction with a push from Greenpeace, resulted in 6000 emails. Within a month, Intimate Brands made a commitment to completely phase out PVC from their packaging.

The overall goal of the *My House is Your House* campaign, which is ongoing, is to support the growing grassroots movement to transform the PVC industry so that it is no longer of source of persistent toxins that threaten humanity and the environment. To that end, it has focused on the following objectives:

⁵ <http://www.myhouseisyourhouse.org>



- To push professionals within the design and building industry to be PVC-free;
- To motivate architectural and design students on university campuses where major construction and renovation projects are in the planning stages;
- To inspire faith-based institutions in the midst of capital campaigns and major building and renovation projects to link their philosophical/spiritual commitment to the preservation of environmental health and justice; and
- To support affordable options to toxic building materials, including supporting Habitat for Humanity efforts to build with healthy and sustainable products.

Working Films led outreach to chapters of American Institute of Architects (AIA), which were awarded Continuing Education Credits (required in most states to maintain licensure) for viewing and discussing the film and its relation to the field of architecture. Building professionals learned more about the dangers associated with PVC and have been inspired to commit to using “green” alternatives. Screenings of *Blue Vinyl* have been hosted by AIA member firms and chapters in over 15 states, with many architects and designers committed to green building by signing a “PVC-free” pledge.

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Greenpeace and the Healthy Building Network spearheaded the design and construction of the first affordable, environmentally sustainable PVC-free Habitat for Humanity House – with *Blue Vinyl* used as a key component in garnering stakeholder support.

Blue Vinyl has screened at over 100 colleges and universities, over 30 of these screenings led to campus policies in support of sustainable building. For example, Cornell University committed to reducing negative environmental impacts of construction on campus through its “Green Building Initiative.”, Tulane now has an institutional commitment to purchase green building materials. Similar examples of impact of *Blue Vinyl* screenings can be seen at Bates College, Bowdoin College, University of Southern Maine, Case Western Reserve University, Oberlin College, SUNY Buffalo, and University of Utah among others.

In 2004, capitalizing on the widespread success of *Blue Vinyl* and the surge of antivinyl discussion within the building industry, Greenpeace and the Healthy Building Network spearheaded the design and construction of the first affordable, environmentally sustainable PVC-free Habitat for Humanity House – with *Blue Vinyl* used as a key component in garnering stakeholder support. Located in a historic New Orleans neighborhood not far from many PVC plants, the house proved to affordable housing providers and the public that you could build an affordable home and still meet an affordable pricing baseline of \$60,000.

The campaign also targeted large companies and institutions with impressive results. For example, after screening the film for 1000 construction and procurement employees at Kaiser Permanente (the largest non-profit healthcare organization with over 30 hospitals and 400 medical centers), Kaiser committed to eliminating PVC in their building and renovation projects, including carpet backing, corner and wall guards and changed its building standards to also include a switch to PVC-free resilient flooring. After Kaiser asked their primary carpet manufacturer to provide PVC-free flooring, the factory introduced new PVC-free commercial products – a key market shift.



Inspired by a closed-door City Council screening of *Blue Vinyl* organized by the Healthy Building Network and the Washington Toxic Coalition; the Seattle Parks and Recreation office cancelled an order for 34,000 feet of PVC pipes and sent them back to their distributor. San Francisco initiated a PVC-free procurement policy with a screening of *Blue Vinyl* for city department heads, with many cities since signing similar commitments after screenings, including New York, Boston and Buffalo.

From the outset, the *My House is Your House* campaign, with thousands of screenings of *Blue Vinyl*, was geared towards helping consumers understand that there is no such thing as cheap when the many long-term problems associated with a product throughout its lifecycle are considered. The film has been leveraged to create demand for alternative materials that in turn lower costs. The availability of *Blue Vinyl* to health and environmental justice organizers and green building proponents provides an invaluable tool that allows them to translate scientific data with pop-cultural appeal. *My House is Your House* has been strategically positioned into the organizing efforts aimed at creating a healthy and sustainable toxic-free future.

