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CHARTING A COURSE *for*

# IMPACT

PRODUCING in Canada

TRENDS, BEST PRACTICES AND FUTURE DIRECTIONS

*prepared for* The Documentary Organization of Canada

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The Documentary Organization of Canada/ l'Association des documentaristes du Canada (DOC) is the collective voice of independent documentary filmmakers across Canada. DOC is a national non-profit arts service association representing over 650 directors, producers and craftspeople in the documentary community, from all provinces and regions of our nation. DOC advocates on behalf of its members to foster an environment conducive to documentary production and strives to strengthen the sector within the broader film production industry.

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## Preface

An important part of the mission of the Documentary Organization of Canada (DOC) is to champion the production and distribution of documentaries across all platforms. In this current ever-changing media landscape over the past few years this has meant exploring new ways for our documentary filmmakers to finance their work. We began that process in 2014 with our publication of *Growing the Pie: Alternative Financing and Canadian Documentary* and continued with a more in-depth examination of one of the emerging models of alternative funding, that of foundation and donor support in our 2015 report *Philanthropic Funding for Documentaries in Canada: Towards an Industry-wide Strategy*.

As this last report showed, the relationship between philanthropy and documentary in Canada lags far behind that in other countries such as Australia, the United Kingdom and the United States. The encouraging news was that with their shared common interest of social change this is also a relationship that is waiting to happen. It also made seven recommendations that could help build a mutually beneficial relationship between the two sectors and open a new funding avenue for Canadian documentary filmmakers.

Our latest report, *Charting a Course for Impact Producing in Canada: Trends, Best Practices and Future Directions*, follows the second of these recommendations, to “Develop Impact Producing Skills of Filmmakers.” With media trends being reinvented by the minute these days, it is arguable that “impact producing” as such, is simply a glorification of work that was already the bailiwick of the producer and/or the distributor. In fact, impact producing is a very comprehensive way of grouping together and honing the many tasks that enter into the process of the making and marketing of a successful documentary. As this report demonstrates, it is a burgeoning field of skill development that upon closer scrutiny is incredibly rich in all of its possible permutations. Its development also comes at a propitious time when finding ways to make Canadian content stand out in the global digital environment has never been more essential.

The report presents an overview of the many developments in the field of impact producing in other countries and how in Canada there are examples of social issue documentary filmmaking with meaningful impact that predate the emergence of impact producing as a formalized practice – films like Rob Stewart’s *Sharkwater* (2006) and *How a People Live* (2013) from director Lisa Jackson and others. The report goes on to show how a social entrepreneurship approach supports the development of best practices for measuring and evaluating the impact of documentaries that will be useful to filmmakers, funders and distributors.

As becomes evident in reading the report, effective impact producing necessitates a strategic approach to team building to ensure that there is sufficient expertise and resources to attain success. Building impact producing in Canada in order to maximize the incredible potential of independent documentary filmmaking in this country requires a similar mindset. As a first step in that direction, it has been most encouraging to see the degree of interest from the seven agencies which have funded the research for this report and its accompanying guide, *Making Documentaries with Impact: a Toolkit*. As the report recommends, it is with this kind of continuing support and collaboration from the various public and private media players that it will be possible to create a robust impact producing practice in Canada.

To that end, DOC applauds the current ongoing efforts by the organizations that are working to make meaningful inroads through innovative initiatives. Examples include Inspirit Foundation and Hot Docs working together to establish a collaborative funding model that supports both production and impact campaigns and the philanthropic sector exploring a shared charitable platform to facilitate appropriate access to charitable funds.

The development of impact producing skills that this report calls for are key to these initiatives in order that they can achieve their goals of creating a flourishing and more diversified funding environment for documentary in this country. With a better understanding and practice of impact producing filmmakers will be able to enter into a more mutually beneficial dialogue with foundations. Similarly, potential charitable donors will have a clearer vision of how the stated goals of a well thought out impact campaign can work in concert with their own objectives.

Creating a robust impact producing space that facilitates the development of a strong relationship between the documentary and philanthropic sector could be a real game changer for documentary funding in Canada. It is exciting to consider what could happen if we all pulled together in the same direction.

***Pepita Ferrari***

Executive Director

Documentary Organization of Canada

# Executive Summary



## 1 KEY TRENDS IN IMPACT PRODUCING INTERNATIONALLY AND IN CANADA

The term “impact producing” describes a new space in documentary filmmaking that combines distribution, community outreach and audience engagement into a formalized coordinated “impact campaign.” The past decade has seen the emergence of impact producing, particularly in the United States and United Kingdom. In these jurisdictions, the practice is professionalized and an ecosystem exists that includes foundations and not-for-profits, as well as documentary filmmakers, impact producers and distributors.

The emergence of impact producing is being driven by the loss of traditional funding sources for documentaries linked to television broadcasting. This has resulted in producers seeking new sources of financing from philanthropic funders who are interested in the potential of documentaries to help them achieve their missions. A key advantage impact campaigns offer is that they allow films to reach a broader audience in a cluttered digital environment.

In Canada, the National Film Board (NFB) and the media arts movement have encouraged the development of a strong tradition of social issue documentary filmmaking. This report finds that a new paradigm of impact producing is emerging, enabled by a fragile web of filmmakers, producers, mission-driven festivals, distributors, charitable organizations and citizens’ groups who have begun working together on shared issues. Selected examples of Canadian impact productions are discussed in the report.

## 2 KEY APPROACHES AND BEST PRACTICES FOR MEASURING AND EVALUATING THE IMPACT OF DOCUMENTARIES

This report examines the innovative approaches and tools developed by The Fledgling Fund, BRITDOC, Participant Media and the Harmony Institute. These approaches and tools combine the use of traditional metrics such as reach and sales, with new measures of social value to provide a rich and nuanced understanding of documentary impact. Whereas the film industry typically measures audience reach and sales, impact measurement examines the extent to which the right audiences are reached in strategic ways to promote social change.

Since the early 2000s, the NFB has conducted a number of studies with a goal of establishing a way forward for measuring the impact of their own productions. For their part, independent producers have begun accessing philanthropic support for their impact campaigns, resulting in at least one formal impact report being published in the industry. These initial steps serve as models for going forward for producers and funders. The study identifies a number of best practices in assessing the impact of Canadian documentaries for consideration by Canadian producers and funders.

### Best Practices in Assessing Impact

- 1) employing strategic flexibility and diversity;
- 2) applying a range of metrics tailored to the outreach goals of each documentary;
- 3) measuring audience engagement, and
- 4) using case study analysis, which integrates a variety of metrics and research methods to tell a documentary’s complete social impact story.

3  
CHARTING A COURSE  
FOR THE FUTURE:  
RECOMMENDATIONS

Impact producing is not as developed in Canada as it is in the UK and US because the Canadian documentary sector lags behind in attracting funding from the philanthropic sector. A previous study commissioned by DOC, *Philanthropic Funding for Documentaries in Canada: Towards an Industry-wide Strategy*, argued for the need for strong measurement of documentary impact to support the sector's efforts to attract philanthropic funding. As the study showed, impact reports are key to alerting the philanthropic sector to the opportunities in partnering with documentary producers. These reports demonstrate social returns on philanthropic investments. The present study reiterates this need, if impact producing is to become a more robust element of the Canadian documentary filmmaking landscape. Documentary producers must be able to show clear pathways to the social change they intend to make through their films, and a significant plan to measure their impact. Within existing resources, there are ways in which funders can support these efforts. The following recommendations are put forward within this context.



#### Ensure Impact Campaigns are Eligible for Funding

Canadian public and private funders could consider funding marketing, promotion and engagement expenses, and the hiring of specialists with impact producing skills. Where this is not already the case, these should be allowable as line items in the development and production budgets of documentaries.

#### Provide Incentives to Stimulate Greater Philanthropic Support for Impact Campaigns

Create incentives for involvement from the philanthropic and charitable sector by identifying and addressing current barriers for charitable dollars to be incorporated into Canadian financing models.

#### Ensure Reports on Impact Measurement are Eligible for Funding

Funders should allow expenses for the production of impact reports as a line item in the production and marketing budgets of documentaries.

#### Conduct and Publish Case Studies of Impact Productions

Canadian public funders could conduct case studies of impact productions and publish them to share lessons learned with the documentary sector and with the screen-based production sector as a whole.

#### Support Impact Producing Skills

Impact producing is specialized, with skills closer to those of a marketer, combined with social engagement and outreach skills. There is room to create more training opportunities for producers. Examples of successful professional development initiatives in other jurisdictions include workshops, fellowships, and impact producing labs, which are a particularly effective way of building skills in the sector.

#### Conclusion

These recommendations will go a long way in building a more effective and meaningful impact producing sector in Canada. They will also help build a better understanding within the philanthropic sector about the benefits of impact producing which will help strengthen the ties between the documentary and philanthropic sectors.



## Introduction

In the last decade, “impact producing” has emerged as an innovative field of practice in the documentary sector largely driven by funding from the philanthropic sector<sup>1</sup>. A study commissioned by the Documentary Organization of Canada (DOC) in 2015 found that, “...establishing the philanthropic sector as an enduring partner to the documentary community [would] require a long-term and industry-wide strategy.”<sup>2</sup> Among the recommendations made by the study was a recommendation to build the skills of impact producers in Canada and strengthen the measurement of documentary impact to better align the sector with the interests of philanthropic funders. With this in mind, Communications MDR was mandated by DOC to examine the field of impact producing from the Canadian perspective.

