



DOCUMENTARY POWER
RESEARCH INSTITUTE

FULL REPORT

Beyond the Impact Report:
What's Really Needed to Produce
and Sustain Social Impact
in Documentary Film?

**FILMMAKERS AND PRODUCERS 'GET REAL'
ABOUT THE LAST DECADE OF
SOCIAL IMPACT WORK**



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ABOUT THE CENTER FOR MEDIA & SOCIAL IMPACT (CMSI)

The Center for Media & Social Impact (CMSI), based at American University's School of Communication in Washington, D.C., is an innovation lab and research center that creates, studies, and showcases media for social impact. Focusing on independent, documentary and public media, the Center bridges boundaries between scholars, producers and communication practitioners across media production, media impact, social justice, public policy, and audience engagement. The Center produces resources for the field and academic research; convenes conferences and events; and works collaboratively to understand and design media that matter.

A BRIEF INTRODUCTION

Credit: And She Could Be Next
Description: State Senator Nikema Williams, Ai-jen Poo, and descendants of Dorothy Bolden march to the polls during the 2018 midterm elections in Georgia.

As both an outcome and a set of activities, making social impact through documentary storytelling has changed enormously over the past decade – an era dominated by the entry of commercial streaming giants, alongside new technological advancements.

It isn't an understatement to say that the entire environment in which filmmakers and impact producers create has seen fundamental change over the last few years, due to important disruptions made by rising social movements and the arrival of new funding powers, distributors, and engagement platforms. At such a juncture, it's important to raise the following key questions:

What does social impact in documentary entail today? What are the current challenges? What lessons and models of the past are being brought forward and which ones are being overlooked? What does success look like in this work and how do we define it?

This report centers this pursuit by engaging a diverse set of working filmmakers and impact producers in conversation around their experiences leading social impact campaigns with documentaries over the last decade. The aim is to “get real” about what their perspectives tell us about the state of the field, and to serve as a practical guide for further exploration and discussion of experiences and issues of shared concern. By creating a space for more than 50 filmmakers and impact producers to hit the ‘pause button’ and take time to reflect on current experiences and trends in the industry – and especially in their own work – this report endeavors to lift key perspectives and immediate challenges for wider deliberation and consideration for a field in rapid transition.



One Big Problem This Report Aims to Address




Intentional social impact efforts with documentary are challenging for a number of reasons. Adequate documentation, funding and support for social impact in the documentary space is notoriously sparse. Often, the stories behind the scenes are the most useful for shaping an understanding about how social impact work happens, how to work around challenges, and what the field needs to do this work in the future. And yet, these stories can be hard to access. This has made it difficult for the field to form a collective understanding of its shared challenges and experiences, and it has made it even harder to pass down good practices and approaches to social impact that have been successful.

Despite instances of success, there is much to improve upon. As one U.S.-based filmmaker interviewed here put it: “I have about 10 million problems with the way impact is being done.”

This study is one attempt to go beyond the standard impact report, to bring real concerns to the forefront, to lift examples of transformative impact campaigns that deserve greater recognition, and to ultimately gain a better understanding of what filmmakers and producers are really doing when they are doing social impact.

Who is This Report For and What Are Its Key Research Questions?

Whether you are a seasoned impact producer, funder, or distributor, or new to the field, this report is designed to offer a way through the noise of documentary and social impact activities today by identifying a set of core learnings and experiences that seek to address:

-  *How are documentary social impact campaigns successful, and what are the core elements and practices that make them so (and, in the converse, what is not successful)?*
-  *What does “success” mean in the context of social impact campaign work?*
-  *What barriers are getting in the way of “success” for social impact campaigns?*

Sections of report

The findings of this report are divided into the following eight key themes:

1. *On Co-Creation*
2. *On Wellness*
3. *On Effective Strategies of Engagement*
4. *On Defining Success*
5. *On Coalition Building/Sustainability/Longevity*
6. *On Overcoming Barriers/Challenges to Engagement*
7. *On Funding (and Distribution)*
8. *On What the Field Needs*

ABOUT THE STUDY

Credit: Softie

What is the Larger Context of this Research?

A couple decades into the social media age, terms like “social impact campaign” and “documentary impact producer”¹ have become common lexicon in the documentary community. However, the objectives and approaches of producers and filmmakers engaged in social impact vary so drastically that these terms offer little organizing clarity or significance today.

In order to bring a clearer understanding of the intersections and divisions of the field, there are two urgent and fundamental questions that must be addressed:

- ❖ *how are documentary social impact campaigns successful, and what are the core elements and practices that make them so (and, in the converse, what is not successful), and what does “success” mean in the context of social impact campaign work?*
- ❖ *how can and should we tell the research-based stories about the societal influence of documentary storytelling at the level of the audience, broader culture and activism, and media agendas?*

These questions serve as the core focus of a path-breaking research initiative underway with the Center for Media & Social Impact (CMSI), under the working title ***Investigating Documentary’s Social Influence and Impact in the Participatory Media Age***. This report reflects a first step of this work.

¹ This term was coined around 2012 to reference a specialized documentary professional who shapes social change engagement alongside a film.



Informed & Guided By a Community of Practice: Advisory Working Group of Experienced Impact Producers and Filmmakers

Following several successful existing working groups across the documentary ecology, this study began by establishing a collaborative working group of eight leading producers and filmmakers: Asad Muhammad, Sarah Mosses, Denae Peters, Simone Pero, Emily Wanja, Tracy Rector, Marcia Smith, Vanessa Cuervo Forero, and Megha Agrawal Sood.. This group was created to help shape the design of its core questions; provide insights and valuable guidance in designing the study (including in identifying selection criteria and recommendations for the interview population); inform the analysis process (including in the identification of the most meaningful and significant findings for the field); and support in socializing and leading the broader campaign for adoption and understanding yielded by this work. As part of the larger documentary study in which this research sits, this group meets at core junctures in the research program to shape the design and implementation of this work.

Method: Interview Participants and Films

This study analyzes 50 social impact campaigns with documentaries, alongside in-depth interviews with the filmmakers and/or impact strategists at the center of each campaign. From this investigation, this report lifts key practices, norms, and learnings as shared by the interview participants. It includes more than 50 one-hour interviews, and an analysis of more than 1,000 pages of documentary impact campaign reports provided by the interview participants in connection with their films and campaigns.

This study's effort to include a diverse scope of films and producer experiences reflects the unique challenge and urgency of this moment in social impact and documentary film. While all of the films and producers here lay claim to being part of the 'social impact' field, the films/campaigns studied reflect a wide variety of approaches to impact. And the diversity of these experiences are meaningful. This report isn't about evaluating each film, or coming to a consensus of unified thinking; rather it aims to pull the lessons and experiences from each film for greater recognition and deliberation.

The selection of films was guided by a set of criteria aimed at ensuring diversity in four key areas: geographic location; year of campaign; race/ethnicity of lead filmmaker; and funding source. And in an effort to ensure that this study's sample included major campaigns/films that have been identified as valuable models of practice by other documentary impact professionals, alongside lesser known films that might not have received sufficient funding to produce major impact reports or receive wider recognition, this study grounded its selection of films and impact campaigns in direct consultation with the filmmaking community – though an advisory group, an active and invite-only curated listserv group of documentary impact producers located around the world (the Global Impact Producers Assembly, or GIPA), and by targeting a sample of important films by BIPOC creators, who have made substantial and meaningful impact in their target communities, though they might not be as well-known, publicized or well-funded through a robust impact report. A detailed overview of the methodology for film selection can be found in Appendix A.



TABLE ONE. INTERVIEW AND FILM SAMPLE

Film/Impact Campaign	Release Year	Country	Interview Participant
"Limiar" / Threshold	2021	Brazil	Rodrigo Diazdiaz
"Unmasked" video series on mental health	2019 (created)	USA	Chris Bullard
#387 (international film title) #numbersintonames (campaign)	2019	Multiple countries (Europe and North Africa)	Madeleine Leroyer
All In: The Fight for Democracy	2020	USA	Lindsay Guetschow
Amazon Adventure	2017	USA	Marjee Chmiel
An Insignificant Man	2017	India	Khushboo Ranka
And She Could be Next	2020	USA	Tracy Sturdivant
Backyard Wilderness	2018	USA	Marjee Chmiel
City of Trees	2015	USA	Lance Kramer
Dawnland	2018	USA	Adam Mazo
Disclosure	2020	USA	Eliza Licht
Duty Free	2021	USA release; Multiple countries	Sian-Pierre Regis
El Tema	2021	Mexico	Pablo Montaña
Ernie & Joe: Crisis Cops	2019	USA	Jenifer McShane, Kathy Leichter, John Amoroso
Escape Fire: The Fight to Rescue American Healthcare	2012	USA	Simone Pero
For Sama	2019	Syria	Sarah Mosses
Ghosts in the Machine	2015	Canada	Liz Marshall
He Named Me Malala	2017	Multiple regions (USA, East Africa, West Africa, MENA, Europe, Asia, South Asia)	Lindsay Guetschow
Homestretch	2014	USA	Erin Sorenson
In My Blood It Runs	2019	Australia	Rachel Naninaaq Edwardson, Alex Kelly
Jacinta	2020	USA	Erin Sorenson
John Lewis: Good Trouble	2020	USA	Dawn Porter
Landfall	2020	Puerto Rico	Cecilia Aldarondo
Love Free or Die	2012	USA	Macky Alston



Maria Luiza	2019	Brazil	Marcelo Diaz
Nasrin	2020	Iran	Jeff Kaufman and Marcia Ross
No Small Matter	2020	USA	Greg Jacobs and Laura Fallsgraff
Our Planet / David Attenborough - A Life On Our Planet	2020	UK release; Many countries	Liz Callegari
Pray Away	2021	USA	Anya Rous
Quipu Project	2015	Peru	Rosemarie Lerner
Roll Red Roll	2018	USA	Eliza Licht
Sands of Silence	2016	USA/Spain release; Many countries	Chelo Alvarez-Stehle
Saving Mes Aynak	2015	Afghanistan	Brent Huffman
Screenagers	2016	USA	Lisa Tabb
Screenagers Next Chapter	2019	USA	Lisa Tabb
Softie	2020	Kenya	Miriam Ayoo
Tell Them We Are Rising: The Story of Historically Black Colleges	2017	USA	Marcia Smith
Thank You For The Rain	2017	Kenya	Emily Wanja
Thank You For Your Service	2015	USA	Ilan Arboleda
The Armor of Light	2015	USA	Stephanie Palumbo
The Bleeding Edge	2018	USA	Stephanie Palumbo
The Interrupters	2011	USA	Tim Horsburgh
The Lucky Specials	2017	South Africa	Marjee Chmiel
The Social Dilemma	2020	USA	Julia Hoppock
This Changes Everything	2018	USA	Ilan Arboleda
To See You Again	2020	Mexico	Merle Iliná
Verde como el Oro	2021	Colombia	Isabela Bernal and Felipe Macias
Voices of the River	2021	Australia	Stephanie King
When Claude Got Shot	2021	USA	Tracy Sturdivant
Youth & Gender Media project	2021	USA	Jonathan Skurnik

Note on the benefit and notable limitation of having a diverse sample of films

In any research about documentary or impact work, it is important to recognize that there has been a long history of past work on this subject which has given special attention to bigger budget and more well-known, festival-celebrated documentaries, while missing other important work – which may have received less funding or attention, but still created a significant impact within their target communities and which stand to offer critical lessons for the field. In an effort to ensure that this study's sample included many such films, this study grounded its selection of films and impact campaigns in consultation with the filmmaking community and by including a wide scope of films in the study – as noted previously and in the appendices.

This focus on reaching beyond the typical impact films and campaigns resulted in an interview sample of films/campaigns that runs the gamut from very participatory work – grounded and created through deep collaborations with communities – to work created by one filmmaker, or small team, working in relative isolation. It includes producers with long histories and deep knowledge about the history of impact work and community collaboration, along with filmmakers and producers who are new to the field. It includes filmmakers who were swayed by impact goals of funders and others who created strong firewalls against funding influence. It also includes filmmakers and impact campaigns based in different countries around the world.

The inclusion of geographic diversity in the study sample is important to discuss further. While this study's endeavor to include a diverse selection of films allows it to pull together a broad overview of perspectives and concerns about the field, it also brings one important limitation: **the progress, contexts, challenges and experiences of impact within documentary film varies considerably across countries.** And while this report notes many of these differences throughout, a notable limitation of this study is that it cannot fully account for the vast differences between or across countries. There are different languages, history, funding arrangements, terminology, social-political influences, and levels of progress around different issues that all influence the contexts of impact work across the countries included in this study.

For this reason, this report does not aim to compare each film, nor does it come to a consensus of unified thinking about the “one right way” to do impact in documentary film; rather, it aims to pull a broad sampling of lessons and experiences – shared by filmmakers working around the World – for greater deliberation, and it calls on the field to avoid one-size-fits-all thinking when it comes to impact.

A Closer Look: Interview/Film Population Demographics

While a total of 73 films/impact campaigns were identified for this project, the filmmakers or impact producers for 50 of these films were available/reachable for an interview. This section provides a reporting of the demographics of these 50 films and the 46 interview participants engaged in this study.²

² There is a difference between the number of films and interview participants because some filmmakers were interviewed for multiple films, and, in a few occasions, multiple people were interviewed for a single film/campaign. In the data represented here, only the “senior” interview participant for each film (defined as the individual with the highest title or earliest involvement) is counted, in order to reflect an accurate representation of the participants without over-representing the demographics of any single film team. For comparability, the two film series projects are not included in the participant demographics reported below.



Demographics and Representation – of FILMS/IMPACT CAMPAIGNS

FOCUS COUNTRY OF PRIMARY IMPACT CAMPAIGN

The geographic representation of the films is balanced, with about 56% of the films being US-centered, while 44% of the films were based in countries outside of the US.

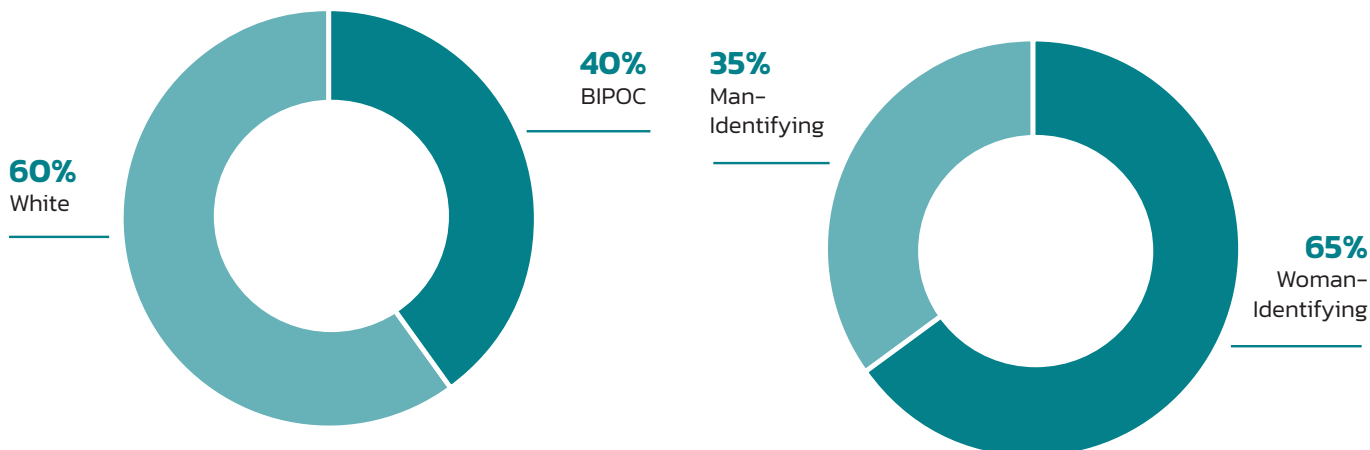
Note: This breakdown of “focus country” speaks only to the country where the film was based. However, it is important to note that not all the producers/creators of these films were from the countries where their film was based. This difference is important. For more information on such disparities within documentary film (i.e. “Who is Telling Whose Stories”) please see the recently released [“Lens Reflected”](#) study.



Demographics and Representation – of INTERVIEW PARTICIPANTS

RACE AND GENDER OF “PRIMARY” INTERVIEW PARTICIPANT

Sixty percent of the interview participants were White, while 40% were BIPOC, and they predominantly identified as Women (65%) rather than Men (35%). None of the participants identified as nonbinary.



EXECUTIVE SUMMARY

Credit: In My Blood It Runs

This report highlights the perspectives of filmmakers and impact producers who worked on 50 social impact campaigns with documentaries over the last decade.


From this investigation, this report lifts key practices, norms, and learnings as shared by the interview participants. It includes more than 50 one-hour interviews, and an analysis of more than 1,000 pages of documentary impact campaign reports provided by the interview participants in connection with their films and campaigns.

The enormous scope of interviews and impact reports considered in this study enables this report to pull from a wide set of experiences, without over-representing any single view of how documentary impact is or should be done. Rather, the analysis of this report is organized around an exploratory question that seeks to understand:

What do filmmakers and impact producers say is critical to produce and evaluate the social impact of documentaries, and what issues do they feel must break through the noise of the current marketplace for wider attention and recognition?


