THE
FLEDGLING FUND
helping stories take flight

THE FLEDGLING
ENGAGEMENT LAB

IMPACT WORKBOOK

2016 ENGAGEMENT LAB

INTRODUCTION

We designed this Impact Workbook to support filmmakers who are telling stories and building engagement campaigns intended to make social change. Whether you want to amplify the work of an existing social movement, influence a national conversation, empower marginalized communities, change behavior, trigger policy changes, facilitate healing, foster inclusion, galvanize citizens, or any other outcome – the workbook provides a set of questions to think about and exercises to help you refine your purpose, set specific and manageable goals, articulate tangible benchmarks, activate and inspire a partner network and discover the appropriate pathway to make a significant and unmistakable contribution to the issues you care about.

This is a working document designed to help us all discover and share best practices and to ensure that all the key elements of the plan are in place and fit together. It begins by focusing on a campaign's vision and then moves to mapping the change strategy, identifying partners and audiences, and defining campaign activities and tactics. It also helps teams work through questions around staffing, budgeting and fundraising. Our hope is that by working through the questions and exercises, your team will create a campaign plan that is grounded in a shared understanding of goals and purpose and the larger system that each campaign is operating within. The result of this work can inform the day to day work, help engage partners and form the basis of funding proposals. The campaign plan can be modified based on what you learn along the way and you can revisit each section to be sure the campaign effectively responds to new or changing opportunities for impact.

ARTICULATING YOUR VISION

A shared vision helps to guide a project and provides clarity around its purpose.

QUESTIONS TO CONSIDER

What is the core problem we are trying to help solve? What needs are we trying to address? Who is the intended audience we hope to impact?

What drove us to tell this story? Why is it important?

What is the purpose of our film's engagement/impact campaign?

If this project is a success, what will we have achieved? How will the project have contributed to social change?

What specific insights and learnings might emerge from this work that could inform existing social movements?

EXERCISE

Craft a 2-3-sentence vision statement that clearly articulates the purpose, goal and desired impact of the project.

MAPPING A CHANGE STRATEGY THAT ALIGNS WITH THE MOVEMENT

While a vision articulates where you want to end up, a strategy lays out how you intend to get there. A good process to help clarify strategy and identify the pathways to change is the creation of a Theory of Change, which uses backward mapping to help clarify the preconditions that need to be in place for a vision or outcome to be realized and why they are important.

QUESTIONS TO CONSIDER

- What factors contribute to the issue/problem identified in our vision statement?

- What needs to change for our goal to be realized?

- What are the processes for change? How can our project influence or contribute to that process?

- Who controls whether that change happens?

- What needs to happen for decision makers to take action? Why are they not taking action now?

- Who benefits from the status quo? How do they benefit? What level of power do they have?

- Who is adversely affected by the status quo? How? What level of power do they have?

Impact Workbook

Which stakeholders are working on this issue already? What strategies are they employing? Are these strategies working or not?

What role(s) can our project play in this environment?

What campaign approaches and activities could accomplish this? What short-term outcomes will these activities achieve? What are our most important priorities?

EXERCISE

Use the answers to the questions above to begin creating an outcome map on the following page that specifies your end goal, intermediate outcomes, short-term outcomes and the campaign activities needed to achieve them.

