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ENDORSE COMMENTS

✓

INVITE PEOPLE

— ZIP
— FULL NAME
— EMAIL
— PASSWORD

PHOTOGRAPHY

ASSIGN GENERAL FINANCIAL VALUE

TAKE PHOTOS

Impact Playbook

BEST PRACTICES FOR UNDERSTANDING THE IMPACT OF MEDIA

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About the Impact Playbook

The Harmony Institute (HI) was commissioned to draft this guide by the Bay Area Video Coalition (BAVC) following the 2012 Producers Institute for New Media Technologies, a development laboratory for social issue media projects. It was made possible through the generous support of The Fledgling Fund and the participation of Producers Institute teams.

Harmony Institute is an interdisciplinary research center that studies the impact of entertainment on individuals and society. HI's work spans original research, entertainment evaluations, and product and service development. Driven by a deep curiosity and commitment to understanding fundamental questions around the nature of impact, HI develops creative, scientifically grounded methods for studying and sharing our insights on emerging trends and contexts. To learn more about HI, visit harmony-institute.org.

Bay Area Video Coalition inspires social change by empowering media makers to develop and share diverse stories through art, education and technology. The Producers Institute for New Media Technologies, launched by BAVC in 2007, is a week-long social impact laboratory that connects the world's best social issue documentary filmmakers and partner nonprofit organizations with leading technologists and mentors to develop transmedia tools and story assets to advance shared social change agendas.

We welcome feedback on this guide. Please send emails to info@harmony-institute.org.

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Foreword

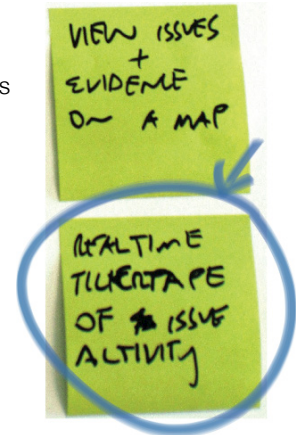
When I walk people through the facilities at BAVC, I point out visual cues to the dramatic changes in the field of documentary media. Over the past decade the "online" postproduction suite has been converted to a dual-boot computer lab with powerful graphics cards and processors; the analog video patch bay that used to hum with transfers and tape mastering has been replaced by fiber optic cables, a live-streamed public access TV station, and terabytes of storage. When I started at BAVC twelve years ago, "social media" meant watching TV with friends. Google was just starting out, and Facebook, YouTube, and Twitter didn't exist.

These changes are not limited to technology. The broader field of support for social change media has grown and evolved as well. Key organizations like The Fledgling Fund, Active Voice, and Working Films, along with foundations and research institutions like the Harmony Institute, have recognized the value of documentary media to make sense of our complex world and foster social change. Organizations like BAVC have trained and mentored media makers in developing innovative documentary projects that harness the opportunities for social change presented by new media technologies. Our field of practice is now connected, collaborative, innovative, and strategic in using documentary media for social change.

As a result, the vernacular of our field has shifted from top-down terms like "distribution" and "outreach" to more socially-oriented, movement and network-minded terms like "participation," "engagement," and "impact." There is already groundwork in place for making sense of these changes. Frameworks like The Fledgling Fund's "Assessing Creative Media's Social Impact" and The Center for Social Media's "Social Justice Documentary: Designing for Impact" offer logical and flexible paths for media makers to understand the hows and whys of impact. The next challenge media makers face is to simultaneously integrate new technologies in their work and to use them to measure and understand impact.

Hence, the "Impact Playbook," a guide that is written specifically for media makers working in collaboration with technologists, organizations, and funders toward shared social impact goals. Building on existing frameworks, this guide offers best practices and concrete strategies to empower media makers to measure, understand, and communicate the impact of their work, at any stage and any scale. We hope that media makers will use this guide to demonstrate the unique contributions of their work to social movements, and that their work will become more rewarding and valued as a result.

We are grateful to The Fledgling Fund for their leadership and support of this work, and are honored to have created this guide with the Harmony Institute, who approached this research by exemplifying the openness, collaboration, and shared goals recommended by the best practices contained herein. We hope you will find the guide useful in your own work, and we welcome your feedback on it so we can continue to build the field collaboratively.



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Introduction

By now the word “impact” is familiar to media makers, funders, and their partners. Although we are confident that all of these groups value the social impact of creative media,¹ these shared commitments must not be left vague, implied, or opaque. As storytelling platforms and data sources proliferate, our goal is to empower media makers to measure and understand the impact of their work.

This guide has two main purposes. The first is to bridge the gap between media makers, funders, and partners by clearly communicating shared motivations and benefits of understanding impact. In this section we will outline these values using clear, simple language. Our hope is to build common ground and open conversations between these different groups. We will also address questions and concerns about impact raised by media makers.

The second purpose of the guide is to build the capacity of media makers to measure the impact of their work. Inspired by the Harmony Institute’s collaboration with the participants at the 2012 BAVC Producers Institute for New Media Technologies, we will outline best practices for media makers to design and implement effective impact measurement with or without outside research or evaluation assistance.

