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DOCUMENTARY POWER
RESEARCH INSTITUTE

MAKING SOCIAL CHANGE WITH DOCUMENTARIES: What Works, Why and How?: A Case Study



EL TEMA

A Different Approach to Climate
Documentary and Impact Work

SPRING 2024

“We tried to make these big screenings with a lot of people, but we realized that it was not the best strategy for us...”

Montserrat Ledezma
Impact Team
El Tema



PERSPECTIVE
FUND

A BRIEF INTRODUCTION

As both an outcome and a set of activities, making social impact through documentary storytelling has changed enormously over the past decade. 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 major disruptions made by rising social movements and the arrival of new funding powers, distributors, and engagement platforms. At such a juncture, an initiative from the Center for Media & Social Impact (CMSI) raises 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 case study, part of a new series of documentary impact case studies being produced by CMSI in 2023, centers this pursuit by engaging with the film *EL TEMA*, selected by an advisory committee of eight leading filmmakers and impact producers, as providing a useful perspective into the features, best practices, tools, lessons, and experiences of an exemplary impact campaign within the documentary field today. This case study is based on multiple conversations with key members of the film and impact campaign team around their experiences working on this impact campaign.

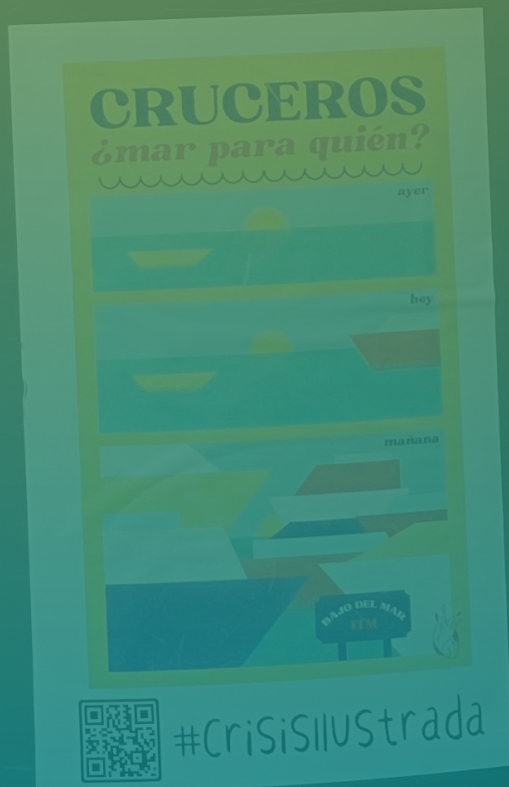
This report is one of five case studies published by the Documentary Power Research Institute at the Center for Media & Social Impact. For more information on other case studies, resources and reports being produced by this research please visit:

cmsimpact.org/program/documentary-power-research-institute

* F=Following several successful existing working groups across the documentary ecology, this study began by establishing a collaborative working group of eight people. 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 met at core junctures in the research program to shape the design and implementation of this work and to select this case study. More information on this advisory group can be found here: <https://cmsimpact.org/documentary-power-research-institute-team>

SECTIONS OF CASE STUDY

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Learnings and process of how it was created



THE FILM



The Film: *El Tema*

EL TEMA is a six-episode, documentary web series that explores different aspects of the climate crisis in Mexico through the stories and experiences of several different players (including environmental and human rights advocates, indigenous communities, local organizations). Each episode focuses on a different issue and the different local strategies and work related to them, including: Water, in Chihuahua; Air, in Monterrey; Carbon, in Coahuila; Oceans, in Cozumel; Energy, in Tabasco; and Food, in Chapala.

Credits

ORIGINAL IDEA:

Gael García Bernal and Pablo Montaña Beckmann

DIRECTOR:

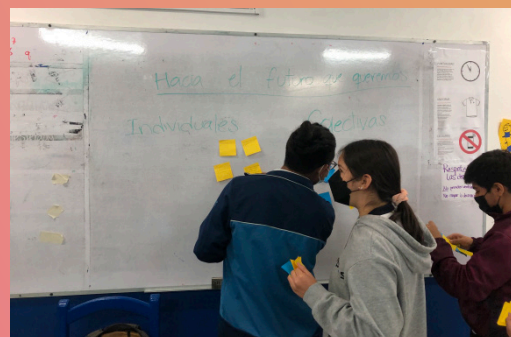
Santiago Maza

SCREENPLAY:

Pablo Montaña Beckmann

PRODUCERS:

Gael García Bernal, Magali Rocha Donnadieu, Pablo Montaña and Mariana Rodríguez Cabarga



THE IMPACT CAMPAIGN

(A BRIEF SUMMARY)

EL TEMA is a different approach to documentary and impact; not only does it tackle the climate crisis in Mexico in a six-part docuseries, but it also develops six different impact campaigns tailored to six issues and six regions in collaboration with local communities.