Among the most common take-aways shared by these documentary professionals were strong opinions that:

- 

With proper support and community leadership, documentary-centered conversations around traumatic issues can (and are) being transformed into healing and empowering opportunities that are driving change. But more attention needs to be given to identifying and amplifying these effective protagonist and participant wellness models for use in more social impact campaigns. Too often, protagonists, participants, and audiences are put at risk of further trauma and harm because organizers are not anticipating the emotional and mental labor that is required of them to participate in documentary impact screenings and events. At the same time, campaigns that have done this well need to be lifted-up for recognition and modeling.
- 







There is still a looming threat to free expression around human rights ideas and content that filmmakers – across countries – face directly when they move to organize impact activities and distribute their film. But there are also communities of filmmakers who have overcome such threats and are working to create supportive precedents. Participants said that filmmakers must not give-in to bullying threats of censorship – from government or streaming forces – and that they should find courage and precedent in the growing list of films and filmmakers who have overcome censorship threats in recent years. Interview participants said that having a compilation of case studies from films that overcame censorship threats (i.e. from films like *An Insignificant Man* and *Softie*), and an overview of the filmmakers' most effective strategies, would be of critical – and immediate – use to the field.
- 

We need to get real about the fact that the people we want to engage in movements of social progress are rarely the ones who show up to watch a documentary. Impact campaigns can help to combat this trend, but only if they are developed with thoughtful approaches to reaching beyond the choir in their audience engagement design. For example, often the people who are committing or contributing to gun violence are not the audiences seeing a documentary about gun violence. Traditional documentary audiences are largely already the converted. Other strategies and platforms for engagement – that focus beyond traditional distribution of documentary and film festival audiences – need to be more widely popularized and used, and the field still needs to learn that traditional documentary audiences are rarely the audiences that need to be mobilized for collective change and movement building.
- 

It's time to seriously consider funding full-time impact producer positions within communities and local organizations. While there was a disparity of opinion on whether impact producers should be funded with groups like national and international NGOs – especially given the documentary field's historic roots in colonialism and western saviorism – there was a broad sentiment that impact producers shouldn't be funded on piece-meal assignments, they should be funded to stay with communities over longer periods of time to help build movements and sustain progress around the outcomes of documentary engagement efforts. Multiple participants said that the model of *parachuting* outside specialists (often based in major cities like New York, Los Angeles, and London) into local communities – even if they are well-trained – is not working; they argue that serious and lasting community building and social impact requires producers to be based in the community – or committed to movement building and impact objectives – for longer than the life of a typical traditional impact or screening campaign.
- 

New technological and social media platforms can be revolutionary tools for engaging new and greater audiences in social impact campaigns, but only if impact producers adopt new approaches to engagement alongside them. Several filmmakers said that the potentiality of new technologies and platforms go untapped when producers simply use them to further traditional strategies – for instance, using TikTok to spread awareness of a community screening is missing the opportunity provided by platforms like TikTok. When a producer uses strategic snippets of films or brings in celebrity voices or community leaders to spark big conversations around the

themes of the documentary on these platforms (even if the audience never sees the film) then these platforms can offer major value.






- 
Building community trust and partnership takes time, but there are examples of it working in the ‘documentary and social impact’ space. It can and is being done! Participants shared several models of partnership building (including ‘brain trust’ conversations) that are working well, but they all shared an understanding that these conversations take time and they have to start early in the process.
- 
Impact producers are finding success going beyond legacy barriers in documentary impact by taking advantage of marketing strategies and corporate/commercial partnerships to advance social progress goals and movements. There is still an aversion to corporate and marketing strategies in the social impact space, but several participants said that the field is missing important opportunities because of it.
- 
While there are numerous industry awards for exemplary films, there aren’t many (or any) such awards for exemplary impact campaigns focused on on-the-ground transformative change (at least not at the \$50,000+ level). Several participants noted their support for the creation of such an award, which they say should be more than a \$5,000 gift; it should be among the ranks of genius awards and other majorly funded industry recognitions, which provide transformational, longer-term support. And one participant said he is willing to fund it.
- 
Community/movement building should be better valued as an essential driver for a successful impact campaign, in addition to the more traditional indicators – like narrative change and awareness raising – that tend to be the primary targets of impact efforts. While community/movement building is often talked about among impact circles, several participants say that it is rarely a core focus of social impact work; community/movement building can’t be rushed (it often requires developing partnerships early), and the work of social impact is too often a rush job.
- 
There are many groups using documentaries and the language of social impact to promote goals and values that filmmakers say are antithetical to social progress and positive social change. As reported by multiple producers: (1) there are still models of far-right movements using documentaries to mobilize communities toward agendas of hate and injustice, (2) there are still models of western saviorism in documentary film and impact campaigns that are being celebrated when they need to be addressed and changed, (3) and there are many examples of films using the language of social impact in order to get funding to attract wider audiences with their films, not to truly drive social impact goals. So it is urgently important to bring more critical conversations into the space of social impact, rather than romanticizing it.
- 
The field needs more case studies that translate the talk around co-creation into replicable models that embody it. The talk of co-creation – which involves placing community members and/or protagonists in leadership positions in the design and implementation of impact campaigns – is still rarely translated into practice (and the arrival of streamers hasn’t changed this trend). Filmmakers and producers say it’s challenging to find many examples of co-creation being done well among social impact campaigns with documentaries; and case studies of co-creation are sorely needed.

Below, we highlight a summary of the other key findings across the eight thematic sections of the report:



On Co-Creation:

-  **Co-creation takes time and often requires building trust with communities that have been betrayed and misrepresented by outsiders and media for decades – this trust cannot be earned if you start the process of co-creation late.** Beginning the process of impact campaign strategy building should start as early as possible (ideally in pre-production stages).
-  **Collaboration should be seen as a process designed with specific communities, not a 12-step program applied to every community.** While many studies and producers seek to find the ideal recipe for meaningful documentary impact work, this is not how several participants think the field should be approaching impact. Instead, they say that the focus should be on building relationships with communities, and then identifying the correct steps, goal posts, success markers, timelines, and partners through that relationship. It is about recognizing and responding to biases, ceding power, asking permission, and – at times – breaking some of the norms around filmmaking.
-  **Social impact might be a relatively new arena for some filmmakers and funders, but it should be understood as part of (not stamping over) a long tradition of work and engagement models/practices.** Few impact producers understand the roots of their field which is leading to the re-creation of old problems and missed opportunities.
-  **Producers are finding success working with communities to identify which local organizations and/or grants should be part of their impact work –** rather than looking for the usual grants/funders in the documentary space, producers are asking communities which organizations they have wanted to partner/work with in the past and consider approaching these organizations for funding (even if they haven't worked with docs before)
-  **When balancing multiple partners and funding interests, it's helpful to always return to "how does all this connect to the issues or the solutions that our communities are working towards."** At every step of an impact campaign, include measures and points-of-pause to see if the community has taken that step with you. Beyond any screening or reach numbers, this is one of the key measures that impact teams should adopt in determining if their collaborative model was successful and in ensuring that partners are being identified based on the needs and solutions identified by the communities at the heart of the film (and not the other way around).
-  **Filmmakers are expanding the formats and forms of documentary to better meet the contexts and goals of communities. Documentaries don't have to be two-hour films and they don't even have to be films –** let the story and community inform how the story should be told.
-  **Universities can be ideal partners for filmmakers; they can bring technical/technological expertise, help identify and leverage funding, and honor thoughtful/ethical design.**
-  **Informed consent shouldn't be viewed as an add-on obligation or optional practice; it should be integral to the design of an impact campaign** and essential to building trust and a space for collaboration to be possible. University partnerships can provide critical support and guidance in this area.

On Wellness:

-  **Many screening efforts include a provocative discussion guide for creating dynamic conversions, but they include little to no resources for hiring care team members (not subject experts) to be in the room;** this reflects how out of touch (even if well-intentioned) the documentary world of social impact can be from the interests of the communities they represent on screen and seek to engage in positive social change. This needs to change.
-  **With proper support and community leadership, conversations around traumatic issues can be transformed into empowering and skill-building opportunities.**
-  **Wellness should not be an add-on consideration of impact work, developed at the end, just before a screening panel:** discussions, planning, and considerations of wellness (and anticipating unintended consequences of a film or impact effort) must be centered from the outset of meeting the community and asking permission to share their story.
-  **Panels and community events should be responsive to the needs of their ‘protagonist participants’.** For instance, a ‘participant protagonist’ (who was depicted in the film) might be willing to participate in a Q/A but they might not want the burden of staying for further audience/community interaction afterward (it isn’t always helpful – and can be traumatic/ draining – for protagonist participants to feel obligated to stay for prolonged informal discussions at the end of events). In other words, documentary engagements must not only be designed to educate external audiences; they must also center considerations for the people represented in the film – and their communities – who should also be considered as a key audience of the film.
-  **There needs to be more accessible models for how to do impact campaigns with participant wellness as the focus:** there is a long tradition of impact work that has not focused on wellness and it’s harder for some producers to find the positive examples.

On Effective Strategies of Engagement

-  **Leveraging platforms and narratives of community leaders can be an effective tool in creating social power.** By empowering and lifting up the stories and platforms of community leaders at the heart of the film, impact campaigns can help bring power to local movements and help to make local leaders more visible. This approach can also serve to help shift the spotlight of prevailing narratives and voices on key issues, strengthen place-based engagement strategies (even in online campaigns), and inform a media strategy (whereby stories about local leaders can be pitched to news outlets for greater recognition).
-  **Use the platforms that get you in front of your audience – engage with your audience through the tools they are already using for engagement (like Instagram and TikTok). Don’t leave this for distributors or for connecting with the “usual” doc folks.** Align strategies with the audiences you want to mobilize for change (this can mean disrupting the status quo of engagement work)



- ❖ **Research can serve as effective tools before/during/after impact campaigns**, in providing evidence-based guidance on many aspects of impact work -- including identifying target communities for engagement on an impact campaign's key issue, and learning from the audience participants who attend screenings (for follow-up action)
- ❖ **In any engagement effort with communities, humility is one of the most important tools an impact producer should possess.** Across interviews, humility was a common refrain as an underestimated – and essential – tool for impact producers.
- ❖ **Cross partnerships and corporate outreach (going beyond typical funders) is an underutilized opportunity in documentary.**
- ❖ **When political sensitivities arise among distributors, lean into these moments (don't shy away).** One strategy shared by filmmakers and impact producers across films was the encouragement to turn moments of resistance or political discomfort among distributors to the advantage of the film, when possible.
- ❖ **Screenings should no longer be seen primarily as venues for distribution, rather they should be used as spaces for strategic partnership building and community leadership.** Co-hosting screenings with organizations and partners can also help ease the burden on main organizers and allow space for partners to add additional perspectives and resources to the screenings (filmmakers should plan for this ahead of time)
- ❖ **Create discussion guides that are focused explicitly on different audiences and what might be the most strategic content for them.**

On Defining Success:

- ❖ **Theories of change and outset objectives – like creating narrative change or institutional change – can be helpful guides, but community building is often the most important driver to achieving any lasting social impact goal.**
- ❖ **The degree to which you are able to maintain community safety protections and engagement in the framing of your film or campaign (i.e. through media coverage, social media engagement, etc.) is also a critical marker of success:** too often the community drops off at this stage, but it's imperative that safety frameworks and community collaboration is maintained to the very end.
- ❖ **Rooting films in local organizations (rather than global NGOs) at the heart of the film can be a useful way to anchor success markers and objectives.**



On Coalition Building/Sustainability/Longevity:







- ❖ **Directing attention to specific power structures and key players within movements is critical in creating a roadmap of lasting engagement.**
- ❖ **Embedding impact campaigns (and producers) with local organizations is one way that filmmakers can ensure their impact activities (and the toolkits, partnerships, commitments, and conversations they create) continue on.** It is critical to target key organizations and partners early in the process, and listen to their input on impact and social change processes before you start designing an impact campaign.
- ❖ **While it's important to start the right way with communities, it's also important to know how to exit the right way.**

On Overcoming Barriers/Challenges to Engagement

- ❖ **The industry needs to understand that traditional documentary audiences are not always the audiences that need to be mobilized for collective change and movement building;** the "community screening" is rarely something that "the community" attends. Therefore, marketing strategies may offer underutilized tools in helping to expand the scope and quality of community engagement and impact efforts.
- ❖ **Don't give-in to bullying threats of censorship; there are communities of filmmakers that have overcome such threats before and which can be used as precedent.**
- ❖ **R ratings can be used as form of censorship and to limit audience reach, but there is a track-record and precedent (in multiple countries) of documentaries successfully fighting to overcome such tactics and lower initial ratings.**
- ❖ **Break through perceived 'issue fatigue' – when people feel like they already understand a topic because they've seen a documentary focused on that issue before – by keeping the attention on the unique and 'local' aspects of the film/issue.**



On What The Field Needs: Some Additional Reflections:

-  **The field needs more spaces for community building within the field of social impact in documentaries** – including opportunities for impact producers to come together for field strengthening, experience sharing and support.
-  **The field needs more examples of impact campaigns being led by people from impacted communities.** There are too many examples of the “parachute model” of impact producing, where well-intentioned producers parachute into a community to leave shortly after the screening is over. Local knowledge and expertise in a local community should be valued alongside previous impact producing experience.
-  **The field needs more diverse funding sources and more funders who aren’t solely interested in stories that are directly aligned with their organizational goals.** Western funding often tries to bend stories for western audiences, and it is limiting the scope of stories and perspectives that are being offered (especially in non-Western communities).
-  **The field needs to have more films translated into local languages. This doesn’t happen enough, but more resources should be dedicated to this.**
-  **The field needs more initiatives and funding grants aimed at supporting filmmakers and producers who are not economically advantaged.** Filmmakers with money have significant advantages over producers and filmmakers who need to raise funds. And participants worry that this isn’t a small-scale problem, it is characteristic of a wider trend – where it’s becoming harder to raise funds for documentary-centered impact work, creating an economic barrier of entry that advantages producers and filmmakers who are independently wealthy.
-  **The field might need a high-level award. While there are numerous industry awards for exemplary films, there aren’t many (or any) such awards for exemplary impact campaigns focused on on-the-ground transformative change (at least not at the \$50,000+ level).**



A professional video camera with a microphone and lens, set against a colorful bokeh background. The camera is positioned on the right side of the frame, with its lens pointing towards the left. The background is a soft, out-of-focus bokeh of various colors, including purple, blue, green, and yellow, creating a vibrant and artistic atmosphere. The text "COMPLETE FINDINGS" is overlaid in the center of the image in a bold, white, sans-serif font.

COMPLETE FINDINGS



SECTION ONE

ON CO-CREATION

Credit: In My Blood It Runs

This section explores the key actors, objectives, and processes that guided the design of the impact campaigns based on principles of community co-creation. It includes an interrogation of how filmmakers and impact producers assigned power and decision-making structures, who was given influence (and how), along with how film teams identified key co-creation objectives and goals in their work.

Work in collaboration, not consultation: Collaboration is a process designed with specific communities, not a step-by-step program applied to every community

Impact producers across films stressed the importance of community collaboration.

Among the most exemplary examples of this is the work done around the film *In My Blood It Runs*, a feature length documentary, co-directed by Maya Newell, released in 2019, that shares the perspective and life of Djuwan, a ten-year-old Arrernte & Garrwa Aboriginal boy living in Hidden Valley town camp in Alice Springs, in Australia's Northern Territory, as he tries to balance his traditional Arrernte/Garrwa upbringing with a state education. Like many of the films in this study, the campaign involved hundreds of local, national, and international screenings, policy-influencer outreach, educational/school engagements, workplace outreach sessions, high-level advocacy, and more. However, despite its impressive outreach activities, much of the unique value of the *In My Blood It Runs* impact efforts reside in the development and execution of its design and community-first approach.

The film's impact team emphasized that their strategy was based in collaborative models of engagement, with the community at the center of decision-making conversations around the development of the film and its distribution/screening efforts, rather than simply models of consultation. While many studies and producers seek to find the ideal recipe for meaningful documentary impact work, this is not how the field should be approaching impact, according to Rachel Naninaaq Edwardson and Alex Kelly, two of the lead producers of the film and its impact work. Instead, the focus should be on building relationships with communities, and then identifying the correct steps – and even what type of film should be made – through that relationship. As Rachel put it, the community at the center of the film must be the starting point:

“I think that was the North Star for this project from the beginning. This project didn't start off necessarily with “we want to make a film which tells this (insert our idea) story”. It started off with we want to work in partnership with this child and his family and community to find the story that needs to be told, and that was very intentional. And so we get asked this question quite a lot, “Well, **what was it that worked? How did you do it? What were the steps? What are the steps we need to follow? What do I need to do to make a film about (insert diverse community.)**” Our response is pretty much always the same, which is that this is a process. It's not a step-by-step program, and the reason it is a process is because the core focus that you should have, if you're going to work in collaboration rather than consultation with the community, whose stories you're telling on screen, if you're working in real collaboration, **it first starts with relationships, and then everything is done together from that point.** And it's done in response to the context the community and key characters are in, and in the context of the particular filmmakers around the project, and the context of the key themes arising in the story. And so everything was first designed from that point; authentic relationships and in response to context. *(Original interview, Rachel, 8 June 2022)*

Several interview participants expressed a concern that many impact producers (even if well-meaning) seek consultative, but ultimately exploitative, relationships with communities, often situating film subjects/ community members within strategies and engagement models that were conceived before their input (i.e. engaging them in conversations around impact after a film is completed, inviting them to film screening Q/As, etc.). However, this is antithetical to the principles of co-creation as underscored by Rachel and Alex's work in *In My Blood It Runs*.

