

DOCTalks



GUIDE

Cross-sector
Collaborative Practices
for Knowledge-based
Documentary Media

Version 1

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and many more...

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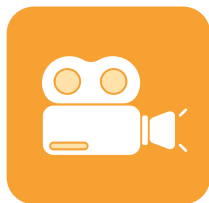
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MESSAGE

In February 2013 the first DOCTalks Festival & Symposium was held in Fredericton, New Brunswick. It consisted of documentary film screenings from the National Film Board and independent producers in Atlantic Canada. There was also an informal meeting of various cross-sectors - documentary producers and officials from university offices of research services, provincial and federal film agencies, charities and foundations. The discussion centred around the question, “Why should we collaborate to produce knowledge-based documentary media content?”

After that meeting DOCTalks and St. Thomas University ORS officials began planning and raising funds to present the 2014 DOCTalks Festival & Symposium. Some 50+ people from various cross-sectors attended. Sitting on panels they shared information about their sector and why there was a need to collaborate with each other. But there were few examples of - How to produce knowledge-based documentary media using cross-sector partnerships?

Since then DOCTalks has taken a “go slow” approach. We presented another Festival & Symposium in 2015 to expand our understanding of how cross-sectors can collaborate. We undertook several ‘hands-on’ pilot projects in 2016-17 to create and promote ‘knowledge-based’ documentary media content, and brought stakeholders together at the 2018 Festival & Symposium to discuss the need for a ‘best practices handbook’ that would guide cross-sector collaborations. Then in 2019, we collaborated with Dr. Paul De Decker from Memorial University to begin the process of compiling this ‘DOCTalks Guidebook’.

On behalf of the DOCTalks Board and hundreds of Festival & Symposium attendees and supporters over the last seven years, we would like to thank everyone that has contributed to Version 1 - DOCTalks Guide: Cross-Sector, Collaborative Practices for Knowledge-based Documentary Media.

We’re very excited to use and continually improve the DOCTalks Guide to help promote, create, fund and mobilize knowledge-based documentary media in Canada using cross-sector collaborative practices!

-Lloyd Salomone, DOCTalks Co-Founder

WHY THIS GUIDEBOOK and HOW TO USE IT

As members of rather diverse, cross-sector communities seek to produce knowledge-based documentary media, they face a number of obstacles that challenge the effectiveness of their relationships. This Guidebook, therefore, puts together insights and observations based on two annual DOCTalks Symposium Roundtable Discussions on Best-Practices (2018-2019) and a questionnaire completed by cross-sector representatives¹.

What follows is organized into several parts in order to present an approach to knowledge-based documentary media.

In the first part we define what knowledge-based documentary media is and the various forms it can take.

This is followed in Part 2 by a brief introduction to what we call a documentary media Community of Practice (CoP). The idea of the community of practice frames our view of knowledge-based projects: that cross-sector collaborators are mutually engaged in the creation of knowledge around a pressing issue facing their community. In this section we identify some of the sectors that we have seen participate in knowledge-based documentary media and what they might offer to a CoP.

Then in Part 3, we turn to direct reports from our survey to present some of the benefits and challenges that face cross-sector collaborators that seek to produce knowledge-based documentary media. We do not provide objective “instructions” to follow as practices that are best for one partnership might not work for others.

Part 4 presents responses to two survey questions on ethics in knowledge-based media production, one dealing with the ethical treatment of people, places and locations that are featured in these projects and another question concerned with the reliable and accurate representation of community knowledge and scholarly research.

We conclude with Part 5 by outlining where we hope to go next.

While we heard from approximately 100 individuals our understanding of some sectors practices are incomplete and require further work. However, we invite you to test our findings or contribute to the discussion. Attend DOCTalks Festivals & Symposia. Start your own DOCTalks CoP wherever you are. Begin to build partnerships with academic researchers, federal and provincial government agencies, NGOs, charities, community members, funders, broadcasters, and documentary producers. Tell us what works, and doesn’t, for you.

We see the Guidebook as a living document, set to grow in proportion to the insights we gather from all cross-sector collaborators. We hope it will serve to provide collective wisdom for new collaborators on ways to mitigate cultural and institutional barriers that might lay in the way of successful knowledge-based documentary media production.

On behalf of DOCTalks Inc., we thank you for your interest in knowledge-based documentary media making. We think this Guidebook will help open some of the doors to productive collaborative work. Or at least, open a few windows of opportunity.

-Dr. Paul De Decker, Linguist, Memorial University & DOCTalks President

¹ No one was compensated for their participation.

Part 1: WHAT IS KNOWLEDGE-BASED DOCUMENTARY MEDIA?

Since the establishment of the National Film Board of Canada in 1939, Canadians pioneered and have expanded the genre of documentary storytelling by creating films that reach audiences across the country and around the world. Today, documentary viewership remains strong and is thriving online.²

However, respondents to our survey and participants at our Festivals and Symposia have noted that, more recently, the popular consumption of documentary media has become sidetracked: most notably around the turn of the century when the Survivor reality TV show first debuted on North American television networks. Since then there has been a proliferation of reality TV and lifestyle shows that have eliminated and displaced what we call here knowledge-based documentary programming on public and private broadcast networks and specialty channels in Canada and across the world. With the rise in reality TV and lifestyle (i.e. cooking & home renovation shows, etc.) programming, DOCTalks is concerned about two main obstacles to using documentary media to educating and improving society:

1. general, poorly-served audiences (citizens) due to a decline in local, educational content, ; and a loss of accessible, high quality, documentary media content that is socially and culturally relevant to local communities
2. the erosion of democratic principles and consensus based decision-making due to a confused, uninformed or disengaged citizenry, leading to a proliferation of ‘fake news’

Despite these current concerns, long-standing relationships between documentarians and academic researchers has produced some of the most acclaimed, factual programming on Canadian broadcast television (The Nature of Things on CBC, Découverte and La Semaine Verte on Radio-Canada). Likewise, the emergence of new opportunities for documentary storytelling due to an ever-changing digital media landscape. This includes: the global expansion of the Internet; access to affordable communication devices; low cost digital media production equipment and software; expanding online streaming services; and the use of social media communities to reach local and global audiences.

DOCTalks believes that documentary storytelling - in its various forms - should be used to educate and improve society. Since 2013, we have worked to further this progress, to address these issues and identify new ways to foster the creation, funding and distribution of knowledge-based documentary media content. Our approach focuses on

building cross-sector collaborations between documentary producers, academic researchers, charities, governments, broadcasters, foundations & funders.