Released on YouTube “with the intention to having it completely free of access for everybody,” as one of the filmmakers Pablo Montaña said during our interview, it’s a platform they “consider to be as open as it can get, and with quality as well, in order for it to be projected and screened in different places.”

Each episode portrays a different theme: *Water*, in Chihuahua; *Air*, in Monterrey; *Carbon*, in Coahuila; *Oceans*, in Cozumel; *Energy*, in Tabasco; and *Food*, in Chapala. The strategies behind the series and impact campaign were largely the result of a collaboration with 25 organizations that they called “the climate resistance network.” The filmmakers picked six locations to talk about six different issues related to the climate crisis. As they wanted to “show the reality of the climate crisis in Mexico through its territories and zooming into different subjects—a very dynamic, very flexible format,” the tailored impact campaigns varied from organizing public screenings to collecting money to “bribe the Ministry of Environment,” to creating orchards with local communities and activists.

After creating the climate resistance network and receiving the initial funding from the Climate Story Fund Society, the filmmakers organized “climate narrative workshops” with activists, partner organizations, and artists around each theme. The ideas and strategies for each impact campaign were, for the most part, developed as a result of these workshops. But the funding was still not enough to compensate their extensive and multiple impact campaigns. “It was very challenging,” said Montserrat Ledezma, an impact producer and project coordinator of Conexiones Climáticas; “we practically fundraised the funds for specific activities.” While funding was emphasized as a challenge by multiple members of the film and impact team, they were ultimately able to piece together enough finances to support multiple strategies aimed at moving the needle around climate crisis awareness and mobilization in Mexico. This report shares some of their learnings from this work.



KEY IMPACT ACTIVITIES AND ENGAGEMENT STRATEGIES

1

WATER, IN CHIHUAHUA

Narrative shift of the protection of the hillsides and strengthening of local allies (projections, activities in the hillsides, illustration campaigns).

2

AIR, IN MONTERREY

Mobilization of mother's collective and online pressure against the refinery of Cadereyta.

3

CARBON, IN COAHUILA

School gardens, solar panels, murals, and school guides for a just energy transition.

4

OCEANS, IN COZUMEL AND LA PAZ

Campaign Sobornemos Semarnat against cruise ports.

5

ENERGY, IN TABASCO








Capacity building of communities resisting oil companies in the ecological reserve of Rio Playa.

6




FOOD, IN JALISCO

Strengthening and amplification of agroecological movement of El Limon, Jalisco. School gardens in 5 schools, and screenings at public spaces.

Key Players/Advisors on The Impact Team:

-  Pablo Montaña - Impact producer and coordinator of Conexiones Climáticas
-  Montserrat Ledezma - Project coordinator of Conexiones Climáticas
-  Fabiola Quinero - Communication Coordinator for La Corriente del Golfo
-  Mariana Rodríguez - Communication Coordinator of Conexiones Climáticas
-  Juan Manuel Orozco - Project officer
-  Ana Lilia Martínez - Administrator
-  Cassandra Palacios- Collaborator

Key Partners:

-  Doc Society
-  Heinrich Böll Stiftung Mexico
-  Iniciativa Climática de México



Rough Timeline of the Film and Campaign

- **December 2020** – January 2021: Production of the documentary series
- **Jan – Apr 2021**: Post-production
- **Apr 2021**: Release of the series and kickoff of the impact campaign
- **Apr-May 2021**: Virtual workshops with the communities from the territories of each episode (6 in total)
- **Aug 2021**: First 2 workshops with communities in their territories (Coahuila and Monterrey), capacity building of youth community members.
- **Sep-Dec 2021**: Workshops with the remaining communities (Jalisco, Playa del Carmen, Cozumel, Tabasco, and La Paz)
- **Oct 2021**: Kick-off of community screenings with local communities as implementers.
- **Oct 2021**: Online activation and on-ground mobilization against PEMEX.
- **Dec 2021**: **EL TEMA** screening tour in Jalisco
- **Feb 2022**: Launch of campaign against cruise ports in Cozumel and La Paz, screenings, activations, and online pressure
- **Mar 2022**: End of anti-cruise ports campaign
- **Apr 2022**: Victory in La Paz, the project was canceled.
- **May 2022**: Study guides for **EL TEMA** are complete and shared with different schools across the country.
- **May 2022**: The first school garden is built in Barroterán Coahuila along with its mural.
- **June 2022**: Production of **EL TEMA 2**



THE IMPACT CAMPAIGN

Learnings and process of how it was created



This section provides a deep-dive into some of the specific impact activities, lessons, perspectives and strategies shared by members of the **EL TEMA** impact team around their six-part docuseries and six accompanying impact campaigns.