In practice, collaboration meant that, from the outset of the filmmaking process, the filmmaker and producer teams for *In My Blood It Runs* prioritized asking the community at the center of the film – a First Nation community – for permission to share and engage with their story and the story of those in their community, before any impact effort or design process could begin. It meant being fully transparent with how they imagined the process would go and to invite their input on how they feel it should go.

So the first thing we did after being invited into the space was to ask permission, and to be completely transparent about what it looked like and what it meant, and to start off the conversation around what the relationship of co-creation would look like from the beginning, and how that would be collaboratively developed, even in and of itself. *(Original interview, Rachel, 8 June 2022)*

Note: See this study's compendium case study of *In My Blood It Runs* for a detailed description of the impact campaign, and an overview of the specific engagement methods, values, tools, and lessons from the design and implementation of their impact work.

Work with communities to identify which local organizations and/or grants should be part of the impact work – use the impact campaign as a way to build relationships with organizations that community groups have wanted to partner/work with in the past.

For the film and impact team working on *Thank You For The Rain*, one of the most important components of their work was anchoring their processes with a local organization. The film was directed by Julia Dahr and released in 2017. It centers around Kisilu, a Kenyan farmer, who uses his camera to capture the life of his family, his village and the damages of climate change to his community. Emily Wanja was one of the lead impact producers for the film and said that one of the important steps her team took was working closely with local organizations in order to better understand the solutions that local community members had already identified to the climate struggles at the heart of their film, and to ensure that the film was in service to those solutions.

For example, rather than bringing-in local organizations after the film or screening schedule had been created, Emily and her team engaged local organizations/partners ahead of time and asked them about how screenings and impact conversations could best serve them. This included asking the community which specific people and organizations they thought could be helpful to their efforts, along with who they have struggled to reach/connect to in the past, and then they worked to make sure that these key actors were present at impact events so that a space could be created for those conversations, relationship-building, and engagements to take place.

Emily said that they designed a “local-global” campaign in the sense that they had many components – including international film festivals and high-level advocacy efforts – but that it was all grounded in close partnership with the local community of Kisulu, the main protagonist of the film. Kisulu was a member of a local community-based organization and so the film team focused on developing an early relationship with that organization and its goals.

And so all the work that we did at the community level was through this Community-Based Organization. And, we partnered with organizations, county government officials, or county government work that's happening at the community level. And for us, our interest here was partners who are working directly with the community members and who community members can reach out to directly. *(Original interview, Emily Wanja, 22 April 2022)*


Emily said it was important that they weren't trying to "reinvent the wheel" by going through parallel conversations of community needs and solutions that were held apart from the already existing conversations and efforts taking place in the community.

So it was always just trying to find out what is the community working on? What are the immediate challenges? And what's standing between them and the solution, and then trying to map out which stakeholders are on the ground. And then why is there still a problem? Why is our community still facing these challenges? So this is kind of what we were trying to understand and trying to use the film as the tool for that. *(Original interview, Emily Wanja, 22 April 2022)*

For the *Thank You For the Rain* team, early community conversations around solution-building – providing a space for community members to tell the film team what is significant about climate change in their community and what they needed to address it – was critical for them in building out a blueprint for impact. In this way, Emily and her team were able to identify a set of community priorities and then match funding and partner organizations to those priorities (rather than the other way around).

For the team who worked on the film *All In: The Fight for Democracy*, a documentary directed by Liz Garbus and Lisa Cortés, about voter suppression in the United States, the strategy was similar. Their focus wasn't simply to work with local organizations on screening efforts, said Lindsay Guetschow, who was part of the impact work's leadership team; rather, their focus was on situating the film as a convening tool to help support work that local organizations were already doing around the issues of the film (increasing voter turnout). As a result, their measures of success were not determined around how many people came to their screenings; rather, they looked at how many people their partner organizations registered to vote (which was more than 200,000 people).

We worked with organizations featured in the film and partnered with the Movement Voter Project, as well as a bunch of our other national level partners to identify hyper-local groups that were building political power within their communities year-round, and not just around elections. We were able to establish a grant making program to get funds down on the ground to these folks, and our funding was not based on showing the film a set amount of times. It was literally focused on building the capacity of these organizations to go further and farther in the work they were doing to get people registered, and get people accurate information around the voting process... **It is essential to me to be able to use the media shine and attention from these films and campaigns to really help build capacity on the ground, and to funnel that attention, resources and money through to the people that are doing this incredible work day in and day out. That to me is the true impact.** *(Original interview, Lindsay Guetschow, 17 May*

 **When balancing multiple partners and funding interests it's helpful to always return to "how does all this connect to the issues or the solutions that our communities are working towards";** Always ask "who are we serving" with this decision, and if the answer isn't the community then you've lost your center.

As funding interests and partners begin to enter design meetings and impact efforts, impact teams stressed the importance of staying anchored in the work and efforts that the community first shared with them. There can be a tendency to quickly zoom out, once national or international partners enter a room, and that's why impact teams across films said it was essential to always go-back to the community. And one question that Emily Wanja, who worked as an impact producer on Thank You For the Rain, among other films, said can help producers to determine if they are headed off-course is "Who are we serving?" If the answer is anyone other than the community then that means your processes have lost their center.

Who are we serving? Even when we ended up having, for example, Climate Story Lab, which happened at the national level ... **it was always informed by how does all this connect to the issues or the solutions our communities are working towards.** So it was always that. Everything we do, we have to see that very clear connection to our communities, who are at the very front line. *(Original interview, Emily Wanja, 22 April 2022)*

In practice, this meant that at every step of their impact campaign Emily and her team had measures and points-of-pause to see if the community had taken that step with them.

Our [marker of] success is: have we at least been able to work with a community from one point to the next? Meaning, at least it's one level up, you know? It's like taking the stairs. At least we are not on ground-floor. Maybe now we are at first floor. Have we at least been able to make that step with a community? And is that how they see it? That is success to us. And I think it's a shared vision with the partners that ended up supporting this work as well, which is success is in the eyes of, have you achieved what you set out to achieve? *(Original interview, Emily Wanja, 22 April 2022)*

Filmmakers are expanding the formats and forms of documentary to better meet the contexts and goals of communities. Documentaries don't have to be two-hour films, nor do they even have to be films – let the story and community inform how the story should be told.

The experiences of filmmakers, Rosemarie Lerner and Maria Ignacia Court, and the team who worked on The Quipu Project, an interactive form of participatory research and documentary storytelling with communities affected by forced sterilization in Peru, point to numerous lessons and contributions related to community collaboration. They also point to the innovative thinking and approaches that filmmakers are taking to the form of documentary itself.

With consultation from partners and women's groups, Rosemarie Lerner said that she and her team identified three audiences of special interest: (1) those directly affected by the sterilizations (the affected sterilized women or their families and communities); (2) Then an international community (who are interested in these issues, reproductive rights); (3) And finally the elites and political classes in Lima (who are in positions to actually create some kind of concrete change in the women's situation through policies and other means, since there's an ongoing legal process). Across all of these audiences they identified three key objectives: (1) to change minds and increase knowledge about the issue (many denied that it had happened or simply didn't know); (2) build community (especially among the affected women groups who were often geographically separated and struggling with the trauma of their experience separately, without support from other women who had survived the same things); and (3) change structures through new laws. But, at its core, the work was about lifting the stories of community members in a way that honored their experience and through a process that they felt co-ownership and recognition throughout:

The main project goal was to make visible the stories of those affected in their own voices and amplify those voices. It was that we [wanted] to create a platform to amplify these voices and create a space for them for a dialogue to happen with others. *(Original interview, Rosemarie Lerner, 16 May 2022)*

The Quipu Project focuses on telling stories of women – many of whom were poor, marginalized women with an Indigenous background – who were tricked or forced into sterilization by the Peruvian government in the mid-90s. The forced sterilization affected an estimated 200,000 women and yet no punishment or justice or reparation has taken place, and, since many of the affected women remain in remote communities of Peru, few know that it even happened. And national media has provided little attention to the event.

When Rosemarie first learned about the sterilization campaign she thought that it would be an important issue for the focus of a documentary. As one of the first steps she took in her process, Rosemarie and her team connected with some activists who had knowledge about this issue. And then, in September of 2013, they met directly with the women’s groups in the regions affected by the sterilization campaign in Peru. They listened to their stories and what was important to them.

“And that’s when I approached Maria and told her, look, I think this story would be great for an interactive documentary because I think it’s much bigger and **the story is much bigger than what can be told through a traditional two hour film...** And that’s when me and Maria started to collaborate, started thinking, ‘okay, how can we use [new media tools] that allow for people to participate and have agency in how to tell their own stories. (Original interview, Rosemarie Lerner, 16 May 2022)

Ultimately, Rosemarie and her team decided that an interactive online and mobile website was the best platform for their project. It would allow for stories to be anonymous, but it would also facilitate a wider community of sharing and engagement. It would allow for community building and create an initiative that would be on-going, with more stories being added over time. It would allow women to share their stories via mobile phones, listen to other stories, and engage with a wider community of people who were affected by the sterilization campaign or who want to send them support. **It would, in other words, provide the storytelling tools and space for the women to tell their stories in their own words.**



Universities can be ideal partners for filmmakers; they can bring technical/ technological expertise, help identify and leverage funding, and honor thoughtful/ethical design.

One of the other important lessons offered by the Quipu Project is the potentiality of university partnerships in impact design work.

When Rosemarie and Maria realized that their “film” would in fact not be a “film,” they knew that the technological challenges of the work would require expertise that went beyond their skills as filmmakers. As a result, they reached out to creative technologists and also with partners at the University of Bristol in the United Kingdom. Through the university partnership, Rosemarie and her team were able to receive key support in the ‘research and development’ and impact stages of the work. They also received critical research support in shaping the project’s approach to ethics, especially on issues related to informed consent.

As multiple participants in this study noted, **informed consent shouldn’t be viewed as an add-on**

I think one thing the academics helped us with was to have a very clear ethical framework of how we are going to approach this. One condition that we had very clear, since the beginning, is the whole problem with the sterilization in the first place – it happened because there was no considerations around informed consent...The problem was around informed consent. And there were things, for example, we were speaking with women who didn’t have Spanish as a first language. For example, during the sterilization campaign, many times nobody ever bothered to translate to the original language ... and explain to [the women] what they were going to sign. Also a lot of times, they were asking women who were illiterate to sign documents that they didn’t even understand. Other times they were asking the husbands for permission for the procedure that were going to be done to the women’s bodies. For us, **informed consent** was crucial. *(Original interview, Rosemarie Lerner, 16 May 2022)*

Another filmmaker, Stephanie King, said that informed consent was also essential to her work on the film *Voices of the River*, which centered around ten traditional owners who were fighting to protect Australia’s Martuwarra Fitzroy River from large-scale water extraction.

At the end of the day, it's really important to gain consent or to ask for consent on all of these matters ... Even people with the best intent, I see that breached all the time where people just make decisions. You have the release form, you just go forth and want to take up an opportunity to put something out into the world, because yeah, legally you can. But culturally, it's appropriate to continue to seek permission for every time there's a new context that the work is shown in. *(Original interview, Stephanie King, Aug. 9, 2022)*

Co-creation is a process that takes time and must begin early. It cannot be rushed, and often requires building trust with communities that have been betrayed and misrepresented by outsiders and media for decades.

One of the overarching lessons of collaboration which came through all of the interviews was the reality that co-creation and collaboration takes time. It cannot be rushed. And while the rush to meet funding objectives, deadlines, travel plans is often standard practice for the filmmaking community, it is at times creating unnecessary hurdles for community collaboration.

A historical truth that is too often under-recognized by filmmakers and other media creators, interview participants said, is the reality that the same storytelling tools filmmakers bring to communities have likely been brought to that community before and have caused them more harm than good. And while the intentions of the filmmaker might be better than those of the person who came before them, collaboration and partnership isn't developed by intentions, it is born through a dedication to collaborative processes.

This reality is perhaps best articulated by Rosemarie, as she reflected on the first conversations she had with Indigenous women's groups in Peru, as part of her work on the Quipu Project:

We were reaching out to the women’s organizations in Peru, to the actual participants. That took time because there’s usually other organizations... women’s rights activists who represent the group of women before you can actually have direct contact. They are gatekeepers, in a way, but very well intended. They do it to protect the women.... We were working with them during all this time, **but we were noticing there was a lot of fear and a lot of distance and they were very careful in the relationship with the media because they had already been betrayed or used many times, even by international production companies that were doing documentaries or photographers or artists or the local media. They felt that people always took from them and then they never saw anything in return.** Not even a photo, a copy of a photo that they took. One of the things that, because it was also a reality that we had to face, it was like, okay, we have to be very careful and go very slowly and also go through all the steps and the necessary people to actually reach the women, but also we want to make sure that, first of all, they know what they are gaining and that there’s something concrete and clear for them to actually want to want to collaborate with us. *(Original interview, Rosemarie Lerner, 16 May 2022)*

Similarly, many filmmakers, including Greg Jacobs and Laura Fallsgraff who worked on the film *No Small Matter*, said that starting impact planning as early as possible is critical, regardless of the budget or resources available.

Even if you don’t have a huge budget, I think starting your impact planning as early as possible, ideally in pre-production, if you are making an impact-oriented film, is the best thing you can do to ensure your own success. And that’s really tough for a lot of films, a lot of filmmakers. But I think that to whatever extent you can make that happen, taking a week to do a brain trust conversation or two while you’re in pre-production or production, and investing in those relationships will set you up for greater success. *(Original interview, Laura Wilson Fallsgraff, 1 July 2022)*

The importance of building trust, and understanding that trust-building takes time, is critical, said Marcia Smith, co-writer, with Stanley Nelson, of the film *Tell Them We Are Rising: The Story of Historically Black Colleges*. Marcia and her team brought on several organizational partners early in the process, sharing early cuts of the film with them so they could begin early considerations of what an impact campaign could look like for them. Informing this process, said Marcia, was the idea of 'brain trust' conversations, an approach developed by Sonya Childress, which aims to bring together strategic partners early in the process of impact design.

[Our] approach included having early screenings before the film was locked... So you have what [Sonya Childress] calls a brain trust and you have eight or 10 people who are very invested in the content. You put them in a room, you show them clips, you talk, you lead them through a discussion about it. You have questions about how they think this part of the film, where that part, might be used by them. *(Marcia Smith, original interview, April 19, 2022)*

This process of facilitating 'brain trust' conversations and community building played a crucial role in ensuring that there was sufficient time and early consideration to develop meaningful community engagements around the film. The partners ultimately organized several community events tied to *Tell Them We Are Rising*, even bringing in HBCU marching bands to participate in three of the events, and they created dynamic and inspiring environments tied to the film's release.

Marcia said that it's important for anyone working in the social impact space to understand that partnership building – whether it's with local community members or organizations – takes time.

Partnerships are best built over time... It takes a lot of time. I mean, those partnerships actually take time to build, and it takes time to build trust. It takes time for organizations to understand why they should invest their time. *(Marcia Smith, original interview, April 19, 2022)*

SECTION TWO

ON WELLNESS

Credit: Pray Away

Many of the filmmakers and impact producers who participated in this study shared their resources, experiences, and tools related to wellness. And nearly every participant pointed to wellness as one of the most important areas for further improvement and interrogation for the field of documentary impact. It is a subject that touches the core of documentary impact work, and its relationship with communities, and it's an area overdue for greater attention.

As part of its investigation into wellness, this study explored the ways that filmmakers and impact producers were thinking (or not thinking) about how the people and communities depicted in their film might be impacted – either positively and negatively – from their participation in the film and/or their impact campaign? It mined for thoughts and suggestions around compensation for participation, and it explored how impact teams prepared (or didn't prepare) for issues of 'trauma' in connection with their impact engagement work. This included exploring how impact producers were preparing for engagements that tackle sensitive social issues, along with any resources that they found helpful in the areas of trauma or creating safe or safe-enough spaces for documentary engagement.

Notably, this study found a spectrum of thinking and concern around participant wellness in relation to the use of how protagonists are engaged in impact campaigns – with some producers primarily engaging protagonists as marketing allies and as the central players in their strategies to create more compelling screenings, while providing little resources or thought to their overall wellbeing (beyond financial compensation for their time), while other producers position protagonists more as credited co-creators and partners of their film and who provided considerable protections and resources dedicated to ensuring their well-being throughout the process. Across the board, filmmakers and impact producers say that more guidance and best practices for working with protagonists in impact work is essential.



Wellness cannot be an add-on feature of impact work, developed at the end, just before a screening panel; discussions, planning, and considerations of wellness (and unintended consequences of a film or impact effort) must be centered from the outset of meeting the community and asking permission to share their story.