In this first section of the Guidebook, we present our approach to ensuring the growth of knowledge-based media in the current digital and social landscapes.

Types Of Knowledge-based Documentary Media

Respondents to our survey indicated they had prior experience with, or showed a strong interest and further need to showcase, mobilize and share what academics or charities have discovered through research. All are united by an understanding that research findings very often do not reach the public and they would like to work to find other ways to disseminate what they know. DOCTalks has identified two types of distributing knowledge through documentary media.

1. Perhaps most common are projects that involve mobilization activities after a research project is complete. We refer to this type of documentary media as knowledge-mobilization (KM) media.
2. Other respondents were involved with what we call knowledge-exchange (KE) media. These focus on the process of cross-sector engagement and seek to capture, generate, synthesize and share knowledge that emerges in the process of engagement.

In addition to identifying these two types of knowledge-based media, our respondents also communicated ideas about what knowledge-based documentary media might look like:

- it can be character-driven (a technique many documentarians use) but should focus in-depth on a response to a problem
- feature the application of scholarly and/or community knowledge to address social issues that create actionable community change
- show the effectiveness of a mutually agreed upon response by presenting available evidence of results
- primarily concerned with providing insight that others can use
- discuss the limitations of their approach
- adhere to established ethical principles to represent participant’s voices and views accurately and responsibly.

We believe a growing number of academic researchers will be amenable to these suggestions. At their most recent annual Congress conferences, the Social Sciences and Humanities Research Council announced their support for knowledge-mobilization using documentary film by providing a forum for academic researchers to learn more about making a documentary film. Further information can be found at, “Mobilizing Research through Documentary Film”, <https://www.congress2018.ca/calendar/1218> and “The Storytelling Power of Documentary Film”, <https://www.congress2019.ca/calendar/1057>.

² 2018 HotDocs Documentary Audience Survey, <https://www.hotdocs.ca/i/doc-audiences>

Forms Of Knowledge-based Documentary Media

DOCTalks identifies several types of knowledge-based documentary media that cross-sectors can collaborate to produce. Below we present 6 forms that cross-sector partnerships can create. These include – long form documentary films, short videos, podcasts, immersive learning technologies (virtual & augmented reality, apps, games), interactive websites, social media. Depending on project goals, each type of documentary media can be created as a stand alone project or in association with several other types.

Social Media

The simplest type of documentary media creation are social media sites (Facebook, Twitter), where knowledge-based information can be posted online as often as required by the cross-sector collaborators initiating and driving the project. The cost of setting up social media is very minimal, but depending on the amount of internally and externally generated content (text, links to articles, events, videos, podcasts, etc.) to be disseminated in a coordinated schedule, the time requirements may be significant.

The main cross-sector challenges associated with social media are what kinds of knowledge will be mobilized to audiences; and who will be responsible for establishing and administering these sites, generating the content for dissemination, posting, and monitoring it on a regular basis.

If social media is part of a larger documentary media project, then the amount of content and time to create and disseminate will be significantly more involved and complex. Some of the cross-sector challenges associated with social media will be who owns and/or shares the intellectual property (site names, design elements) and how funds will be raised and shared by cross-sector participants to create and maintain the sites and disseminate content.

Interactive Websites

Next is the creation of a website that can be used to establish an online presence for a cross-sector collaboration project. Like social media, the participants will need to determine what kinds of knowledge will be mobilized on the project website; and who will be responsible for designing and administering the website, generating the content for dissemination, placing it on the website for online access, and posting it on a blog and/or social media for online distribution, and monitoring the analytic data to see its audience reach.

Depending on the type of information placed on the project website this content can be static (text, images) or more dynamic and interactive (links to videos, podcasts, feature length documentary film, virtual reality, apps, games). Again, if the website is part of a larger documentary media

project, then the amount of knowledge-based content and time to create and mobilize it will be significantly larger and more complex.

Some of the cross-sector challenges associated with producing an interactive website will be related to who owns and/or shares the intellectual property (domain name, graphic designs, content created); and how the funds will be raised and shared by each cross-sector participant to create and maintain the website and disseminate the content.

Podcasts

Podcasts are audio recordings that are uploaded to and distributed through online audio streaming services (SoundCloud), links embedded on websites and social media, listened to on over-the-air and online radio stations, and/or to be digitally stored for reference and archival purposes. Knowledge-based podcast content can feature interviews and talks with people that want to share their knowledge about a subject or issue that's of interest to them and which they have an understanding of. Podcasts can also be created as part of the research process, so a digital record of the interviews and talks can be kept for future purposes.

The following are some of the processes and challenges that the cross-sector participants will need to discuss and work out before proceeding with the creation and dissemination of a knowledge-based podcast.

Before creating a podcast, the cross-sector collaborators will need to determine what the focus of their project will be, the people to be recorded and will they consent to an audio or video recording. If these interviews and talks are to be conducted by academic researchers then ethics approval through their institution may be needed before the project can begin. Some charities may also have an internal review process before people associated with the project can be interviewed. Documentary producers use personal and location consent forms to ensure they have permission.

Issues of intellectual property will need to be discussed as it relates to who owns and/or shares in the intellectual property. As a general rule, if the academic researcher or charity secures all of the funding to create and disseminate the podcasts then they own the underlying copyright. If the documentary producer provides funds to the project then the copyright could be shared, for example, using a variety of Creative Commons Licenses.

Creating a podcast will require an audio or video recording of the personal interview or talk. This is where a professional documentary producer can assist an academic researcher and charity with podcast planning, budgeting, production and dissemination activities. The cost of creating and mobilizing the podcasts will need to be budgeted so that cross-sector participants can identify and secure

project funding.

A project related website and/or social media activities should also be considered to help disseminate the podcast to online audiences. Podcasts may also be the first step to create additional knowledge-based documentary media (short video, long form documentary film) as they both make use of audio and video recordings.

Finally, the role of the cross-sector participants will need to be clearly defined as to what their association and contribution to the podcast project will be. In some instances a formal agreement (e.g. a Memorandum of Understanding or MOU) between the collaborators may be sought depending on their internal administration policies and processes.

Short Videos

Short videos are audio-video stories distributed through online video streaming services (Youtube, Vimeo) that can also be digitally stored for reference and archival purposes. Short videos – run approximately 5 to 15 minutes in length - are a more complex form of knowledge-based documentary media due to their intended purpose and audience, and because the process to create them is more involved and expensive.