### Goals and Methodology

The goals of the study are three-fold as follows:

- To define impact producing and provide an overview of the context in which it has emerged as a formalized set of practices;
- To review current tools and metrics being used in other jurisdictions to measure the impact of documentaries; and
- To provide funders in Canada with essential market intelligence and best practices for project assessment and measurement within the Canadian context.

The methodology for this study included a review of literature from Canada, the US, the UK and Australia. Interviews were conducted with 39 practitioners from the field of documentary, including filmmakers, media artists, impact producers, funders, impact measurement specialists, and distributors.

### Structure of this Report

This report is divided into three key sections as follows:

- **Section A** provides an analysis of key trends in impact producing internationally and in Canada;
- **Section B** examines the key approaches and tools being used to measure the impact of documentaries and identifies best practices for consideration in the Canadian context;
- **Section C** concludes with recommendations for consideration by funders of documentaries in Canada.

1 Barbara Abrash, *Social Issue Documentary: The Evolution of Public Engagement*, Center for Media and Social Impact, 2009, retrieved from <http://cmsimpact.org/resource/social-issue-documentary-the-evolution-of-public-engagement-2/>

2 Maria De Rosa and Marilyn Burgess, *Philanthropic Funding for Documentaries in Canada: Towards an Industry-wide Strategy*, Documentary Organization of Canada, 2015, page 8, retrieved from <https://docorg.ca/en/philanthropic-funding-documentaries-canada>

## a. An Analysis of Key Trends in Impact Producing Internationally and in Canada

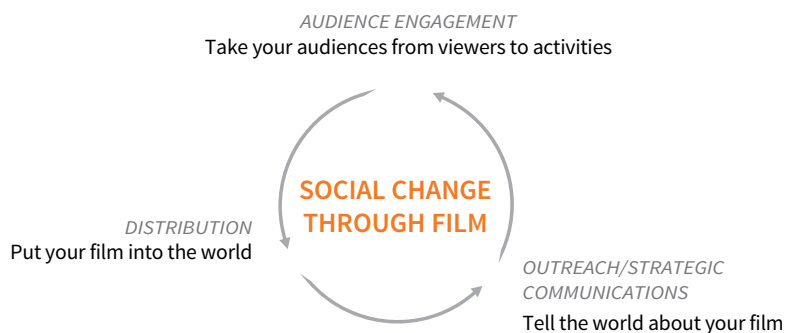
### 1 KEY TRENDS IN IMPACT PRODUCING INTERNATIONALLY

#### 1.1 Impact Producing Blends Age-Old Ideas of Community Organizing with Marketing and Distribution

“The term “impact producing” describes a new space in documentary filmmaking that leverages marketing and distribution strategies to engage audiences and create social change<sup>3</sup>. This trend is occurring in parallel with advances in technology that enable new ways to fund, create, view and distribute content.”<sup>4</sup>

Impact work involves “age-old ideas of community organising, the town hall meeting and collective dissent,” blended with new funding approaches and new digital, marketing and distribution channels.<sup>5</sup> One observer describes impact producing as, “a hybrid of activism, movement building, community organising, grass roots event management, marketing and distribution.”<sup>6</sup> Over the last decade, impact producing has evolved from a focus on traditional grassroots outreach to audience engagement and, most recently, to a powerful new model that brings together a film’s distribution, community outreach and audience engagement tactics into a more sophisticated, coordinated “impact campaign”. Figure 1, which was originally developed by The Fledgling Fund, illustrates this relationship between outreach, distribution and audience engagement in creating social change.

*Figure 1: How Outreach, Engagement and Distribution Work Together<sup>7</sup>*



<sup>3</sup> Graeme Mason, *The Future is Now/ Screen Australia at AIDC*, February 29, 2016, speech given at AIDC 2016, retrieved from <http://australiaonscreen.com/the-future-is-now-screen-australia-at-aidc/>

<sup>4</sup> Alex Kelly, *Winston Churchill Memorial Trust 2012 Fellowship Report: Exploring social change documentary film outreach, engagement and impact campaigns*, The Winston Churchill Memorial Trust, November, 2013, retrieved from [http://echotango.org/wp-content/uploads/2013/12/AlexKelly\\_Churchillreport20131.pdf](http://echotango.org/wp-content/uploads/2013/12/AlexKelly_Churchillreport20131.pdf)

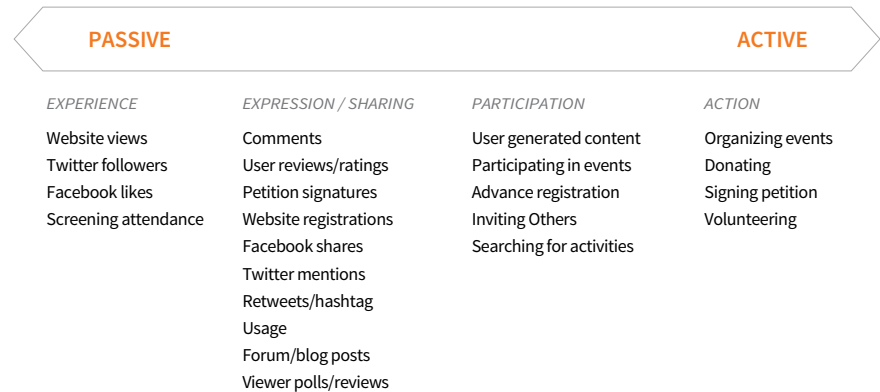
<sup>5</sup> Alex Kelly, Op. Cit.

<sup>6</sup> Tanya Notley, University of Western Sydney, Australia Andrew Lowenthal, Engage Media, and Sam Gregory, WITNESS, *Video for Change: Creating and Measuring Social Impact: A Working Paper by the Video 4 Change Network*, June 2015, retrieved from [https://www.v4c.org/sites/default/files/video4change-impact-working-paper-2015\\_final.pdf](https://www.v4c.org/sites/default/files/video4change-impact-working-paper-2015_final.pdf)

<sup>7</sup> Emily Verellen, *From Distribution to Audience Engagement – Social Change Through Film*, Fledgling Fund, August 2010, retrieved from <http://www.thefledglingfund.org/wp-content/uploads/2015/10/From-Distribution-to-Audience-Engagement.pdf>

Engaged audiences exist along a continuum from passive to active engagement. First developed by the Harmony Institute, Figure 2 below illustrates the range of engagement, where the most active engagement involves organizing events, donating to a cause, signing petitions or volunteering.

Figure 2: *The Engagement Continuum*<sup>8</sup>



The success of impact campaigns has come to depend to a large extent on identifying the right distribution opportunities for a film and the timing of such opportunities.<sup>9</sup> “Timing an impact campaign around a documentary’s festival and theatrical distribution leverages the film’s visibility. In the UK and the US, impact producers are working alongside distributors to reach impact goals.”<sup>10</sup>

As described by one producer, the period of six to ten months during which the film is “making waves” and garnering a critical mass of attention in its traditional theatrical, broadcast and digital distribution windows, is the most intensive. The campaign will continue for two to three years following this initial push.

“Projects like these forge new tools, pipelines, and circuits of circulation in a multi-platform media environment.”

*Barbara Abrash*

In the American context, revenue generation is critically important. By maximizing distribution opportunities, impact campaigns also support financial goals. One producer noted that, “developing a strategy for overseeing the film’s theatrical distribution, community screening and grassroots distribution will reach more audiences, sell more tickets and sell more to educational institutions.”<sup>11</sup>

Digital technologies are being used to increase the number of distribution channels, but perhaps more importantly, to extend grassroots activism. By developing digital tools to attract, engage and mobilize people, impact campaigns in the digital space are said to be forging new and innovative public media that is accessible, participatory and inclusive.<sup>12</sup> As Barbara Abrash notes, “Projects like these forge new tools, pipelines, and circuits of circulation in a multi-platform media environment. They help to create sustainable network infrastructures for participatory public media that extend from local communities to transnational circuits and from grassroots communities to policy makers.”<sup>13</sup>

<sup>8</sup> Harmony Institute, as cited in Philip M. Napoli, *Measuring Media Impact: An Overview of the Field*, The Norman Lear Center, Winter 2014, retrieved from <https://learcenter.org/pdf/measuringmedia.pdf>

<sup>9</sup> Interview.

<sup>10</sup> Interview.

<sup>11</sup> Interview.

<sup>12</sup> Barbara Abrash, Op. Cit.

<sup>13</sup> Barbara Abrash, Op. Cit.

## 1.2 Impact Campaigns Range in Scope and Budget

Impact campaigns range considerably in their scope. Producers noted that impact campaigns can range from a few weeks in length, to months and even years. They can include a theatrical release, a broadcast and national or international digital release. One American impact producer spoke of theatrical releases ranging from 20 to 30 screens, to up to 400 screens in over 50 markets. In the US market, 50 to 100 screens are more common.<sup>14</sup>

While campaign budgets also vary, we note that a number of successful films benefitted from particularly well-funded impact campaigns. As shown in Figure 3, award-winning films have had impact campaign budgets representing as much as 50- to over 80 percent of the production budget. According to one US-based producer, the cost of a typical year-long campaign with a screening tour, viewer’s guide, social media strategy, and impact evaluation report will cost about \$200K (USD).<sup>15</sup>

Figure 3: Examples of Impact Campaign Budgets<sup>16</sup>

Documentary Title	Film Production Budget (USD)	Outreach Budget (USD)	Outreach Budget as % of production budget
American Promise	\$1,500,000	\$1,200,000	80%
Granito: How to Nail a Dictator	\$800,000	\$400,000	50%
No Fire Zone	\$361,850	\$314,086	87%
The House I Live In	\$1,700,000	\$2,500,000 over two years	74% per year

Note: All amounts shown are in US dollars.