LEGACY⁶

A documentary film by Tod Lending, *Legacy* tells the inspiring story of how members of the Collins family broke free of welfare, recovered from substance abuse and escaped the specter of violence in their community. Family members succeeded in education and job training, secured employment, moved to a safe neighborhood and gained self-respect. Its multi-phased and multi-platform outreach campaign was designed and organized by Outreach Extensions, a national consulting firm that specializes in comprehensive, high-profile educational and community outreach campaigns for media projects. The outreach campaign, supported by the Annie E. Casey Foundation, The John D. and Catherine T. MacArthur Foundation, W.K. Kellogg Foundation and HBO, was designed to expand public awareness and dialogue and to work in partnership with key organizations on the ground that focused on strengthening youth, families and communities.

The overall outreach plan comprised a number of components including: the *Legacy Community Action Toolbox*, the *Legacy* website, screenings and events, customized materials for the faith community, and local public television station engagement. Importantly, it also involved national partnerships with social issue organizations that could bring the film to community audiences. These organizations focused on families and children in public housing, youth development, and grand parenting and intergenerational issues.

Outreach Extensions advanced a dual strategy to utilize the strengths of both HBO/Cinemax (audience reach and media power) and PBS (targeted audiences, community outreach expertise and on-the-ground activities, role of stations as neutral conveners, and its online presence) to reach and serve communities. This strategy helped to build a seamless campaign for the July 2001 Cinemax premiere broadcast and the later November 2002 PBS broadcast.

By all accounts the campaign was very successful and can point to a number of positive outcomes. An evaluation by Applied Research & Consulting LLC (ARC) found that the outreach campaign was “highly successful in achieving all of its four major goals, including:

⁶ For more information on *Legacy*, please see <http://www.pbs.org/legacy/documentary/index.html> and http://www.filmmakermagazine.com/archives/online_features/triumph.php



- Utilizing media in innovative ways to stimulate community action;
- Engaging and supporting organizations that work with new and special audiences (e.g., families living in poverty, individuals in substance abuse prevention and recovery, grandparents who are primary caretakers for their grandchildren, highrisk youth)
- Raising awareness and understanding of pressing and complex social issues; and,
- Encouraging coalition-building among community organizations and helping them develop sustainable resources and strategies to improve the lives of families in cities across the country.”⁷

ARC’s evaluation also reported that the campaign had reached more than 562,000 individuals through outreach activities, publications, and broadcasts of local productions; had 33,600 web site visitors; and distributed more than 5,300 *Legacy of Faith* videos, 4,800 *Legacy of Community Action* videos, almost 2,500 copies of the *Legacy Community Action Toolbox*, and about 11,250 separate Toolbox sections. The national campaign facilitated over 1,000 community and faith events and screenings and organized 103 appearances of Collins family members at events and screenings. Local public television stations involved in the campaign helped to customize campaign resources to serve their audiences.

The campaign’s production of two short videos, *Legacy Community Action* and *Legacy of Faith*, repurposing footage from the documentary, created a springboard for local discussion and action. The *Legacy of Faith* video opened the door for congregations to begin to use media effectively in convening audiences and generating sustainable action. Outreach Extensions has engaged this target audience in subsequent faith-based campaigns including *Faith Into Action* and *Omar and Pete*. The latter also penetrated the Federal Bureau of Prisons to assist prisoners who were reentering their families and communities allowing incarceration.

Legacy can also point to a clear policy impact directly linked to the film. The campaign successfully used the documentary film as a platform for social action, including efforts to achieve federal housing legislation on behalf of grandparents rearing their grandchildren. The Transportation, Treasury, and Housing and Urban Development appropriations bill signed into law on November 30, 2005 included \$4 million for LEGACY Housing Demonstrations (named after the film). Along with Outreach Extensions, Generations United, one of the national outreach partners, was instrumental in this unprecedented outcome. Congressional sponsors cited the film as an inspiration and an effective tool in garnering support for passage.

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While *Legacy* was a high dollar campaign, about \$1.3 million over its five-year duration, outreach and community engagement campaigns funded at lower dollar amounts can achieve substantial impacts.