In the earliest stages of the film *In My Blood It Runs*, long before any video material was taken to the edit suite, Maya (the filmmaker), Rachel, Alex and the other members of their film team focused on deepening their relationships with the community and hearing their perspective on “impact”. A three-day event with about 35–50 members of the community – inclusive of the people and families at the center of the film, along with other community leaders and partners – served as the basis for developing their overall impact campaign, the partners that were sought, the identification of key messages and objectives. And these conversations then framed all of the media interviews, Q and As, speeches, and other engagement efforts around the production of the film and its impact work. The event centered around both building trust and understanding, and involved recognizing harmful practices and media representation from the past. It also involved anticipating potential risk and harm that the filmmakers and impact team might be overlooking or missing. This work formed the foundation of a Duty of Care strategy for the roll out of the film and its impact campaign. It involved discussing how future media groups might represent them and the film, what it would be like to go to the city for a screening or conversation, and then come back. It touched on processes of reintegration with the community after traveling for film and impact related efforts. They talked about what might happen if people in the life of the film’s main protagonist (Dajuan) bully him about the film. In short, it involved developing a community and duty of care, said Alex and Rachel. **In this way, wellness wasn’t an add-on feature of the work, developed at the end, just before a screening panel; it was centered from the outset of meeting the community and asking permission to share their story.**

The first thing was developing the relationship. We were talking about impact at Stage One when we first had this conversation. We were having conversations around broad themes, around focus. We did the story workshop with the community on the ground, with Dajuan, with his grandmothers, with the family... we had many conversations in our own team, and pushed ourselves to work on our own biases at every single step, including how we were structuring things, why we were structuring things that way, who else we needed to talk to.
(Original interview, Rachel Naninaaq Edwardson, 8 June 2022)

As part of these consultation efforts, the team had discussions with the community around the themes of the film, and the difficult issues it raised – including violence in their community, drugs, alcohol, welfare and school/education-related issues. These discussions unpacked the existing tropes and stereotypes about how these issues were portrayed publicly and how instead to explore them with nuance and sensitivity in conversations around the film. And from these conversations they developed shared resources, values, and guides with the community to help them anticipate and prepare for key challenges moving forward.

Screening efforts shouldn't end with provocative discussion guides, they should include the inclusion of hiring care team members (not just subject experts) to panels and provide support resources for participants and audiences.

For the impact work around the film *Pray Away*, there was considerable effort made to including care team members – including mental health practitioners – at in-person screenings, and making resource guides available for anyone who saw the film to seek support on the issues it featured. The film investigates and exposes the practice of LGBTQ conversion therapy in the Baptist church, featuring intimate profiles of ex-leaders and a survivor of “conversion therapy” who speak out about its harm and devastating persistence. Among the main goals of the team’s impact screening, which were led and designed by a survivor of conversion therapy, was to host transformation conversations with diverse groups – including religious leaders, since religious organizations were central to maintaining the practices of conversion therapy – in communities where it is being practiced. Given that many of the participants in the film, and in the communities they represented, have deep trauma that could be triggered by both the film itself and by conversations with others in their community, the impact team of *Pray Away* knew that considerations of

So, given that there are much higher rates of suicide or suicidal attempts and ideations in this community and self-harm, and people having direct experiences with having lost loved ones or close community members, [we asked our team] how could we be really clear-eyed about the harm of this movement, but also sensitive to not having this be something that was retraumatizing people? And that was also true ... that’s true for the content of the film itself and then also around the conversations and the rollout and the screenings beyond it. That went into how we built the discussion guide so that we knew that when Netflix came on and bought the film that millions of people were going to see the film on their own, sometimes in vulnerable situations, where they might be currently in households where their family members are trying to push them or are already in conversion therapy, or having come through the experience, but living with the ongoing impact in their lives.

So, we wanted to make sure that there are resources that could support them if they just saw the film on their own. And then also, we thought about the resources needed at community screenings, and how could we support facilitators to be thinking about what a care environment would be for having a screening at the community level. *(Original interview, Anya Rous, 26 May 2022)*

Note: See this study’s compendium case study of *Pray Away* for a detailed description of the impact campaign, and an overview of the specific wellness guides, strategies and lessons from the design and implementation of their impact work.

Working with impacted communities to ensure inclusion of the right people and care teams in the room was also of central importance to the impact approach for director Adam Mazo's film *Dawnland*, a film about the removal of Native American children from their communities in Maine, a state in the northeast of the United States.

Several other filmmakers said that having trained therapists in the room, and putting facilitators through advanced wellness training, for sensitive-issue conversations around their films was essential and should become more common practice in the documentary impact field. For Lance Kramer, for instance, who was a producer on the film *City of Trees*, creating safe spaces for conversations around their film was part of their thinking early on, during the production of the film.

It was definitely a part of the discussion. I mean, it was part of the discussion of making the film. It was part of the discussion in rolling it out. I think it showed up in ways like when I'm describing when someone expressed that they didn't want to do something because it was going to be too traumatizing or too painful, we always respected that. It's in [our] guide when we were trying to create spaces for difficult conversations, we also worked really hard to try and, in a sense, qualify that we don't want to push difficulty past the point of safety. Then, there was always a consciousness of trying to make sure that what we weren't saying is just to have a comfortable conversation around the film, and we wanted to be able to dip into areas of discomfort, but we didn't want to push into areas of pain or harm, and so then finding that line was difficult. *(Original interview, Lance Kramer, Aug. 10, 2022)*

At the same time, Lance said that they could have benefited from more advanced guidance on the best way to create safe community spaces for engagement around their film. While they worked with social workers and specialists to try to anticipate risk areas and better prepare for the community conversations they wanted to facilitate, he said that they still felt over their head. While many participants said that participant and protagonist wellness shouldn't be simply a 'do the best you can' approach, and that they should have rigorous protections and steps in place ahead of time, many filmmakers – like Lance – admit **that greater attention and guidance around wellness is desperately needed in the field of social impact work with documentaries.**

We did a number of screenings with different communities of social workers and practitioners with MSWs and those types of credentials to try and understand how the film both could be useful in their communities, but also to inform the strategy so that we weren't re-traumatizing people. All that said, we also realized we were way in over our heads and that we were asking those questions of ourselves, but there weren't people asking that question of us and there was no resource or support for doing the work on that level, or just being conscientious of things like trauma. It was tough... I think we pushed ourselves as far as we felt comfortable going, given our level of experience and the amount of support that we had. I think, if anything, we probably pushed too far. I wish that there had been more discussion and expertise around how to deal with trauma, to have a more trauma-informed approach that also had the kind of expertise that it needs because I think that there's a lot more that could have been done with the film, but there wasn't that in place so I think we just had to do what we could. *(Original interview, Lance Kramer, Aug. 10, 2022)*

Panels and community events should be responsive to the needs of the participants; a participant might be willing to participate in a Q/A but they might not want the burden of needing to stay for further audience/community interaction afterward (this isn't always helpful for participants).

When it came time to prepare for Q/A events, the impact team on the film *Pray Away* said they learned that it was always important to check with participants to see if they were interested and/or able to interact with communities after Q/A sessions. After such events, other community will often share stories of trauma with the participants of panels or films and there can be little awareness by event planners of the toll that this can take on the participants holding and listening to such stories.

Even when people are intending to be positive or supportive, it's also just a really intense thing for people to share all of their trauma with you. And I know that this is true for other projects, where the director might be a victim of sexual assault and people talk to them and share those stories. So we had conversations with the survivors that we had for panels or for these events and we asked 'what is okay to share' What are the kinds of questions that could come up in Q and As that you feel comfortable talking about? What does not feel comfortable talking about? What are the kinds of questions that we as a film team are going to answer or take on, so that this isn't your responsibility to take that on? [One participant] was open to participating in the Q and A, but not being there afterwards for people to come up to her and unload on her.... So, every time we have a survivor on a panel, we're very conscientious about who that survivor is, what kind of support system they already have, what's their level of awareness or comfort and experience with already fielding questions and being public around their story? And what of their story are they comfortable sharing? *(Original interview, Anya Rous, 26 May 2022)*

Many of the interview participants said that conceptualizations of audiences are integral to considerations around wellness. And too often filmmakers and impact producers do not consider the trauma that their films could cause on their audiences.

For Cecilia Aldarondo, the director of *Landfall*, which chronicles the aftermath of Hurricane Maria and the fraught relationship between the US and Puerto Rico after the hurricane, wellness and trauma considerations should be vital to impact work around documentaries. But too often filmmakers don't consider the harm or trauma that their films can create – or recreate – for communities, because filmmakers too often think about a certain kind of film festival audience that is often not representative of the communities at the heart of their work. More filmmakers and impact producers should be thinking about wellness from the perspective of the communities and people in their films, not about the people who might be paying tickets to watch them at festivals and other elite gatherings. Cecilia shared her experience:

Well, it's very simple, we knew our audience was traumatized. I think that all too often documentaries about traumatic events have a real blind spot that their primary audience should be the people in your film. **And if the people in your film are traumatized, then think about what it's going to be like for them. I have about 10 million problems with the way impact is being done in the United States. And this is a big sign of it.** People have biases about who the audience for these kinds of films will be. And very often it's more economically, racially and all kinds of other forms of privileged kinds of audiences that maybe aren't going to be re-traumatized by the film experience. But in our case, we were very clear about centering our primary audience as being people who experienced the heart-ache. And so if that's our primary audience, I can tell you that there were very many people who would say, why would I want to relive this? I already lived through it, I don't want to watch this film. And so a big part of what we felt was very necessary, particularly in screening the film in Puerto Rico, we knew we needed to prepare people for what the experience was going to be like, and also set up an invitation that they would want to accept. *(Original interview, Cecilia Aldarondo, 2 May 2022)*

With proper support and community leadership, conversations around traumatic issues can be transformed into empowering and skill-building opportunities.

When it came time to prepare for Q/A events, the impact team on the film *Pray Away* said they learned For the *Quipu Project* team, considerations of wellness were central to all aspects of their design, given the sensitive and traumatic nature of the sterilization campaign and how infrequently many of the women had spoken or revisited the issue before the documentary project arrived. For this reason, it was crucial, they said, to have co-ownership with the local women's groups.

I think that's why it was very important that all the work we did, we did it through the organizations of women. They were already in this space that was dedicated for this and it was a space where they felt safe and they felt supported.... Most of the places or the context where the testimonies were shared were during events with multiple women, and usually it was one woman sharing their testimony, getting emotional and two or three other women hugging her or holding her when they were sharing. And for us, it was really, really important to do this with care to be really careful. *(Original interview, Rosemarie Lerner, 16 May 2022)*

Helping to ensure the project had local leadership and co-ownership, one of the women (Esperanza) at the heart of the documentary project was paid and empowered as a lead organizer for the Quipu Project effort. Esperanza helped the Quipu Project team to identify women to interview, and she encouraged women to participate in the work; she was the "main champion" of the work within the community and integral to its success, said Rosemarie.

Because Esperanza also had ambitions to serve in a more leadership and activist role against sterilizations, she was one of the few women who didn't ask for anonymity. Esperanza also helped the women and organizers of the Quipu Project to see how the initiative would also help them improve their ability to communicate with others about such a painful past experience. In this way, Esperanza played a central role in transforming the project from an experimental documentary and into a practical, capacity building opportunity for local communities.

And one thing that Esperanza saw in this, and the other women too, was that the project also was good for them as a way to practice how to tell their stories better and how to communicate better. For example, when the prosecutors would come to interview them again, because they had been mistreated before by prosecutors and people like that, and because we are talking about illiterate women who sometimes don't even know their birthdays and they were asking them details and specific dates and times, and they couldn't answer. And they felt that they had failed when the prosecutors had come and interviewed them. **For them, it was not only cathartic, but Esperanza is like, this is a tool for us to learn how to communicate better with other people, for other people to listen to us and to speak back to us. She kind of took the project like that and used it as well.** *(Original interview, Rosemarie Lerner, 16 May 2022)*

There needs to be more accessible models for how to do impact campaigns with participant wellness as the focus; there is a long tradition of impact work that has not focused on wellness and it's harder for some to find the positive examples.

As part of the need for more attention around participant wellness in impact work, filmmakers and impact producers say it would be helpful to see more resource guides and case studies from films that offer direct guidance on how wellness considerations can be more systematically included in the design and implementation of impact campaigns.

For Cecilia Aldarondo, the director of *Landfall*, a film that investigates and highlights “Puerto Rico’s colonial status and leadership in mutual aid and community-based recovery post-Hurricane María,” wellness and trauma considerations are vital to impact work around documentaries. But she says that it’s difficult to find accessible examples of this being done well, especially in the United States. When asked if there was a model or resource guide that she found useful for her film’s impact preparations and planning around community trauma and wellness, Cecilia said:

We had no model for what we felt was right. I mean, I had examples of what not to do.... Just as there is a very top-down hierarchical set of entrenched practices in the making of documentaries, where generally speaking, you have people with privilege making films about people who lack it, the same things very often apply when you get to the distribution phase. And it’s not just the impact space, but festivals, just even conceiving of audiences. And I think that most impact campaigns, that prevailing models of impact work in the United States, are very top down, very often privileging breadth over depth, numbers over stories and big foundations over small grassroots initiatives that very often understand communities far better. And so I made this film with a certain clear set of ethical commitments. To me the story of Puerto Rico in the week of Hurricane Maria is a story of mutual aid and grassroots response to the crisis. So why would I apply a kind of NGO approach to impact when that’s who saved lives? It was people who saved each other. So it would’ve been totally out of step for me to design a campaign that looked like the campaigns that I’ve seen, and that have been, unfortunately, more often like marketing than actually about making positive social change. *(Original interview, Cecilia Aldarondo, 2 May 2022)*

SECTION THREE

ON ENGAGEMENT STRATEGIES

Credit: And She Could Be Next

This section explores the specific engagement strategies used across the impact campaigns, with an eye toward better understanding what worked well – and what didn't – in terms of engagement, and where things could work better.

This included questions that explored engagement strategies – online and/or offline – for the following goals (as identified by the filmmakers):

1. What strategies worked well – *with engaging grassroots communities in dialogue* around the issues of a film?
2. What strategies worked well – with *engaging large audiences* around the issues of a film?
3. What strategies worked well – with *driving communities toward a common goal or action?*
4. What strategies worked well – with *changing a community's perceptions/attitudes/behaviors/beliefs about something?*
5. What strategies worked well – with *community building?*
6. What strategies worked well – with *healing and/or reconciliation?*
7. What strategies worked well – with *building partnerships/coalitions?*
8. What strategies worked well – with *changing policy or larger advocacy-based goals around an issue?*
9. What strategies worked well – with *any other impact related goal?*

This section also explores considerations around technology (i.e. how were new technologies utilized as part of the engagement design of the campaigns? what motivated these decisions around technology – was it out of *purpose* or out of *necessity*? etc.)

Leveraging platforms and narratives of community leaders can be an effective tool in creating social power. By empowering and lifting-up the stories and platforms of community leaders at the heart of the film, impact campaigns can help bring power to local movements and help to make local leaders more visible.

While many of the filmmakers pointed to the importance of leveraging the existing platforms of main protagonists during impact efforts, one of the best examples of this strategy was raised by Tracy Sturdivant in connection to her work around the two-part documentary *And She Could Be Next*, which follows a defiant movement led by women of color as they fight for a reflective democracy and transform politics from the ground up. By centering and lifting the platforms of the women activists at the heart of the film, Tracy and her team were not just meeting distribution goals they were supporting a central idea of the film: to make women of color leaders more visible in public discourse and receive more recognition so that they can inspire more people to follow their lead.

So there were two intentions. **One, we wanted people to make the leadership, the political leadership of women of color visible. And that was not only the elected or women who were running for elective office in the film, but also the women of color organizers, who are the folks who do this work day in and day out in communities. And to make them visible.** And then the other component of that was [the saying] that ‘there is an organizer in all of us,’ which ended up being one of the rallying cries, so whether or not she’s the person who’s organizing [activities] in your church or the PTA. There is an organizer in all of us .. and we need everyone to organize. Everyone needs to be organizing everywhere. And the film was such a great representation of that, of women stepping off the sidelines.
(Original interview, Tracy Sturdivant, 3 May 2022)

Tracy and her team used quantitative and qualitative measures to determine the effectiveness of their impact strategies, which were guided by three overarching goals: (1) to inspire the new American majority to connect and to step into their own power through civic actions (this involved partnering with state and local organizations to amplify and elevate them to the film’s audiences and platforms); (2) to shift narratives around women of color leadership (this involved pitching different leaders – both women of color who showed up in the film and other women of color leaders across the country – to news outlets); (3) to spotlight and support women of color organizers.

These three principles formed the guiding north star for Tracy and her team. And so when they were faced with the unanticipated covid-19 pandemic, which made many offline engagements impossible and forced them to change their approach – from ‘let’s go to these states to organize people’ to ‘let’s go online and develop a robust digital strategy’ – her team turned back to these three principles to determine their next steps.

Using place-based strategies, even in online campaigns.

While the *And She Could Be Next* team had to pivot to online strategies in response to Covid-19 pandemic restrictions, they maintained a place-based strategy:

Looking at women of color across sectors was an opportunity for us to help elevate, right, and amplify this narrative around the power of women of color leadership. And so many of the tactics ... [were] around really trying to shape the issue environment for folks in media to grab hold on to. And so some of the tactics that we utilized were in service to that. But they also involved looking at how the amplification of the power and the importance of women of color political leadership and our votes matter, and focusing in on a handful of states that were subjects of the film and leaning into amplifying the work that was happening or the things that made voter engagement really important in those states.
(Original interview, Tracy Sturdivant, 3 May 2022)

As part of their online, but place-based efforts, Tracy and her team led a series called “All Eyes On ____”. This included All Eyes On Georgia, All Eyes On Michigan, All Eyes On the APPI community, etc.