The cost of impact campaigns can be intimidating to filmmakers, particularly as it can happen that filmmakers do not make their investment back. However, in some cases, according to seasoned producers, very targeted results may be achieved with smaller budgets, where the impact campaign’s scope is narrow.

One impact producer explained that the best strategy may be to undertake the impact campaign in steps. For example, there could be separate fundraising efforts to create a translated version of the film, and to create a series of short films.

## 1.3 Philanthropic Funding Has Created an Impact Producing Ecology

The importance of philanthropic funding to the success of impact documentaries is nowhere more evident than in the US. The American field of impact producing has been described as “blooming, as more and more entrepreneurs — impact producers, networks and associations, distribution experts, campaign strategists, and media makers — build upon [existing] practices while contributing a range of new skills and expertise.”<sup>17</sup>

The impact producing sector has been created in part through the efforts of filmmakers, who invested in educating the philanthropic sector about the opportunities of investing in documentary films. In the words of one filmmaker, “It was the social justice filmmakers who created the conditions for impact funding, by educating the foundations about the power of film. This led to more foundations funding social justice films.”<sup>18</sup>

<sup>14</sup> Interview.

<sup>15</sup> Interview.

<sup>16</sup> Dana Chin, Director of the Media Impact Project, and Johanna Blakely, co-principal Investigator of the Media Impact Project, “Developing a Common Language to Assess Impact,” retrieved from <http://www.britdocimpactaward.org/op-ed/developing-a-common-language-to-assess-impact>.

<sup>17</sup> Shaady Salehi and Ellen Schneider, “It’s a Wrap! Why Active Voice is Shifting from Campaigns to Big Picture Strategy,” Active Voice Blog, January 21, 2015.

<sup>18</sup> Interview.

Philanthropic organizations in the US made grants totalling \$536 million (USD) between 2009-2013 to film and video initiatives. Of this amount, grants to documentaries totalled more than \$95 million (USD). While funding goes primarily to production, there are significant resources available for impact campaigns, considered vital by foundations.<sup>19</sup>

Around the world, BRITDOC is playing a transformative role in impact producing through its successful initiatives aimed at stimulating greater interest and investment from the philanthropic sector. Its signature event *Good Pitch*, has raised \$23 million (USD) from the philanthropic sector since 2005. One hundred and thirty-four documentary projects from 60 countries have been presented at *Good Pitch* events around the world.<sup>20</sup>

The *Good Pitch* initiative aims to build a global network of filmmakers, philanthropists and social change organizations. Since 2011, *Good Pitch*<sup>2</sup> (“Good Pitch Squared”) events have been hosted around the world, including Johannesburg, Buenos Aires, The Hague, Taipei, Mumbai and Sydney. These have led to the emergence of major continental hubs for impact producing.<sup>21</sup> In Australia, over the past two years, *Good Pitch*<sup>2</sup> has raised more than \$6 million (AUD) in philanthropic funding and more than 60 powerful new partnerships have been forged to fund production.<sup>22</sup>

#### 1.4 Impact Producing is Giving Rise to New Relationships

To extend their reach, impact producers are developing relationships with community organizations to access their networks and leverage their expertise.<sup>23</sup> Attracting the participation of these community organizations depends on strong relationships, which is one of the more challenging aspects of creating an impact campaign. As one Canadian impact producer noted, “Everyone thinks money is the hardest part. Money is hard. But aligning with a really big NGO [non-governmental organization] is just as hard and just as good as money in terms of accomplishing your goal.”<sup>24</sup>

“It’s not necessarily about being an activist, as much as it is about bringing your film to the activist community”

*Robert West, co-founder of Working Films*

To attract major community partners, filmmakers are strategizing how to build potential partnerships early on, identifying clear goals for these partnerships and possible sources of funding. Working in this way creates better preparedness when approaching potential partners. Seasoned producers note the importance of identifying potential sources of funding, and having an audience that is already engaged with the issue on social media before approaching potential partners.

Collaborations and partnerships with community organizations are also important means to deepen the public engagement around a film’s social issues and influence public policy. Robert West, co-founder of Working Films, is quoted as saying, “It’s not necessarily about being an activist, as much as it is about bringing your film to the activist community, forming strong, legitimate relationships.”<sup>25</sup>

19 Ethan McCoy, “Funding Documentaries to Drive Policy Change,” blog entry, The Center for Effective Philanthropy website, March 1, 2016, retrieved from <http://effectivephilanthropy.org/funding-documentaries-as-a-driver-of-policy-change/>

20 BRITDOC website: <https://britdoc.org/>

21 *Good Pitch*<sup>2</sup> Australia website: <http://goodpitch2australia.com.au/>

22 Graeme Mason, Op. Cit.

23 Diana Barrett and Sheila Leddy, *Assessing Creative Media’s Social Impact*, Fledgling Fund, January 2009, retrieved from <http://www.thefledglingfund.org/impact-resources/assessing-social-impact/>

24 Interview.

25 E. Schlaikjer, “Can Documentaries Change the World?”, *Benevolent Media*, 2011, cited in Atalanti Dionysus, “The Social Impact Documentary and the Collective Approach,” *The Journey of Documentary*, April 2, 2013, retrieved from <http://www.thejourneyofdocumentary.com/blog/the-social-impact-documentary-and-the-collective-approach/>

## 2 | KEY TRENDS IN IMPACT PRODUCING IN CANADA

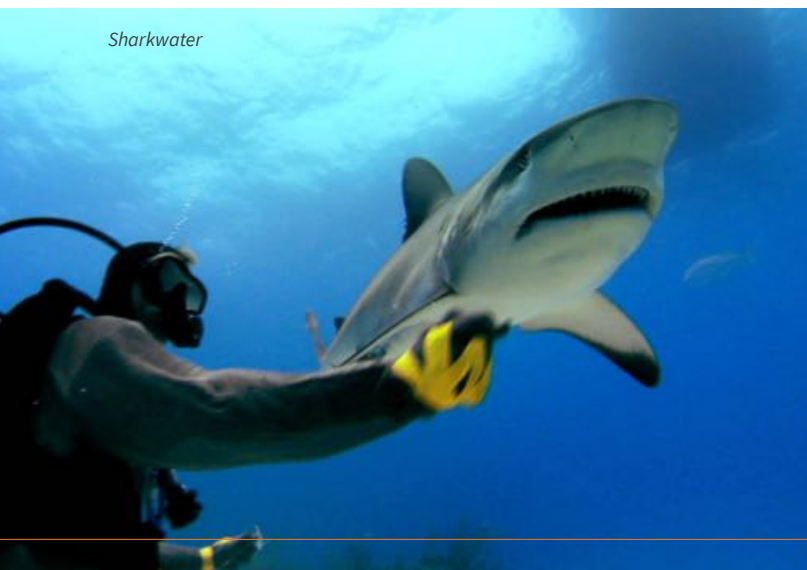
### 2.1 The Role of the NFB and Media Arts Movement in Social Issue Documentary

Historically, the NFB has played a foundational role in defining the Canadian approach to producing social issue documentaries. One filmmaker noted that, “filmmakers and change makers have been trying to do impact campaigns under different names in a history going back to the ‘60s with [the NFB’s] *Challenge for Change*. It is not new.”<sup>26</sup>

Media artists in Canada have for their part long recognized the power of film and video to facilitate social change. The principles that established the *Challenge for Change* initiative were also directly connected to the creation of community-based video art movements.<sup>27</sup>

Thanks to the NFB and the media arts movement, Canadian documentary production comprises within it a skilled tradition of using film to promote dialogue and discussion that can effect social change. There are examples of Canadian documentaries produced for theatrical exhibition, broadcast television, media arts networks and Indigenous communities that are achieving social impact outside the impact producing model as supported by the philanthropic sector. Examination of a few of these reveals the strength of change-making documentary filmmaking, and points to the potential for the sector to engage the philanthropic sector as a partner.

#### 2.1.2 Examples of Canadian Documentaries Achieving Social Impact Without Formal Impact Campaigns



#### *Sharkwater*

Produced a decade ago, *Sharkwater* (Rob Stewart, director) is an example of a theatrically released film that had great success in moving audiences to action. The film’s impact has accrued over time, benefitting from the film’s long tail of distribution opportunities made possible by its initial box office success. A shark conservation documentary told as an adventure story, *Sharkwater* set a record for the highest opening-weekend gross by a Canadian documentary feature, becoming one of the highest-grossing Canadian documentaries.<sup>28</sup> The film earned close to \$1 million in Canadian box office sales, was distributed globally, and won almost 40 awards.<sup>29</sup> The visibility afforded by the film’s success at the box office, coupled with a sophisticated strategy to build a world-wide shark conservation movement, has had a direct and significant impact on inspiring shark conservation movements world-wide,<sup>30</sup> resulting in shark finning practices being banned in over 60 countries.<sup>31</sup>

<sup>26</sup> Interview.

<sup>27</sup> Eric Peter Becker, *A Renewed Challenge for Change: Participatory Media Production for Transformative Change at EMMEDIA Gallery and Production Society*, Masters Thesis, Department of Communication and Culture, University of Alberta, Calgary, Alberta, May 2014, retrieved from [http://theses.ucalgary.ca/bitstream/11023/1569/2/ucalgary\\_2014\\_becker\\_eric.pdf](http://theses.ucalgary.ca/bitstream/11023/1569/2/ucalgary_2014_becker_eric.pdf).