The film team chose an **issue-based** approach to each documentary because it allowed the short films to be used more effectively by communities and organizations. “It is a very dynamic, very flexible format,” said Montaña about the use of short films, “they’re easier to be used with classes or school work and to establish conversations.”

Similarly, their **region-based** approach also allowed the filmmakers to create both national and local networks and coalitions for each episode. One of the central coalition building efforts of the film team centered around building the Climate Resistance Network, a collaboration of twenty-five organizations with shared interest and work around climate crisis issues in Mexico.

Montaña said the core thinking and planning of the docuseries’ impact campaigns were born out of this coalition building effort: “[T]his first network was the one that we designed in order to carry that communication and to carry the release campaign. And I guess that would be the first moment when we started thinking of the impact campaign.” The film and impact team then applied for the Climate Story Fund Society—“We applied, we won that grant. And to be honest, that took us to a whole different level.” With the funding and the network of local and national institutions, community leaders, and artists, they started holding brainstorming meetings that they called Climate Narrative Workshops.

With these workshops, they went to each region they identified and talked to local communities and activists to understand how each region was experiencing the climate crisis differently, and to learn who to interview and feature in the episodes: “Who should we interview? Who do we need to talk to? What story do we need to tell if we want to talk about the oceans and climate change and we want to talk about it in Cozumel? ‘Oh, so you need to talk with this fisherman, you need to talk with this specialist. You need to talk with her.’” Montaña said that that’s how they met and identified their protagonists in each episode: “They basically told us what to film and that made it very easy for them to use a film and to feel proud of being in that film. And then to participate of the campaigns made also a lot of sense.”

Changing minds and structures, and building communities

Another member of the impact team, Montserrat Ledezma, said that from the beginning, they set three main goals: (1) change attitudes and beliefs in the communities where El Tema was recorded, (2) change structures around the climate crisis, and (3) build communities. Ledezma explained that they planned screening events, with pre- and post- screening activities, around their first goal, about changing minds:



We tried to make these big screenings with a lot of people, but we realized that it was not the best strategy for us... We did this screening tour in Calisco where we screened in seven cities. So it was a lot of people... but we weren’t able to work with them later or to do something else with them. And also ... it was really, really expensive. It was really expensive and the impact wasn’t expected. So we changed the strategy and we started to make small screenings with local organizations in the six cities where we recorded, where El Tema was recorded. So that was the strategy that we changed.



Since the campaign began, they organized about 98 screenings with local organizations across the six cities associated with the docuseries.

For their “changing the structures” goal, Ledezma explained that they wanted to first reach young people in the country in order to build movements and create lasting changes. “Change structures were focused with universities . . . we were thinking about the same strategy that actually the oil companies used in the seventies. So it was [designed to] introduce the topic with students and try to change structures [starting] from the universities.”

The film and impact team’s efforts around building communities were among the most complex of their goals. Ledezma explained how they combined workshops, screenings, call to action items, and concrete, material works such as planting an orchard or installing solar panels for this goal. The filmmakers explained that their expected outcomes were closely related to their goals. According to Ledezma, “the main point” was “to put the climate crisis at the center” of the public discourse in order to create cooperation between networks of organizations working on climate, and to amplify the efforts of local organizations” within these networks.

Coalition building

Montaño said their workshops not only helped them to come up with concrete impact campaign strategies but they also helped them to understand the issues, roles, and parties at the local level better.

“This Climate Narrative Workshop allowed us to first understand what’s actually the issue? What are the stakeholders? Who are we fighting here? Who’s doing what? What are our allies and our baseline organizations doing in this territory? Why is it important? How can we help them? How can climate narrative tools provide some advantage for them?”

The film team then invited more people and groups to their network at the local level; as the links between each organization in the Climate Resistance Network and each issue in the docuseries became clearer, local impact strategies emerged for each region.

“It was a bit of madness because we would end up having six different open fronts,” said Montaño. “It started to be like juggling all the time . . . we have this thing developing in Chihuahua, oh, but those guys in Cozumel in the coast are telling us that this is happening. So we started having cleared out what does the climate action means in Chihuahua? The climate struggle in Monterey?”