Again, looking at demographic and geographic places where we amplified the voices of leaders, women of color leaders, who were representatives of those respective communities to be in conversation about what was at stake and what was important. And we did a series of that content that maintained a place-based focus, demographic focused throughout the arc of the impact campaign.
(Original interview, Tracy Sturdivant, 3 May 2022)

Pitch stories focused on leaders of the film to news outlets.

Another effective strategy for several filmmakers was the traditional but still vital strategy of pitching to news outlets. Tracy and her impact team constantly pitched stories focused on the leaders and protagonists of the film – and the movement they represented – to news outlets. Rather than waiting for news coverage to happen, they made an effort to make the connections that would generate this coverage.

I would say that many of the women of color in the film were excited about being elevated. We did a significant amount of pitching of some of those women activists to outlets like The Times and The Post... and they became a part of this ground swell of stories that happened in 2020 around women of color and the power of the votes of people of color. And so, again, one would go, “Well, what does that have to do with this film?” Well, it’s the film living its values. And I would say that we were very fortunate to have a group of filmmakers who understood the assignment. *(Original interview, Tracy Sturdivant, 3 May 2022)*

Tracy, who led impact efforts around *And She Could Be Next*, pointed out that traditional screenings can be important, but that they hardly scratch the surface of engagement activities that impact teams should be using to engage communities in conversations about the content of a film. And ensuring that you can feed stories into the current political moment and social conversations is one essential tool in this pursuit.

***Note:** See this study’s compendium case study of *And She Could Be Next* for a detailed description of the impact campaign, and an overview of the innovative strategies and lessons from the design and implementation of their impact work.

Use the platforms that get you in front of your audience – engage with your audience through the tools they are already using or have access to for engagement (even Instagram, Facebook, TikTok, or streaming platforms). Don’t leave this for distributor or for connecting with the “usual” doc folks.

The ultimate challenge for many engagement strategies is figuring out how to expand the typical audience for documentary film. And this means embracing platforms like Instagram, and using them as core engagement strategies, rather than dissemination tools. It means training filmmakers and producers in digital engagement strategies and skills, and to really commit to engaging audiences that don’t frequent film festivals or donate to documentary and public broadcasting organizations. It not only means not relying on traditional documentary organizers and broadcasters to reach your audience, but also understanding that their audience is probably not reflective of your audience, or at least not a fair representation of all of your audience. As Tracy put it:

And so we knew that part of the audience for *And She Could Be Next* was we wanted young women of color to see this film and see themselves in it. So we spent a significant amount of money **building an Instagram profile, which is very different than building a Facebook community**. Yes, the women with the pink hats definitely want to be engaged in this conversation. They have a film but there's also a different kind of conversation to have with young people. And with the filmmakers, we ran them through a whole audience profile, mapping and exercise. To get really clear, right, it's like, **"These are not the people who are part of [traditional doc communities]... And if you're really trying to make impact, then that's a whole different audience with a whole different set of tactics.**

(Original interview, Tracy Sturdivant, 3 May 2022)

One tactic that served effective for Tracy and her team's impact efforts around the film *When Claude Got Shot* was mobilizing a "cadre of micro influencer moms" to spread and engage in content around the film on mothers day.

So, what are the other non-traditional ways that we can promote content that aren't the traditional ways of promoting documentary films. *(Original interview, Tracy Sturdivant, 3 May 2022)*

At the core of such non-traditional strategies, filmmakers and impact producers said, is **aligning engagement strategies with the audiences you want to mobilize or change** – and while this might sound simple enough, it can mean disrupting the status quo of engagement work.

Several filmmakers and impact producers echoed this sentiment from their own experiences, and they shared a myriad of platforms and digital strategies they used for engaging audiences outside of the traditional screening. This ranged from apps that help audiences to engage with the issues of their film in their own communities (i.e. for the film *Our Planet*) to *Facebook* chat bots that could provide audiences with information on where they could see the film in their area and to connect with local advocacy partners who could provide caregiving or other support that they were interested in receiving.

Facebook ended up being one of the most useful engagement tools for Sian-Pierre Regis, director of *Dutyfree*, a film which investigates ageism, the care crisis, and economic insecurity in America. Many of the older people in their target community were on Facebook, and this allowed Sian-Pierre and his team to connect with audiences that weren't necessarily able to get to one of their screenings or even see the film. It also allowed them to guide many elderly people-in-need to organizations that were better-placed to help them.

Every day, we were posting something new, emailing folks back and forth, pushing them to our partners when necessary. So if one of our followers reached out and said, "Hey, I'm in Indiana and I am 68 and I have nobody to care give for me. And I don't know where my next meal is coming from. How can you help me? How can you sort of speak to my story?" And so then we would push them to National Council on Aging's benefits checkup, where they could figure out exactly how they could access those resources. *(Original interview, Sian-Pierre Regis)*

Sian-Pierre and his team also set-up a Facebook chat bot which would automatically send people who messaged them with resources related to their queries. One challenge, however, was that Sian-Pierre and his team did not follow-up with what happened after people received these resource messages (i.e. they didn't know if people actually reached out to the organizations shared with them, or if those organizations actually helped them).

Similarly, Stephanie Palumbo said that her team used digital ads and messages on Facebook and other social platforms in order to direct the attention of target audiences to the key issues and perspectives shared in their film, *Armor of Light*.

We, also through digital ads, digital marketing and things like that, then targeted members of the church and lay leaders through doing things like placing targeted ads within a mile of those megachurches. So, anytime somebody was on Facebook, and they were within a mile of the megachurch, and they fit a certain audience profile, they'd see the ads. *(Original Interview, Stephanie Palumbo, July 11, 2022)*

Stephanie said that they also used *direct mailings to targeted leaders* within evangelical churches, who were identified during their early – and critically valuable – period of landscape research, they placed *op-eds in key publications that they knew these audiences already were reading* and engaging with. (The method of op-eds and press coverage was echoed as an important/effective strategy by many participants)

“ We built an email audience of several thousand leaders at evangelical churches who opened up and engaged with our emails every week. They were written by other pastors. (Original Interview, Stephanie Palumbo, July 11, 2022) ”

In person engagements can also be approached in new ways. Stephanie said that convening in-person discussions was the most effective movement-building tool for their film, but only because they took a unique approach to their screenings. Going one step further into their targeted community of Evangelical pastors, Stephanie and her team hosted small dinners, where everyone was required to sign an NDA agreement, in order to allow for more honest conversations and to help the pastors know that what they said in the meeting wouldn't be aired beyond the group who was there.

“ So then, we were able to have these pastors together. They were able to share really freely without fear. The biggest thing we heard across the board from pastors, not just at these dinners but overall, was they wanted to take a stand. They agreed with us, but they were really scared of losing their congregation. They were scared that the board at their church would fire them essentially. So, in doing these small intimate dinners with their spouses, with the NDAs, they were able to share really openly and then brainstorm....I think the conversations and dinners worked best. I think that was number one. Also, very time intensive, but that was by far, I think, the biggest return on investment. (Original Interview, Stephanie Palumbo, July 11, 2022) ”

Similarly, Sarah Mosses, who produced impact campaign activities around films such as *For Sama* and *Unrest*, said that digital engagement strategies are most effective when they are paired with (not replaced by) private, strategic screenings.

I think in any campaign that we've worked on, where it's around very senior top tier political strategies, digital engagement alone will never give you the results that you potentially need. So in that sense, it was the in-person private screenings, the in-person private meetings, the in-person briefings, they're the ones that would sort of take effect. *(Original Interview, Sarah Mosses, April 18, 2022)*

Sarah said that a lot of the major influence – especially related to policy change – that documentary engagements can bring, often occur in closed door meetings. But robust digital engagement campaigns, and media attention, can often be the key to getting into those meetings.

What sometimes gets you in the door is the weight of press attention, the weight of social media conversation, the weight of people donating... So I think to get the door in some spaces, it was because of the fact that there was a weight of public awareness that was growing and that the press attention was growing around it. *(Original Interview, Sarah Mosses, April 18, 2022)*

The use of technology to reach audiences where they are, while still building a sense of shared experience, is highlighted by Erin Sorenson, who led impact activities around the film *Homestretch*, a documentary about youth homelessness in Chicago.

Erin and her team set-up a series of strategic screenings with housing and youth related organizations in cities across the country. They organized simultaneous screening times in each location and then they live streamed a screening event in Washington, D.C. – which included several high-level policy makers on a panel – so that young people and organizations tuning-in across the country could feel part of – and participate in – cross-country conversations after the film screening. In other words, they used streaming technology to strategically connect the homes and offices of social workers, young people, and on-the-ground youth and housing-related organizations with D.C. based policy makers who had direct power over housing issues. During the panel session, Erin fielded questions from participants across the country and gave them to the D.C. event moderator to raise publicly in discussion with the panelists.

“ So they had some set questions in the beginning, but we wanted most of it to be a call in. And we prepared the panelists that this is what it was going to be, but we didn't say, “We're not going to ask you the hard questions.” We just said, “It's an opportunity for you to talk with providers across the country. They're going to be asking you questions and isn't that going to be cool?” But we knew that people were really mad. And that this was an opportunity for a social worker, a person who was just providing meals to kids, to log in and ask questions of these policymakers. *(Original Interview, Erin Sorenson, July 25, 2022)* ”

The event brought on-the-ground concerns from social workers and homeless organizations who needed more resources and specific policy changes related to funding distribution and other issues. The participants included a woman in Nevada, who broke down in tears relaying her challenges with keeping children warm during their winter in Reno; she told the policy makers that they have run out of sleeping bags to offer their homeless youth, and she doesn't know what to do. After the Reno social worker shared her concern, Erin said that there was a long moment of silence.

“ And so it was like dead silence, dead silence on the panel. Because she was like, “What are you doing about this? What are you men doing about this?” And it was just dead silence. And so then one of them spoke up and said, “I used to work with the George Bush foundation Thousand Points of Light. I'm willing to call them and see if they can send out sleeping bags to you.” And she's like, “Well what about all the other programs?” ... So it just ended up being a great discussion. And then afterwards, those folks stayed, talking for a long time. They sat down in the theater and started talking amongst themselves. So we thought this was great progress. Our goal was using the film to connect these policy makers with the voices of case managers in the field and it worked. *(Original Interview, Erin Sorenson, July 25, 2022)* ”

Research can serve as effective tools before/during/after impact campaigns, in providing evidence-based guidance on many aspects of impact work -- including identifying target communities and 'most vulnerable' districts for engagement on your impact campaign's key issue, and learning from the audience participants who attend screenings (for follow-up action).

On the film, *The Armor of Light*, impact producer Stephanie Palumbo and her team used extensive research to zero-in on the key target communities for their impact campaign. The film tells the story of an Evangelical minister who tries to raise awareness among an Evangelical community about the growing toll of gun violence in America. Stephanie's colleague, Campaign Strategist and Digital Director Jess Duda, used tools like Google Maps to map out all of the congressional districts in the country (in 2016) and color-code them based on their political affiliation. Then, she took a list of every evangelical church in the country and a list of mass shootings from the last three years, and they layered this data over-top of the political map. This allowed them to identify communities where there were high concentrations of evangelicals and mass shootings, and that were in swing districts (where local politicians and policy makers may be more open to discussions around gun laws because they aren't so reliant on a district that's firmly in one side of the political spectrum). They were then able to focus their time and resources on these communities.

For some filmmakers, using survey tools during actual impact engagements proved a useful way to make data-driven decisions and learn from the processes of community discussions and building; other filmmakers and impact producers said they used issue-specific research to help them better understand the systemic (for some) and local context-specific (for others) of the issues at the heart of their campaigns.

One filmmaker, Stephanie King, worked on the film *Voices of the River*, a documentary web series that features stories from and by Traditional Owners along the Martuwarra Fitzroy River and their fight to protect the river from large-scale water extraction. As part of their impact campaign, Stephanie and her team conducted a comprehensive landscape analysis survey, with her impact campaign's partner organizations, in order to get a sense of what kind of advocacy work and organizations were already engaged in the key issue of her film.

“We conducted a research paper and quite detailed overview of the campaign, [a] sort of framework for the campaign. This was led by the thoughts and feedback from Waad and Ed [the filmmakers] and speaking with different campaign partners. We reviewed a set of impact objectives and opportunities based on the current understanding of the issues, and partner actions already in motion. (Original Interview, Sarah Mosses, April 18, 2022)”

From there, Sarah said that the impact campaign activities they developed were directly informed by the research done in this formative period.

In any engagement effort with communities, humility is one of the most important tools an impact producer can possess.

Across interviews, humility was a common refrain as an underestimated – and essential – tool for impact producers working with documentaries.

For the *In My Blood It Runs* impact team, humility was core to their engagement approach. Given the tremendous power of film, and the role it can play in social change, Rachel and Alex pointed to humility as one of the most important tools a producer can have in their toolbox. Humility means not only being humble in your conversations with communities, but also in your approach to designing filmmaking and impact processes. It means grounding your decisions and understandings with people and organizations other than yourself. Rachel noted that partnerships with local organizations like Akeyulerre Healing Centre and Children’s Ground, who were working in the communities and issues centered by their film, was transformational for them. At the same time, Rachel pointed out that it isn’t just collaborating with formal local organizations, it’s about recognizing the expertise, vision, work and knowledge of everyday community members.

They understand the issue. They understand the context. They are in a much deeper relationship with the community, long term, multi-generation, multi-issue, pushing for advocacy for social change, writing the papers, doing all of the things, right... We haven’t been there for generations doing this work. We are not continuing as a film for generations through this work. We exist in this moment, and there’s an incredible utility in it, but if we don’t recognize the context that we sit in, if we don’t recognize the expertise, and experience, and not just agency, but the expertise of those who are actually doing the work on the ground, then we miss an opportunity to be as effective as we possibly can be, and we miss an opportunity to develop authentic partnerships with organizations who are doing this work. ... **A lot of times that humility part is just maybe unintentionally missing.** *(Original interview, Rachel Naninaaq Edwardson, 8 June 2022)*

Humility is and is not about intent. While anyone working in documentary impact may feel that they are doing ‘good things’ for ‘good reasons,’ humility is acknowledging that it shouldn’t be up to the impact producer alone to decide if their film’s impact is ‘good’ or not.

It’s this bigger conversation about bigger picture change work, and about the place that films have in larger social movements, that Alex says the field of documentary impact needs to have more.

I think the humility piece is really important for filmmakers and impact teams to see themselves in relationship with and in service of social movements, and people who will be doing this work long past the arc of our film, and to see our film as something that can be a gift to elevate and sort of propel social movements in a moment rather than think of our film as a mini NGO, and a whole organization, and build the whole world around it, and tell all the funders that we're doing the changemaking. So it's quite complex, because you want to be humble about what you're doing, and obviously you need to sell it enough that people will fund you, but that you're also saying, "We're not going to achieve it all. We're part of a bigger picture movement." (Original interview, Alex Kelly, 8 June 2022)

The humility of listening was also raised by Emily Wanja as an integral asset to her impact team's work around *Thank You For The Rain*.

And then there's the thing about respecting and really listening. At least personally, especially working with the community, I have learned to really just listen because it's easy to assume. It's easy to look and assume the set of things. Or to look and assume people's priorities. Even when they're just like me and we are Kenyans and everything still. I might think that maybe what they need is a heavy jacket, but they will tell you if they wanted that, they would've already got it. And I think that's very humbling, really just to learn to listen. (Original interview, Emily Wanja, 22 April 2022)

Impact producer Stephanie Palumbo echoed the importance of humility and being humble in the work her team did around the film *The Armor of Light*. For her team, being humble meant understanding that transformational change means going beyond transactional relationships and is sometimes about more than getting big audiences; rather, it required understanding that transformational change takes time and can be slow.

Sometimes, people think that impact campaigns are publicity or impact campaigns are marketing, whereas for us, impact campaigns are about the potential to activate transformative social change. And so, especially with a campaign like this one, we had to be really humble. We couldn't just be about getting people to see and promote the film. It really had to be about meeting them where they were to then slowly build this kind of change. *(Original interview, Stephanie Palumbo, July 11, 2022)*

Cross partnerships and corporate outreach (going beyond typical funders) is an underutilized opportunity in documentary:

While some filmmakers and impact producers were uneasy about the prospect of corporate outreach within impact work, other impact teams leaned into their potential as transformative allies in engagement campaigns. One of the best examples of an impact team successfully using corporate partnerships in pursuit of impact goals came from Tracy Sturdivant and her work around *And She Could Be Next*.

Among the corporate partnerships that Tracy and her team built, one was with a major computer technology company, which gave her campaign printers to give to organizers in the core states of their campaign so they could print out voter registration, on the promise that they didn't reveal the name of their company publicly. Other companies, like a major beauty company label, expressed interest and then pulled-out of their relationship because of political concerns.

Cross sector partnerships is an opportunity that I think some doc folks underestimate. *(Original interview, Tracy Sturdivant, 3 May 2022)*

Another film that Tracy worked on was the documentary *When Claude Got Shot*, a film about Claude Motley, a victim of gun violence who becomes conflicted about the punishment for his attacker. For this film, Tracy said that the corporate partnership model has been effective in widening the communities who would see the film – so that it can engage audiences that might not necessarily watch its PBS airing.