<sup>28</sup> Historica Canada entry on Rob Stewart, <http://www.thecanadianencyclopedia.ca/en/article/rob-stewart/>; <http://www.oceanarkalliance.org.au/sharkwater/>

<sup>29</sup> <https://storypilot.org/films/sharkwater/>; interview with Rob Stewart.

<sup>30</sup> Interview with Rob Stewart.

<sup>31</sup> <http://www.oceanarkalliance.org.au/sharkwater/>; Historica Canada Entry on Rob Stewart, Op. Cit.

*How a People Live*

### *How a People Live*

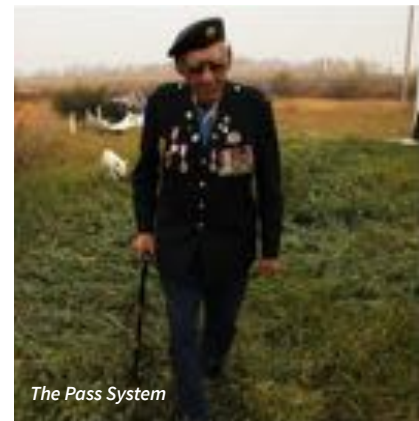
While some films are effective at mobilizing global movements, others strive for and achieve their impact locally. *How a People Live* (Lisa Jackson, director), reveals how one film can have a profound effect on a single community. Commissioned by the Gwa'sala-'Nakwaxda'xw First Nations, the film traces the history of their forced relocation by the Canadian government in 1964 to the Tsulquate reserve on Vancouver Island.<sup>32</sup> The aim of the community in commissioning the film was to tell their version of their story, to reconnect with their traditional homelands and provide an opportunity for their young people to take pride in their identity. The process of making and viewing the film had a profound healing effect on the community that commissioned it. In the course of the making of the film, people returned to their traditional territories, many of them for the first time since the forced relocation. About half the community participated in the cathartic first screening of the film in the local high school.

### *Tales From the Organ Trade*

*Tales From the Organ Trade* (Ric Esther Bienstock, director) is a film created for television, which stimulated dialogue and deepened understanding of the complex issues surrounding the trade in human organs. While the dominant narrative in pop culture is about kidnap victims, a key goal of the film was to shift the narrative around organ trafficking to explore the more complex moral ambiguity surrounding the issue.<sup>33</sup> Created for television, the film achieved “remarkable media attention,” generating substantial primetime media coverage of the issue.<sup>34</sup> It was screened before key influencers and decision-makers, including officials at the World Health Organization, the Danish Council of Ethics, The Hague and the Canadian Bioethics Conference. Embraced by the bioethical, medical and public health community, it made a “powerful impact at the highest forum of national governments.”<sup>35</sup>

### *The Pass System*

*The Pass System* (Alex Williams, director) is an example of a community engagement, low-budget, media-arts documentary that has achieved impact through DIY distribution. The goal of the project is to raise awareness and stimulate discussion amongst both non-Indigenous and Indigenous Canadians about the pass system and Canada's hidden history of racial segregation, in which the Canadian government regularly denied Indigenous peoples the basic freedom to leave their reserves without special permission. The filmmaker travelled with the film to over 50 communities across the country, attracting print media attention and increasing awareness of the subject. The original research undertaken for the making of the film contributed to changing the perception of the pass system amongst Canadian historians, which will have lasting impacts. The Canadian Museum of History has expressed interest in acquiring parts of the film for its permanent collection.

*The Pass System*

32 Moving Images website, [https://movingimages.ca/store/products.php?How\\_A\\_People](https://movingimages.ca/store/products.php?How_A_People)

33 Patricia Finneran, *Documentary Impact: Social Change Through Storytelling*, Hot Docs, 2014. Retrieved from [http://s3.amazonaws.com/assets.hotdocs.ca/doc/HD14\\_Documentary\\_Impact\\_Report.PDF](http://s3.amazonaws.com/assets.hotdocs.ca/doc/HD14_Documentary_Impact_Report.PDF)

34 Patricia Finneran, Op. Cit.

35 Patricia Finneran, Op. Cit.

## 2.2 A New Paradigm is Emerging

Though still in its early days, a new paradigm is emerging today in Canada, in which some documentary filmmakers are working more deliberately within an impact producing model. Their documentaries feature formal impact strategies, with impact campaigns funded by philanthropic organizations, and impact measurement and reporting.

### 2.2.1 Examples of Canadian Impact Productions

*The Ghosts in Our Machine* (Liz Marshall, director) received funding for an impact campaign through BRITDOC. It is one of the few independent Canadian productions to have produced an impact report.

The film illustrates how the successful cultivation of online relationships can enhance the film's creative development and lead to success with audiences, achieving campaign goals to raise awareness about animal rights. Social media played a major role in building the audience for the film and raising awareness of the issue worldwide. Launching two years before the film's premiere, the film built a fan base on its Facebook page spanning more than 45 countries, with an estimated 30,000 online followers who participated in promoting the film's screenings throughout the campaign.

“Gently removing peoples’  
blinders to reveal the staggering  
truth about society’s pervasive  
use of animals.”

Liz Marshall, director, *The Ghost in Our Machine*

The film's impact campaign combined a commercial release to 15 theatres in Canada and the US with an 18-month, worldwide community screening campaign leveraging 92 global campaign partners who helped promote and disseminate the project. During this time, the filmmaker travelled to about 60 cities with the film. In all, the film was screened in 201 North American cities, sold to broadcasters in 4 countries and distributed globally on digital platforms, including Netflix, where a three-day run gathered 4.5K views. *Ghosts in our Machine* was screened at 33 festivals worldwide, earning 9 global awards and distinctions.

The front-line engagement and direct relationships developed online were key to understanding the audience demographic for the film and influenced the creative process that shaped the film. As a result of interaction with a widely diverse following online, the decision was made to create a film with wide appeal, foregoing the use of graphic imagery, to engage audiences by “gently removing peoples’ blinders to reveal the staggering truth about society’s pervasive use of animals.”<sup>36</sup>

*This Changes Everything* is a multi-platform project combining the non-fiction book of the same title by Canadian writer Naomi Klein, and the simultaneous making of the film by Canadian director Avi Lewis. This Canadian/US film is an example of successful philanthropic fundraising. The film received support from Good Pitch Chicago, the Bertha Foundation, and numerous philanthropic grants and donations totalling more than \$200K (USD).<sup>37</sup> The campaign has as its goal to change the perception of climate change from one of disaster to an opportunity to create a more economically equitable and sustainable world.

<sup>36</sup> Impact Report - *The Ghosts in Our Machine*, LizMars Productions 2015, retrieved from <http://www.theghostsinourmachine.com/impact-report/>

<sup>37</sup> Minority Staff Report, *The Environmental Chain of Command*, The United States Senate Committee on Environment and Public Works, July 30, 2014, retrieved from <https://goodpitch.org/films/this-changes-everything-formerly-the-message> from <https://goodpitch.org/films/this-changes-everything-formerly-the-message>

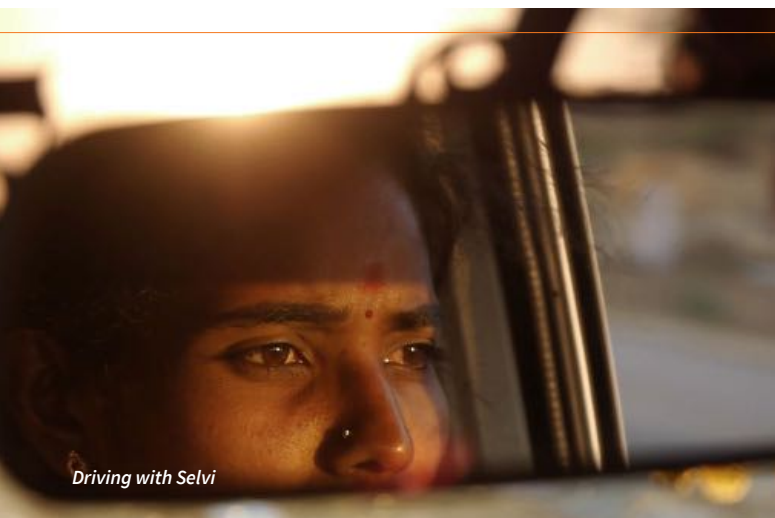
At the outset of the project, the filmmakers hired an outreach director who worked with their community partners, including 350.Org, Greenpeace and Friends of the Earth, to activate their networks to host screenings. The filmmaker has noted that, “to bring a new narrative into a cluttered culture, you need multiple points of entry.”<sup>38</sup>

The campaign seeks to reach the widest possible audience while also making the film a useful organization tool.<sup>39</sup> The film’s distribution has included worldwide theatrical distribution and traditional sales, combined with making the film available to a niche audience of educators and activists. The film’s release was timed to take place ahead of the United Nations Conference on Climate Change in Paris (COP21).

While the filmmakers have sought to build a broad-based movement around the film by convening different groups such as the members of the green and labour movements to find common ground and build relationships, an interesting development of the film has been the ways in which people have been inspired to undertake their own organizing, from reading groups in Vermont to self-organized large scale gatherings in the UK.<sup>40</sup>

*Do Not Track* illustrates the power of interactive documentaries to engage users and change behaviours. The modern web is increasingly a space where users’ movements, speech and identities are recorded and tracked. Through interaction with this webdoc, users learn how their personal information is being gathered and sold, with implications for political surveillance and control of political dissidents.<sup>41</sup> The goal of the project was to change perceptions and behaviours on privacy online, by empowering users with the knowledge and tools to protect their online privacy.

