

Assessing Creative Media's Social Impact

Abridged Version

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ASSESSING CREATIVE MEDIA'S SOCIAL IMPACT

ABRIDGED VERSION

The Fledgling Fund believes that films and other media can and do have social impact, and obviously, would not be funding in this area if we thought otherwise. In our view, a well-made documentary film—especially one with a compelling narrative and well-crafted outreach plan, can 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 can be key tools in raising awareness and engaging viewers in social issues. However, we also believe that the social impact of media, particularly documentary films, is often difficult to assess and needs to be better understood and documented. In our December 2008 paper, *Assessing Creative Media's Social Impact*, we put forth a framework, drawn from a combination of case studies, interviews and other research, which we will use to help us think about and assess the impact of our funding in creative media. While the complete paper is available on our website, this abridged version outlines some of its key elements.

MOVING FROM FILM PROMOTION TO OUTREACH AND COMMUNITY ENGAGEMENT

While there are many examples of successful outreach campaigns, we focused on three in our paper: *Blue Vinyl's My House is Your House Campaign*, *National Legacy Outreach Campaign* and *The New Americans Campaign*. Each illustrates how effective community engagement and outreach campaigns can magnify the social impact of documentary films. These and other examples make clear outreach campaigns do not all look like. They can be short or long term, local, national or even international in their scope. 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. 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. 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.



BLUE VINYL: MY HOUSE IS YOUR HOUSE

Blue Vinyl and its 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. The film 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’s goal is to support the growing grassroots movement to transform the PVC industry so that it is no longer a source of persistent toxins that threaten humanity and the environment. From the start, the campaign has achieved clear results including:

- Intimate Brands made a commitment to completely phase out PVC from their packaging within a month of *Blue Vinyl*’s Sundance premiere. Viewers sent over 1500 signed postcards to the company in conjunction with a push from Greenpeace that resulted in 6000 emails.
- Institute of Architects member firms and chapters hosted screenings in more than 15 states, with many architects and designers committing to green building by signing a “PVC-free” pledge.
- *Blue Vinyl* has screened at over 100 colleges and universities, over 30 of these screenings led to campus policies in support of sustainable building.
- Greenpeace and the Healthy Building Network spearheaded the design and construction of the first affordable, environmentally sustainable PVC-free Habitat for Humanity House. *Blue Vinyl* was a key component in garnering stakeholder support.
- Kaiser Permanente screened *Blue Vinyl* for 1000 construction and procurement employees and then committed to eliminating PVC in its building and renovation projects. It changed its building standards to include PVC-free resilient flooring. After it asked its carpet manufacturer to provide PVC-free flooring, the factory introduced PVC-free commercial products – a key market shift.
- Seattle Parks and Recreation office cancelled an order for 34,000 feet of PVC pipes after a closed-door City Council screening of *Blue Vinyl* organized by the Healthy Building Network and the Washington Toxic Coalition.
- 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.

Blue Vinyl has proven to be an invaluable tool to health and environmental justice organizers and green building proponents, allowing them to translate scientific data with pop-cultural appeal. Further, the *My House is Your House* campaign has been strategically positioned into their organizing efforts aimed at creating a healthy and sustainable toxic-free future.



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- **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, are already working on the issues addressed in the film and have relationships with key audiences. Partnerships are critical 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, Outreach Extensions or others 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 output 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. Each campaign will have a different set of "moving parts" and will thus be customized and unique. A strategic campaign can move people from awareness to a some cases help to build or strengthen broad social movements which in turn can lead to social change.



LEGACY

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. They 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 developed and organized by Outreach Extensions and designed to expand public awareness and dialogue and to work in partnership with key organizations that focus on strengthening youth, families and communities. 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:

- utilizing media in innovative ways to stimulate community action;
- engaging and supporting organizations that work with new and special audiences;
- 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.”

ARC’s evaluation reported that the campaign reached more than 562,000 individuals through outreach activities, publications, and broadcasts of local productions; had 33,600 website 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.

The campaign’s production of two short videos, *Legacy of 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.

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.



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.

THE NEW AMERICANS

A 2004 PBS miniseries produced by Kartemquin Films, *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 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/cultivate leaders in immigrant communities.
- Develop/strengthen coalitions resources and activities.
- Convene public forums and preview screenings.
- 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, focused 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 module promotion.

According to an external evaluation, 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 progra-



THE NEW AMERICANS (CONT'D)

mming 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.

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 in 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.

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. 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.
- **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 in 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.