It's about gun violence. And so some of the partnerships that we've been focusing on they're of course brands that engage with communities of color more broadly, the NBA and others, to be partners on some of the offline engagement work that we're doing. So I say all of that to say these have been the ways in which we have begun to look at blending the advocacy world in a permissible way, of course, and a brand engagement world **to help amplify beyond the traditional target PBS audience, right? So there's the PBS audience and then there's the people who you actually want to watch this thing, right? Let's be honest.** *(Original interview, Tracy Sturdivant, 3 May 2022)*

When political sensitivities arise among distributors lean into these moments (don't shy away).

Another strategy shared by filmmakers and impact producers across films was the encouragement to turn moments of resistance or political discomfort among distributors to the advantage of the film, when possible. Since many documentaries center on important social justice issues there are frequently conflicts of interest and political sensitivities that arise during times of distribution. But impact teams said it's important that filmmakers respond to these moments by making the film content louder, not quieter.

As Tracy Sturdivant offered, while reflecting on the impact work around *And She Could Be Next*:

We ran into some bumpy roads because there were a handful of women in the film who were **running for reelection and some of the local broadcast affiliates didn't want to air the film until after the election or after certain periods of time or only wanted to run it late at night because they didn't want to have to deal with equal time with other candidates.** A lot of that was driven by **politics** at the end of the day. And so there were some periods of time, where we're like, 'Let's burn it all down' ... But then [we asked], 'How do we utilize this to our advantage?'

In response, Tracy and her team didn't back away; instead, they made noise around the distributor's political hesitation.

[We told our audiences:] “Here’s the film that Georgia Public Broadcasting doesn’t want you to see.” And then created the local narratives around that. So one of the things that we did was we got a group of micro influencers, people on social media who got followings of 10,000 or more to be a part of helping us to promote the film and to get people to watch, and these are folks who weren’t necessarily political, but who had large followings and had a base or audience of people who they could have a conversation about why election was so important. *(Original interview, Tracy Sturdivant, 3 May 2022)*

For *An Insignificant Man*, a documentary about Arvind Kejriwal, the head of the Common Man’s Party in India, as he confronts the status quo of corruption in his country’s politics, the film team learned early-on that key distributors in India were not going to help distribute the film because of its political nature. Khushboo Ranka, one of the film’s directors, recalled:

What didn’t work was trying to go a regular way, So we did show the film to a lot of traditional Bollywood producers and distributors, and who could have just financed the distribution of the film for a profit share. But because it was a political film, they were like, “Okay, this is a fantastic film. It’s so entertaining. And you should release it on a large scale. It’ll be a hit. But we can’t do it, because we’ll get into trouble, but you should do it.” So a lot of these distributors saw it, and all of them said this. But we didn’t have the kind of funding to release it at that scale. You know? *(Original interview, Khushboo Ranka, 18 April 2022)*

In response, Khushboo and her team found support through other means. They screened the film at some international festivals to develop some credibility, they led crowd-sourcing campaigns, generated memes on social media, and targeted influencers to spread more word about the film. They then used platforms like YouTube to reach wider audiences. Eventually they were able to reach a wider audience in India than any documentary before them – becoming the highest grossing documentary ever in India (with more than 2 million views on their YouTube Channel alone).

For Khushboo and her team, reaching families and communities in India that were previously difficult – if not impossible – for independent documentary cinema to reach previously was core to their goals. Their main goal was to make politics transparent, and to make it accessible, and to bring some light on how a new person can enter politics. In this way, reach wasn’t a profit-seeking goal, but one based on trying to start wider conversations on important issues that were ‘untouchable’ by major distributors. In the end, Khushboo said that her team wanted to make sure that her parents – who weren’t frequent documentary watchers – could be able to watch the film; they wanted it to go from an untouchable documentary to one that was ubiquitous.

Screenings should be seen as starting points (not finish lines) for impact, used as opportunities for further partnership buildings and community leadership.

While this observation on engagement is more of a principle than a strategy, it was raised by nearly every filmmaker and impact producer interviewed for this study.

As Emily Wanja put it, when reflecting on the impact work done around *Thank You For the Rain*, screenings were the grounds through which partnership and stakeholder building often started to get traction and take shape. And central to these screening opportunities and partnership was ensuring that community members were placed at the front of table in conversations around climate change; ensuring that they weren't simply the focus of the film or poster, but that they were given opportunities to lead conversations with key partners.

Especially for international screenings, it was so important for Kisilu to be there, because we understood that local communities... especially communities at the front line of climate change... are mostly left out in key climate events, where all these negotiations are taking place and everything. **A lot of times they've not been involved. And when they have been involved, they have been seen, but not heard, it's not been meaningful participation.** We knew from the beginning, any screening in any key climate event, Kisilu has to be there. And Julia, the director, also had to be there. *(Original interview, Emily Wanja, 22 April 2022)*

For Lindsay Guetschow, who led impact efforts around *He Named Me Malala* and *All In*, the point of seeing film screenings as a starting point is essential.

I always say that the film is just the jumping off point. It's a way to convene people to emotionally engage in an issue through story. It's just one piece. **Screening the film is not the end point. It's just the very beginning of the impact work.** And my hope and goal is always to center the impacted community to be able to be leading these efforts. It can't be outside people coming in. However you can shift power resources, help build capacity and get out of the way. *(Original interview, Lindsay Guetschow, 17 May 2022)*

Create discussion guides that are focused explicitly on different audiences and what might be the most strategic content for them.

For the impact team working around the film *Disclosure*, which examines Hollywood's depiction of transgender people and the impact it's left on the transgender community and American culture, a period of deep research informed the design of the impact campaign alongside a commitment – identified early in the process – to target lawyers and other key corporations and organizations. The film was distributed through Netflix and several film festivals, generating considerable viewership numbers and interest at a social moment in time when people needed to watch it. The campaign used webinars, virtual screenings, and robust social media campaigns – driven by one of the main participants in the film who already had a major following. But one of the most unique aspects of their impact campaign centered around the deep research and targeted guidance they provided through toolkits and other materials directed at key audiences (including lawyers), said Eliza Licht, one of the lead impact producers for the film.



SECTION FOUR

ON DEFINING SUCCESS

Credit: Thank You For the Rain

This section provides an overview of the varied outcomes and success markers held by filmmakers across documentaries, how goals were identified, and whether they were achieved.

Theories of change and outset objectives – like creating narrative change or institutional change – can be helpful guides, but community building is often the most important driver to any goal or success measure

While filmmakers shared various objectives for their work – from narrative change, policy change, institutional change, to social change – there was a common refrain among filmmakers and producers that these goals are rarely possible or sustainable without coalition and community building. Rather than focusing on trying to reach the right person at the right moment, several filmmakers stressed that dedicated focus to community building – whereby coalitions of community members are able to advance solutions and push for change themselves – is one of the most effective strategies to most impact goals.

Emily Wanja said that Thank You For The Rain involved screenings and festivals at the national and global level, community screenings and community engagements with community leaders, targeted screenings aimed at policy makers and influencing elections abroad, school educational campaigns (to help educate new generations on issues related to climate justice), and so on. It also included detailed, layered, complex theories of change. But in the end, Emily argued that such meticulous theories of change and projections of robust impact deliverables, plans, and goals – while typically essential for raising funds and providing an early articulation of some key objectives – are, or should be, guides not blueprints. Ultimately, Emily said their focus and route to change was oriented around advancing work and objectives that their target community had already started (including helping support the actual construction of a dam in one community).



The activities that we were always looking for support for were heavily to do with the community. It was always, if the community participates, if they're happy, if they are involved and they say, 'this is what we want' and it works, then that's success to us. If we can clearly see that lives have been changed, which we have seen now, with the construction of the earth dam. We can see how it supports the livestock, how it supports with the provision of water for over 300 families, for instance... We can see how they're implementing the knowledge in their farms. *(Original interview, Emily Wanja, 22 April 2022).*

Julia Hoppock, an impact producer for the film *Social Dilemma*, said that they needed to change their 'theory of change' – i.e. the driving objectives of their impact campaign – several times. While their initial goal was primarily about "broadening awareness", the partnerships that they developed along the way led them to evolve their main objective to being less about 'starting conversations' and to be more about leveraging "the power of storytelling to put pressure on big social [media]'s business model." But this only happened, Julia said, because of the partnerships that were built in the tech reform space throughout the early stages of their impact campaign.

The degree to which you are able to maintain community safety protections and engagement in the framing of your film or campaign (i.e. through media coverage, social media engagement, etc.) is a critical marker of success: too often the community drops off at this stage, but it's imperative that safety frameworks and community collaboration is maintained.

For the film *In My Blood It Runs*, a central component of their collaborative design was the importance of following through on the objectives and promises afforded to the community at the outset of the collaboration. This meant that a successful realization of their collaborative model would have failed if they didn't maintain community collaboration after the film was complete. It meant that they needed to build feedback mechanisms so that the community could be engaged in the framing of the work as well – how it is framed for any screening, social media post, or engagement related effort.

Rachel and Alex said that their team participated in a three-day meeting with the community to discuss the upcoming screenings and impact efforts around the film. As part of the meeting, the community and

“ We looked at the impacts of colonization. We talked about other film impact campaigns. We talked about film distribution. We talked about duty of care, and we started to map out the key thematic areas and the key messages that the family wanted to see the release of the film achieve. And that became the basis of a draft impact strategy, and then we went and talked to lots of our other potential partners about what was actually happening in the political space, the policy space, within social movements, around those themes, and then we went back to the family and sat in the community. *(Original interview, Alex Kelly, 8 June 2022)* ”

Rachel, Alex and their team also spoke to partners and funders and made it clear that “the principles and processes that we used within the film, and that if we were working with them in any way, that we expected them to adhere to those as well” *(Original interview, Alex, 8 June 2022)*. These commitments with partners were organized through memorandums of understanding, which held the principles, goals, and key messages of the community, and it also made it clear that partners can’t use the film images from the film or speak about the film, unless they’re abiding by those principles.

Even though many of the organizations working in film are considered “progressive,” that doesn’t mean that their work or approaches can’t be damaging. At times, this meant that some organizations were challenged in new ways; but Rachel and Alex said that it was always important not to assume anything, but to ensure stay rooted in the model of collaboration that created the film and impact strategy in the first place.

“ I think for some partners it seemed unusual that we would say, “As a basis of this partnership can we read your drafts of your social media posts or your press release before you send it out?” And sometimes it’s only one or two words, but the conversation that we would then have on a Zoom call where we would step through why those two words undermined agency, or undermine dignity and the kinds of work that the family had identified they wanted to do, and why, and what the messages and principles were. That actually also feels like a really big piece of the impact work, and that’s got nothing to do with metrics, and numbers, and bums on seats...We’re not in every lounge room conversation. We’re not reading every review with the audiences, but to the extent that we could possibly influence the framing, and the conversation, the education materials that we produced, the Q and As that we hosted, the media op-eds that were published, everything came through back to these core principles and processes. *(Original interview, Alex Kelly, 8 June 2022)* ”

Rooting films in local organizations (not global NGOs) at the heart of the film can be a useful way to anchor success markers and objectives.

The act of ensuring that all impact efforts and engagement was led by local teams – not international organizations and global north “experts” – was crucial for Lindsay Guetschow and her impact team on the film *He Named Me Malala*. In the five countries (Pakistan, Afghanistan, Nigeria, India, and Kenya) where they pursued large-scale global impact goals, they embedded their strategies with local organizations.

We did not want to insert ourselves or be leading the impact work from the Global North. We spent a lot of time in the regions that we were focusing on building relationships with local leaders and community support with elders and tribal leaders. To be able to even show the film, and do the kind of work our community partners and grantees wanted to do, we needed to get their buy-in. We dubbed the film in local languages so it was accessible to the communities we were working with ... **To me, it makes more sense to be embedding [impact] efforts at nonprofits. They have longevity,** and we’re training these folks in the communications, programs and advocacy teams at nonprofits how to use storytelling as an additional tool to further their work and amplify their message. These efforts can live inside organizations. It’s not just a big moment around a film premier and all the ancillary releases, and then the campaign just goes away after a set amount of time. In this scenario the campaign lives on and can continue within an organization. *(Original interview, Lindsay Guetschow, 17 May*

In the case of the campaign Stand #withMalala, which was organized around the film *He Named Me Malala*, the nonprofit run by the main protagonist (Malala), called the Malala Fund, was the home of the impact campaign effort. Lindsay, who was the lead strategist and impact producer on the project, was actually working at the Malala Fund and leading design efforts around the campaign – meaning that the effort was orchestrated and started from within the main protagonist’s own organization and nonprofit. And this allowed any global goal or effort to feed back into the local organization and country-level work.



And the reason that we did that obviously was because the film was about her and her efforts as one piece of a global effort around securing safe, free, and quality secondary education for every girl, everywhere. It would've felt a little weird to have a production company, or someone outside the work trying to feed what the advocacy goals should be, or what the programmatic goals should be within a campaign. Those already lived within her organization; her foundation was living and breathing this day in, day out. It was easy for us to build an impact campaign using the film as a tool, to further and build upon the existing organizational and advocacy goals. We worked closely with local partners, experts and girl advocates to inform our advocacy goals and programs in Pakistan, Afghanistan, Nigeria, Kenya and India and had multiple ways for people to plug in from a global perspective to our broader campaign.

(Original interview, Lindsay Guetschow, 17 May 2022)

At the country and global level, their campaign involved screenings with high level stakeholders and meetings (including African Union or at UNGA), policy makers, movement leaders, and convening high level advocacy meetings, working on research reports and reporting current data and statistics to aid advocacy work. On the local community level, they also engaged in a robust community screening campaign – including mobile screenings in refugee camps in Kenya, hosting leadership and advocacy trainings of young girls across all the countries they worked in, radio programming, programs specifically targeting fathers and brothers (main deterrents for girls attending school) among other activities, and supporting door-to-door educational and advocacy campaigns, alongside free educational screenings at schools. However, Lindsay said, the common denominator for their success wasn't the delivery of the screenings and engagement activities but the longevity of the conversations they started – and any chance of this happening successfully was through partnerships with local organizations working on these issues, who could keep the work going through the grants the campaign delivered long after the screenings ended.

SECTION FIVE

ON COALITION- BUILDING, LONGEVITY, AND SUSTAINABILITY

Credit: Pray Away

This section explores how filmmakers and impact producers are thinking about the sustainability and longevity of their work, what strategies and principles they have found important/useful in this effort, and where they think more attention and resources are needed.

Directing attention to power structures and key players within movements is critical in creating a roadmap of lasting engagement

In her work with *Pray Away*, Anya Rous emphasized the importance of using impact efforts to direct attention to areas that are key to major structural, long-term change in the key issues of the film. As part of his effort, Anya and her team planned community events at the intersection of faith communities, and particularly Christian communities. They also focused on cities where conversion therapy is particularly prevalent, and they pointed toward key advocates and policy issues where audiences could provide targeted, long-term focus and support.



One of the [areas where] we wanted to come in and thought we could make an impact was around culture change, that part of building public awareness around the fact that this is not a story, this is not a thing of the past, this is not a fringe practice.... We chose to build the story of Pray Away **around looking at the leadership in the movement, so that people could understand the power mechanisms that drive the movement and sustain the movement, so that both advocates could be better equipped to challenge the movement, but also so we could have a better diagnostic around what are the levers of change and where does power sit in this context.** *(Original interview, Anya Rous, 26 May 2022)*

Simone Pero, speaking about the impact campaign around the film *Escape Fire: The Fight To Rescue American Healthcare*, an investigative film about the design and approach of the U.S. healthcare system, said that building strategic alliances in public policy was essential for them in raising the profile of the film and getting it into key spaces of political power and social change. While it can be hard to quantify the significance of major public policy engagements, often their importance to informing and creating positive social change cannot be overstated.

We developed a relationship with Senators' offices, including Richard Blumenthal and he was the biggest champion for this project because he was launching a bill related to prescription drugs in the military. . . So, that was extraordinary. And the film was even mentioned by name on the Senate floor by Senator Mikulski as a documentary that showed how our healthcare system increases costs but doesn't improve our health outcomes. *(Original Interview, Simone Pero, June 24, 2022)*

Simone said that Senator Blumenthal saw the film as a great way to showcase the work that he was doing with veterans and the Take Back Bill, as there was a concern of the high amount of usage in the military at the time.

“ We held a bi-partisan Capitol Hill screening with Senators Blumenthal and McCain. That was another huge event for us. But it wasn't just the film screening, right? It was [that] we organized a substantive policy discussion on Capitol Hill after the film with Chiefs of Staffs and several Congressional offices. ”

(Original Interview, Simone Pero, June 24, 2022)

Julia Hoppock, an impact producer for the film *Social Dilemma*, said that they also worked to get their film in front of key political audiences ahead of significant hearings and moments in social media regulation and safety protections (a key issue of their film). Ahead of congressional hearings with Mark Zuckerberg of Facebook, Sundar Pichai of Google, and Jack Dorsey then of Twitter, Hoppock and her team were able to get their film in front of key members of the Democratic Caucus of Congress, including speaker Nancy Pelosi.