These best practices build on existing frameworks such as The Fledgling Fund’s 2008 paper “Assessing Creative Media’s Social Impact.” Complementing these frameworks, the strategies in this guide are grounded in the creative process and engagement efforts of today’s media makers. Our aim is to distribute impact design and data collection throughout these different stages in a way that adds to our appreciation of art and storytelling. We recognize that all projects are unique and that there is no single formula or metric for understanding impact, but we are confident that all media makers can adapt these best practices to suit their own work.

Why measure impact?

The growing emphasis on measuring and understanding impact is informed by a set of shared but often unstated values between filmmakers, partners, and funders. The following list outlines some of the most compelling reasons for measuring impact. Deciding which values are central to your work and your partners can inform how much time, energy, and resources to devote to impact measurement.

Intrinsic: Understanding impact adds tremendous value to justice and social change work. Media makers, funders, and partners share a deep desire to make a better world. Impact measurement connects stories to the issues, ideas, and people that spark social change.

Community: Communicating impact to partners, stakeholders, and subjects creates a participatory experience. Designing for impact leads to active, engaged audiences. Measurements of social impact provide transparency for contributors and collaborators.

¹ In this guide we use the terms “media” and “media makers” where the term “documentary film” and filmmakers” may have been used in the past. We chose these terms to reflect the fact that long form social issue storytelling has migrated to a number of platforms and media. At the same time, many of the ideas in this document owe a clear debt to the creative and outreach processes pioneered in documentary film and video.

Pragmatic: Measuring impact is a strong argument for the value of creative media. In competitive funding environments, demonstrating social impact sets work apart.

Strategic: Understanding impact provides insights that inform present and future work. By tracking impact over the course of a project, media makers can adjust and optimize outreach and engagement efforts. At a project's conclusion, impact evaluation yields lessons and insights for new projects and collaboration.

Challenges and opportunities

It is equally important to acknowledge the challenges facing media makers and the limitations to measuring impact. Do media makers have the capacity to add impact to their long list of responsibilities? Should media makers be expected to incorporate research and evaluation into their work? What if data and measurements fail to meet expectations and goals?

These concerns are legitimate, but there is reason to be optimistic. Funders are increasingly aware of capacity issues and have made strong commitments to impact in recent years. Special grants and awards like The Fledgling Fund's Impact Grants,² Britdoc's PUMA.Creative Impact Award,³ major foundations such as the John D. and Catherine T. MacArthur Foundation, the Bertha Foundation, and the Ford Foundation, and participatory programs supporting innovative impact such as the BAVC Producers Institute⁴ and Tribeca Film Institute New Media Fund⁵ have all made investments to support media makers interested in impact. New tools and services have made impact strategy and measurement more attainable. Interactive online platforms like Sparkwise⁶ allow filmmakers to track online engagement, provide context, and tell the story of a campaign in new ways.

Increasingly, filmmakers need not act alone to make an impact. Organizations like Active Voice⁷ and Working Films⁸ bring together media makers, funders, and advocacy communities. The Harmony Institute collaborates with media makers and

² [The Fledgling Fund](#) is a foundation that works at the intersection of film and social change. Most of their grants support outreach and audience engagement for social issue documentary films. In 2013 they announced a special set of impact grants to support grantees interested in measuring, documenting and communicating impact.

³ The [PUMA.Creative Impact Award](#) is a €50,000 award established in 2011 by the BRITDOC Foundation to recognize a documentary film that has made a significant social or environmental impact.

⁴ The [BAVC Producers Institute for New Media Technologies](#) brings together social issue documentary filmmakers, non-profit partners, designers, and technologists to develop groundbreaking story platforms and advance social change.

⁵ The [Tribeca Film Institute New Media Fund](#) supports nonfiction, social issue storytelling that moves beyond traditional channels, incorporating games, mobile apps, and interactive websites, along with other emerging platforms.

⁶ [Sparkwise](#) is a flexible, interactive tool that collects and visualizes a wide range of online and offline data. Users can customize individual Sparkwise boards to track the most important metrics for their projects and publish boards to share their results.

⁷ [Active Voice](#) connects filmmakers, funders, and communities to promote lasting social change. These relationships use film as a vehicle for addressing important social issues.

⁸ [Working Films](#) is an independent media organization that links story-driven nonfiction media with organizers and activists to promote social change and justice. They have pioneered many of the outreach and audience engagement strategies used by many media makers today.

their supporters on research to measure and understand impact. And while it is impossible to know from the outset whether a project will meet its goals, both funders and the larger community value efforts to draw lessons from past projects.

A more existential concern expressed by media makers is that a focus on impact has the potential to rationalize or diminish the artistic or journalistic values of media. While there are many festivals, awards, and standards for judging aesthetic, entertainment, and journalistic achievement, only recently have foundations and organizations begun to formally value social impact. This new focus will complement (not replace) artistic appreciation of stories of social change.