The following are some of the processes and challenges that cross-sector participants will need to discuss and work out before proceeding with the creation and dissemination of a knowledge-based short video.

Before creating a short video project, the cross-sector collaborators will need to determine: what the purpose and focus of the video(s) will be, the audiences to be reached online, the main storyline narratives and the content required to tell the story (people, places, archival material). Issues on how the video(s) will be creatively shot and edited can be discussed by the cross-sector participants, but these decisions should be the responsibility of the documentary producer and the production team (writer, director, camera, sound, editor). The documentary producer will also need to assist the academic researcher and charity with key audio and video activities: planning, budgeting, production and distribution.

A project related website and/or social media activities should be considered to disseminate the short video(s) to online audiences. Short videos may also be the initial step to create additional knowledge-based documentary media (podcasts, long form documentary film).

Again, the role of the cross-sector participants will need to be clearly defined as to what their association and contribution to the short video project will be. Does a formal agreement (e.g. a Memorandum of Understanding or MOU)

between the cross-collaborators need to be signed.

Long Form Documentary Films

Long form documentary films are designed to reach larger audiences through broadcasters and online streaming platforms, such as CBC Television & Gem and the National Film Board. They are usually created so the length of the knowledge-based documentary film will fit into a 30, 60, 90 and 120 minute television broadcast time slot, once commercial advertising, program promotion and other public service announcements are factored in. They are also created and designed for online streaming platforms to be accessed and watched with advertising or a subscription based video-on-demand model.

Long form documentary films are more complex due to their intended purpose and audience, and a lengthy process to create and finance them. All documentary films go through a multi-phase process to complete and release.

The initial phase involves Research & Development activities that will position the documentary film project to attract and secure funding for the Production & Distribution phase. In a cross-sector collaboration, the documentary producer will be the main proponent driving the project, as they have the experience, skills and professional network to create and distribute a documentary film that will reach broadcast and online streaming audiences. The academic researcher and/or charity associated with the knowledge-based film will collaborate with the documentary producer to ensure the project moves through each phase and that mutual benefits will accrue to all of the cross-sector participants upon its completion.

Before creating a documentary film, the cross-sector collaborators will need to determine what the purpose and focus of the project will be; the audiences to be reached via broadcast and online streaming; the main and secondary storyline narratives and content required to tell the story (people, places, archival material); how they can secure funds to complete all of the phases; ways to promote the film upon completion; and intellectual property rights. For the academic researcher and charity they will also need to understand how their knowledge-based research and/or activities will be incorporated into the documentary film, so it will be disseminated to regional, national and international audiences. All of these discussions will focus on what each cross-sector participant will contribute to and receive from the project.

Then the documentary producer will prepare a Research & Development proposal outlining what the focus of the knowledge-based documentary film project will be; the involvement and benefits of each cross-sector participant;

the cost of activities to be undertaken and delivered; the key creative people associated with the project (producer, director, writer); and sources of potential funding they will seek and apply for. If all the participants are in agreement they can proceed with raising the funds to complete this phase. In some instances a formal agreement (e.g. a Memorandum of Understanding or MOU) between the cross-sector participants may be required at this phase depending on their internal administration policies and processes.

The primary purpose of the Research & Development phase is to position the documentary film project to attract and secure funding for the Production & Distribution phase. Some of the activities and deliverables at this stage are:

1. Travelling to meet and conduct on-camera interviews with people that may be in the documentary film to better understand them, their knowledge of the subject, and confirm their participation in the project.
2. Using this footage, producing a short, non-broadcast fundraising video to assist with securing Production & Distribution phase funding. This video would be made available to watch online (Vimeo, Youtube) and provided to interested funders and project partners.
3. Designing a project website and/or social media sites that contain information about the project will also assist with securing Production & Distribution phase funding.

A Production & Distribution phase proposal containing creative, financing and distribution information regarding the knowledge-based documentary media project will then be prepared and sent to potential funders for their consideration and financial support. (i.e. broadcasters, federal & provincial film development agencies, private film funding agencies, foundations, academic research funders, and other potential funders).

As funds for the Production & Distribution phase are secured to complete the documentary film, and all of the required agreements are signed, the production team can begin the process of shooting and editing the film in accordance with the terms and conditions that all cross-sector participants and funders have agreed to.

Upon producing the long form documentary film, it will then be released for distribution purposes. Depending on the intended audience, this could include screenings at film festivals, conferences, community events and possibly movie theatres. As well, the film can be distributed through regional, national and international television broadcasters and online streaming service providers. Measuring the impact of the knowledge-based documentary media project is another key aspect of the distribution process. This requires keeping track of online metrics, broadcast audiences, and film screening attendees in various geographical

areas.

Some other challenges that the cross-sector collaborators will need to work out along the way are:

1. Academic researchers may need ethics approval through their institution and charities may require internal approval before the documentary media project can begin.
2. Documentary producers will need signed personal and location consent forms.
3. Ownership of various types of intellectual property will also need to be discussed. For example: The documentary producer will need to own the documentary film copyright and control the creative process and budget before a broadcaster or online streaming platform will license the documentary film. But if short videos, podcasts, website and social media content are created as part of the knowledge-based documentary media project some of this may be shared (i.e. under a creative commons license).

Again, the role of the cross-sector participants will need to be clearly defined as to what their association and contribution to the knowledge-based documentary film project will be. During the Production & Distribution phases, a formal agreement (MOU) between the collaborators will need to be discussed and signed to ensure the project moves through the various phases.

Immersive Learning Technologies (virtual & augmented reality, apps, games)

Unlike the other projects mentioned (social media, interactive websites, podcasts, short videos, long form documentary films), immersive learning technologies make use of different types of digital media technologies to create knowledge-based documentary media. But in many respects are similar to a long form documentary film, in that they are more complex to produce due to their intended purpose and audience, and a lengthy process to create and finance them. They also require a multi-phase process to complete and release, which include Research & Development and Production & Distribution phases.

Rather than repeat the long form documentary film section as it pertains to defining cross-sector responsibilities and benefits for a more complex project (purpose, content creation, intellectual property rights, securing funding, distribution), we will briefly describe how immersive learning technologies can be used to create knowledge-based documentary media using virtual reality, apps and games.