⁷ http://www.centerforsocialmedia.org/documents/legacy_eval.pdf



THE NEW AMERICANS⁸

A seven-hour PBS miniseries produced by Kartemquin Films and that premiered in 2004, *The New Americans* focuses on the search for the American Dream through the eyes of today's immigrants and refugees. Its community engagement campaign was the result of a partnership among the ITVS Community Connections Project, Active Voice, The National Issues Forums Institute and Outreach Extensions. The four organizations created resources to help public television stations, educational institutions and community organizations develop partnerships and grassroots initiatives that support newcomer integration. The civic engagement outreach campaign had the following goals:

- Improve student and faculty cultural sensitivity on immigrant issues.
- Encourage professional development and sensitivity training for service providers and business leaders who work with immigrants.
- Recognize and cultivate leaders in immigrant communities.
- Develop and strengthen coalitions, resources and activities.
- Convene public forums and preview screenings on related issues.
- Build awareness of the series using electronic networks, newsletters and websites.

The outreach campaign enlisted a range of national partners and developed multiple resources targeted toward specific audiences. Active Voice and Kartemquin Productions collaboratively developed 15-20 minute theme-based video modules, that focus on civic engagement, sensitizing educators, and youth as well as companion discussion guides and training packages for advocates, teachers, human resources professionals, youth organizers, and inter-group facilitators. Active Voice also partnered with a range of local organizations across the country providing technical assistance and support to organizations actively involved in launching the *New Americans Campaign* in their communities. They provided staff support for managing local campaign activities including screenings, trainings and promotion of the modules.

According to an evaluation conducted by the Association for the Study and Development of Community for Active Voice, the campaign had impact at the individual, organizational and community levels. Individuals reported increased knowledge and awareness of immigrant related issues and became more involved in activities to address them. Organizations formed new relationships with national and local groups working on similar issues, enhanced their programming to address immigrant issues and expanded their membership. At the community level, new relationships were formed and there was increased advocacy for the rights of immigrants.⁹

⁸ <http://www.pbs.org/independentlens/newamericans> & <http://www.itvs.org/outreach/newamericans>

⁹ Final Report for the Evaluation of the New Americans Campaign prepared by Association for the Study and Development of Community for Active Voice, July 29, 2004.



In addition to Active Voice's video modules, ITVS developed classroom and community discussion kits. The National Issues Forum Institute created a companion discussion guide for civic and educational organizations interested addressing public issues in local forums. Finally, Outreach Extensions focused on the needs of the Latino community developing a workshop curriculum (in English and Spanish) to assist parents and caregivers of young children. Overseen by Outreach Extensions, selected public television stations received funds to join with local partners to conduct activities such as educational workshops, screening events, public forums, museum exhibits, local public affairs productions, teacher trainings, and resource fairs - all of which were designed to facilitate discussions and raise awareness about the challenges faced by new immigrants among diverse audiences and communities.

KEY LESSONS

In addition to Active Voice's video modules, ITVS developed classroom and community discussion kits. The National Issues Forum Institute created a companion discussion guide for civic and educational organizations interested addressing public issues in local forums. Finally, Outreach Extensions focused on the needs of the Latino community developing a workshop curriculum (in English and Spanish) to assist parents and caregivers of young children. Overseen by Outreach Extensions, selected public television stations received funds to join with local partners to conduct activities such as educational workshops, screening events, public forums, museum exhibits, local public affairs productions, teacher trainings, and resource fairs - all of which were designed to facilitate discussions and raise awareness about the challenges faced by new immigrants among diverse audiences and communities.

Each of the campaigns, discussed very briefly above, was unique and used a somewhat different approach. In addition, each was spearheaded by a different organization. While they all use a film as a centerpiece of a larger campaign, they target different audiences and the goals of the campaigns move well beyond traditional film marketing, incorporating goals that are linked to social change rather than simply building audience size. Analysis of these and other case studies as well as various conversations with key outreach providers including Working Films, Outreach Extensions and Active Voice, point to certain determinants of successful campaigns. These include:

- **Clear Goals** that are realistic and linked to the narrative and to the needs of the movement. The goals can be focused on education and raising awareness among key audiences, grassroots organizing and clear "take action" steps, movement and coalition building, as well as larger public policy goals.
- **A Specific Plan** that is based on an understanding of key target audiences and how best to reach them whether it be through traditional avenues, key partnerships or a methodical online outreach plan. Online plans should include clear strategies to engage each target audience in action, tools to monitor and report on this action in order to further engage the community around the film. The film's website and broader online presence should be seen as far more than a parking place for information about the film. Instead, each filmmaker should be thinking strategically, and as early as possible, about building and sustaining a community of activists online. This action could be a meaningful discussion and dialogue or action oriented requests, such as hosting a screening, donating to a cause, engagement in direct advocacy around the issue.