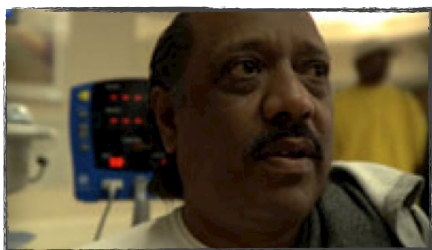
Further, as this field emerges, media makers should take part in building a shared understanding of the terrain. Impact isn't a magic formula or even a single set of metrics. It depends on context, planning, and collaboration. Understanding impact means looking beyond commercial metrics and critical reviews to the ways in which social issue media changes the world in both intended and surprising ways. Rather than reducing impact to a single number or data point, the best impact measurement combines carefully chosen qualitative and quantitative metrics that tell a nuanced story.

What is impact?

The simplest synonym for impact is “change.” Every media project or story changes some aspect of the world. Impact is the sum of these changes.

Underlying this abstract definition is a set of more complex questions: Who or what changes? How can media makers distinguish between change in individuals, groups, organizations, governments, societies, and other possible actors? Over what time frame does impact occur? Is it possible to untangle the role of media from all the other complex factors that contribute to social change? This guide works through these questions to propose best practices that are grounded in the experience of practitioners, using concrete examples. How does documentary media change its audiences and the world? Here are three of the many ways:

Media shapes our personal understanding of important social issues. Stories raise visibility and awareness, build empathy, reframe important issues, and persuade audiences. Long lines of academic research from psychology, to evolutionary biology, to neuroscience provide insight to the ways in which stories affect our minds and why they are so pervasive in our society.



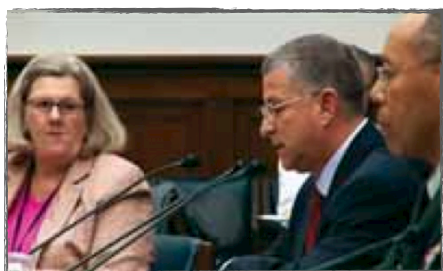
The Waiting Room (Peter Nicks / Open'hood, BAVC Producers Institute 2009) is a recent example of a documentary that relates unfamiliar perspectives and experiences. The film weaves together the stories of uninsured patients and hospital staff waiting for treatment in an emergency room lobby. By telling the stories of these unique individuals and setting, *The Waiting Room* joins a rich lineage of documentary films that provide visibility and context to important social issues.

Media provides a platform for connecting individual and groups. Documentary media can serve as a focal point for bringing together individuals and groups working on a common mission. Networks and movements are strengthened by shared awareness of social issues represented in documentary media.



Not in Our Town (Patrice O’Neal / The Working Group, BAVC Producers Institute 2007) is a film series about hate crimes in America. The film series began in 1995 and has added a robust website with tools for community organizing groups to come together and coordinate action against hate crimes. The stories and site serve as rallying points for local organizing and education efforts, and the site builds capacity for local organizations to lead sustainable grassroots efforts to address hate and intolerance.

Media is a tool for advocacy. Documentary narratives introduce and spread new ideas within the public sphere. These frames⁹ can change minds, build social movements, and impact the conditions of society. Some stories and campaigns advocate explicitly for formal changes in policy; others change the way individuals, groups, institutions, and systems function.



The Invisible War (Kirby Dick, 2012) built on long-term advocacy efforts to inspire legislative change regarding the U.S. military’s handling of sexual assault cases. The film was screened for Secretary of Defense Leon Panetta, who immediately issued a directive to elevate the level of sexual assault investigations. The 2013 National Defense Authorization Act signed by President Barack Obama included a full subsection with provisions to prevent and investigate instances of sexual assault in the military.

This list is only a starting point for thinking about the social impact of media. Further examples and more detailed frameworks from the nonprofit and academic communities can be found in the “Resources” section at the end of this guide. The next section outlines a set of best practices that media makers can apply to their work.

⁹ The word “frame” is used informally throughout this guide to refer to how issues are presented and conveyed to solicit social and behavioral responses. The use of this concept has a long history in social science research, from the work of sociologist Erving Goffman to psychologists Amos Tversky and Daniel Kahneman, among many others.

Best practices for measuring impact

Using this guide

The following sections provide media makers with concrete, applied strategies to measure the impact of their work. This focus follows from our experience of collaborating with media makers and the recognition that this set of skills and capacity needs support. However, the emphasis on strategies and metrics, the “how to,” should not come at the expense of larger questions, the “why.” There are a variety of existing frameworks that ground these practices in strong logical frameworks and theories of change. The Fledgling Fund’s paper “Assessing Creative Media’s Social Impact” or The Center for Social Media’s resource, “Social Justice Documentary: Designing for Impact” contain case studies and provide broader advice and context for understanding impact. To get the most out of this guide, the following best practices should be applied within existing frameworks and theories of change.