OUTCOME MAP

END GOAL / SOCIAL CHANGE

INTERMEDIATE OUTCOMES

CAMPAIGN SHORT-TERM OUTCOMES

CAMPAIGN ACTIVITIES
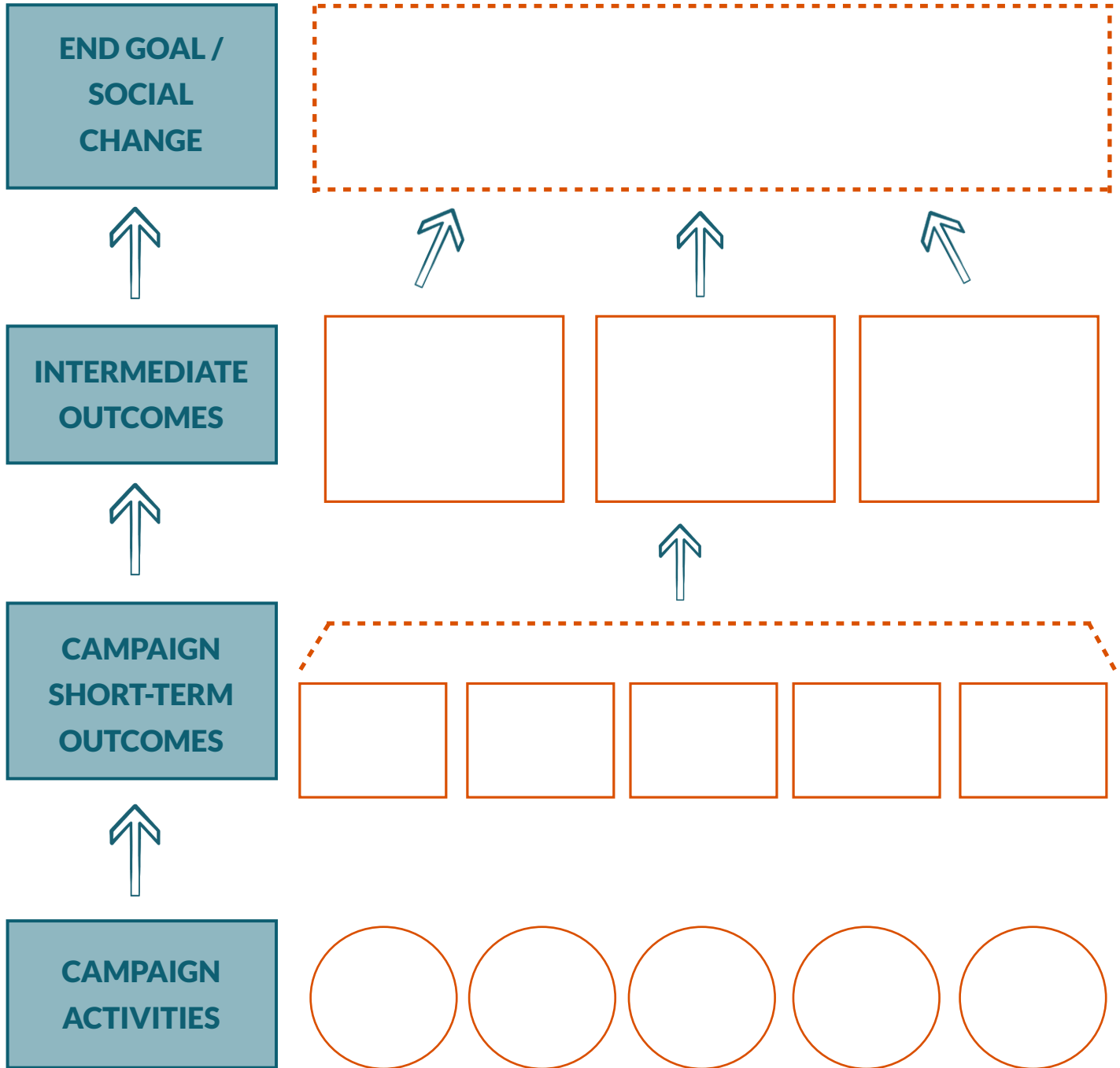
USING DATA TO DEEPEN YOUR IMPACT

Data can be an incredibly useful tool to help inform and modify campaign strategy as well as to communicate effectively with stakeholders throughout the life of your campaign. Collecting and analyzing data from the beginning and then sharing what it reveals both internally and externally is critical. Creating a plan up front ensures that you collect information - both quantitative and qualitative - that is timely, useful and fits with the needs of your campaign and stakeholders.

QUESTIONS TO CONSIDER

Why are we collecting data? Who are the internal and external audiences for the data?

What indicators do we need to track to assess whether we are achieving our short- and long-term goals? When do we need to track them?

What kind of impact story do we want to tell? What kind of data do we need to create that story? (Be sure to consider both quantitative and qualitative.)

What are the currently available and meaningful data sources that we can track to show progress toward our goals?

What data do we need to collect on our own? When do we need to collect it and how?

Which of our partners could share data that could help reveal the most meaningful impacts?

How do we want to communicate what the data shows?

What information will reveal how people's lives have changed because of our

DATA COLLECTION GRID

OUTCOME	INDICATORS (may be several for each outcome)	DATA SOURCE/ TYPE	DATA COLLECTION METHOD	FREQUENCY/ TIME FRAME	TEAM MEMBER RESPONSIBLE

BUILDING STRATEGIC PARTNERSHIPS

Working with NGOs or advocacy organizations is often a key component of your film's impact campaign. We often talk about connecting films to the movement. And, we know that advocates and NGOs can help inform campaign goals, use the film to amplify their work and reach new audiences. In short, partnerships can be incredibly rewarding and critical to deepening and extending the impact of film campaigns.   But, identifying the right partners and building strong relationships requires thoughtfulness and careful management.

QUESTIONS TO CONSIDER

Given the stakeholders we have identified, which are our film naturally aligned with?