- **Flexibility** that allows the project to take advantage of new opportunities and partnerships, to implement action steps over time and to alert audiences to developments that may have occurred following the completion of production such as a change in circumstance related to one or more of the characters, new legislation, or new issues related to the project that are being addressed.
- **Appropriate Level of Partnership** with key organizations that have content area expertise and that are already working on the issues addressed in the film and have relationships with key audiences. Partnerships are key to a campaign's sustainability beyond the release. Partners whose missions are aligned with the issue can carry action forward. Vital campaign resources such as guides, educational materials and material repurposed for community/educational use can support screenings, discussion and action planning. These partners can feature the film and the associated campaign on their own website and in digital communications to their membership or community. This can be a critical factor in driving new people to the film's website and broader online presence.
- **Sufficient Expertise and Resources** including management, technical and financial. Successful outreach campaigns require ongoing coordination and commitment. In some cases, this means that outreach can be coordinated by the filmmaker or an outreach coordinator working out of the filmmaker's office. In other cases an external organization like Working Films, Active Voice or Outreach Extensions can be enlisted to design and manage the campaign. However, regardless of the model chosen to manage the outreach activities, sufficient resources are required to support the planning and implementation of the outreach campaign.
- **Defined Timeline** which can reflect different phases of a project. This can be focused around the film's releases, such as pre-broadcast and post-broadcast activities, or festival, theatrical, digital or DVD releases or linked to the timetable of ongoing grassroots campaigns. A clear start and end to various phases, however, provides an opportunity to reflect on key lessons, impact and evolving needs of the campaign. Importantly, an outreach strategy should begin long before the actual release of the project to help ensure a built-in community for the film's release and action campaign.
- **Plan to Track Impact** that is linked to the campaign's specific goals and when possible moves beyond process measures such as number of screenings or website hits, toward outcome measures such as viewer action and policy change. This deeper-level impact can often be tracked through online audience engagement and anecdotally through the stories and reports that people post on a film's website.

Obviously, all of these factors are dependent on the type of outreach campaign being undertaken and they all need to fit together into a coherent whole. For example, the ability to achieve the stated goals will be guided to a great extent by the campaign's timing, having the right partners on board, and the appropriate level of resources. Likewise, measures of impact need to flow from the goals, plans for each target audience, and the phase of campaign.

Figure 1. Outreach Versus Film Promotion provides an overview of some of the different types of outreach. We make a distinction between traditional marketing, which in our view has revenue as the key goal, and the use of film as a vehicle of social change.

As a funder of outreach, The Fledgling Fund pays particular attention to the goals of a film, where the issue is in the public consciousness, what audiences it is targeting and what kind of change is reasonable to expect. For each project, we strive to determine what type of outreach will be most effective given the issue addressed in the film and the film's narrative.