While turning the Climate Resistance Network into Climate Narrative Workshops, they used the snowball method in which the filmmakers started meeting with people and organizations within their own network and then keep meeting with and adding local groups those initial people and organizations recommended. “What I did is that I just talked to a bunch of people that I know. First with people that they know, who are they? And many of them are friends of mine or they friends of friends. So we ended up having for instance, people that are small community organizations,” said Montaño, in addition to bigger, national organizations.

After the initial efforts to organize bigger screenings, the filmmakers relied on their local partners and ended up organizing more than 12 relatively small, local screenings in each city they targeted. Montaño explained how they were able to work with and reach more people with this approach; initially they hired a company to organize big screenings, but then instead of paying to the company, they decided that they “could pay the allies to do the screenings and to do it in schools, do it in universities, do it in cycling clubs, etc. And you would get a similar amount of people, but you could have 12 screenings. So, for the money that we spent in one tour of six screenings, we paid for over 50 screenings.”

They released the docuseries a few weeks before the general elections; their “objective was to inject the climate conversation into the political one.” And they initially planned big screenings to start their impact campaigns, but according to Montañó, organizing big screenings didn’t work for them; they were expensive and weren’t ideal for their local approach. “We would put a massive screen, pay for chairs, make a lot of publicity, and end up having 50 people watching the film in different places. And it was very expensive, and it didn’t make any sense.” They also partnered with artists to illustrate their arguments for each issue and its local manifestations. Local artists were part of their climate communication strategies, said Ledezma. Talking about including artists in their workshops, Ledezma said that “it was a good match.”

In addition, effective illustrations and images that communicate different aspects of the climate crisis also came out of these collaborations, said Ledezma. By the time of our interviews, Ledezma said they were still holding workshops and very much in touch with the artists and other participants: “we are very much in touch because we have some meetings maybe twice a month... We are very close and last year we had a meeting in Mexico City we had a workshop just to develop some strategies for this year. So we are working together.”

More on building communities through documentaries

One of the reasons the filmmakers and their climate network developed the specific issue/region approach in their impact strategy is that in addition to raising awareness they wanted to build communities.

Beyond raising awareness and changing mindsets, which are among the more traditional – though still important – goals of documentary impact campaigns and release events, the film team said they were particularly interested in “the development of community” around the issues raised in their docuseries.

As Montañó framed the success of the campaigns, for example, creating an orchard is not the orchard itself, “the success is the fact that the people that are promoting these kinds of techniques in agroecology now portray themselves as part of the climate movement and work along other organizations in the country.”

Another dimension to the community building workshops and efforts was also the development of “call to actions” which aimed to translate some of the specific needs and challenges identified in the series with specific actionable steps and activities that communities could support. In describing one campaign, Ledezma said:

So for example, in Tabasco we [organized] this protest [showing photos from the protest] that it was like, ‘Tabasco underwater Pemex doesn’t love you’; that is the bigger oil company in Mexico. . . This is the house of the president. So it was like kind of try to make this noise to [say] that, ‘Tabasco, you’re really vulnerable.

Ledezma also said that they tried to pick key moments for their call to action parts; for the theme oceans, for example, they went to Cozumel in July when “the ocean was on fire. So we can try to look for these moments just to amplify the conversation and also the work that the local organizations are doing. So that’s the idea.”



Concrete, tailored, local-focused impact activities

"We fought against the idea of making a campaign about the film." According to Montaña, this was the reason behind their elaborate and local-focused impact campaign. "We're more obsessed with understanding the climate struggle in each place and having the people in those places feel that we actually want to support them, not just distribute our film like crazy." Montaña said that as soon as they started their climate narrative workshops and went to the territories they identified for each of the issue centered in the episode, they "started to understand what could be more fixed goals for each one of those places. How does a success story translate for Cozumel, this island in the Caribbean, how to translate [it] for Chihuahua?" And they focused on making the impact campaign to fit and even contribute to the local struggle in each region. Montaña put it this way:

his is in Chihuahua because it's the episode of water. This is in Coahuila because it's the episode of coal. And this is in Cozumel for the episode of oceans. . . We did this mural in Coahuila in this school. We plant an orchard in order to make people understand how they can have a different relationship to their territory other than extraction, extracting coal. They can also produce fruits and vegetables. The episode of EL TEMA from the oceans, it covered the part of how cruise ships affect the environment.