Do the stakeholders collaborate, and if so, how? If not, why?

Which stakeholders should we prioritize based on their reach, influence, experience or reputation?

Does the work of these stakeholders align or overlap with our change strategy?

For each stakeholder, how is the organization structured and how are partnership decisions made?

Do we already have relationships with these organizations? If not, through which channels might we approach them?

How might we describe our film and social change goals to these partners to pique their interest?

How will we build trust with each partner and develop shared goals?

What kind of communication will we need to nurture the relationship over time?

How might we structure these partnerships to ensure that they are mutually beneficial and sustainable?

Do we see these partnerships as long-term or short-term?

EXERCISE

Use the questions above to help you complete the Partner Grid
on the following page.

PARTNER GRID

PARTNER NAME	SECURED, PENDING OR TARGETED	AUDIENCE/ REACH	SHARED STRATEGY/ GOAL	CAMPAIGN BENEFIT	PARTNER BENEFIT	NEXT STEP
EXAMPLE: Los Angeles Boys and Girls Club	Targeted	15,000 Youth in k-12 Northeast Los Angeles, parents of K-12 students in Northeast Los Angeles	Create opportunities for children to succeed in and out of the classroom by supporting after-school supplemental programming.	A secured place for screenings throughout the country that will reach primary target audience. Legitimacy from an established community organization.	A new tool for fundraising and parent engagement efforts.	Emily reaches out to friend who knows Director of L.A. Admin office.

CAMPAIGN TACTICS & CALLS TO ACTION

Specifying tactics and calls to action is key to engaging and activating audiences. Calls to action help audiences understand the various ways that they can get involved or deepen their existing involvement and help contribute to the larger change strategy.

QUESTIONS TO CONSIDER

When thinking about a ladder of engagement for each target audience, what is our call to action for each that will add value to the movement?

When the lights go up after our film screens and someone asks what he or she can do to help, how will we answer?

What kinds of engagement activities will we use to realize those calls to action? (For example, viewers guides, curriculum, a "take action"-based website, a petition, a social media conversation, etc.)

What engagement activities and tactics do our partners already use? Can we leverage them or do we need to create our own?

How would we prioritize these tactics and activities?

GROUP EXERCISE

Using the call to action grid on the following page, identify and link your goals, audiences, partners and calls to action.

CALL TO ACTION GRID

CAMPAIGN GOAL	TARGET AUDIENCE	CALL TO ACTION	PARTNER LINK	TOOLS NEEDED
EXAMPLE: Inspire healthier food systems at public elementary schools in California	Parents with children in middle to low-income elementary schools in California	Form school-based parent task groups to identify local solutions for school lunch nutrition improvement	Healthy Schools Campaign	A step-by-step guide for task group formation and actions

SOCIAL MEDIA AND STRATEGIC COMMUNICATIONS

There is no doubt that social media and strategic communications are now key components of the vast majority of film campaigns. If you plan ahead, they can take your campaign to the next level and greatly extend the life of your campaign and expand your reach and story to multiple platforms and new audiences.

QUESTIONS TO CONSIDER

- How are we framing the core issues within our campaign? What is our message?

- How can we establish thought leadership on the issues of our campaign?

- What is our press strategy and how does it reinforce our goals and core message? Will we pursue earned or paid media?

- Which digital and social media platforms will we use to reach our target audiences?

- Which of our target audiences will we NOT be able to reach through social media? How will we reach them?

- For what purpose should each of these platforms be used to most effectively engage our audiences?

- For each platform, what kinds of things will we post? Is there additional content that we need to create or can we leverage existing content? What will the tone and voice of the posts be? How often will we post?

- Who will manage our online community? Does our team need any support or training on managing those platforms?

GATHERING THE RIGHT TEAM

Having a well-thought-out strategy and action plan is critical, but not enough. You also need a team in place that can manage the various components and implement the plan. Sometimes this can be done by the film team but in many cases it requires hiring external people on either a short-term or long-term basis. Who you hire, for how long and for which tasks depends on your strategy as well as your existing staff and financial resources.

QUESTIONS TO CONSIDER

- What is our current team structure? Does it adequately meet the needs of our campaign strategy?

- What are the assets of our current team - including skills, availability, experience, interest and commitment?

- Does our team have extensive project management experience?

- What are the gaps in our current team - including skills, availability, experience, interest and commitment?

- What kinds of skills do we need to add to our team in order to meet the needs of our campaign? How would we prioritize those?

- What are the different ways that our team could be structured? What are the pros and cons of each type of structure?

- Are there ways that we could deepen our partnerships to meet some of our staffing needs?