Figure 1 - Outreach vs Film Promotion

FILM AS A VEHICLE FOR SOCIAL CHANGE

	FILM PROMOTION	EDUCATIONAL OUTREACH	TAKE ACTION CAMPAIGN	COMMUNITY ENGAGEMENT
GOAL	Revenue: Increase size of "paying" audience	Education: Increase awareness among viewing (and non-viewing public) about a key social issue	Individual Behavior Change: Use the film as a tool to raise awareness and spur individual behavior change/action	Long Term Social Change: Embed film in long term social change effort
CHARACTERISTICS OF PLAN	Classic Marketing: to "sell" the movie	Classic Marketing to Sell the Issue: More complex plan that uses movie as key component of larger educational effort	Social Marketing: Seeks to move individuals from awareness to action. Such as donating to a cause or advocating for particular policy change	Community Engagement Initiatives: Seeks to use the film as tool for advocates who are already working on the issue and to strengthen and grow that movement as way to achieve sustainable social change
LEVEL OF PARTNERSHIP WITH ACTIVIST/NGOs	None	Consists of working with partners to gather info for the message	Involves partnership with key organizations around specific campaign actions	Requires long term partnership with organizations who work on the issue
EXPERTISE AND RESOURCES NEEDED	Distribution Expert, understanding of traditional and nontraditional distribution	Strategic Communications and PR with issue area expertise. Screening or curriculum guide, Ability to utilize web-based media	PR/Marketing with issue area expertise and nonprofits with "Take Action Plan." Ability to utilize nontraditional web-based media	Build and manage long-term collaborative relationships with nonprofits; has the expertise to work with both traditional and nontraditional media, can develop initiatives and bridge campaigns
LENGTH/TIMING	Timed to film's festival, theatrical and DVD release	Can be long term particularly if education market is accessed and if online strategy is robust	Timed to window for action (i.e. election fundraising effort, key legislation)	Long term effort of which film is only one part
TRACKING IMPACT	Box office, DVD sales	Box office, DVD sales, media stories on the issue that mention the film. Use of film in educational setting and changes in knowledge, attitudes and beliefs	Box office, DVD sales, media stories on the issue that reference the film, participation in specific action (donations etc.). Specific online tools can be used, such as www.zazango.com to provide widgets for social impact tracking	Box office, DVD sales, media stories on the issue that reference the film, # and strength of NGOs using film. Participation in NGO screenings/discussions. Specific policy changes, change in the way topic is portrayed in media. Specific online tools can be used, such as www.zazango.com to track social impact
EXAMPLES		<u>New Americans</u> <u>War / Dance</u>	<u>Murderball</u> <u>Born into Brothels</u>	<u>Ghosts of Abu Gharib</u> , <u>Blue Vinyl</u> , <u>Legacy</u> , <u>Aging Out</u> , <u>King Corn</u> , <u>The Return of Navajo Boy</u> , <u>A Jihad for Love</u>



ASSESSING IMPACT

Perhaps more difficult than assessing the structure of an outreach plan, is assessing its impact. This of course is critical in justifying funding and informing foundation boards. To the extent possible, we want to move from an intuitive sense that documentary films have social impact to more concrete measures. While we do realize that making a causal link between a film and broad social change is incredibly difficult to do, we know that filmmakers, funders and others focused on social change and performance evaluation have done an enormous amount of work that can and has informed our thinking. (Appendix B includes a list of various resources in these areas.) Based on our analysis of work within the fields of social media, social change and advocacy, and evaluation, several key lessons have emerged. These include the need to:

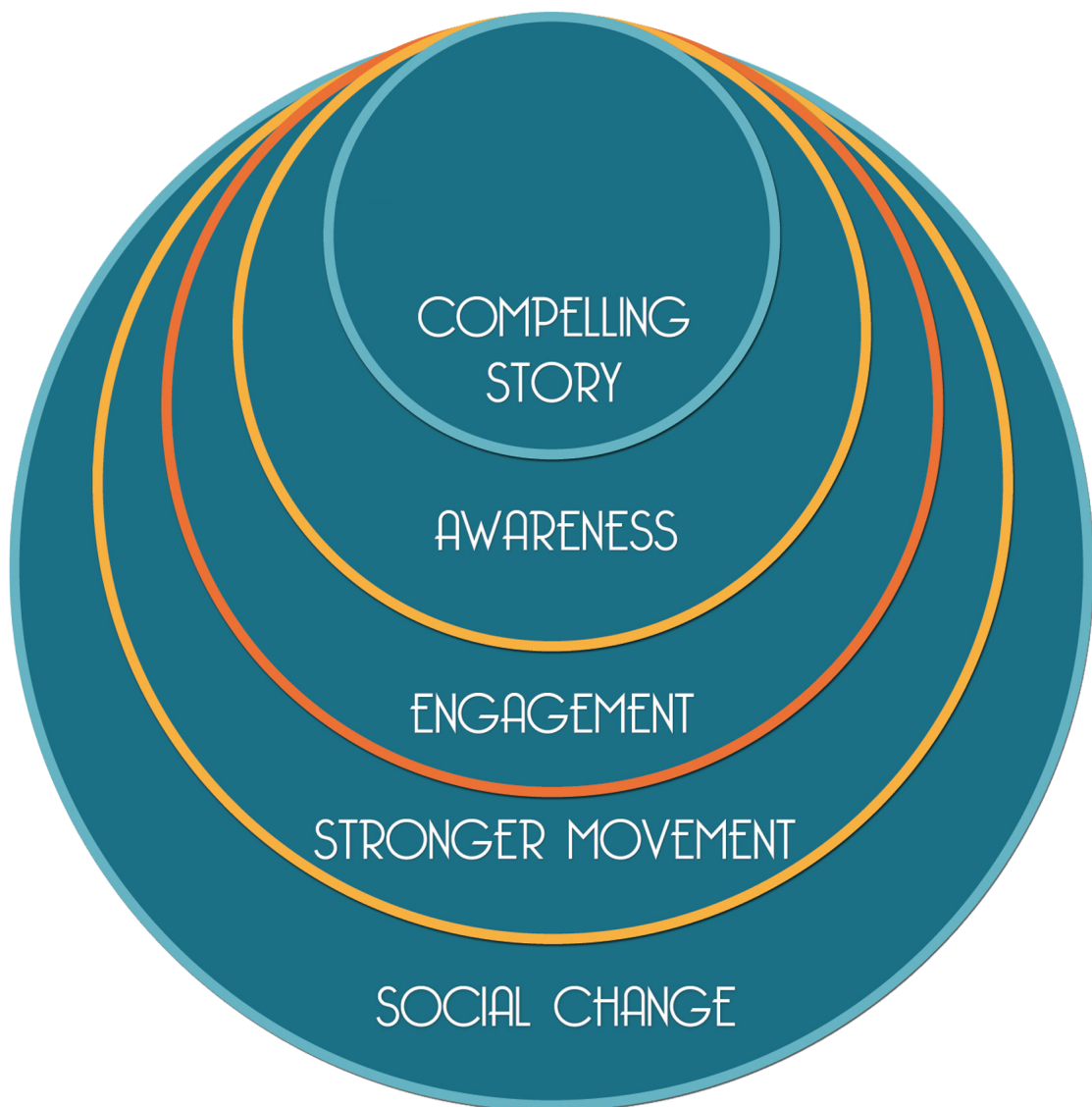
- **Think Beyond Box Office Success.** Because The Fledgling Fund is interested in supporting films that have the potential for social impact, it is important for us to move beyond thinking of just box office success and instead look at the overall impact of the film. For example, while we are interested in the number of people who saw the film, we are more interested in how many people better understand the issue because the film was made.
- **Use a Range of Data to Assess Impact.** In an ideal world, we would like to be able to point to hard outcome measures or statistically significant measures of change to assess the impact of a film and/or its outreach campaign. In reality, we understand that this is not always possible or feasible. Thus, we believe it's important to look at a variety of data sources, such as survey results, case studies and anecdotal data that when taken together can provide a nuanced picture of a project's impact. In addition to different data sources, it is also important to look at a combination of both process/output measures (e.g. the number of screenings) and outcome measures (e.g. what happened as a result of those screenings). This tracking can be done through a film's website where people can report the impact the film has had on their own lives and, in turn, the impact they are making on their community.
- **Set Realistic Expectations for Impact.** After reviewing case studies as well as models of individual and community change, we believe it is critically important to understand the state of the movement and where an issue is in the public consciousness in order to set realistic expectations for impact. It is not reasonable to expect broad social change if there is little public awareness that a problem exists. In some cases, just getting audiences to see the film, connect with the story and better understand an issue is enough. This awareness is the first step to social change. If an issue is incredibly complex or not well understood, the goal of the film and its outreach campaign may focus simply on raising awareness and stimulating dialogue. On the other hand, if an issue is well-understood and there are clear solutions, we would hope the goals of the campaign would shift to something more concrete than simply dialogue. There needs to be an infrastructure in place that encourages individuals, organizations, and/or communities to act.
- **Work Collaboratively with Key Stakeholders to Develop Goals and an Assessment Plan.** Clearly, setting expectations for impact needs to be a collaborative process that involves the filmmaker, outreach/community engagement professionals, funders, as well as key organizations that work on the film's issues on a day-to-day basis. From the standpoint of funding, it may be that a small planning grant can facilitate this process by bringing key stakeholders together to develop a plan that is strategic, focused and measurable.