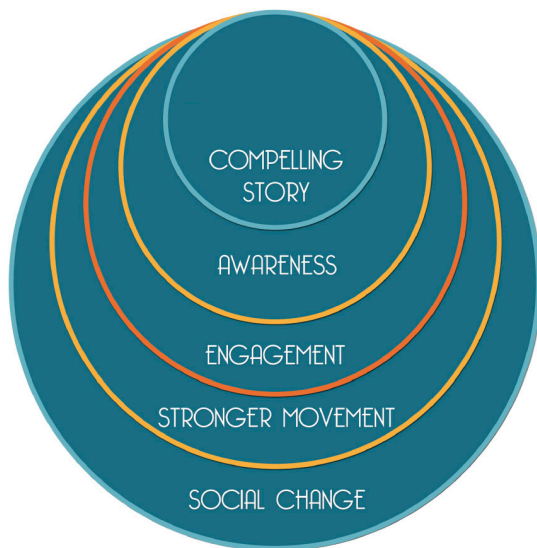


Figure 1: The Fledgling Fund’s “Dimensions of Impact” demonstrate the stages of media leading to social change.

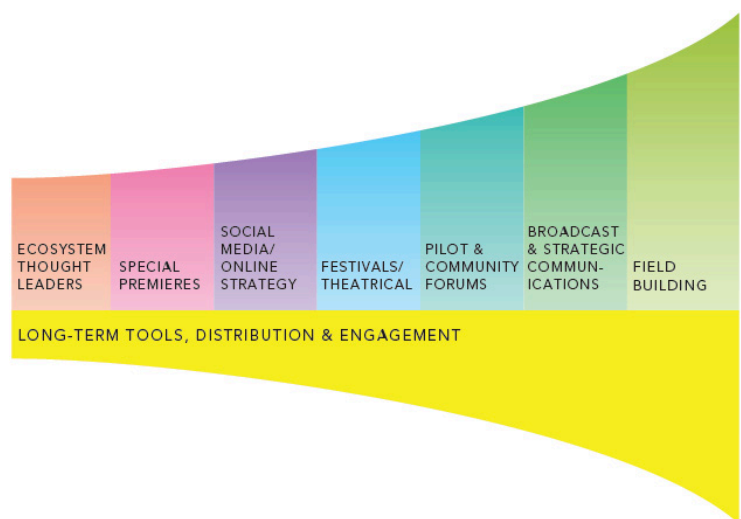


Figure 2: Active Voice’s megaphone model provides a framework for impact that progresses from short-term events to long-term field building strategies over the life of a campaign.

The above frameworks reveal the larger processes that media makers should understand as they work for social change. They explain in more detail how media makers should identify the issues presented in their work and map the larger issue landscape. The project should then be situated within a theory of change that states how each project element will work toward concrete social change objectives. For example, target audiences should be identified in terms of how they fit into

a model of social change. Goals and objectives must be clearly measurable in order for impact measurement and evaluation. Building on this work, these best practices provide advice throughout the creative and outreach processes.

Planning for impact

The road from inspiration to a completed work isn't always a straight path. While early planning is helpful, flexibility is important, as project elements and focus will change along the way. Goals and audiences can be modified, plans redrawn, and new data collected at different points in the process.

Planning for impact should begin as soon as you have a draft, rough cut, or prototype of your story. If applying for early-stage for funding, you may want to think about these questions even sooner and project forward. Having at least an idea about distribution platforms and outreach partners will be helpful as well. Before you begin to exhibit and share your work, you should be able to answer three impact-related questions:

- ▶ What are my social change goals?
- ▶ What audiences do I want to reach?
- ▶ What metrics correspond to my audiences and goals?

Goals

Setting end goals at the project's outset may seem counterintuitive, but only by clearly defining desired outcomes is it possible to plan and carry out impact measurement. A common worry is that setting concrete outcome goals can lead to unmet expectations or even the perception of failure. Accordingly, media makers may restrict their goals or leave important outcomes unstated. While media makers should obviously take factors like budget and capacity into account, goals should not limit media makers' ambitions nor restrict their actions. Goals represent ideals, and need not be measured simply with a binary "yes" or "no," "success" or "failure" logic but rather by understanding "to what extent?" or "in what ways?" Goals may even conflict; for example, a frame that resonates with a specific target audience may not appeal to a broader public. Mapping these goals early in the process allows you to identify and manage these conflicts.

High-level goals provide an initial language and logic for understanding impact.

Examples (drawn from 2012 BAVC Producers Institute participants):

- ▶ Raise awareness of the history and consequences of the Tax Revolt following the passage of Proposition 13 in California.
- ▶ Reframe attitudes toward immigration to recognize the humanity of immigrants and raise awareness of a shared immigrant past.
- ▶ Activate participants to help find housing solutions to homelessness in their local communities.

Initial goals must then be refined to include three important elements: time frame, audience, and metrics:

Time frame

Bounding goals within time frames is necessary for creating a feasible plan to measure impact. Some changes will occur in the short term and others in the long term. Although it isn't possible to forecast time frames with perfect accuracy,

monthly estimates and projections keep impact and outreach efforts on schedule. When determining time frame, ask both, “When can I reasonably expect outcomes to occur?” and “How long can I track these outcomes?”

Audiences

There are two useful questions to ask when narrowing and segmenting audiences: “Who is likely to see my work?” and “Who do I need to reach to influence outcomes?”