Virtual & augmented reality technologies (VR and AR, respectively) are commonly used to create new worlds (futuristic visions), re-imagine the present day, or rebuild historical environments (ancient civilizations). These worlds can be created using evidence-based research. For example: based on historical and archaeological evidence,

an academic researcher or museum may want to re-create a virtual reality model of a historic site or event from the distant past. Once re-created, audiences can access and experience this virtual world using VR headsets, goggles and glasses. VR also has many applications in science and engineering fields.

Apps or computer applications can also be created using evidence-based research. For example: medical apps can be created to assist health professionals understand, prescribe and inform patients about how to properly use a medication. Teachers can use customized apps to help students learn about specific subjects. Once the apps are developed and tested they can be accessed online using any device – phone, pad, desktop.

Games can be produced for the purposes of creating knowledge-based documentary media. For example: game theory has applications in many fields of social and computer science as it relates to the science of logical decision making. Many of these theories are used and tested to create games for applied learning purposes in the fields of biology, economics, and behaviour relations.

Because these immersive learning technologies are uniquely created using computer coding, hardware and software equipment, and graphic interfaces, the cross-sector collaboration team will need to have the technical knowledge and experience to produce and distribute this type of knowledge-based documentary media project. Sources of funding for immersive learning technologies are also specialized, so the documentary producer will need to have the knowledge and experience to identify and tap into them. Legal agreements regarding IP and copyright will also need to be discussed and signed by cross-sector participants to ensure the project moves through various phases until completion.

Issues Relevant to All Knowledge-based Media

Who owns and/or shares in the intellectual property will also need to be discussed. As a general rule, the cross-sector participant(s) that secure the funding to create and distribute the documentary media content will own and/or share in the underlying copyright.

Depending on the people and animals being featured in the media, academic researchers may need ethics approval through their institution and charities may require internal approval before the video project can begin. Documentary producers will also need signed permissions in the form of personal and location consent forms.

A project related website and social media activities should also be considered to assist with reaching intended audiences through online distribution. In some instances the creation and distribution of a short video(s) could lead to the development of a long form documentary film

project.

Again, the role of the cross-sector participants will need to be clearly defined as to what their association and contribution to the knowledge-based, media project will be. A formal agreement (MOU) between the collaborators may be required depending on the various completion phases to be undertaken and internal administration policies and processes.

Part 2: THE DOCTALKS COMMUNITY OF PRACTICE

DOCTalks has come to view knowledge-based documentary media as fundamentally collaborative and centred on community relationships. We therefore propose a Community of Practice approach^{3,4} for knowledge-exchange and mobilization partnerships.

The Community of Practice framework (CoP) has its origins in the scholarship of Jean Lave (a cognitive anthropologist) and Etienne Wenger (an education theorist). They defined a CoP as: “a group of people who share a concern or a passion for something they do, and learn how to do it better as they interact regularly”⁵.

A CoP approach to the type of documentary media proposed here provides a number of advantages. First, it turns the focus towards collaboration, defined by cross-sector collaborators engaged around a common interest to investigate and address the social concerns they face at local, national and international levels. All participants, peripheral as well as central members are responsible for contributing to the final product. Second, this process of engagement prioritizes the CoP’s members’ experiences and specialized knowledge (e.g. media production, academic research, understanding of social problem under investigation, personal experiences), sees them as important to the identity and goals of the entire group and seeks to capitalize on them. Third, it views its members’ interpretation of research knowledge or personal experience as important to the development of the emerging media project. The collective learning that takes place in a CoP becomes the focus of knowledge-based media, as it works to develop a common narrative for the issues they seek to address.

Naturally, the combination of a diverse group of cross-sector participants is likely to lead to cultural barriers, and inhibit the creation of knowledge and practices for communicating that knowledge. It is therefore the goal of DOCTalks to understand these barriers and develop strategies to mitigate them. In the next section we introduce who the members of a CoP might be and then, later below, identify

3 Lave, J. & Wenger, E. 1991. *Situated Learning: Legitimate Peripheral Participation*. Cambridge: Cambridge University Press. ISBN 978-0-521-42374-8.

4 Wenger, E. 1998. *Communities of Practice: Learning, Meaning, and Identity*. Cambridge: Cambridge University Press. ISBN 978-0-521-66363-2.

5 <https://wenger-trayner.com/resources/what-is-a-community-of-practice/>

potential cross-cultural boundaries each sector may bring.

Who's Who In A Documentary Media Community Of Practice

In order to produce, fund and distribute knowledge-based documentary media we identify six cross-sector groups: documentary producers, academic researchers, charities, governments, broadcasters, foundations & funders. This section introduces each sector and what they can offer to a knowledge-based documentary media community of practice. All responses reported here are paraphrased versions based on the original author's survey response.

Documentary Producers

DOCTalks has identified the Documentary Organization of Canada as the primary association representing professional documentary producers in Canada. But this does not exclude other documentary producers from participating in knowledge-based documentary media projects.

“The Documentary Organization of Canada (DOC) is the collective voice of independent documentary creators across Canada and the premier organization for Canadian documentary advocacy. DOC operates in six regional chapters from coast to coast (with over 800 members).”⁶

Documentary Producers can offer a CoP the following:

- experience in producing compelling & watchable documentary films and digital media content
- expertise in research, visual arts & storytelling
- understand narrative structure, with an emphasis on visible evidence and an empathetic approach to characters that impact the documentary and the entire research process
- bring an outsider's perspective to the academic research and ask a lot of questions
- able to help academic researchers and charities identify ways to raise their profile and mobilize their knowledge/issues beyond their traditional means of dissemination and promotion.
- can identify and secure various sources of revenues to produce content that benefits all of the cross-sector participants collaborating on a documentary media project

Academic Researchers

DOCTalks has identified the Canadian Association for University Teachers as the primary association representing professional academic researchers in Canada. This does not exclude other academic researchers from participating in knowledge-based documentary media projects.

“The Canadian Association for University Teachers (CAUT) is the national voice for academic staff representing 72,000 teachers, librarians, researchers, general staff and other academic professionals at some 125 universities and colleges across the country.”⁷

Researchers typically disseminate their findings at academic conferences (93%); some have explored film or video production (4%) (Gopaul et al. 2016)

Academic researchers can offer the following to a CoP:

- funding: within the past few years, SSHRC has encouraged researchers to use documentary film for knowledge-mobilization purposes.
- some academics can travel within their regions to collaborate on a project.
- because their research is sponsored and they receive a salary from their university, they charge no additional professional fees.
- will hire students as research assistants if funded through Tri-Council* grants.
- first-hand experience with the science behind the issues/ research findings and must comply with ethical practices and standards.
- academic rigour & peer review to ensure legitimacy of claims.
- universities provide access to materials, equipment, community meeting spaces. Some have media production in-house.