DIMENSIONS OF IMPACT

In an attempt to apply these lessons to our efforts to measure the impact of our work, The Fledgling Fund has identified some “Dimensions of Impact” (See Figure 2) that we use as a framework to assess the various projects that we fund.

Figure 2 - Dimensions of Impact





The core dimension is a quality film or media product that can function as a jumping off point for collaboration and action. By this we mean a film that has a compelling narrative that draws viewers in and can engage them in the issue and illustrate complex problems in ways that statistics cannot. We believe that a quality film is the foundation for strong distribution and can lay the groundwork for innovative and high profile outreach and community engagement strategies. For this dimension, we look at measures such as festival acceptance, theatrical success, broadcast, internet streaming, online “buzz”, international and national DVD sales as well as traditional film reviews and awards. All of which, we believe, create buzz around a film and begin the process of building awareness about both the film and the issue. This in turn can make it easier to engage partners in outreach and community engagement efforts.

The next dimension that we consider is a project’s ability to raise awareness around a particular issue since awareness is a critical building block for both individual change and broader social change. Here we consider both the audience size and the diversity of that audience. By diversity we think of the geography, age, faith, political views, as well as racial diversity. For example, was the film able to energize those concerned about a particular issue and involve them in even deeper and more meaningful ways in advocacy efforts? Or, did it reach beyond those who already know and care about the issue explored in the film? In addition to audience, we also look at things like press coverage both on and off entertainment pages and online discussion forums and blogs. As we mentioned above, a relatively small percentage of people actually saw *The Inconvenient Truth*, but a much larger percentage heard and read about the film given the publicity and press that the film generated.¹⁰ More and more, potential audiences are not reading traditional film reviews, but doing a simple internet search for the film and reading postings about the film from viewers around the world.

Next we look at public engagement, which indicates a shift from simply being aware of an issue to acting on this awareness. Were a film and its outreach campaign able to provide an answer to the question “What can I do?”, and more importantly mobilize that individual to act? To evaluate a project’s success along this dimension we can look at participation in and response to facilitated dialogues and screenings, blogs, activity on social networking sites, and participation in Take Action Campaigns. We can also look at website hits and view generated opinion and editorial pieces and response letters.

Moving beyond measures of impact as they relate to individual awareness and engagement, we look at the project’s impact as it relates to the broader social movement. We are interested in understanding if a project can strengthen the work of key advocacy organizations that have strong commitment to the issues raised in the film either by energizing, building or growing active participation in that movement, or perhaps by spurring collaboration among key organizations. We can look at such measures as the number of advocacy organizations using the film in their strategic work and increased viewer participation in the movement as indicators. In addition, we are interested in the role of the film in larger policy debates. Is it mentioned in policy discussions and the legislative press? Have there been screenings with key decision and policy makers? Both of which can indicate the film’s usefulness as a tool for policy change.

Ultimately, of course, social change is the goal. And while we understand that realizing social change is often a long and complex process, we do believe it is possible and that for some projects and issues there are key indicators of success. For example, in some cases we could look to key legislative or policy changes that were driven by, or at least supported by the project, such as the *Legacy* project. In other cases, we can point to shifts in public dialogue and how issues are framed and discussed.

¹⁰ <http://www.centerforsocialmedia.org/resources/publications/docsonamission/>



An overview of these dimensions with some sample measures is shown in **Figure 3**. It is important to emphasize that this is framework for evaluation and we do not expect that every project will result in concrete policy change. The goals of the project and our expectations will be driven by where an issue is in the public consciousness and the role a film can play, given its narrative, in the process of social change. It may be that film can play a key role in raising public awareness and educating key target audiences about a particular issue. In other cases, there is the potential for substantive policy change. The key for each project is to understand the state of the movement and how the film and outreach initiative can move it to next level. In other words, we need to be clear as to what type of outreach is most appropriate and set reasonable expectations in terms of impact.

Figure 3 - Sample Measures for Dimensions of Impact





It is also important to recognize that larger campaigns may have different layers of evaluation. For example, evaluative measures may emerge from campaign actions that occur on the local level by public television stations and their local partners. These may include viewership of local documentaries or public affairs segments (radio or television) that explore local perspectives and solutions related to a national documentary.