- What does our personnel budget look like?

GROUP EXERCISE

Use this time to assess your current team structure and how it relates to your campaign strategy. Use the questions above to help guide the conversation.

CREATING THE CAMPAIGN TIMELINE AND IDENTIFYING KEY MILESTONES

Understanding the timeline and key milestones for your film's engagement campaign can help to keep you on track, maximize internal and external resources, and effectively manage your stakeholder expectations.

QUESTIONS TO CONSIDER

When will we begin our campaign?

Are there broad phases within our campaign (i.e. broadcast phase, community screening phase, etc.)?

What are the key dates that affect our campaign? Think about holidays, remembrance months, political cycles, our distribution opportunities, etc.

What key milestones should we focus on to ensure we stay on track?

What are the fundraising deadlines and decision dates that we have targeted?

What are the important dates for our partners?

When do we envision wrapping up our campaign and what is our exit strategy?

GROUP EXERCISE

Use the questions above to create the timeline for your campaign.
From there, translate that timeline into milestones.

BUILDING THE BUDGET

A campaign budget is clearly a necessary component for any funding proposal. It can also be a useful management tool providing valuable insight into which activities are giving you the most impact bang for the buck.   Structuring your budget around key activities with a clear understanding of what the cost drivers are for each allows your team to easily break out the costs of different campaign elements and to "flex" the budget up or down depending on funding levels.

QUESTIONS TO CONSIDER

What are the key activities/components related to our campaign?

What are key costs associated with each activity? What drives each cost?
        Staff?
        Consultants?
        Events?
        Travel?
        Social Media and Communications?
        Web Design?
        Screenings?
        Data Collection and Analysis?
        Communications and Reporting?

Based on our timeline, how would we prioritize the activities?

What are our potential sources of revenue?

GROUP EXERCISE

Create an ideal master budget that is linked to the activities in your plan. Using the master budget, create a phased budget that is linked to your timeline. Think about how you would prioritize that budget. What would you do with $50K? $100K?

FUNDRAISING

Most films and campaigns have different sources of funding, including but not limited to film sales revenue, crowdfunding, friends and family, individual donors, screening fees, honoraria and philanthropic funding. Increasingly, foundations are playing a stronger role in campaign funding and a strong and adaptable funding proposal is important. It should reflect not only deep understanding of your campaign's vision, strategy and what needs to be in place to realize them, but also an awareness of what potential funders support and how a project fits into their guidelines and criteria.

QUESTIONS TO CONSIDER

- Do you have a clear understanding of what kind of support you need? Do you feel confident about your planning to date?

- What are the core issues your film and impact campaign address? Have you identified funders who support these issues? Are there funder networks that focus on these issues?

- Which funders supported your film's production? Would they be open to supporting the impact campaign?

- What are the funding guidelines and criteria for each of the potential funders you have identified? What level of support does each typically give? When are their deadlines and what is the application process?

- Have you thought about the best way to approach different funders? Do you have personal relationships with key staff? Is it possible to initiate a conversation before submitting a proposal?

- Do you have a short, 2-3 minute "elevator pitch" that you can share with potential supporters?

GROUP EXERCISE

Brainstorm a list of possible foundations to approach for support. Create a short one page overview of your project that can be sent to a potential funder to pique their interest. It should include a brief synopsis of the film, campaign vision and goals and general needs of the campaign.

PLANNING FOR THE UNKNOWN

One thing is certain - your campaign will absolutely not go as planned. It's important to plan for the unexpected - as confusing as that may sound - and ensure you are ready to take advantage of opportunities and manage potential pitfalls..

QUESTIONS TO CONSIDER

If our film is nominated for, or wins, an award, how will we leverage that opportunity?

If our film or campaign receives a major newspaper endorsement or mention, how will we take advantage of that opportunity?

If an influencer or celebrity talks about our film, how will we use that opportunity?

If the issue(s) in our film begin receiving major attention from elected officials and there is political movement, how will we ensure our film becomes part of that conversation?

What will we do if we receive an unfavorable review or someone influential says that our film is inaccurate, misleading or damaging in any way to the issue?

What will we do if we do not receive the distribution opportunities we have planned for?

What will we do if there is another film made about the issue(s) in our film? Or a major news outlet begins covering the issues in depth without mention of our film?

What if one of our campaign partners or funders does not like or approve of the final cut of the film?

What will we do if one of our partner organizations receives bad press?

What are other "unexpected" things that we should be thinking about?

IMPACT WORKBOOK

2016 ENGAGEMENT LAB

THE FLEDGLING FUND

helping stories take flight