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>

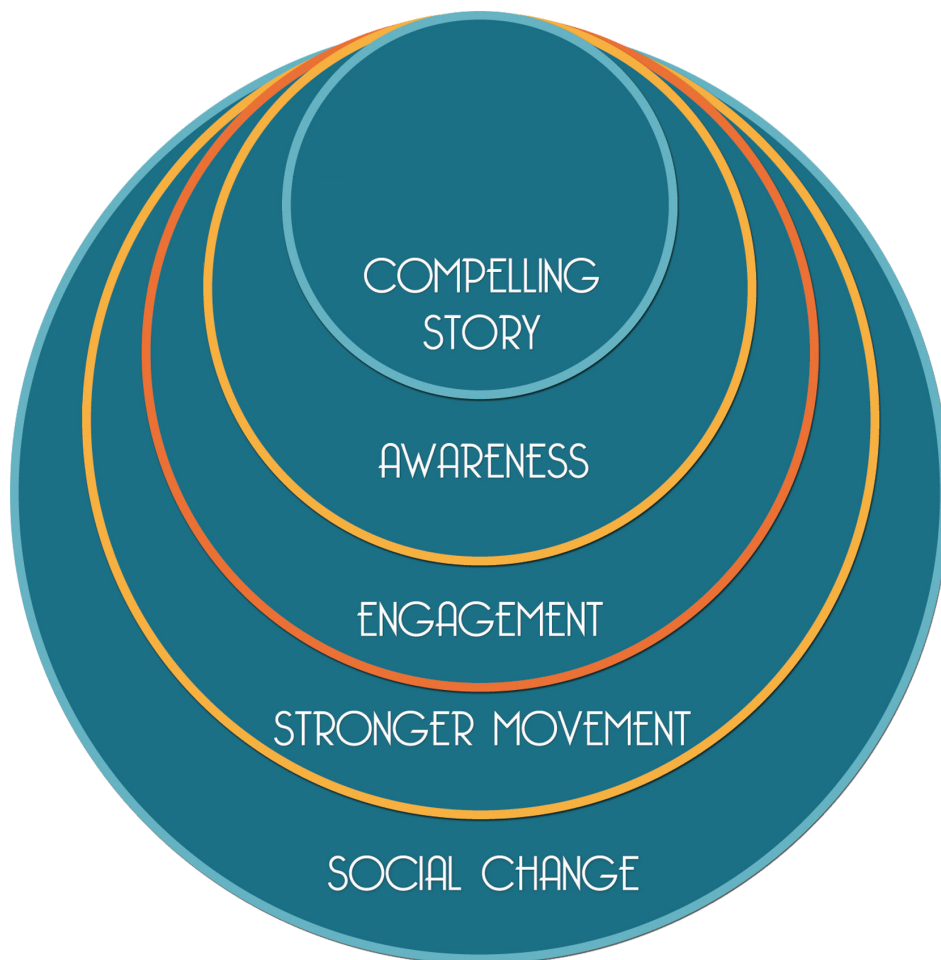


- **Work Collaboratively with Key Stakeholders to Develop Goals and an Assessment Plan.** Clearly, setting expectations for impact needs to be a collaborative process that involves the filmmaker, outreach/community engagement professionals, funders, as well as key organizations that work on the film's 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





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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 energy 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. 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.¹ 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.

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 the 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

¹ <http://www.centerforsocialmedia.org/resources/publications/docsonamission/>

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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.

Figure 3 - Sample Measures for Dimensions of Impact





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 the 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 a clearly defined 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.

For our active projects, this framework will guide our work with our grantees and our evaluation of projects. We look for opportunities to help our grantees use their film or other media as tools for awareness and engagement and to link them with social justice organizations that work to advance social change. We understand that often our funding may help a project realize only one component of its strategy and that other funders and partners are needed for a project to fully realize its potential. A number of films that Fledgling has supported have premiered at festivals, secured national broadcasts, and/or built strong relationships with social justice organizations. They are now extremely well-positioned to achieve social impact. For example, *No Impact Man*,



which premiered at Sundance, will launch a community engagement campaign that will be focused on engaging individuals and communities in efforts to reduce their own environmental impact. *Lioness* continue to engage and educate policy leaders about the unique challenges facing female soldiers and veterans. *Sin by Silence* is in the early stages of planning its community engagement strategy that will give voice to victims of domestic violence and advocate for solutions. We have used this framework to assess these and other projects, build the evidence of impact and identify future opportunities. We continue to add more information on our funded projects, their impact to date and how that impact could be magnified to our website, www.TheFledglingFund.org.

In addition to applying this framework to our own grant making, 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 to 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.