*The Tri-Council funders are the Canadian Institutes of Health Research (CIHR), the Natural Sciences and Engineering Research Council of Canada (NSERC), and the Social Sciences and Humanities Research Council of Canada (SSHRC). For more information see Academic Funding Sector, below.

It is worth mentioning that most funders require end of project achievement reports that show the impact of their project. SSHRC⁸, in particular, uses these reports to:

- promote social sciences and humanities research, and show how it contributes to a better future for Canada and the world;
- demonstrate the impact and outcomes of the research it funds, and how the findings from this research are used to improve our quality of life, enrich cultural expression, and drive prosperity, equity and sustainability through innovation;
- monitor the performance of its funding opportunities;
- report to government; and
- provide input for decision-making on and the evaluation of funding opportunities.

Knowledge-based documentary media can be designed around these report requirements to clearly illustrate how researchers have used the funds given to them and provide short, concise illustrations of impact and engagement

⁷ <https://www.caut.ca>

⁸ <https://www.sshrc-crsh.gc.ca/funding-financement/using-utiliser/achievement-realisation/reports-rapports-eng.aspx>

⁶ Source: <https://www.docorg.ca> [Note: DOCTalks is not affiliated with the Documentary Organization of Canada.]

beyond scholarly publications.

Charities⁹

DOCTalks refers to the Canada Revenue Agency definition of registered charities and non-profit organizations.

“Registered charities and non-profit organizations (NPOs) both operate on a non-profit basis, however they are not the same. Registered charities are charitable organizations, public foundations, or private foundations that are created and resident in Canada. They must use their resources for charitable activities and have charitable purposes that fall into one or more of the following categories. Some examples are:

- relief of poverty (food banks, soup kitchens, and low-cost housing units)
- advancement of education (colleges, universities, and research institutes)
- advancement of religion (places of worship and missionary organizations)
- purposes beneficial to the community (animal shelters, libraries, and volunteer fire departments)

Non-profit organizations are associations, clubs, or societies that are not charities and are organized and operated exclusively for social welfare, civic improvement, pleasure, recreation, or any other purpose except profit. Here are a few types of non-profit organizations and examples of each:

- social, recreational, or hobby groups (bridge clubs, curling clubs, and golf clubs)
- certain amateur sports organizations (hockey associations, baseball leagues, and soccer leagues)
- certain festival organizations (parades and seasonal celebrations)”

For the purposes of creating knowledge-based documentary media using cross-sector collaborations DOCTalks is referring to ‘charities’ that have an approved charitable tax number issued by the Canada Revenue Agency versus non-profit organizations that do not. But this does not exclude non-profit organizations from participating in knowledge-based documentary media projects.

Charities bring the following benefits to a CoP:

- engagement in understanding and addressing societal issues that are of value to the public
- compelling stories to tell about how they’re making a differ-

⁹ Canada Revenue Agency : <https://www.canada.ca/en/revenue-agency/services/charities-giving/giving-charity-information-donors/about-registered-charities/what-difference-between-a-registered-charity-a-non-profit-organization.html>

ence in the communities they serve

- existing collaborations with other cross-sectors (governments, academic researchers)
- their charitable tax status enables them to seek funding from a variety of sources to create documentary media (governments, foundations, donors)

Governments

There are various levels of governments (federal, provincial, territorial, municipal, indigenous) and types of government bodies (ministries, departments, agencies, programs) in Canada. DOCTalks refers to various levels of government as outlined by Immigration & Citizenship Canada, but acknowledges there are numerous government bodies that could participate in the creation, funding and mobilization of knowledge-based documentary media.

Governments might bring the following to a CoP:

- understanding and addressing societal issues that are required by the public and important to their government and policies (ministries, departments, agencies, programs).
- engagement with citizens and target audiences by producing knowledge-based documentary media content that can highlight a societal issue (i.e. social, cultural, economic, environmental) and/or activities that will address challenges (problems) and opportunities (benefits) associated with an issue.
- existing collaborations with and provide funding to various cross-sectors (documentary producers, academic researchers, charities, broadcasters, foundations) that are collaborating to address societal issues using knowledge-based documentary media.

Broadcasters¹⁰

DOCTalks refers to broadcasters that are licensed by the Canadian Radio-Television and Telecommunications Commission to operate in Canada under the Canadian Broadcast Act. These do not exclude international broadcasters and other media content distribution platforms.

The CRTC recognizes “the services of different types of broadcasters, including the following.

- 9(1)(h) services: These are services that benefit from a mandatory distribution order under section 9(1)(h) of the Broadcasting Act. The Commission requires the mandatory distribution of these services because the programming they offer is important for achieving certain objectives of the Act. (For example: CBC Television, Ici Radio Canada Tele, APTN)
- Over-the-air services: Many stations are available over-the-air (OTA). Those stations typically included a significant amount of local programming. (For example: TV Ontario, Knowledge Network)
- Community television: Community programming channels

¹⁰ Government of Canada (Canadian Radio-television & Telecommunications Commission): <https://crtc.gc.ca/eng/television/services/types.htm>

are generally operated either by over-the-air (OTA) stations or by terrestrial broadcasting distribution undertakings (BDU), such as cable companies. Community television is a service that offers: Locally-produced programs reflecting a community; Access to the broadcasting system by members of the community. (For example: CHCO in St. Andrews, NB; CIMC in Arichat, NS)

- Discretionary services: Discretionary services are those services other than conventional television stations that are not available over-the-air (OTA). Subscribers have the option to have those stations as part of their broadcasting distribution undertakings (BDU) offerings. While licensed as discretionary services, these have additional conditions associated with their licences that are unique to these services and do not apply to other discretionary services. (For example: National news services, mainstream sports services, specialty channels)
- Ethnic and third-language programming: An ethnic service devotes at least 60 percent of its programming in the broadcast week to ethnic programs. Ethnic programs are programs in any language that are specifically directed toward any culturally or racially distinct group other than Aboriginal Canadians or groups from France or the British Isles.(For example: Omni Television, Teletatino Network)
- On demand services: On-demand services are available from service providers, such as cable or satellite companies, and are increasingly becoming available over the Internet. Such services offered by BDUs allow subscribers to choose the programs they want to watch. (For Example: Crave, Superchannel).
- Religious television: A service that is licensed to focus on offering religious programming.(For example: The Miracle Channel) ”

What do Broadcasters bring to a CoP?