MOVING FORWARD

The Fledgling Fund views the framework above as a model to help structure how we develop and evaluate the projects that we fund. As we consider funding proposals, we consider a series of factors that are all linked back to our dimensions of impact and the lessons that we have learned to date. These include:

- **Quality:** This is a first criterion that we consider. We look for projects that center around a high quality film, website or other media that tells a story with a compelling narrative, strong characters that we care about and a clear story arc. We ask whether the project tells a universal story and whether it tells it well.
- **Potential for Social Impact:** We ask ourselves the following questions: Does it add to or advance our understanding of the issue? Is it a unique perspective? Is this project likely to make a difference? Is it likely to change attitudes and perhaps behavior? Will something be lost if a project does not move forward? Is the issue socially ripe for change? In other words, given the state of the movement or the issue, can this project move the issue forward?
- **Strong Outreach Plan:** We seek projects with clear and strategic plans that incorporate the key elements we discussed earlier in this paper. And, while we are thrilled when a project comes to us with this clearly defined with a strategic outreach plan, we recognize that in some cases, these plans evolve over time. Critical to us is that a project's director has thought about the overall goal for the film or project, its key audiences and constituencies, and has developed or is willing to develop relationships with the key organizations who understand and work on the issue. Given that starting point, we often work with filmmakers to develop a more comprehensive outreach strategy to take the project to the next level of social impact.
- **Strong Leadership.** We look for a filmmaker or project leader who is committed; one who really cares about the issue and either has or can develop key relationships with activists, outreach providers and others to create and implement a really innovative outreach plan.
- **Learning Potential.** We believe that evaluation provides funders, filmmakers and social justice organizations important information. It provides an opportunity not only to determine if goals were met and objectives achieved but also why a campaign was successful and how it could have been improved. We view evaluation as a critical learning process rather than a punitive exercise and believe both successes and failures can inform our efforts. We have learned that assessing the impact of our media projects and continuing to add to the documentation that exists will build confidence among key stakeholders in the field that film and other creative media projects can catalyze social change. In addition to applying this framework to our own grantmaking, we will continue to incorporate new learning to strengthen it. Our hope is that this paper will prove useful to a range of stakeholders interested in using media to achieve social impact – from filmmakers and other media makers to activists and funders. We also recognize that our work in this area is only just beginning. We view this as a working model that will continue to evolve as our work and the field evolves. Now more than ever, we believe that film and other media can have tremendous social impact and can indeed ignite social change. We welcome your comments and suggestions.



APPENDIX A - SAMPLE LIST OF OUTREACH CAMPAIGNS

- *Aging Out*
- *A Healthy Baby Girl*
- *Beyond Beats and Rhymes*
- *Blue Vinyl*
- *The Doula Story*
- *Everything's Cool*
- *Farmingville*
- *The Forgetting: A Portrait of Alzheimer's*
- *The New Americans*
- *Re-entry National Media Outreach Campaign*
- *Trembling Before G D*
- *Two Towns of Jasper*
- *Waging a Living*

APPENDIX B - RESOURCES RELATED TO IMPACT

Documentaries on a Mission: How Nonprofits are Making Movies for Public Engagement. By Karen Hirsch with an introduction by Matt Nisbet <http://www.centerforsocialmedia.org/resources/publications/docsonamission/>

Making Television Matter: How documentaries can engage and mobilize viewers.
<http://www.benton.org/publicbrary/mtm/index.html>

Using Grassroots Documentary Films for Political Change, June 26, 2001 Outreach Tips for Nonprofits and Activist Organizations
http://www.mediarights.org/news/articles/using_grassroots_documentary_films_for_political_change

Reassessing the Impact of Documentary Film: Filmmakers, Activist Community Organizations, and Public Policy

The Impact of *The Uprising Of '34*: A Coalition Model of Production and Distribution
<http://www.ejumpcut.org/archive/jc45.2002/whiteman/uprisingtext.html>

Communication for Social Change: An Integrated Model for Measuring the Process and Its Outcomes, by Maria Elena Figueroa, D. Lawrence Kincaid, Manju Rani, Gary Lewis, 2002

The Challenge of Assessing Policy and Advocacy Activities: Part II – Moving from Theory to Practice, The California Endowment, October 2006