The project team connected to the social networks building around the project at the design stage, and identified partners who could help promote the iDoc to festivals, media partners and bloggers. The campaign attracted 1.5 million users with a high level of engagement.<sup>42</sup> The Mozilla Foundation, creator of the web browser Firefox, used the project for consumer education around online privacy.<sup>43</sup>



*Driving with Selvi* (Elisa Paloschi, director) is an example of a documentary created with the support of Canadian media arts funders, which has an ambitious impact campaign. Shot over a ten-year period, *Driving with Selvi* aims to achieve lasting social change by improving the lives of girls and women in India, using the film’s story of one woman’s incredible journey from child bride to successful and independent adult to inspire others.

With support from BRITDOC, the filmmaker created an impact campaign for the film that has the potential to leverage the film’s community of interest. The film has attracted interest from a large following, successfully raising over \$50,000 through its crowdfunding campaign on Indiegogo, part of which was used to finance the participation of the film’s protagonist at festival screenings. To date, the film has had almost 40 screenings at festivals internationally, winning three top awards. It has been sold to broadcasters in Jordan, Peru and the Netherlands.

38 Cara Buckley, “Filmmakers’ Pitch: See Our Movie, Save the World,” *The New York Times*, September 29, 2015, retrieved from [http://www.nytimes.com/2015/09/30/movies/racing-extinction-and-this-changes-everything-how-films-market-a-harrowing-message.html?\\_r=0](http://www.nytimes.com/2015/09/30/movies/racing-extinction-and-this-changes-everything-how-films-market-a-harrowing-message.html?_r=0)

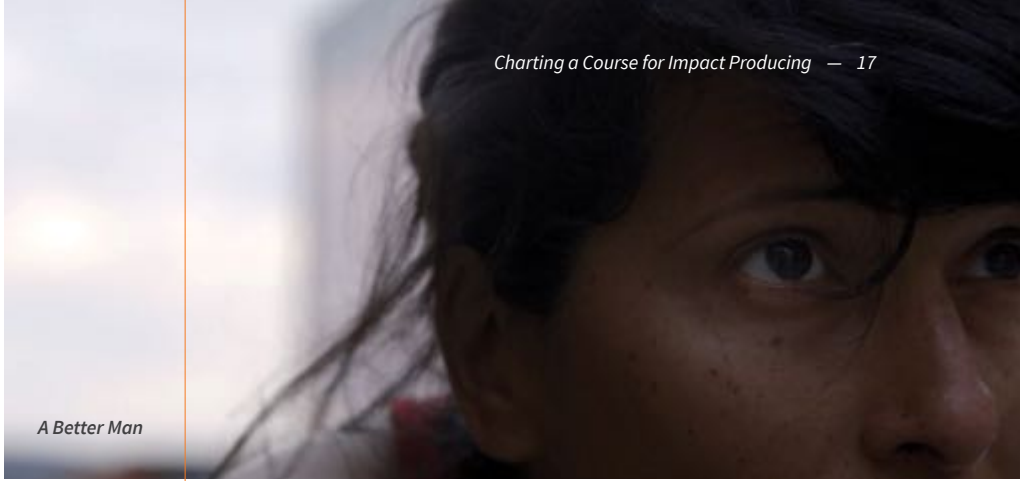
39 *This Changes Everything* Press Kit, August 05, 2015.

40 Katie MacKenna, “Does art change the world? Lessons from the emerging field of impact producing,” Treehouse Talks, April 2015, <https://vimeo.com/126336539>

41 Jennifer Miller, “Do Not Track: An Interactive Docu-Series Shows Just How Little Online Privacy We Really Have,” *Fast Company*, April 4, 2015, retrieved from <http://www.fastco.create.com/3044996/do-not-track-an-interactive-docu-series-shows-just-how-little-online-privacy-we-really-have>

42 Brett Gaylor, “Rebutting ‘The Interactive Paradox’ – A Response to Sergio Kirby,” in *POV Magazine*, March 8th, 2016, Issue 100, Winter 2015, retrieved from <http://povmagazine.com/articles/view/rebutting-the-interactive-paradox>

43 Brett Gaylor, Op. Cit.



*A Better Man*

*A Better Man*, (Attiya Khan and Lawrence Jackman, directors), which raised over \$110,000 on Indiegogo, illustrates the power of relationships to bring attention to a film and the issue it is about. The filmmakers spent a year building relationships with community organizations working in the area of violence against women and girls, obtaining their support for the project and public endorsements on the film's Indiegogo campaign page. The film also received celebrity endorsements from Executive Producers Sarah Polley and well-known singer, Lesley Feist. Pearl Jam posted a video of Choir! Choir! Choir!'s rendition of their song, *A Better Man* to their Facebook activism page further enhancing the campaign's reach. The film's producers have been selected to attend the Fledgling Fund's impact producing lab, where the film's impact strategy, building on the momentum achieved thus far, will be honed.

### 3 CONCLUDING OBSERVATIONS

In the US and in the UK, impact producing has emerged as a professional field providing essential distribution and marketing services to support documentaries with the potential to affect social change. The practice is evolving towards more sophisticated impact campaigns that combine a film's distribution, outreach and audience engagement into a formal strategy to achieve the greatest impact. The role of an impact producer is to develop and implement an impact campaign extending the long tail exploitation of a documentary through partner networks and multi-platform distribution. Audience engagement plays a particularly important role in achieving impact.

Impact campaigns range in scope and budgets, and can be very modest or ambitious. The needs of every film are different and strategies for the production and impact campaign need to be tailored to their different circumstances. However, whatever the impact campaign strategy, achieving impact requires significant planning, coordination, and sustained activity over time. In the US, funding from the philanthropic sector is fuelling the growth of impact producing, supporting an ecosystem of service providers. Filmmakers are forging new relationships with not-for-profit community organizations, creating a virtuous circle of support.

In Canada, a similar but fragile web of filmmakers, producers, mission-driven festivals, distributors, charitable organizations and citizens' groups have begun working together on shared issues. These collaborations, drawn together by a new class of filmmakers and producers, are giving rise to a new paradigm for impact producing in Canada. The NFB and the media arts movement, with support from the Canada Council for the Arts and provincial arts funders, have played key roles in the development of social issue documentaries with lasting impact on Canadian communities.

From the experiences of Canadian impact productions we can draw the following lessons:

- Films are achieving their impact through a range of different storytelling techniques, from adventure documentaries to journalistic exposés. An increasingly popular approach, used to good advantage in most of the examples profiled, is to use character-driven stories to engage audiences.
- Digital platforms are being used in sophisticated ways to raise substantial amounts of money, engage significant numbers of people, and extend the reach, life and storytelling of documentaries across crowdfunding platforms, social media, and dedicated websites. One of the main advantages is that it allows filmmakers to begin audience outreach early on in the fundraising phase of the project.
- The social change goals of the films profiled vary widely, from a desire for global impact evident in films like *This Changes Everything*, *Ghosts in Our Machine*, *Sharkwater* and *Tales of the Organ Trade*, to a focus on community transformation led by films like *How a People Live* and *The Pass System*.
- Factors for success are many and vary according to the needs of each film: from achieving box office success (*Sharkwater*); to having a well-funded impact campaign (*This Changes Everything*); to leveraging a timely issue (*A Better Man*); and tapping into an unexpected audience (*Ghosts in Our Machine*).

These also provide opportunities to create programs that include guest speakers, panels and Q&As with the filmmakers.”

*Distributor, Interview*

screenings so it is important to do community screenings. These also provide opportunities to create programs that include guest speakers, panels and Q&As with the filmmakers.”<sup>44</sup>

There may be opportunities for impact producers to partner with both commercial distributors and not-for-profit distributors in the media arts sector who have networks and educational clients, as a means of extending the reach of a film. A new digital distribution platform, vucavu.com, a joint initiative of a consortium of media arts distributors with funding from the Canada Council for the Arts, will enable greater engagement with media arts documentaries.

A few filmmakers in Canada whose films are discussed above have benefitted from professional development opportunities to hone their impact producing skills, cutting their teeth on their own impact campaigns. This is critical training as it helps filmmakers understand all the elements that must be brought to an effective campaign. Internationally, both BRITDOC and the Fledgling Fund provide training and producer labs to hone impact producing skills.

## b. Key Approaches and Best Practices for Measuring and Evaluating the Impact of Documentaries

### 1.1 Philanthropic Funders are Driving New Approaches to Measuring Impact

New approaches to defining and measuring impact are being developed and adopted in large part driven by the need to answer to the interests of philanthropic funders.<sup>45</sup> While research on audience reach and media effects is well established, the new field of impact measurement seeks to understand the social value of media. Measurement of social value extends beyond financial measures of success to consider improvements in the well being of individuals and communities.<sup>46</sup>

The most important indicator of success for funders of impact media is long-term social change. At the same time, outcomes such as collaboration, engagement, and reception are also important. Significantly, reach, the indicator that private companies and public media funders track most frequently, is not of top-most interest to foundations. This may be because reach in and of itself does not necessarily translate into impact. For similar reasons, revenue is considered the least valuable indicator of impact, though it is critical to the health of the media sector.<sup>47</sup>

One observer points out that there is an increasing interest on the part of large foundations – such as The Bill and Melinda Gates Foundation, The John and James L. Knight Foundation, and the Ford Foundation – to fund media productions and their impact campaigns.<sup>48</sup> Other interviewees noted that these and other foundations expect an analysis of outcomes with respect to the investments they make.