Understanding who is likely to see or be interested in your work is essential for making informed decisions about distribution, outreach, and even the content of your story. An effective technique borrowed from the worlds of marketing and product design is to create user profiles of prospective audience members. A user profile is a specific biographical sketch of an audience member that illustrates how they will interact with your story. A user profile should include:

- ▶ Demographic information.
- ▶ Media consumption habits.
- ▶ Motivations for interest in your story or issue.
- ▶ Types of language, frames, and arguments likely to resonate.

For example, a key target demographic for the Tax Revolt goal discussed earlier may be civic-minded urban adults over the age of 40 who connect with their neighbors both in person and via neighborhood blogs and social media.

At this stage, many media makers find it useful to use a picture that represents an actual person s/he knows in order to keep real attitudes and behaviors in mind when designing for this audience. Mapping realistic motivations and the actual contexts in which audiences are likely to experience the story provides a theory of change that reveals opportunities for measuring impact. For example, if you think target users may experience the work at a community screening and stay involved by signing up for an email list, both of those actions can be measured during the outreach stage.

After creating user profiles, media makers should also think creatively about how to reach less conventional groups to broaden your impact. Active Voice has created a “[Beyond the Choir](#)” model that details how to incorporate a variety of stakeholders into impact campaigns and outreach efforts.

Moving beyond individual user profiles, media makers should incorporate specific influencers, decision-makers, stakeholders, and organizations that fit into their theory of social change. Similar to creating user profiles, media makers can project different actions or responses to their work for each audience. As opposed to individual users, these audiences may be defined at the group or institutional levels. To return to the example of the film on taxation in California, screenings may target influential policy analysts, local civic associations, and the state legislators.

In many cases, the most effective target audiences are located where these groups intersect. Thinking about broader audiences composed of unique individuals will inform the process of turning high-level goals into measurable ones.

Metrics

The final step in moving from broad goals to a logical plan for measuring impact is to translate these goals into measurable pieces of evidence. This process of clearly defining measurable concepts is called operationalization. In practice, operationalizing goals always involves interpretive and even subjective choices in order to move from a vague concept to a measurable outcome. Media makers should think in terms of how to relate available evidence to goals. Creators should be able to clearly and simply communicate how and to what extent metrics relate back to larger goals. Revisiting our earlier examples reveals possible ways to operationalize some common goal language:

Broad goal	Possible metrics
“Raise awareness of the history and consequences of the Tax Revolt in California.”	Measurable increase in number of mentions of the Tax Revolt in print and online news outlets.
	Incorporation of media project into California educational materials.
	Measuring audience size (least direct measurement of this group).

Broad goal	Possible metrics
“Reframe attitudes toward immigration to recognize the humanity of immigrants and awareness of a shared immigrant past.”	Identifying changes in language describing immigration on social media platforms.
	Increased participation in or donations to partner or aligned nonprofit organizations.
	Content analysis of user-generated content to identify attitude shifts.

Broad goal	Possible metrics
“Activate participants to help find housing solutions to homelessness in their local communities.”	Number of participants at local outreach events.
	Qualitative audience feedback from participation in community game events.
	Change in homeless population in an outreach location (longer term).

These are just a few of the potential ways to operationalize these broad goals. Creative, innovative metrics are emerging, especially for online or interactive platforms. At the same time, it is important to remember that users of online platforms are not representative of the overall population. When using these metrics, media makers should consider which groups may not have the access or desire to engage online. In all cases, the strength of a metric lies in how strongly it can be linked to a concrete goal. In the next section we list additional metrics to help inspire impact measurement. We can now revisit one of the original goal statements to create a more complete, measurable objective.

Before: “Reframe attitudes toward immigration to recognize the humanity of immigrants and raising awareness of a shared immigrant past.”

After: “We will engage our core target audiences of young, technologically savvy immigrants and nonprofit partner the American Immigration Council to reframe public conceptions of immigration. We will measure engagement in our outreach events, including a screening tour, a national television broadcast, and interactive online storytelling platform. Key metrics include changes in language and frames describing immigration in social media conversation, major national news sources, and national and local policy and legislation for six months following the project’s launch.”

Metrics to track

As storytelling platforms proliferate, there is a growing recognition that there is no single standard metric for measuring impact. Instead, media makers should work to find the combination of metrics that best addresses impact goals and works within the project’s budget and time frame.

A key point for starting any measurement project is to establish baselines. To register change it is necessary to measure the original conditions to provide a point of comparison. Questions to ask include: Are there any surveys or articles that reveal current attitudes? How would nonprofit partners or other experts describe the current state of affairs? Are there existing projects of a similar scale that deal with similar issues? Answers to these questions will provide context for impact metrics.

Throughout our work together, media makers have expressed a desire for concrete metrics and sources of data to incorporate into their impact evaluations. To this end, the following five groupings outline a concrete set of metrics according to five common themes. These options are not exhaustive but are a good starting point when designing an impact plan.

Audience reach

A precondition for impact is for media projects to reach an audience. Traditional distribution metrics drawn from marketing and advertising can help answer questions about audience size and makeup. Many of these metrics will be familiar from the worlds of marketing and distribution. However, they are only the first stage impact measurement.