- can ensure that Canadian broadcasting content meets the needs and interests of Canadians by delivering compelling, high-quality Canadian-made creative content from diverse sources on a variety of platforms
- provide support for the maintenance and development of Canadian talent by ensuring that Canadian artists can:
 - create content for both Canadian and global audiences,
 - gain financial support, and
 - promote their creations
- broadcast time and production facilities
- broadcast licenses that can trigger more funding options
- facilitate local content
- knowledge of business practices for distribution and broadcasting of content

Foundations & Funders

DOCTalks has divided Foundations & Funders into three sub-sections related to public & private foundations, charities, academic researchers and documentary producers.

i) Public & Private Foundations Sector Funding

DOCTalks has identified four member-based organizations in Canada that represent public and private foundations. This does not exclude foundations that may not be members of these organizations.

“Community Foundations of Canada believe in a future that is bright; a future that is just and sustainable; a future that is not the status quo; and we’re building a movement that connects community foundations, partners and Canadians to make this future a reality. Our network of 191 community foundations operates across Canada. From coast to coast to coast, through grassroots relationships and bold coalitions, we work to create systems-level change on the issues that matter to Canadians.”¹¹

“Philanthropic Foundations of Canada is a member association of Canadian grant makers, including private and public foundations, charities and corporations. We seek to support our members and organized philanthropy by encouraging public policies that sustain the sector, by increasing awareness of philanthropy’s contribution to the well-being of Canadians, and by providing opportunities for funders to learn from each other. We provide a voice for organized philanthropy, assist in building a professional network for our thought-leaders, and inform on good practices.”¹²

“Canadian Environmental Grantmakers’ Network is a network of funders inspired by a vision of an environmentally sound and sustainable Canada and working to strengthen the impact of philanthropy in support of that vision. Together, we represent private, public, community, and corporate foundations that share a desire to learn, collaborate, and leverage resources in pursuit of common priorities.”¹³

“The Circle on Philanthropy and Aboriginal Peoples in Canada is an open network to promote giving, sharing, and philanthropy in Aboriginal communities across the country. The goal of the Circle is to connect with and support the empowerment of First Nations, Inuit and Métis nations, communities, and individuals in building a stronger, healthier future.”¹⁴

What Foundations have to offer a CoP:

- wide variety of mandates that enable them to engage, understand and impact societal issues that are of interest to them
- existing collaborations with and provide funding to various cross-sectors (academic researchers, charities)
- they need to effectively communicate their social impact activities to the public and various target audiences
- diverse group of registered charities funders that annually contribute funding to qualified donees across the country

¹¹ Community Foundations of Canada: <https://www.communityfoundations.ca>

¹² Philanthropic Foundations Canada <https://pfc.ca>

¹³ Canadian Environmental Grantmakers Network: <http://www.cegn.org>

¹⁴ Circle on Philanthropy and Aboriginal Peoples in Canada <http://www.philanthropyand-aboriginalpeoples.ca>

- work on multiple projects at a time by providing sponsorship or funding for projects
- have networks of organizations and individuals working “on the ground” as well as other foundations and thought leaders working on issues similar to their own
- some take a systems approach and can provide insight into how the issue at hand exists within a wider ecosystem

ii) Academic Research Sector Funding¹⁵

DOCTalks has identified three academic research funding agencies overseen by Innovation Science & Economic Development Canada. This does not exclude other academic research funding agencies in Canada or internationally.

“The Social Sciences and Humanities Research Council (SSHRC), the Natural Sciences and Engineering Research Council (NSERC), and the Canadian Institutes of Health Research (CIHR) support and promote high-quality research in a wide variety of disciplines and areas.

Applications to SSHRC as the primary source of research or research training support must meet the following criteria:

1. The program of research must be primarily in the social sciences and humanities (i.e., aligned with the SSHRC legislated mandate) and;
2. The intended outcome of the research must primarily be to add to our understanding and knowledge of individuals, groups, and societies - what we think, how we live and how we interact with each other and the world around us.

Applications to NSERC as the primary source of research or research training support must meet the following criteria:

1. The program of research must be primarily in the natural sciences and engineering, other than the health sciences (i.e., aligned with NSERC’s function legislated in the NSERC Act); and
2. The intended objective(s) of the research must primarily be to advance knowledge in one or more of the natural science or engineering disciplines.

Applications to CIHR as the primary source of research or research training support must meet the following criterion:

1. The intended outcomes of the research must, as stated in CIHR’s mandate, primarily improve or have an impact on health and/or produce more effective health services and products and/or strengthen the Canadian health care system. “

What Academic Funders have to offer a CoP:

- fosters and maintains an environment that supports and promotes the responsible conduct of research
- ensures the effective management of conflict of interest of any participant in the review process

¹⁵ Source: Government of Canada (Industry Science & Economic Development) http://www.science.gc.ca/eic/site/063.nsf/eng/h_FEE7261A.html?OpenDocument

- informs the public about Agency grants and scholarships awarded, programs of research support and research training, and the impact of research conducted at their Institutions or facilities funded by the Agencies (SSHRC, NSERC, CIHR)

All three major federal academic research funders mentioned support cross-sector collaborations and partnerships.¹⁶

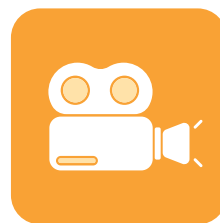
iii) Documentary Film Sector Funding¹⁷

DOCTalks has identified a variety of federal, provincial and private sector film agencies that provide funding for documentary media projects. This does not exclude other sources of documentary funding in Canada or internationally.

“The vibrancy of [this] sector is reflected in how filmmakers are embracing global digital transformation with content for expanding platforms, evidence of their ingenuity and resilience.

To finance their productions, independent documentary producers are accessing federal, provincial & territorial production tax credits and grants; licence fees from broadcasters (such as CBC, Radio-Canada, TV Ontario, Knowledge Network) and web-based platforms (such as Telus Storyhive, Optik); funds from public agencies (Canada Media Fund, Telefilm Canada); equity from private funders (such

¹⁶ https://www.sshrc-crsh.gc.ca/about-au_sujet/partnerships-partenariats/index-eng.aspx
¹⁷ Documentary Organization of Canada (Report: Getting Real – 6th Edition) https://www.docorg.ca/getting_real_6



Documentary Producers



Academic Researchers



Charities



Governments



Broadcasters



Foundations & Funders

as Rogers Documentary Fund, Bell Fund), National Film Board of Canada programs; financing from distributors, foundations and corporate sponsorships.