Producers are approaching these funders with a solid understanding of their project's change or impact proposition. This was referred to by one interviewee as “the hook” to attract foundations.<sup>49</sup> For mission-driven foundations that are accountable to their Boards of Directors, reliable measurement of outcomes is essential. Without it, foundation staff cannot make the case for investments in projects. As one interviewee noted, foundations need to know how filmmakers propose to demonstrate that their funds were well spent, remarking, “that’s where all of the calculus on social impact is critical.”<sup>50</sup>

### 1

#### OVERVIEW OF THE FIELD OF DOCUMENTARY IMPACT MEASUREMENT

<sup>45</sup> Philip M Napoli, *Measuring Media Impact: An Overview of the Field*, The Norman Lear Center, Winter 2014, retrieved from <http://learcenter.org/pdf/measuringmedia.pdf>

<sup>46</sup> Katy Borum Chattoo, *Focus on Documentary's Social Impact at the 2015 International Documentary Festival Amsterdam (IDFA)*, International Documentary Association, online blog, December 17, 2015, retrieved from <http://www.documentary.org/blog/focus-documentary-social-impact-2015-international-documentary-festival-amsterdam-idfa>

<sup>47</sup> *Funder Perspectives: Assessing Media Investments*, Media Impact Funders, January 2015, retrieved from [http://mediainpactfunders.org/wp-content/uploads/2015/01/MIF\\_Funder-Perspectives.pdf](http://mediainpactfunders.org/wp-content/uploads/2015/01/MIF_Funder-Perspectives.pdf)

<sup>48</sup> Media Impact Funders, Op. Cit.

<sup>49</sup> Interview.

<sup>50</sup> Interview.

## 1.2 There is Debate on How Impact Should Be Measured

However, within the documentary sector, there is some debate on how the success of documentaries should be evaluated. Concern has been expressed by some filmmakers, particularly in the US, that approaches to measuring impact risk reducing documentary art to instrumental purposes. Others point to an excess of evaluation, which may stifle creativity.

“awareness and reach are the easiest common denominators across the work of everybody who uses film for social change.”

- *The Skoll Foundation*

Those in favour of impact analysis point to its strategic usefulness for concretely tying mission to outcomes, and justifying investments. Funders of impact campaigns such as the Fledgling Fund defend the need to demonstrate impact to philanthropic organizations.<sup>51</sup> The Skoll Foundation supports evaluation, noting that, “awareness and reach are the easiest common denominators across the work of everybody who uses film for social change.” In addition to these, the Foundation is interested in measuring the large-scale impact of its investments on the world’s most pressing problems.<sup>52</sup>

In some cases, the academic research sector has been enlisted to apply measurement methodologies drawn from the social sciences and to provide scientific measures of a film’s influence on social change. For example, the Norman Lear Center at the University of South Carolina, undertook a one-year study on the impact of the documentary, *Food Inc.* The study demonstrated that a year following the release of the film, people who had seen it were eating differently. However, it has been noted that there are challenges with applying methodologies borrowed from the social sciences and that these approaches may not be applicable to all films or all research questions.<sup>53</sup> Leading approaches are profiled below in Section 2 of this chapter.

## 1.3 The Canadian Context

Measuring the impact of documentaries has been examined in Canada. A study commissioned by the Inspirit Foundation found that, as “funders, filmmakers and non-profits are all keen to demonstrate impact, the reach and relevance of documentaries has become an area of increased study.”<sup>54</sup> A 2005 NFB report entitled, *Breaking New Ground, A Framework for Measuring the Social Impact of Canadian Documentaries*,<sup>55</sup> sought to develop a measurement framework that would estimate the social and cultural impact of Canadian documentaries.

The framework was grounded in an analysis of seven representative-Canadian documentaries and a review of literature. In 2013, the NFB commissioned a new study to identify a standard approach to measuring the impact of documentaries.<sup>56</sup> A pilot case study was developed for the film *Pink Ribbons, Inc.*,<sup>57</sup> providing an opportunity to test the use of applied social science methodology. However, there are significant cost implications to such an approach and there is legitimate concern amongst Canadian impact producers lest these approaches come to dominate the field.

51 *Fledgling Response to Impact Measurement Debate*, website of the Fledgling Fund, September 2, 2014, retrieved from <http://www.thefledglingfund.org/impact-resources/impact-measurement-debate/>

52 Learning for Action, *Deepening Engagement for Lasting Impact: A Framework for Measuring Media Performance and Results*, Bill and Melinda Gates Foundation and the John S. and James L. Knight Foundation, October 2013, retrieved from <http://learningforaction.com/our-tools-resources>.

53 Interviews.

54 Friesen, Tracey, Canadian Media Impact Research Report, Inspirit Foundation, August 1, 2014, page 5, retrieved from [https://inspiritfoundation.org/application/files/9814/6154/0045/Canadian\\_Impact\\_Media\\_Report.pdf](https://inspiritfoundation.org/application/files/9814/6154/0045/Canadian_Impact_Media_Report.pdf)

55 George Spears, *Breaking New Ground: A framework for measuring the social impact of Canadian documentaries*, Erin Research, 2005, retrieved from [http://onf-nfb.gc.ca/publications/en/pdf/social\\_impact\\_engl\\_study.pdf](http://onf-nfb.gc.ca/publications/en/pdf/social_impact_engl_study.pdf)

56 George Spears, ERIN Research Inc., *Social Impact of NFB Documentaries: Toward a Measurement Methodology*, The National Film Board of Canada, 2013, retrieved from [http://onf-nfb.gc.ca/publications/en/pdf/social\\_impact\\_engl\\_study.pdf](http://onf-nfb.gc.ca/publications/en/pdf/social_impact_engl_study.pdf)

57 George Spears (2013), Op. Cit.

Amongst independent producers, Canadian documentary filmmaker Liz Marshall contributed to the field of impact measurement by developing the first impact assessment report of her film, *The Ghosts in Our Machine*, discussed above.<sup>58</sup> Through her involvement in the Fledgling Fund's inaugural engagement lab in 2014-15, another Canadian director, Nadine Pequeneza developed an interactive impact story for her documentary on fair sentencing for youth, *15 to Life*.<sup>59</sup>

## 2 KEY APPROACHES TO MEASURING THE IMPACT OF DOCUMENTARIES

In the last few years, the Fledgling Fund, BRITDOC, Participant Media and Harmony Institute have developed innovative approaches for evaluating and measuring the impact of documentary films.

### 2.1 The Fledgling Fund

The Fledgling Fund measures five “dimensions” of impact, beginning with a compelling story, and moving through to wider dimensions of impact such as awareness, engagement, movement building and social change. The Fund's impact measurement model identifies indicators that can be used to measure each dimension of impact, as shown in Figure 5.

Figure 5: Measures for the Dimensions of Impact<sup>60</sup>

Dimension of Impact	Indicators
<b>Compelling story</b>	Festival acceptance Theatrical release Broadcast/Internet Awards Film Reviews/Online “buzz” Sales
<b>Awareness</b>	Audience size (by distribution segment) Diversity of audience (geographic, age, faith, etc.) Press coverage (including online)
<b>Engagement</b>	Participation in/Response to: Facilitated dialogues Social network sites Take action campaigns Website hits Op/Eds and response letters
<b>Stronger Movement</b>	Number of advocacy organizations utilizing the film Collaboration amongst organizations Viewer participation in movement Screenings with decision- and policy makers Mention in policy discussions and legislative press Longevity of the film/media
<b>Social Change</b>	Policy/legislative change (international, national, state and local) Behaviour change Shift in public dialogue

58 *Impact Report - The Ghosts in Our Machine*, LizMars Productions, 2015 retrieved from <http://www.theghostsinourmachine.com/impact-report/>

59 *Impact Story: 15 to Life*, Hitplay Productions, 2015, retrieved from <http://www.thefledglingfund.org/impact-resources/15-to-life/>

60 Diana Barrett and Sheila Leddy, Op. Cit.

## 2.2 BRITDOC

BRITDOC’s measurement model measures the success of the film in terms of its reach, the scope and implementation of the impact campaign, and the resulting outcomes. (See Figure 6.) These analyses are brought together in case studies that include both quantitative data and qualitative information to tell the “impact story” of a film.

While quantitative or numerical data may be easier to come by compared to qualitative data, in many cases the latter, which is more descriptive and observational, is more appropriate to capture the complexities of social change and provide a deep context that cannot be achieved with numerical data alone<sup>61</sup>. Beadie Finzi, Director of the BRITDOC Foundation, champions the break from old ways of doing business, stating, “our beautiful and precious field is still in the grips of this problem that box office and TV ratings are worshipped as gods. This is really unfortunate and it absolutely impacts what projects are even made. [However] we can strive to understand the other ways our work can have value in the world.”<sup>62</sup>

Figure 6: Evaluating the Performance of a Documentary Film <sup>63</sup>



## 2.3 Participant Media

Participant Media is a private production company, which invests in documentaries and is interested in both financial and social returns. It has developed a measurement tool called The Participant Index (TPI)<sup>64</sup>, which can be used to inform investment decisions by providing insights into the types of documentaries that are likely to resonate with audiences to create change. TPI evaluates audiences’ levels of knowledge, attitudes, and actions or behaviours about social issues and provides insight into what viewers learned while watching; how they felt after watching; and what they did as a result<sup>65</sup>. Figure 7 shows the many sources of data used by the TPI to arrive at its findings.