- ▶ **Audience size:** box office sales; television ratings; DVD and video on demand (VOD) sales; streaming views; trailer views.
- ▶ **Targeted events:** attendance at community and partner screenings; screenings with target audience groups; qualitative feedback from screening audiences; comment cards and surveys collected from screening audiences.
- ▶ **Audience demographics:** top television markets; top box office locations; geographic VOD data; well-attended or noteworthy outreach events with particular groups.

Engagement

Engaging audiences can range from passive viewership to more involved sharing or commenting or creation/remixing of content. In many cases online engagement is less costly to measure, although both online and offline engagement may be important depending on the project. The levels of engagement presented here are presented in ascending order from passive to active.

- ▶ **Experience:** website views; Twitter followers; Facebook Likes; screening or outreach attendance.
- ▶ **Expression and sharing:** comments; user reviews and ratings; petition signatures; website or newsletter registrations; Facebook shares; Twitter mentions; retweets and hashtag usage; forum or blog posts; viewer polls and surveys.
- ▶ **Participation:** posting user-generated content; participating actively in screening or outreach events: registering in advance, inviting others, or posing questions; searching for more in-depth issue information.
- ▶ **Action:** as a direct result of experiencing, sharing, or participating, audience members perform a goal-oriented action; self-reported attitudinal or behavior change; organizing a screening party; donating to a nonprofit organization; signing a petition; volunteering or contributing other skills and resources; contacting leaders or elected officials.

Media and issue landscape

In many cases, media makers are interested in understanding how their stories frame social issues in public discourse. There are a variety of contexts for such discussions, from high visibility news media to social media conversation. Focusing on a wider landscape also permits baseline comparisons to projects dealing with similar issues.

- ▶ **News media:** Google Alerts for usage of key phrases and direct project references in news media; identifying themes in critical reviews; content analysis and number of articles in major news outlets; counting and tracking appearances on local and national programs.
- ▶ **Social media:** record of highly shared social media posts; influential blog posts.
- ▶ **Wider field:** targeted comparisons with similar work, highlighting different audiences reached; interviews with experts and stakeholders in the field; analysis of public commentary at community forums or town council meetings; analysis of academic articles, research, educational curricula design, and public opinion polls.

Building the capacity of partners and allies

Nonprofit and advocacy partners play a crucial role in amplifying the impact of social issue media. These groups provide natural audiences for social issue media and are effective partners for promoting organizational or legislative change. Working with partners to set impact goals and metrics at the outset of the project will encourage them to help you gather data.

- ▶ **Media integration:** tracking effects of media project usage and outreach efforts through events and screenings; volunteer or member registrations; increased donations; constituent surveys; online referrals to and from partner websites; tracking usage of media within organization.
- ▶ **Partner experience:** Interviews with key volunteers or organization leaders about media project and outreach efforts; recording how organizations used media to further their own goals and missions.

Changes in policy or behavior

Longer-term changes in individual or group behaviors, policy, and other material conditions represent long-term goals of many social issue media makers. This type of impact is typically driven by a number of different causes, but independent, noncommercial media fosters this change in important ways. Documentary media can play a central role in coalition building and community organizing by offering a tangible, symbolic story and a trusted journalistic voice that advocates can point to and rally around to build public and political will for material change. These stories create a shared vernacular and memorable, personally resonant examples of complex policies and concepts.

- ▶ **Policy change:** analysis of opinion change or official political stance of legislative leaders; changes in voting patterns; evidence of institutional or corporate policy change; passage of local or national legislation; gathering quotes from key decision makers and supporters; incorporation of media into educational curricula.
- ▶ **Behavior change:** self-reported changes in habits or behavior; observed behavior change among key target audiences and constituencies; community or corporate initiatives; changes in consumer preference or demand; changes in material factors such as emissions, consumption, or usage.

Media makers may also consider hiring or partnering with external or academic research organizations to measure changes in attitudes and behavior that otherwise may be too complex to measure and analyze. In many cases, these organizations can design and implement more sophisticated research methods for measuring impact. This type of

research can be more costly and time-intensive, but provides a clear, rigorous assessment of social impact. Some additional research options include:

- ▶ **Customized pre- and post-surveys** to measure self-reported changes in audience attitude and behavior.
- ▶ **Social experiments** to identify the causal relationships between media and clearly defined outcomes.
- ▶ **Quantitative analysis** of large data sets to identify patterns in social science research, press coverage, or social media conversation.
- ▶ **Qualitative methods** such as focus groups with target audiences and structured interviews with experts to identify the mechanisms behind impact.

Stages of data collection

Even the most well designed impact plans are only as valuable as the data collected. In this section we will outline strategies for media makers to integrate data collection into their planning, outreach and distribution processes. The theme of this section will be building data collection into the normal workflow of designing and distributing social issue media. This strategy emphasizes impact thinking throughout the project's lifecycle and distributes the work of gathering data evenly.

Pre-release

At early stages, media makers should gather baseline data, solicit audience feedback, and identify emerging narratives.

- ▶ Find baseline data from research organizations, issue experts, and similar projects.
- ▶ Establish social media and online analytics tracking mechanisms. Important platforms to consider include Google Analytics, Hootsuite, and Sparkwise to gather and publish online impact data.
- ▶ Gather impact data from test audiences through interviews, comment cards, and surveys; identify particularly powerful characters, scenes, or frames to test when measuring impact. Use this actionable data to refine the media project and plan outreach.
- ▶ Record all festival appearances and awards; analyze early reviews to identify emerging media narratives.