Distribution is commonly taking place on broadcaster networks and web-based platforms such as CBC Gem, Crave, Arte Webdocs; as well as on internet platforms such as Telus Storyhive, YouTube, Vimeo, Amazon Prime Video and Netflix.”

What Documentary Funders have to offer a CoP:

- ensuring Canadian artistic expressions and cultural content are created and accessible at home and abroad
- ensure that Canadians and the audiovisual industry achieve maximum social, cultural and economic benefits
- developing and retaining talented creators
- foster the quality and diversity of Canadian films and digital media content and build larger audiences at home and abroad for it
- build, preserve and disseminate our collection of Canadian films and digital media content for audiences at home and abroad

Part 3: WHAT COLLABORATORS NEED TO KNOW

How different sectors work

While documentary media production is already a collaborative activity, cross-sector collaborations can be a challenge. At times, each cross-sector participant may have their own goals and want to achieve different things. For instance, funders may want to showcase their good works and the impact they are having; broadcasters might want content that will reach audiences and generate revenue; charities may want to be recognized for their work; academics might want unbiased research data; governments may want issues, policies and programs to be highlighted; and documentary producers might want to tell a good story.

These are not necessarily mutually exclusive goals but may be more difficult to achieve unless there is a mutual understanding of each collaborator's needs and requirements as it relates to the creation, funding and mobilizing of various types of knowledge-based documentary media contents and projects. This section presents observations from survey responses about what participants should know about their CoP collaborators before setting out to create knowledge-based documentary media. All responses presented here are anonymized but reported verbatim for the sake of authenticity.

Documentary Media Producers

- It takes more time to build relationships and trust between various cross-sector partners, as each sector and partner have different ways of operating internally and externally. Patience is a requirement.
- The production must have a viewable structure with an unfolding story that holds the viewer's interest. The technical content (sound and picture) must be of the best quality achievable and the editing must be of the highest skill level.
- Adhere to various film funding agencies (federal, provincial, private) eligibility and policy criteria. Ownership of copyright for certain types of documentary media content. Insurance policies at various stages in the filmmaking process.
- The research, development, production and distribution of a documentary media project could go on for several years with the launch at Festivals, Conferences, Television, Online Streaming, Website, Social Media, etc.

Academic Researchers

- Will want to consider how a film will fit with the scholarly objectives of their research project.
- While universities are driving themselves towards commercialization and entrepreneurialism, some academics are cautious about commercialization and do not want to contribute towards the creation of marketable products.
- Create opportunities for knowledge exchange and educational experiences/training for graduate students.
- Want community members to understand how their disciplinary methods can be applied to community issues. Also, seek to make their research accessible while educating an audience about how research is conducted.
- Must follow Tri-Council policies on research ethics.
- Documentary projects, if research-based, will require an internal ethics review at the university.

Charities

- Have limited resources (staff, volunteers, facilities, funds), so they are careful about taking on new projects.
- Need to protect their core service activities, charitable tax status and donor relations, so any new project will need to tap into additional sources of funding.
- The story they want to tell will need to be based on a service activity that they offer, meets a public need and will resonate with an audience.
- May have access to reach various target audiences (local, regional, national, international) through internal and external promotional affiliations and partnerships

Governments

- Every level of government has a variety of ministries, departments and agencies that need to achieve policy and program objectives
- May require communication strategies to accomplish their policy objectives and reach target audiences by collaborating with other cross-sector partners (charities, academic researchers, documentary producers) that have similar societal interests and goals (social, cultural, economic, environmental, etc.).

Broadcasters

- Broadcasters require that documentary media producers own the copyright and retain editorial control, adhere to journalistic standards and practices, take responsibility for errors and omissions, and be a Canadian owned for-profit business, before providing a broadcast license for their documentary media content.
- Production budgets and funding for documentary media projects may need to meet license fee threshold requirements.
- A broadcast license can trigger other sources of funding.
- Community-based broadcasters seek financial contribution/project sponsorship to help maintain services.
- Pitches to a broadcaster must balance newsworthiness, artistry, and broadcaster's values.
- Productions that get approved will need to have experienced storytellers/technicians involved.
- Have to be comfortable that the documentary media project will be delivered on time and meet technical and quality control standards.

Foundations and Funders

- The 'impact producing' role is one which could use more developing in Canada, as this seems like it has a potential to tie projects together.
- Different funders (e.g. foundations, government agencies) are sometimes limited by what they can do/fund based on the source of their funding.
- In kind contributions are not always considered eligible by funding agencies.
- Funding is guided by federal and provincial regulatory requirements (Canada Revenue Agency, various ministries).
- Create agreements or memoranda of understanding with partners and creative agencies to ensure any internal administration policies are met.
- Grants and funding must be approved by officially designated staff, committee's and boards.

Some Known Challenges

There are several key steps and processes that participants will need to fully understand if they want to successfully create knowledge-based documentary media using a cross-sector collaborative approach. These steps and processes are outlined below.

Knowledge-based documentary media will require a documentary producer to oversee the production process. But the producer may not be the cross-sector partner initiating or driving the project. In many instances the proponents are academic researchers that want to disseminate and mobilize their research knowledge and/or charities that have a unique story to tell about their activities. In other instances the documentary producer will approach an academic researcher and/or charity with a project. Determining which cross-sectors will be the primary participants is the first step in the process.

Related to this is the need for all cross-sector participants to mutually respect and understand each other as it relates

to what they can and will contribute towards the creation of knowledge-based documentary media. Being comfortable with each other and agreeing on why they want to collaborate will be the first challenge. But there are many processes and challenges that cross-sector participants will need to discuss and work through as they engage with each other in a knowledge-based documentary media CoP. What follows here is a brief outline of challenging experiences that cross-sector participants have needed to tackle during past projects. Responses presented here are anonymized but reported verbatim for the sake of authenticity. It is also worth noting that these are responses made by those who participated in our survey and may not reflect the views of DOCTalks.