“ [The film gave] them a background of the issue we brought together, panelists experts in this space, some that were included in the film, but many others that weren't. And connected them and that led to some other conversations ahead of the hearing. ”

(Original Interview, Julia Hoppock, July 8, 2022)

As another example, Ilan Arboleda, who produced the film *Thank You For Your Service*, said their team had success with a big screening in Virginia, where they were able to get the Lieutenant Governor and the Head of the Veteran Affairs in the audience.

“ And as the results, we passed legislation of Virginia, because it was an audience there demanding action. And they saw the film and they saw the effects of the film and said, “Oh, I could do something here. That will be popular.” So setting up those state Capitol screenings were very, very helpful. That was some really direct action. ”

(Original Interview, Ilan Arboleda, July 15, 2022)

Embedding impact campaigns (and producers) with local organizations is one way that filmmakers can ensure their impact activities (and the toolkits, partnerships, commitments, and conversations they create) continue on. But partnerships need to be formed early.

One of the clearest and most raised tactics for ensuring the longevity of impact work comes back to a lesson that cuts through all of this study: embedding impact work and design with local communities is the best strategy to ensuring that campaigns are responsive to the needs of communities in a given moment and in the future.

For Lindsay Guetschow and the impact team working on the film *All In: The Fight for Democracy*, one strategy was focused on ensuring that the film and its campaign was situated to support the organization, Fair Fight, for one of its main protagonists, Stacey Abrams. This meant strategizing with the organizations on exactly the kind of relationship and partnership that would be in the best long-term interest of their work.

“...we were able to take the community that we built through the #AllInForVoting campaign and feed it back into Fair Fight. **Those engaged in the campaign could stay in the fight so to speak with Fair Fight, so the engagement lives on somewhere. And Fair Fight could take the film, resources and all the toolkits, guides and things that we created and carry that on, where they wanted to or share it with partners.** (Original interview, Lindsay Guetschow, 17 May 2022)”

Lindsay said that this issue of legacy building and impact longevity is an area where she thinks more cross-industry practice sharing, thinking and collaboration is essential. As part of this conversation, she wonders if there should be more examples of impact producers being situated in organizations, rather than operating as short-term contract hires, as one way to ensure that the work, conversations, and commitments that are raised by documentary impact work have a home for follow-up action and continued progress after film campaigns conclude.

“I’m curious how folks in our field and space are thinking about legacy, and where this lives and how it lives on and continues. And to me, I’m thinking it lives within these organizations and should start there also. **Wouldn’t it be great to train all community-based organizations and nonprofits how to use storytelling as a central tool in their work?** (Original interview, Lindsay Guetschow, 17 May 2022)”

Several participants echoed a similar perspective when it came to strategies for ensuring longevity: ***Target key organizations and partners early in the process and listen to their input on impact and social change processes before you start designing your campaign because the more you are able to embed the film in existing movements and organizations the more likely it will have longevity.***

Julia Hoppock, an impact producer for the film *Social Dilemma*, said that building relationships and partnerships early in the process was essential for her team to ensure both longevity and to overcome a reality, faced by many filmmakers, of being overstretched on small teams that don't always have enough bandwidth to give the intricacies of an impact campaign ample attention.

Building relationships early because you can't do it alone. And because ... people in organizations will take your film and use it in ways you couldn't even imagine to help further the movement. And they are going to be more invested in that if they've been a part of the project. So, as much as you can, there's a divide, you want to have your own creative project and really pursue the vision that's in your head. But as much as you can get input from people early that are experts in this space, and that may end up using this film as a tool for change And they're going to be much more likely to want to promote the film and to use it, to advance the causes that you're trying to advance. *(Original Interview, Julia Hoppock, July 8, 2022)*

Filmmaker of *Sands of Silence*, Chelo Alvarez-Stehle, underscored the importance of bringing in key organizations and partnerships early, by sharing early works in progress and concept boards, and opening-up the storytelling process to their input.

First of all, try to establish issue-related partnerships from the onset. The best way to do this is by screening short excerpts of the film, a work in progress. Don't be afraid. Sometimes the works in progress that I've screened had little to do with the final thing. It doesn't matter because it's about the issue, and it's about getting these people inspired to be on board. You are working with the film, it's going to change. So by doing this, you accomplish two things. One, you move these people to the point that they want to work in this path with you, no matter how long the path will be, and once they are engaged, they will bring in their networks. And two, they can inform your film. They can share their grass-roots knowledge and experience and give key input on how you address the issue on your film, which I think can help you go deeper. *(Original Interview, Chelo Alvarez-Stehle, July 12, 2022)*

Filmmakers, Greg Jacobs and Laura Fallsgraff, who worked on the film *No Small Matter*, brought together a “brain trust” of shared-interest organizations and individuals during pre-production stages of their film.



We did that with the goal of coming out of it both with some impact plans, answering questions like when’s the ideal time to release the film politically? So ranging from that to, how do we tell the story? What are the icebergs that we need to avoid that could turn people off from the subject matter? What in terms of messaging has worked in the past and what hasn’t? So we invited stakeholders and experts that could speak to those issues. *(Original Interview, Greg Jacobs and Laura Fallsgraff, July 11, 2022)*

Dawn Porter, director of *John Lewis: Good Trouble*, further underscored that building a relationship with the communities at heart of the film and within the movement of the community/issue at the heart of the film as early as possible is essential.



When you design a campaign, you never want to drop in and ignore the [groups already working on this issue]... You always want to work with the activists on the ground... The thing I think some filmmakers don’t always think about is they’re so excited about their movie that they can forget that people have been working years or decades on the topic. *(Original Interview, Dawn Porter, June 17, 2022)*

For Dawn, this meant reaching out to local groups and finding out what specific progress they were making and what kind of work they were doing, and then seeing how their film could further support that progress and work.

I think the most successful thing to do is to identify the local organizations doing really strong work and then tailor the assets that you give them for what they need. Sometimes filmmakers are trying to just have screenings. And I think that's, in some ways, the least effective thing that you can do. I think it's more... I didn't care how people use the movie, whatever is good for them is great. So I think in the campaign, the focus shifts from your movie to the people you want to reach. And so you just have to be open to what your experts, which are your activists. I'm not the activist and you are the activist and so they know who they're trying to reach, who's the hardest to reach. Getting it in school... Getting all that done, that was all really important to us. *(Original Interview, Dawn Porter, June 17, 2022)*

Macky Alston, filmmaker of *Love Free or Die*, said that developing deep partnerships over an extended time and using organizing expertise was also at the core of their impact efforts.

We were in deep, long collaboration and relationship, a decade long, with the organizations that were at the front lines of the organizing. And in fact, I had worn another hat and been employed to do that work not as a filmmaker, but as an organizer. And so we had competency, we had knowledge, in regard to what was likely to work. We were documenting movement organizing within the religious LGBTQ space. And we were in relationship with them. We were even members of them. And then we were working with organizers, state and national and regional. So that when we launched our impact campaign at Sundance about five or six of the national organizers from Center for American Progress, the Task Force, Human Rights Campaign, GLAAD, they flew out. *(Original Interview, Macky Alston, June 22, 2022)*

Filmmaker Jenifer McShane and engagement strategist Kathy Leichter of *Ernie & Joe: Crisis Cops*, said that while filmmakers can bring dedication and a certain level of expertise to impact campaigns they will rarely be able to provide the same level of commitment and perspective that communities and local organizations can offer. Therefore, having impact producers who are able to forge those partnerships – rather than working in silos – and work as useful communicators with the organizations/movements/partners that are uniquely relevant to the film is critical.

I think there's been an assumption, that's a little bit of an arrogance among documentary filmmakers that we are somehow more expert than we are. And I have to say, I felt pretty darn expert. I'm living, breathing this for over three years, and had great access, I did feel pretty expert about it. But I think there's a little bit of this, "We know better, because we're so smart." And I think it's dangerous because then I think it tends to, if we're not careful, it's easy to not treat the community that you're advocating or supporting as a partner, as much as possible. *(Original Interview, Jenifer McShane, June 6, 2022)*

While it's important to start the right way with communities, it's also important to know how to exit the right way.

For Emily Wanja, one of the lead producers for the film *Thank You For The Rain*, the focus on sustainability is too often an issue that producers wait until the end to think about. However, Emily said it is crucial for sustainability to be a focus of impact campaigns from their inception, and one helpful tool in this pursuit is planning for exit strategies from the very beginning and acknowledging that the teams and organizations who will be best placed to take the conversations, commitments and work forward after screenings are the community organizations (not necessarily the filmmakers and impact teams). Emily said it's always important to ask:

How are we going to exit? How are we going to bring this campaign to a close to the point that all this work we've been doing with the community doesn't go to waste. And that they're empowered and they are strong enough on their own to just carry on. And so we said, of everything else that we need to do right now is to work towards that. *(Original interview, Emily Wanja, 22 April 2022).*

For Emily and her team this meant helping the local community-based organization at the heart of their campaign to strengthen their framework for continuing their climate justice-oriented work and helping to position them for better access to financial resources, other partnerships, and whatever else they might need.



So we transformed it into a co-operative together with the community. Because we had to check if that's something they would like. And it turns out they had actually been wanting that for a long time. And so it was kind of trying to figure out what structures do we need to put in place for the work to carry on. And what needs to carry on also, it's not everything. Some things just need to come to an end and that's that. *(Original interview, Emily Wanja, 22 April 2022).*



SECTION SIX

ON OVERCOMING KEY BARRIERS TO ENGAGEMENT/SUCCESS

Credit: Softie

This section provides an overview of key challenges in doing impact work with documentaries, along with a discussion of some industry barriers/trends that interview participants feel are standing in the way of engagement strategies and impact work being as successful as they could be.

The industry needs to understand that traditional documentary audiences are not always the audiences that need to be mobilized for collective change and movement building; in the United States, for instance, the “community screening” is rarely something that “the community” attends

Tracy Sturdivant said that a frequent challenge that comes up within the documentary impact field is the industry’s slow realization that their typical audiences are not always the same communities that need to be mobilized in order for campaigns to achieve their change goals. For instance, in the case of gun violence, the issue at the core of the film *When Claude Got Shot*, the typical documentary audience was one that already knew gun violence was a problem; they weren’t the group that needed to see the documentary. This issue connects with the idea behind “community screenings”; just because it’s called a ‘community screening’ doesn’t mean ‘the community’ will be there. And in many communities, documentary screenings are not on the agenda. The sooner that the impact field can come to this realization, the better.



I would say that of the barriers that exist, there's this tension between wanting people to see the film and wanting to have impact. The people who want to watch a two part docuseries, right, are not the people who need to be organized. It's just not, right? **The people who are going to watch a documentary film about gun violence are not the people who are committing gun violence. Let's be honest about that.** And I feel like there's this disconnect about that? Or like, "Let's go do a community screening." They're not coming to the community screening y'all. And we're not clear eyed about that.

So then for me it goes, what does it mean about audience engagement, about audience segmentation and engagement, and really getting folks to understand it. Because it's like, "We've done this this way and we've got our list of [screening venues]." But Coke doesn't just sell new Coke products to everybody. Where they put out their marketing materials is very intentional. We have to do the same thing. And I would say the same thing for filmmakers in terms of there's an impact you say you want, and then there's the stuff that you're comfortable doing. And the distinction between that, which also then means how we're able to utilize the film content to tell the story of the film when we know that people aren't going to watch 60, 90, 120 minutes of content, right? That means snackable bite size pieces on just social media, our breadcrumbs to want to entice people to engage in the conversation and in the content. And both the desire to do that, the understanding of how that works and the money to do it is a really important piece of being able to market a film and its respective impact campaign. And having funders who understand that. **And having filmmakers who understand that because filmmakers are artists....** So the culture of dealing with the new normal around how people capture ideas, right, or shape their imagination about what's possible. It's not always going to be in long form.
(Original interview, Tracy Sturdivant, 3 May 2022)

Don't give-in to bullying threats of censorship; there are communities of filmmakers that have overcome such threats before you.

Government censorship is a problem faced by many filmmakers and impact producers across countries. But the experiences and lessons offered by Khushboo Ranka, the filmmaker behind the documentary *An Insignificant Man*, and how her team was able to get around censorship struggles in India, provides a wealth of encouragement and tools for filmmakers and impact producers.

“The thing is, censorship [in India], it's very smartly packaged, because it's called the Censor Board or whatever. But actually, what they do is that they make it inconvenient for stories that challenge powerful narratives. They make it difficult. (Original interview, Khushboo Ranka, 18 April 2022)”

Khushboo says that one of the biggest challenges posed by censorship battles is not just the legal hoops that government and other powerful entities impose, it is the energy they often pull from filmmakers at the very moment – at the end of a film process – where they are often already drained. It's facing this intimidation and challenge at seemingly the worst possible moment that can cause filmmakers to give in. And it took Khushboo and her team about seven months to get past the censorship attempts. But Khushboo says that it's often all part of the censorship strategy and filmmakers should be prepared for it, and to understand that the threat of censorship is often more an act of posturing than anything else. There are resources and organizations around the world that are available to help filmmakers through these struggles if they confront them, and so filmmakers should know that precedent – in some countries – is on their side. And the sooner that filmmakers can understand the posturing game then the more likely they will be to overcome it.

“It was difficult, because you're really exhausted after you make a film, and then you realize you have to do this whole thing You have to keep the optics in favor of yourself, right?... So you have to really sustain energy to be able to do that. I think the main thing that the Censor Board does is that it intimidates filmmakers... It discourages them. It says that we are going to not only make it inconvenient, but also potentially threatening for you. And so, we were also threatened actually. And the advice there is to actually... It's more posturing than real threat, first of all.”

I mean, I'm not just saying this based on my film. If you look at the number of, not just documentaries, but fiction and nonfiction that have had censorship trouble, and then they've fought it in courts, more films have succeeded than not succeeded. In fact, if I'm not wrong, all the films have succeeded. No film has been entirely banned [in India]. So the lesson there is that, don't give into the bullying of the powers to be, completely.

And actually, if you fight it out, you will come out on the other side. Of course, there are certain number of funds and resources needed. But actually, even if I was to talk about our case, the lawyer who worked with us worked pro-bono. So there are people out there who are fighting the good fight. If you just pull through a little bit, you'll come out on the other side. (Original interview, Khushboo, 18 April 2022)”

R ratings can be used to limit audience reach, but documentaries have successfully fought for lower rating.

One censorship-related strategy can be the use of “R” ratings to limit the audience reach of documentaries. But interview participants said that there is a history of documentaries who have successfully battled for these ratings to be reduced, and so filmmakers should not be surprised or discouraged if this happens. For instance, Miriam Ayoo and her team was able to overcome an effort meant to suppress the reach of their film, by lowering the rating for their film, *Softie*, from a “R” rating to “PG-13” in Kenya.

Break through perceived ‘issue fatigue’ – when people feel like they already understand a topic because they’ve seen a documentary focused on that issue before – by keeping the attention on the unique and ‘local’ aspects of the film/issue.

Several participants raised the perception that some audiences are experiencing “issue fatigue” around certain issues, given the rise of social-issue documentaries, especially through streaming platforms. As a result, some audiences feel like they ‘heard that story’ before, even if they haven’t.

For Julia Hoppock, an impact producer for the film *Social Dilemma*, their challenge was not only breaking

There’s so much good content out there. How do you get people to care about your issue? And one thing to think about is starting small and staying local. You might find that audience that cares about the problem that you’re portraying in your film, and really work with them. Sometimes just working in a small scale is incredibly effective. If you can get the right people that care about your issue, that are actually going to take action to move solutions forward, sometimes just scaling it smaller actually is incredibly effective. And then, that progress just builds people to see what’s happening.

(Original Interview, Julia Hoppock, July 8, 2022)

SECTION SEVEN

ON FUNDING (AND DISTRIBUTION)

Credit: In My Blood It Runs

The range of funders, across the films and impact campaigns engaged in this research, varied dramatically. They included sources such as: Good Pitch, film festivals (Sundance and IDA especially), Chicken and Egg, foundations, and funds (including Perspective, Ford, Firelight, and others.), kick-starter/crowdsourcing efforts, national and global NGOs, and a myriad of civil society organizations and funders across themes.

For a couple of the films, the sole funder of the impact campaign was the director – who was independently wealthy and so capable of funding all of the impact work (which the interview participants said isn't a replicable model, but is also not entirely rare).

The majority of the interview participants shared a perception that it is more difficult to get funding today than it was a decade ago – even with new funders entering the space. Several filmmakers shared the perception that this is because impact funders are primarily only interested in the “big players” and so they are funding grants that are going to the same small group of producers and filmmakers again and again. And while some new groups have started providing grants for new filmmakers and those from underrepresented communities, interview participants argued that these grants are often quite small (around \$5,000) and not enough to reasonably fund an entire impact campaign.