Release and distribution

A film's release is often the peak of conversation on both social media platforms and in the specialized and nation media outlets. Media makers should be equipped to:

- ▶ Gather traditional distribution and marketing data to gauge audience size; make sure that digital distributors can track *and share* emerging data sources like digital cable, video on demand, and streaming. These platforms often include useful viewer data such as demographics, dates and times of access, and geographic distribution. This data can later be mapped to target audiences and goals. Viewership data from the early release phase may also help media makers identify naturally emerging audiences for their work that can be targeted for future outreach and engagement efforts.
- ▶ Track social conversation, appearances in major press and broadcast outlets; identify topics and themes on different platforms; save exemplary posts, articles or quotes; count mentions of film, issue, and key frames.

Outreach and engagement

During outreach efforts media makers are likely to be working directly with target audiences, stakeholders, and decision makers, making this an ideal opportunity for gathering targeted data. Data should be solicited directly from partners during this stage.

- ▶ Gather data from screenings and outreach events: gather advance registration and attendance data; record panel discussions, question and answer sessions, and audience feedback sessions; gather audience member contact information for follow-up, mailing lists, and social media; solicit question cards, audience surveys, or comment cards; document screenings with photographs and written records; note attendance of key groups, decision-makers, or stakeholders; keep a cumulative record of screening events and locations.
- ▶ Collaborate with partners to collect data: provide guides for screening hosts that ask them to input audience metrics; check with partners about what is working well, what could be improved, and what they would do differently.
- ▶ Collect, monitor, and provide context to data online: use Sparkwise or another tool to centralize the online data collection process. Consider creating and embedding a public Sparkwise board to provide context to the real-time data for stakeholders, collaborators and audiences. Whenever possible, be transparent and explicit about social impact goals, and display the goals and context alongside representative data. Make use of the data as it is gathered to adapt strategies and allocate resources.

Communicating impact

Communicating impact to partners, funders, and the larger public validates the time and resources spent in impact design and data collection, presents an opportunity for analysis of goals, process, and outcomes, and provides closure to the most resource-intensive phase of a campaign. By itself, data adds little value to a project. Effort must be taken to interpret and present key findings in a reasonable narrative describing the project's impact. This final step is an excellent opportunity to share successes and lessons learned for application in future projects, and to recognize partners and collaborators for their contributions to the outcomes.

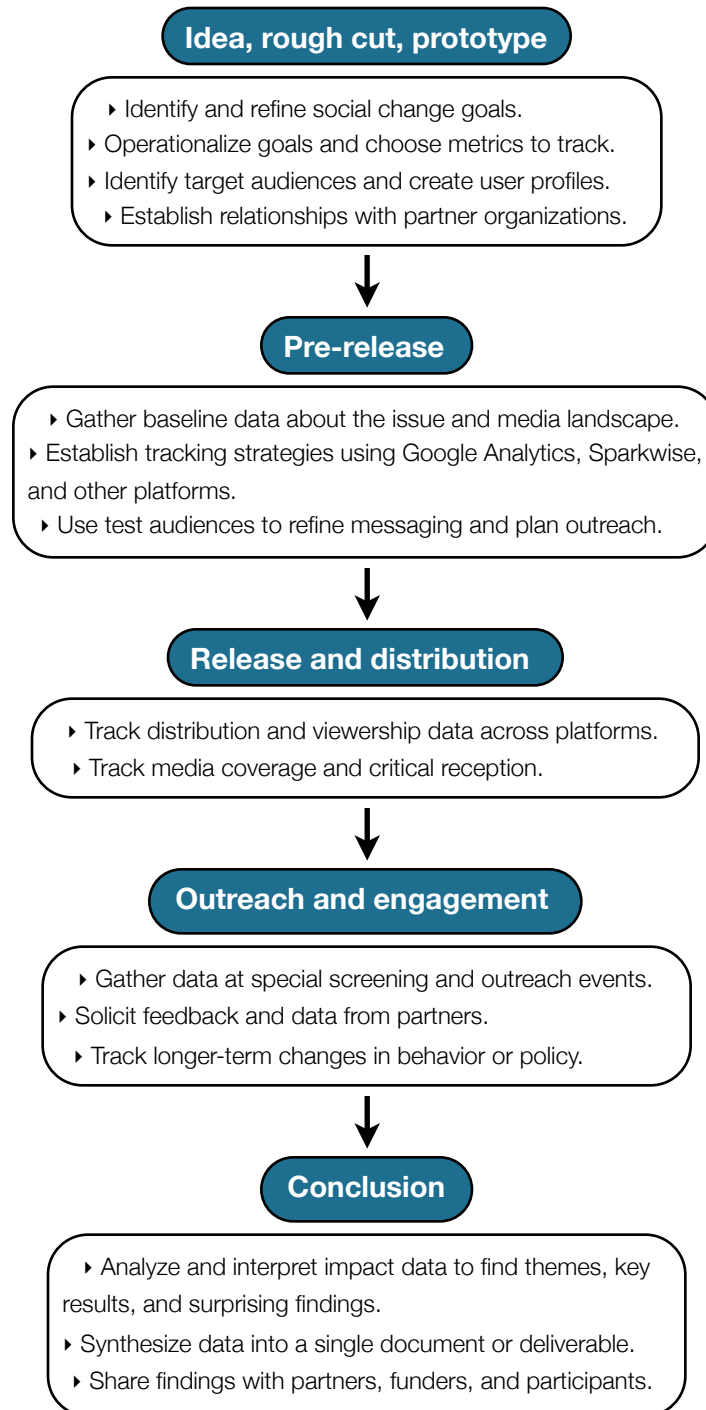
Impact reporting guidelines:

- ▶ Choose relevant data. Gather findings that are representative as well as those that were surprising or unexpected. Where possible, link quantitative metrics to qualitative metrics that explain their value. For example, when reporting the audience size during special screenings, consider adding representative quotes from audience feedback.
- ▶ Relate metrics back to goal statements and theories of change. Rather than simply listing metrics such as Facebook Likes, describe how these numbers fit into your impact and engagement strategy. Segment data from clearly defined target audiences for more nuanced, meaningful results.
- ▶ Express the results of innovative attempts. Even if a specific goal was not met, funders, partners, and collaborators appreciate transparency from media makers when it comes to experiments and innovation. Revealing what was tried, what worked well, and what could work better under different circumstances engages stakeholders in the learning process and strengthens the network of support for a project.

- ▶ Create a single deliverable that clearly and succinctly presents key goals and outcomes. This can take a number of forms, from a one-page document, to a series of blog posts or videos, to a report with data visualization. A public Sparkwise board is a useful tool for presenting online metrics. Whatever format is chosen, sharing results provides important lessons for the larger community.

Workflow

A summary of strategies and best practices mapped to different stages of the creative and engagement process:



Conclusion

At the Harmony Institute we work to understand how media influences our understanding of and interaction with the world. Where we once relied on anecdotes and intuition, we increasingly have access to data that allows us to better observe and measure impact. However, as data sources and platforms proliferate, it isn't always easy to see how the numbers fit together and which metrics matter. Too often more data means more noise. How can we make sense of followers, friends, and posts? How can we cut through the hype of Big Data to create more meaningful and impactful media?

In a word: stories. Even the best data is meaningless without a theory, without a compelling narrative of how the world has changed. In a world of clicks, streams, and downloads, understanding the social impact of media demands careful preparation and thoughtful analysis. This is why we emphasize using clear language to frame goals. It's why we share our results and why we stress a shared set of values that underlie impact measurement.

The importance of narrative and context also makes us optimistic that media makers are better prepared to deal with data than they may think. With skills in crafting and editing complex narratives, media makers are well equipped to gather, analyze and communicate insights from data. The Harmony Institute's experience in impact measurement and evaluation has taught us that finding and interpreting the right metrics for a project is more important than gathering all possible data.

Throughout this best practices guide, we have emphasized the importance of collecting and presenting data to understand how stories change the world. By grounding this thinking in the experience and practice of the creative and outreach process, we hope to empower media makers, partners, and funders to understand and share the impact of their work.

Resources

Guides and frameworks

Diana Barrett and Sheila Leddy. "Assessing Creative Media's Social Impact." The Fledgling Fund. 2008. <http://www.thefledglingfund.org/resources/impact>

Jessica Clark and Barbara Abrash. "Social Justice Documentary: Designing for Impact." American University Center for Social Media. 2011. <http://www.centerforsocialmedia.org/designing-impact>

"Sparkwise Wise Start Guide." <http://sparkwi.se/marketing/wisestart.fhtml>

"Impact: A Practical Guide to Evaluating Community Information Projects." The Knight Foundation. 2011. <http://www.knightfoundation.org/publications/impact-practical-guide-evaluating-community-inform>

Barbara Abrash. "Social Issue Documentary: The Evolution of Public Engagement." American University Center for Social Media. 2009. <http://www.centerforsocialmedia.org/making-your-media-matter/documents/social-issue-documentary-evolution-public-engagement>

"Measuring Public Media's Impact: Challenges and Opportunities." National Center for Media Engagement. 2013. <http://mediaengage.org/CommunicateImpact/index.cfm>

Evaluations and case studies

"The End of The Line: A Social Impact Evaluation." The Britdoc Foundation. 2011. http://britdoc.org/uploads/media_items/theendoftheline-evaluationdocument.original.pdf

"MTV's (DIS)CONNECTED: Entertainment Evaluation." Harmony Institute. 2012. http://harmony-institute.org/docs/full_report_v5.pdf

"Bully: Measuring Online Engagement." Harmony Institute. 2012. <http://harmony-institute.org/wp-content/uploads/2012/10/bullysocialmedia.pdf>

Lisanne Pajot and James Swirsky. "Indie Game: The Movie: The Case Study." 2012. <http://www.indiegamethemovie.com/news/2012/10/31/indie-game-the-movie-the-case-study.html>