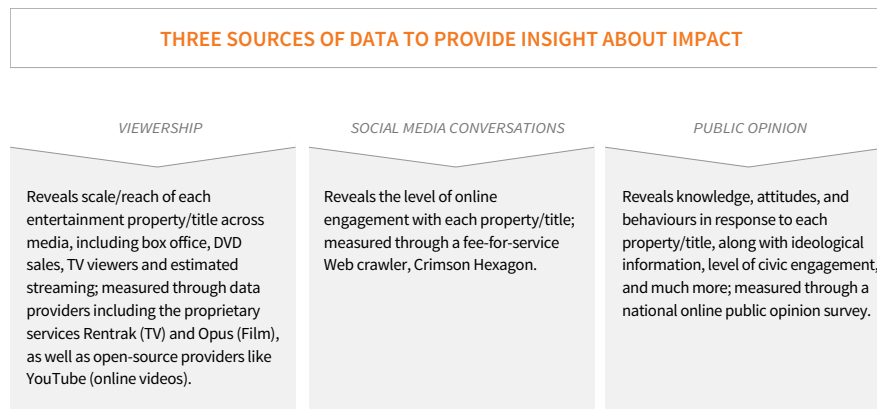
61 Media Impact Funders, Op. Cit.

62 Caty Borum Chattoo, Op. Cit.

63 “Give Up Tomorrow”, case study, in The Impact Field Guide & Toolkit, Britdoc, retrieved from <http://impactguide.org/static/library/GiveUpTomorrow.pdf>

64 Michael Cieply, “Participant Index Seeks to Determine Why One Film Spurs Activism, While Others Falter,” in *New York Times*, July 6, 2014, retrieved from [http://www.nytimes.com/2014/07/07/business/media/participant-index-seeks-to-determine-why-one-film-spurs-activism-while-others-falter.html?\\_r=0](http://www.nytimes.com/2014/07/07/business/media/participant-index-seeks-to-determine-why-one-film-spurs-activism-while-others-falter.html?_r=0)

65 FAQ, The Participant Index, retrieved from <http://www.takepart.com/tpi/faq>

Figure 7: How the Participant Media Index Works<sup>66</sup>

Somewhat controversially, the findings of the TPI are quantified and combined to create a single quantitative score for each documentary, ranking films as to their likelihood to incite social action.<sup>67</sup> In late 2014, when the *New York Times* reported on the launch of the TPI, American documentary filmmakers expressed concern that the TPI did not reflect the ways in which documentaries may be enjoyed as art.<sup>68</sup> Indeed, a majority of filmmakers had been opposed to impact measurement even before the TPI was launched.<sup>69</sup> The new index brought this opposition into sharper focus.

#### 2.4 Impact Measurement Tools: Harmony Institute's *StoryPilot*

Harmony Institute, a leader in measuring the impact of media, including documentaries, has developed *StoryPilot*, an online tool that aggregates a range of existing datasets to provide a meta-analysis of impact. Measures of reach such as trailer views and box office data are combined with social media reach (the number of followers/likes/tweets/shares) and with the findings of content analysis (via identification of key terms and hashtags).

*StoryPilot* measures instances of information seeking (for example the number of hits on the project's Wikipedia page), "amplification" (mainstream media mentions), and policy impacts (such as mentions by politicians and policy outcomes). As noted by one interviewee, "*StoryPilot* shows media shifts revealing how people are talking about [a topic]. It shows social media following and box office and viewers, and shows it over time."<sup>70</sup> The development of software tools for measuring impact reflects the appeal of big data in the impact producing space and the possibility of telling stories through data visualization.

<sup>66</sup> *About the Participant Index*, white paper, Participant Media.

<sup>67</sup> Johanna Blakely, "Participant Media's Impact Index," *Media Impact Project*, July 12, 2014, retrieved from <http://www.mediaimpactproject.org/blog/participant-medias-impact-index>

<sup>68</sup> Patricia Finneran, "What is in a number? Thinking about The Participant Index and the recent *New York Times* article announcing its launch," blog entry, July 9, 2014, retrieved from <http://mediaimpactfunders.org/what-is-in-a-number-thinking-about-the-participant-index-and-the-recent-new-york-times-article-announcing-its-launch/>

<sup>69</sup> Alison Byrne Fields, "The Downside of Measuring the Social Impact of Documentary Films," *Indiewire*, August 1, 2014, retrieved from <http://www.indiewire.com/article/the-downside-of-measuring-the-social-impact-of-documentary-films-20140801>

<sup>70</sup> Interview.

## 3 BEST PRACTICES IN ASSESSING IMPACT OF DOCUMENTARIES FOR FUNDERS

The review of literature conducted for this report revealed four best practices that can be used by funders to inform project assessment and the measurement of outcomes.<sup>71</sup>

### 3.1 Employ Methodological Flexibility and Diversity

Different documentaries lend themselves to different methodologies to measure their impact. For this reason, it is difficult to standardize any approach to measurement. In many cases, multiple methodologies may need to be used to measure different types of impact, such as changes in attitudes and behaviours, changes in public debate or discussion, and changes in public policy.

Some common methodologies being used to measure impact include audience surveys, in-depth interviews and focus groups, media content analysis and network mapping, ethnography, data analysis, and analysis of online analytics and case studies.

### 3.2 Use a Broad Range of Performance Metrics

As shown above, impact can be measured using many different indicators. When measuring impact, it is advisable to use a variety of metrics. In today's digital media environment, a great number of metrics can be readily measured, including viewership, social media conversations and public opinion. Questions to consider when choosing metrics include:<sup>72</sup>

- What are the metrics needed to measure strategic progress?
- Is the metric simple, descriptive, easy to explain and transparent?
- Is the metric actionable? Does it clearly and quickly signify what it means and what should be done as it changes?
- Is the data underlying the metric credible and timely?

Selecting the right tools is vitally important and presents a broad range of possibilities. Traditional measurement tools include box office statistics, focus groups, and exit surveys. In today's digital media environment, data collection and analysis has expanded to content analysis online, such as press coverage, blogs, etc., to understand the level of public awareness on an issue following the release of a documentary; and sophisticated web analytics, which provide information on how the public is engaging with the issue.<sup>73</sup>

### 3.3 Measure Audience Engagement

Audience engagement is a critical step in creating long-term social change. Engagement can be measured in terms of attention, interaction, dialogue, emotions and activation.<sup>74</sup> Digital engagement metrics may be the most readily available.

### 3.4 Case Study Analysis

The method of case study analysis has been used by BRITDOC and the Fledgling Fund to promote the power of documentaries to create change. Case studies are particularly versatile for telling the story of a film's impact, as they can integrate a diversity of metrics and research methods, including measurement of audience engagement.

<sup>71</sup> Philip M Napoli, Op. Cit.

<sup>72</sup> Philip M Napoli, Op. Cit.

<sup>73</sup> Beth Karlin, John Johnson, "Measuring Impact: The Importance of Evaluation for Documentary Film Campaigns," *Media Culture Journal*, Vol. 14, No. 6, 2011, retrieved from <http://www.journal.media-culture.org.au/index.php/mcjournal/article/view/444/0>

<sup>74</sup> Gambetti, R.C., Graffigna, G., Biraghi, S., "The Grounded Theory approach to consumer-brand engagement: The practitioner's standpoint," *International Journal of Market Research*, 54(5), 2012, pp 659-687, retrieved from <http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.649.6723&rep=rep1&type=pdf>



#### 4 CONCLUDING OBSERVATIONS

There is a growing field of documentary impact measurement intended to meet the needs of philanthropic funders who require an evaluation of social return on their investments. Innovative approaches and measurement tools have been developed with the thought leadership of The Fledgling Fund, BRITDOC, Participant Media and the Harmony Institute. Their approaches and tools share a desire to examine impact through multiple lenses, to provide a rich and nuanced understanding of the many ways in which social issue documentaries create change in the world. With continued investment from the philanthropic sector and social financiers in social issue documentaries, it is likely that the field will continue to evolve.

The field's focus on the social value created by documentaries distinguishes it from more traditional measures of business success or academic studies of media effects. Whereas the film industry typically measures audience reach and sales, impact measurement examines the extent to which the right audiences are reached in the right ways and contexts to promote social change. To a certain extent, the role of the documentary producer and the impact producer becomes that of a social entrepreneur.

A number of best practices can be identified that are of particular use for funders of documentaries. An important point in this regard is to be flexible in selecting measurement methodologies, to ensure that these are well suited to the evaluation of individual documentaries. Similarly, a broad range of metrics are available and should be used to capture the timely and credible data and information on a range of indicators to tell a complete story of impact. Measuring levels of audience engagement is also critical to understanding impact. Case studies are said to be particularly effective in promoting the power of documentaries to effect social change.

## c. Charting a Course for the Future: Findings and Recommendations

### 1 | OVERVIEW OF FINDINGS

In the US and the UK, the past decade has seen the emergence of impact producing, a practice that aims to achieve social change by aligning documentary production with an array of distribution, outreach and community engagement practices brought together in a coordinated fashion to affect social change. In these jurisdictions, the practice is professionalized and an ecosystem exists that includes foundations, not-for-profits, grass-roots organizations, corporations, as well as documentary filmmakers, impact producers and their networks, associations, and distributors.