Further concern was raised about the concentration of funding sources among individual private donors – which means that a large portion of the documentaries that are able to find funding can only do so because they are in-line with the personal interests/perspectives/comfort-levels of elite groups. This raises several concerns for interview participants, who also say that funding relationships continue to favor the privileged filmmakers who have easier access and contacts among wealthy communities. As one filmmaker put it:

Independent non-fiction filmmaking is so reliant on funding from wealthy, individual, private donors. And those people have perspectives and biases and they have things that they do and don't want us to be talking about. And I think that has an effect on the stories that get told and the stories that don't get told. And as long as there's not much government support, it's going to be that way. And I think that also re-entrenches systems of privilege, because I, as a white man am more likely to have contacts who are closer to people with wealth than somebody who comes from an oppressed community. And so it makes it easier for me to get into filmmaking and to be able to fund that filmmaking. And I think there's at least more awareness of that reality. I think we're maybe beginning to make steps from awareness to trying to change the systems, but it's still all the wealthy white folks who feel comfortable talking to me because they can relate to me in a way that they maybe don't for with people of color. And so that just makes it all the more hard for folks to break through and get the funding they need. So to me, that's huge. The people that maybe have great access to great stories don't necessarily have great access to the funding to be able to bring them to a wide audience. And I think that the streaming model is breaking and is more and more just about replicating the old studio model. And so it's, there's not that many opportunities for independent filmmakers to really break through and reach a wide audience. *(Original Interview, Adam Mazo)*

This sentiment was echoed by Stephanie Palumbo, outreach director on the film *Armor of Light*:

I think a lot of distributors, their goals are really opposite of what transformative social change means. They might want as many people to see the film as possible, but they don't necessarily want to invest into the film being used as a tool for change if it's something controversial. I think that there are these gatekeepers and barriers in the industry that people are recognizing and trying to change. But, I think there needs to be money to pay impact producers and to pay protagonists and to pay for this work to happen. *(Stephanie Palumbo, Original Interview, July 11, 2022)*

Several filmmakers also raised concerns around media consolidation and increasing distributor power; many participants worry that commercial documentary players are, at best, not interested in the social impact space, and, at worst, hostile to it. There are further concerns that many films are losing impact rights to major distributors or simply not finding support because of the gatekeeping powers of major streaming platforms. These perspectives on funding and distributors varied so drastically across the interview participants that future research – targeted exclusively on the impact of funding in the making of documentaries – would be helpful in generating a clearer picture of the ecosystem and role that funding is playing in shaping the field of documentary and documentary-related social impact work.

Ultimately, the topic of funding was a cross-cutting issue that came up in nearly every category of questions and findings covered above. For that reason, insights related to funding are interwoven throughout this report and they are anchored to the questions/themes in which they were raised by participants.









SECTION EIGHT

ON WHAT THE FIELD NEEDS: SOME ADDITIONAL REFLECTIONS

Credit: Softie (community screening)

This section includes a broad collection of additional perspectives shared by multiple filmmakers and producers during the interviews -- outside of the main scope of questions raised by the research -- on what they feel their field of social impact needs, with a special eye to issues and trends that they feel are not receiving the attention and sense of urgency they deserve.














-  ***The field needs more spaces for community building within the field of social impact in documentaries*** – including opportunities for impact producers to come together for field strengthening, experience sharing and support.
-  ***The field needs more examples of impact campaigns being led by people from impacted communities.*** There are too many examples of the “parachute model” of impact producing, where well-intentioned producers parachute into a community to leave shortly after the screening is over. Local knowledge and expertise in a local community should be valued alongside previous impact producing experience.
-  ***The field needs more diverse funding sources and more funders who aren't solely interested in stories that are directly aligned with their organizational goals.*** Western funding often tries to bend stories for western audiences, and it is limiting the scope of stories and perspectives that are being offered (especially in non-Western communities).
-  ***The field needs to have more films translated into local languages. This doesn't happen enough, but more resources should be dedicated to this.***
-  ***The field needs more initiatives and funding grants aimed at supporting filmmakers and producers who are not economically advantaged.*** Filmmakers with money have significant advantages over producers and filmmakers who need to raise funds. And participants worry that this isn't a small-scale problem, it is characteristic of a wider trend – where it's becoming harder to raise funds for documentary-centered impact work, creating an economic barrier of entry that advantages producers and filmmakers who are independently wealthy.
-  ***The field might need a high-level award. While there are numerous industry awards for exemplary films, there aren't many (or any) such awards for exemplary impact campaigns focused on on-the-ground transformative change (at least not at the \$50,000+ level).***



APPENDIX A

METHOD: IDENTIFYING AND SELECTING FILMS

- 1 For the first step, we compiled lists of docs from industry reports and well-known sources. This included: scraping all of the docs listed on the Doc Society's Impact Guide list (<https://impactguide.org/library/>); adding campaigns from past CMSI reports/studies and other industry reports (including Working Films). and sending a call-out on the GIPA list serve for any impact campaigns they through would be relevant (generating about 50 additional films). Duplicates were then removed, and this resulted in a list of about **100** films/campaigns.
- 2 As a next step, we convened/consulted with an Advisory Committee of 8 industry leaders in the field of documentary impact. From their suggestions, we identified an additional 20 films/campaigns. This resulted in a list of about **120** films/campaigns.
- 3 In an effort to ensure we are also considering potentially overlooked films produced by BIPOC and other creators -- which have made substantial/meaningful impact, though they might not be as well-known/publicized or well-funded through a robust impact report -- we included a systematic sampling of docs/impact campaigns from key organizations/funders. This resulted in about 100 additional films/campaigns being added, and a full list of **221** films/impact campaigns. The organizational websites and grantee lists that were consulted for this third round of sampling included:

-  Firelight Media
-  Women Make Movies
-  Black Public Media
-  Latino Public Broadcasting
-  Vision Maker Media
-  CAAM
-  Pacific Islanders In Communication
-  Multicultural Alliance
-  Picture Motion
-  POV
-  Together Films
-  Fledgling Fund
-  Impact Partners



[Short-listing of films/campaigns]

- 4 Every documentary that was recommended by the GIPA listserve was selected, since it was presumably recommended by impact producers in the field. This resulted in a list of about **50** films/campaigns.
- 5 After a review of the randomly-sampled, aggregated list of 221 films/impact campaigns, every documentary that was recommended by the Advisory Committee of industry leaders was also selected. This resulted in a list of **20** more films/campaigns – which were identified by the Advisory Committee as reflecting a diverse universe of filmmakers/impact producers, diversity in funders, range of notoriety (ie. inclusive of lesser well-known films/campaigns) and a mix of community-vs-globally-oriented campaigns.
- 6 From this list of **70** films/campaigns, **19** were selected for a first round of interviews. These films reflect the “must include” films as identified by the Committee, along with a sample weighted for diversity. The filmmaker and/or impact producer for each of these films responded to the research invitation with availability for an interview.
- 7 After the first 19 interviews, we conduct a preliminary analysis of any trends among the first group of films – with special attention given to ‘who funded it’ and whether these were ‘well known’ or already ‘well documented’ campaigns. Adjustments were made to the interview guide and film team’s representing the remaining 51 films were emailed with interview invitations. The remaining **31** interviews were then completed (note: filmmakers for 31 of the 50 films responded to our invitations with availability), resulting in a total interview population of **50 films**.



APPENDIX B

INTERVIEW GUIDE QUESTIONS

Investigating Documentary's Social Influence and Impact in the Participatory Media Age *Draft Interview Guide*

Overarching Research Question(s)

- 1 Beyond the discussed "obvious" elements within impact producers and documentary filmmakers as a community of practice, how are documentary social impact campaigns successful, and what are the core elements and practices that make them so (and, in the converse, what is not successful)?
- 2 what does "success" mean in the context of social impact campaign work?

Overarching objective of research

This research aims to go beyond the mythos of documentary engagement work and the traditional impact report. It aims to provide the field with honest reflections and tangible learnings that can help identify/address troubling trends and barriers, and lift-up exemplary work and practices that deserve greater recognition (and that can serve as guideposts for future engagement work).

Requests BEFORE interview

- 1 Can you share any reports of your campaign's impact with us?
 - Ask if they have any internal impact reports (ie. for funders) that are unpublished but useful to learn from
 - Also ask if they have any strategy or planning documents they can share
- 2 Permission to audio record confirmation and statement on anonymity
- 3 Provide a list of funders, if possible (request for them to delineate between film and impact campaign funding).
- 4 Did the filmmaker work with an explicit impact producer and/or impact production company? Did the filmmakers or others (impact producer) develop and facilitate a formal parallel social impact campaign?
- 5 Define your role in documentary today. (quick reference to major function/title)
- 6 What was your role in this film and/or its campaign? (brief overview sentence)



Exploring design and extent of co-creation

(Lit anchors: boundary work; documentary studies; media studies; participatory communication; post-humanitarian communication; co-creation; docs/media for social change; diversity/representation)

(References: Borum Chattoo, 2020; Carlson, 2019; Chouliaraki, 2013; Cizek, K, et al., 2019; Driver, 2020;; Gans, 1979; Manyozo, 2012; Powell, et al., 1991; Tufte & Gumucio-Dagron, 2006; White, 2020)

Thank you for sharing feedback on all the background questions we sent by email. That was very helpful and it will allow us to dive into a discussion here. We want to go beyond the typical impact report with this study. We are interested in learning from the real experiences of documentary impact campaigns and what others can learn from them. And so the next few questions we want to ask are in this spirit.

- 1 What was the campaign designed to do (in terms of social change), and who was it designed to help? What was the change you were going for here?
 - Probe to explore whether they were ‘mainly’ interested in change at a ‘global’ or more ‘targeted’ audience level?
- 2 Can you help me understand the various people and roles (i.e. the ecology) of your impact campaign? Probe to identify:
 - the funders...
 - the protagonist(s) represented ...
 - the target communities ...
 - the impact leads/team...
 - the local and national partners?...
 - the distributor...
 - *any other actors not listed above?...

Note: Look to see if this is reflected in the impact report they shared ahead of call. If so, then use questions to confirm/expand upon the universe in that document.

- 3 Now, can you walk me through how this collection of actors designed or influenced this impact campaign? (please walk us through from the beginning)
 - **(important: probe for how/if the *protagonists* were involved in design)**
3A. What group or partner or distributor or funder – that we just talked about (in Question 2)– do you feel had the greatest influence over the impact campaign’s design and execution?
 - **3A (alternate wording):** How would you describe the different contributions from this collection of actors or partners, and the role that these contributions played in the actual campaign?
 - *(probe for: how they decided their way “into” talking about the issue(s) of the film)*

Exploring success, 'wellness', approaches/influences/barriers of engagement, and sustainability/longevity of impact

(Lit anchors: Wellness, Engagement, Technology; Narrative Persuasion: Entertainment Value, Narrative Transportation, Emotion, Character Involvement/Identification; Public Sphere, Civic Dialogue & Civic Practice; Trust & Credibility; Media Representation and Diversity, media/comm for social change; media impact; media activism; social movements)

(References include: Barney 2004; Bennett and Segerberg, 2013; Borum Chattoo, 2020; CMSI, 2021; Coskuntuncel, 2020; Hesmondhalgh 2013; Jenkins, 2016; Nash & Corner, 2016; POV staff, 2018; Smith, SL, et al, 2019; Solórzano & Tara J. Yosso, 2002; Tufekci, 2014)

Next, we want to drill a little deeper into how you thought about 'success' in this campaign, and whether you feel the campaign achieved its original goals.

- 4 **On Success** – What outcomes did you **hope to achieve** through this impact campaign?
 - 4A. Did all of the actors you shared previously (i.e. the filmmaker, community represented, funder, impact team, etc.) share this goal, as far as you know?
 - 4B. To what extent do you feel this goal was achieved? Or did the film and campaign have some valuable outcomes that you didn't expect? [Probe: like what?] (*Note for 4B: Let them know and contemplate how the work was meaningful beyond stated or imagined goals at the beginning.*)
 - 4C. Did they ever pivot their approach from their initial outcome goals?
If so, why? (because of world events, new partners, available resources, team expertise, etc)
 - *4D. How did you determine success/whether you achieved this goal?
(Probe for: How they thought of success "for whom?" – in terms of through the eyes of the community, vs the filmmaker vs the funder, etc.. ?)

- 5 What were some **barriers** to this engagement work being as successful as it could be?
 - (probe beyond finances, to include barriers to engagement strategies working well and – more generally – to a 'successful' effort)
 - (probe beyond short term outcomes to also explore barriers to long-term success)

- 6 In what ways did you think about how the people and communities depicted in the film might be impacted, if you did –either positively and negatively – from their participation in the film and/or your impact campaign? How so?
 - 6A. *If yes* – Why did you think to do this?
 - 6B. *If no/not really* – why not? How might you have approached doing this, if you could do it again?
 - *6C. Depending on the content: Were the participants/protagonists part of the impact campaign at any point? If so, could you describe their involvement?
 - *6D. What was your approach to compensation for these participants? (no 'right' or 'wrong' answer here, but we are interested in exploring how you think about these things)
 - 6E. How would you describe your relationship with the community/ies at the heart of your film/impact campaign? (i.e. are you from this community? Do you see yourself as an ally of this community? Are you an activist on an issue that affects this community).



- 7 *If you can think about ‘success’ from the perspective of the participants/protagonists of the film, do you think they would consider the film and its impact campaign a successful effort? Why or why not?
- 7A. Did you or the filmmakers (or impact producers) stay in touch or get in touch with the people and/or communities depicted in the film after the impact campaign?
 - 7B. ****Must ask/If applicable** – Can you share the contact information of a protagonist from the film who we might be able to speak with?
- 8 Do you put measures in place to create some longevity for the campaign, to help ensure that its impact would continue after its screening run? How so? What are the challenges in doing this effectively, you think?
- 8A. Did the coalition or momentum that you built through this campaign last? Why or why not?

Moving to some of the specific engagement strategies you used, we want to better understand what worked – and what didn’t – in terms of engagement, and where things could work better.

- 9 Overall, what engagement strategies –online or offline – do you think worked best and which did not work as well?

Probe for:

1. What strategies worked well – with ***engaging grassroots communities in dialogue*** around the issues of a film?
2. What strategies worked well – with ***engaging large audiences*** around the issues of a film?
3. What strategies worked well – with ***driving communities toward a common goal or action?***
4. What strategies worked well – with ***changing a community’s perceptions/ attitudes/behaviors/beliefs about something?***
5. What strategies worked well – with ***community building?***
6. What strategies worked well – with ***healing and/or reconciliation?***
7. What strategies worked well – with ***building partnerships/coalitions?***
8. What strategies worked well – with ***changing policy or larger advocacy-based goals around an issue?***
9. What strategies worked well – with _____ ***Other goal?***

*9A. What other general lessons, strategies, or experiences from this impact campaign do you think might be most valuable for others in this field to know about?

- 10 How did you get **funding** for this impact campaign? And how did this influence your engagement strategies in any way?

(Probe for: resources available to the campaigns and *fundraising* (i.e. the work it takes for someone on the film team to raise the money for the social impact work))

- 10A. When did fundraising for the impact campaign begin? Can you explain how the fundraising process went?
- 10B. How did ***award goals and marketing strategies*** intersect or distract from your engagement goals?



- 11 Were considerations around **technology** part of the engagement design of this campaign?
- 11A. What motivated these decisions around technology – was it out of *purpose* (i.e. because you felt that some platforms or modes of technology could better achieve your goals) or out of *necessity* (i.e. the pandemic)
 - 11B. How effective do you feel these technologies were in helping you to achieve your goals of community engagement and reach?

Explore harmful trends/discussions that are often missing/overlooked in research...

Finally, we have a couple questions focused on larger trends that are too often overlooked...

- 12 Generally speaking, what do you see as the big challenges or opportunities in documentary engagement work right now?
- 12A. Have you seen or experienced cases in which organizations, distributors, or individuals are using documentary's potential for impact in ways that you feel are harmful (even antithetical) to social justice missions?
 - 12B. *If yes (and if this follow-up makes sense to ask)* – How do you think this could be prevented from happening again?
- 13 Some participants have raised preparing for '**trauma**' as an emerging area of importance for doc impact work – is something that came up during this impact campaign or your engagement work more broadly?
- 13A. How do you make sure engagements are not re-traumatizing? (note: the focus here is in exploring how impact producers are preparing for engagements that tackle sensitive social issues. For instance, how are producers ensuring that conversations they lead around racial violence are also promoting racial healing/justice outcomes, for instance, and that they don't force participants to relive traumas for no good reason, or in an environment where facilitators aren't trained in how to respond/understand trauma).
 - 13B. Do you know of any good resources out there related to trauma and creating safe-spaces for engagements for doc engagements? (link with question 16 – make sure to probe beyond the participants to also include the people working on the campaign)
 - 13C. How do you navigate safety and security issues for the impact and filmmaker team, in addition to the protagonists/participants in the film?
- 14 *Censorship*– Did you face any struggles related to censorship? If so, how did you navigate these challenges or how would you recommend others to navigate the struggles with censorship?
- Note: especially relevant for 'An Insignificant Man'
- 15 **Forward looking** – Looking forward through a more hopeful lens, what trends, opportunities or possibilities are you excited or optimistic about for the field?

On wellness of producers

- 16 Were considerations given to the wellness of the impact producers (and/or filmmakers) who worked on this campaign?

Final questions

- 17 How can this research support your work?
- 18 Is there anything else you would like to share or that you think would be helpful for us to know?
- 18A. (This can be an email follow-up): Is there another doc impact campaign that you feel is a great example of “good” documentary impact work and that we should consider involving in this research?

[Turn off Audio Recorder]

End of Interview

Follow-up: The recorder is off, but if there is anything you would like to share with us off-the-record then please feel free.

Thank you for sharing so much of your time and experience with us!

We will be producing a report at the end of this research, and we will be in touch with updates on its progress and outcomes moving forward.





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