In addition to organizing more than thirty school screenings, Q&As, and community reach, the filmmakers and their climate network also created actual, material works with locals, artists, community organizers, and local communities such as planting an orchard, creating a mural that called into question the impact of cruise ships on the environment, installing solar panel to a school, and even organizing a fundraising effort to "bribe the ministry of environment" as a political statement, a campaign which got a lot of attention including from the media. Montaña said:

We're going to try to bribe them and we're going to bribe them because they're not doing their job. And apparently that's how they move. So let's just get some money in order for them to do what they have to do. And we then created this thermometer of bribe-ability. If we get to 10,000 pesos, can you please read the impact assessment? If we get to 100,000 pesos, please Google the impacts of cruise ships.

After raising about \$1500, the film team filmed themselves trying to deliver the funds to the offices in Mexico City, which also raised additional media attention. The money was then spent hiring lawyers to stop projects harmful to the climate in Cozumel.

The film team also planted another orchard in Coahuila with high school students, and this time they also installed solar panels with the students and locals and talked about alternatives to using coal. “So for instance in Coahuila, the situation is that they are producing massive amounts of coal. There’s coal everywhere and there’s a very strong narrative around coal. So there, the narrative workshop showed us that there is no community organization, there’s no activism happening. In order for them to advance their agenda... we [organized efforts] in the high school of the town, this orchard. And this orchard was a way of projecting in the students that they could also develop different relationships with their territory.” The filmmakers were able to raise enough funding to finance the solar panels in addition to an orchard in a coal town:



We put orchards and at the same time we wanted to finance solar energy. So although it seems very small to put some solar panels in the high school, to do it in this particular region, in the only high school of this town, along an orchard and having them, the students understand and learn about this new technology. We’re attacking a second pillar of the community narrative of the coal region, which is that they produce energy. By showing them that they also have a huge capacity to produce clean energy and solar energy. So we founded an additional fund in order to pay for this solar panels. And we just got just installed this last December. And it feels like a huge transformation for a small town, coal mining town that never, nothing happens, to all of a sudden have an orchard where growing foods and vegetables in a very cold and extreme region. And also having the high school being run 60% by solar energy.



Montaño emphasized that the success of these campaigns was not about creating, for example, the orchard or the solar panels themselves, but “the fact that the people that are promoting these kind of techniques in agroecology now portray themselves as part of the climate movement and work along other organizations in the country. So this is our activity.”

The filmmakers also developed four hours-long school material; “so you can have half of your semester covered with **EL TEMA** films.” This includes guidelines, syllabi, and arranging guest speakers.

Challenges with multiple episode and campaigns

During their tailored-to-local impact campaigns, finding a balance between the filmmakers’ and the local communities’ narratives was one of the main challenges said Ledezma. “I think in the coal region, it was kind of hard to translate the narrative,” he said, and continued that the local organizations are focusing on workers’ and human rights there. “We cannot screen the episode about coal with the miners. It’s kind of hard to demonstrate that coal is not the answer, but it’s their work. So we had to introduce another narrative.” They decided to try to change the belief that coal is the only answer there, so they tried to introduce agriculture as another potential use of the land. In Monterrey, initially they wanted to



include more radical messaging than the local groups were using there about the right to quality air, but the local communities didn't agree. "So we have to just focus on the narratives that are helping the local organizations because we are not there. So we have to be more sensitive with these local narratives. I think that's the most important challenge."

Ledezma also emphasized collaboration and coalition building: "I think that the most important part is to collaborate with other organizations because it's a huge problem and you can't resolve everything. So the networks for us were crucial to achieve our goals."

According to Montaña, the biggest challenge for them was working in different regions with different issues; time was flowing differently in each place, not only in terms of the pace and the intensity of the effects of a particular climate issue, but also in terms of the pace and the intensity of the activism, organizing, and climate movement. "You have allies that are very organized [and] that the struggle is moving really fast. Others, ones that are completely halted, so you don't have any news from them for a while. This also created logistical challenges, too." Another but related challenge was the amount of work. "You're always working... [and] you're always working with people that are burned out because you're working with activists."

Throughout the project, Montaña said they had to change their plans multiple times. "What we sent to Doc Society, what we told them what we're going to do, to what we ended up doing is very different in some aspects," and according to him, the lesson they learned during the process of planning, trying, and changing plans was to "be open, to experiment," and so they did.





DOCUMENTARY POWER RESEARCH INSTITUTE

CMSI would like to thank Pablo Montaña, impact producer and coordinator of Conexiones Climáticas, and Montserrat Ledezma, project coordinator of Conexiones Climáticas, who shared their experiences and stories throughout this research.

About this Case Study Report

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