There are several key factors that have driven this growth. First, the loss of traditional funding sources for documentaries (predominantly funding linked to television broadcasting), which has had the effect of encouraging documentary makers to seek out alternative funding sources. Second, not-for-profit organizations and foundations are funding documentaries and impact campaigns that they believe can help them achieve their missions. Third, filmmakers are also forging new relationships with not-for-profit community organizations, creating a virtuous circle of support. These factors have created a perfect storm for the emergence of impact producing.

The growth in documentary impact measurement described in this report reflects the documentary sector's response to a key requirement of philanthropic funders. Best practices for measuring impact include maintaining a flexible approach in selecting measurement methodologies, integrating a broad range of metrics and including measures of audience engagement. A number of leading organizations are using case studies that integrate many measures to present a complete story of change effected by individual documentaries.

In Canada, the NFB and the media arts movement have important histories in social issue documentary. At the same time, a new paradigm is emerging, inspired by impact producing abroad, that seeks to obtain funding from the philanthropic sector. This source of funding is largely untapped in Canada. The documentary sector will need to take the lead in developing relationships with philanthropists and make the case for funding in order to develop this source of financing.

A previous study commissioned by DOC, *Philanthropic Funding for Documentaries in Canada: Towards an Industry-wide Strategy*, recommended an industry-wide strategy to create a funding model for documentary production and distribution that leverages new resources from the philanthropic sector. As the study put forward, a key element in sensitizing the philanthropic sector to the opportunities afforded by partnering with documentary producers is the production of impact reports that demonstrate social returns on philanthropic investments. The present study reiterates this need for a strategy, if philanthropic funding is to become a more robust element of the documentary filmmaking landscape. Within existing resources, there are ways in which funders can support the efforts of the documentary community in building partnerships with the philanthropic sector. The following recommendations are put forward within this context.



## 2 | RECOMMENDATIONS

### Ensure Impact Campaigns are Eligible for Funding

The various Canadian public and private funders are encouraged to consider assisting documentary filmmakers in building awareness and engagement with their films through impact campaigns by ensuring that they make funds available to support these activities.

Canadian public and private funders could consider funding marketing, promotion and engagement expenses, and the hiring of specialists with impact producing skills. Where this is not already the case, these should be allowable as line items in the development and production budgets of documentaries.

### Provide incentives to Stimulate Greater Philanthropic Support for Impact Campaigns

Create incentives for involvement from the philanthropic and charitable sector by identifying and addressing current barriers for charitable dollars to be incorporated into Canadian financing models. This could include providing matching funds for philanthropic dollars and collaboration on existing efforts by the private sector to incentivize the philanthropic sector to fund Canadian documentary production and impact campaigns. Other measures, which were beyond the scope of the present study, but that are equally important, would be eliminating the tax credit grind and supporting the creation of shared charitable platforms so that documentaries and impact campaign can be considered charitable activities. As a result individuals and foundations would be able to contribute charitable dollars easily to documentaries and their impact campaigns.

### Ensure Reports on Impact Measurement are Eligible for Funding

Impact reports are critical to attracting this new source of funding and as a tool to educate the philanthropic sector about the benefits of supporting documentary productions that match their goals. The field of impact measurement is specialized, and it is not realistic to think that filmmakers can or should track impact on their own. Funders should allow expenses for the production of impact reports as a line item in the production and marketing budgets of documentaries.

### Conduct and Publish Case Studies of Impact Productions

The method of case study analysis, which utilizes qualitative and quantitative metrics is a recognized best practice for measuring the social impact of documentaries. BRITDOC is a leader in the development of the method of case study analysis for impact documentaries. As confirmed through interviews, the costs relating to case studies need not be onerous.<sup>75</sup>

Canadian public funders could conduct case studies of impact productions and publish them to share lessons learned with the industry. Lessons learned through case studies will benefit the screen-based production sector as a whole.

<sup>75</sup> Interview.



### Support Impact Producing Skills

Impact producing is specialized, with skills closer to those of a marketer that are combined with social engagement and outreach skills. There is room to create more training opportunities for producers. Examples of successful professional development initiatives in other jurisdictions include workshops, fellowships, and impact producing labs. Impact producing labs are a particularly effective way of building skills in the sector. These have taken place at festivals such as Hot Docs and the Reelworld Film Festival. The Reelworld Film Festival is an example of an ongoing impact producing lab that is training emerging producers. These initiatives depend on continued funding.

Interviewees pointed to the need to create more such opportunities for Indigenous filmmakers. The NSI, which has an Aboriginal documentary program, could add training in impact producing skills.

### Conclusion

The recommendations made in this report are in the long run aimed at assisting the documentary sector in its efforts to build bridges and create stronger ties with the philanthropic sector, a potential source of funding that is still largely untapped by Canadian documentary producers. Reaching out to philanthropists and their organizations is a promising avenue worthy of effort due to the considerable resources held by philanthropic funders. It has the potential to partially fill the gap in funding experienced by documentary producers, with benefits extending to the Canadian public as a whole.

Impact measurement remains at the heart of building the case for investing in documentaries and their impact campaigns. The stronger the case that can be made to the philanthropic sector of the ability of documentaries to effect social change, the greater the support that can be leveraged. This would create exciting possibilities to reach and engage more Canadians with Canadian documentaries and extend the reach of Canadian documentaries internationally.

## Annex 1: Glossary

**Engagement** The response of an audience to a film. There is a continuum of engagement, which ranges from liking the film on Facebook, tweeting a link to the trailer, participating in Q&A and volunteering for or donating to a cause related to the film.

**Evaluation** A process designed to articulate how activities are intended to achieve a set of outcomes, specify indicators to measure progress toward those outcomes, and collect and analyze data on those indicators. Two primary purposes include: to “prove” (establish value) and to “improve” (support organizational learning).

**Framework** A theoretical structure that describes an approach for managing an impact measurement effort.

**Impact investor** Individuals or organizations that invest in ventures with the intent to achieve not only financial returns but also better social outcomes than would be the case in typical investments.

**Impact measurement** The process of determining and tracking change that occurs after an extended period of time and as a result of a specific effort.

**Impact producer** Devises and executes a strategic campaign including distribution, communications, outreach, social engagement and marketing to maximize the impact of a film.

**Impact space** The emerging sector of the audiovisual sector engaging in the practice of creating social impact and social change with documentary.

**Metric** A measure for which data are available to quantify outputs or outcomes (also referred to as an indicator).

**Outcomes** Changes that follow as a result of program implementation.

**Outputs** Tangible products or services delivered; e.g., the most immediate results of program implementation.

**Reach** The number of people who see or are exposed to a film.

**Social investor** Individuals and organisations who want to invest financial resources to deliver positive social impact. These can include government and quasi-government funds, independent grant-making trusts and foundations, venture philanthropists, high net worth individuals and ethical investment funds.

**Social change** Significant alteration over time in behaviour patterns, and cultural values and social norms.

**Tool** A measurement instrument that users can directly modify by entering program or project data, and then begin to utilize.

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## Annex 3: Interview List

1. Clint Beharry, Director of Design and Technology, Harmony Institute
2. Ric Esther Bienstock, Director and Producer, Associated Producers Ltd.
3. Caitlin Boyle, Executive Director, Film Sprout Inc.
4. Nancy Chapelle, Executive Director, Bell Fund
5. Nathalie Clermont, Director of Program Management, Canada Media Fund
6. Loc Dao, Executive Producer and Creative Technologist, English-language Digital Studio, National Film Board
7. Avi Federgreen, Distributor, IndieCAN Entertainment
8. Patricia Finnerman, Founder and Strategist, Story Matters
9. Beadie Finzie, Director, BRITDOC, Foundation
10. Joanne Fishburn, Impact Producer
11. Tracey Friesen, Author and Producer
12. Trevor Grigg, Head of Audience Management and Measurement, National Film Board
13. Patricio Henriquez, Director and Producer, Macumba International Inc.
14. Lisa Jackson, Director, and Director Advisor for the National Screen Institute's Aboriginal Documentary Training Program
15. Sylvia Jonescu Lisitza, Distributor, Moving Images Distribution
16. Gwen Joy, Director of Grants and Evaluation, Inspirit Foundation
17. Christine Kleckner, Producer, Intervention Productions Inc.
18. Liz Marshall, Director and Producer, LizMars Productions
19. Chris McDonald, President, Hot Docs
20. Katie McKenna, Founder and Principal, Working Knowledge
21. Robin Mirsky, Executive Director, Rogers Group of Funds
22. Sarah Mosses, Co-founder and Director of Strategy, Together Films
23. Andrea Nemtin, President and CEO, Inspirit Foundation
24. Elisa Paloschi, Director, Producer, Cinematographer, Eyes Full
25. Justine Pimlott, Producer, National Film Board
26. Michel Pradier, Director, Project Financing, Telefilm Canada
27. Sandra Rodriguez, Director and Engagement Specialist
28. Jason Ryle, Executive Director, ImagineNATIVE Film + media arts Festival

29. Ellen Schneider, Founder and Director, Active Voice and AV Lab
30. George Spears, President, Erin Research
31. Michele Stanley, Program Officer, Canada Council for the Arts
32. Rob Stewart, Director and Producer, Sharkwater Productions
33. Louis Richard Tremblay, Producer, National Film Board
34. Denis Vaillancourt, Distribution Coordinator, Le Videographe
35. Michelle Van Beusekom, Executive Director of English Programming,  
National Film Board
36. Wanda vanderStoop, Director of Distribution, Vtape
37. Emily Verellen, Director of Programs and Communications, Fledgling Fund
38. Alex Williams, Director
39. Pamela Yates, Co-founder and Creative Director, Skylight Pictures