Documentary Media Producers

- Intellectual property and copyright agreements are the producers responsibility (as opposed to broadcaster).
- Academic funders prefer to fund student development which makes it really hard to hire professionals. There is also an expectation that professionals will work on a research project for free or at significantly reduced rates. There seems to be no appreciation that documentarians do not receive the salary outside of the actual documentary work they do.
- Academic ethics can be especially problematic when things start changing "on the ground". Documentary filmmakers are very good at adapting as the story reveals itself. Researchers are locked into a pre-determined plan. Also, researchers like to do very long interviews that follow a fixed line of questioning. This leads to some pretty dry material and a lot of footage to be transcribed.
- The usual release for a participant in a film is a simple one compared to the the release required for an academic researcher which can run to several pages.
- Memoranda of Understanding can be useful but be careful they do not handcuff the production.

Academic Researchers

- Universities, governments, and foundations take time: time to apply for funding, set up funding accounts, and time to complete and process other bureaucratic paperwork.
- Universities may want control of copyright. Work through faculty union to maintain control/allow producer to maintain control.¹⁸
- University research offices may have no prior experience administering a film project. This could result in a mismatch between the realities of the continuous costs "on site" and reimbursements required.
- Academic funders need to see that collaboration is research, an element that is not covered in the Tri-council policy 2). This has far-reaching consequences for academics including how to document collaborations in annual academic reviews, Promotion and Tenure Reviews, etc. If a faculty member's

¹⁸ Another commenter notes: "Each institution must respond to different intellectual property and copyright requirements. Instead of circumventing the universities, work collaboratively with them."

Collective Agreement supports media/creative works, that's a good start.

- Research funding is not easy to combine with any of the usual sources for documentary production: broadcast licenses, Canada Media Fund, tax credits, etc. This relegates research documentaries to a low-budget, online-distributed category that not only makes the productions poorer but sharply limits the audiences they can reach.

Broadcasters

- While broadcasters might normally be thought of as the final step in documentary production, they recognize a role for themselves at the onset and throughout the development and production processes as well.
- Academics and charities may pay less attention to the artistry and professional standards expected by broadcasters.
- Producers must work very closely with Broadcasters to ensure all information is completed accurately and on time or delays in funding can happen.
- For broadcasters to get involved: programs must be of interest to North American audiences, provide diverse voices and stories and to ensure that the shows meet the ptv guidelines for packaging, funding credits, etc.

Foundations and Funders

- Foundations are often hesitant to support work they have not seen. This is a challenge when considering the funding cycle of a production.
- Projects that cost over a certain amount and/or feature some foundations may require approval from a Board of Trustees.
- Telefilm and Canada Media Fund, as well as Government Tax Credits (provincial and Federal): Although similar, the agreements and application forms differ enough that each needs to be completed individually instead of sharing data sets.

Working Through Cross-sector Differences

In the previous sections we outlined some of the known-challenges cross-sector collaborators have faced in the production of knowledge-based documentary media. We now turn to suggestions our respondents offered to address past challenges. Suggestions fall into four practical areas: production and content, intellectual property, funding, and collaboration/feedback.

Production and Content

- Establish how creative decisions will be made ahead of time. This goes hand in hand with intellectual property and copyright. Who will own what? These are important discussions to have with collaborators early on in a project.
- Collaboration and consultation are good things but “too many cooks can spoil the broth”. Identify decision makers.
- Who is telling the story? Ensure that it is their story to tell. Consider including other voices that should be heard. Make sure facts stated accurately.
- Research can produce a lot of worthy material. A film has to tell a story within a proscribed time frame and maintain an audience's interest. Painful as it might be material has to be sacrificed.
- It is common and good practice for a producer to hire a pro-

duction accountant. On this note, ensure funds are secured for all behind-the-scenes expenses.

- If a product is only for internet distribution it does not need the same clearances and associated costs as it would for “broadcast” on television.¹⁹
- Make outreach a primary consideration at the outset of producing content to ensure/budget enough money for it.

Intellectual Property and Copyright

- Who owns what?
- Documentary filmmakers and researchers are both apex predators in the information-gathering world. They both need to be able to demonstrate that they are the person responsible for the accuracy and presentation of the finished work. The only solution is for one to defer to the other within a framework of collegiality, mutual trust and a well-written contract.
- It should be clear from the outset who “owns” the creative outputs of this project, as well as any other materials associated with it. How will they be maintained? Who will host them?
- There may be assumptions based on who suggested the project and who the collaborators are. It is important to discuss these issues to create transparency so everyone starts on the same page.

Funding

- Be aware of extra costs that you might encounter arising from collaboration or delays in the process of filmmaking.
- Separation of funders from the content can help maintain editorial integrity of a production.
- Who are the funders and how much did they contribute to the documentary, do any of the funders or their representatives appear on-screen?
- Funding organizations are more likely to fund larger knowledge-based documentary media projects if experienced filmmakers/producers attached.
- Who has the ultimate approval for funding and release of the final product?

Concerning Collaboration and Feedback

- Bring - and keep - all collaborators at the table. Make sure all are clear on the issues to be addressed. Clarity and understanding are key.
- Determine who, if anyone, works from a distance.
- May want to meet with a production executive at the Broadcaster to seek their input before doing a proposal.
- Communicate and understand what each partner needs. No voices go unheard.
- Discuss in detail before camera rolls. This will save a lot of re-edits.
- Understand each others' professional standards. Be prepared to navigate these conflicts.
- All parties must be prepared to compromise on a loss of creative and messaging control, and on speed of production.

¹⁹ Though another commenter notes that this is “not necessarily true, e.g. high-budget docs commissioned or licensed by big streamers like Netflix or Gem.”

- Gaining consensus takes time and patience.
- Establish timelines: each funding agency has different application dates.
- Do not underestimate the length of time for decisions to be made.
- As painful as it might be, some documentary media material will need to be sacrificed to create the most compelling stories and narratives.

Part 4: FOCUS ON ETHICS & PARTNERSHIPS

As with any research endeavour, knowledge-based documentary media projects will face a number of issues concerning the proper treatment of participants. In this final section of our report we present answers to two survey questions that offer a glimpse into the ethics of knowledge-based media storytelling. As more cross-collaborative projects emerge and are documented, DOCTalks will continue to provide updates to reflect new and evolving practices.

Question 1: How does your sector adhere to ethical principles to protect the people, places and things that appear in your documentary projects?

- Permission agreements and research.
- Memoranda of Understanding need to be very specific in terms of roles and responsibilities and help inform a shared understanding of what to expect during the collaboration.
- This is a big one. A good documentary film can often provoke someone's wrath or objection. If so can they prevent the work from being seen?
- Criminal record and vulnerable sector checks. Making sure that each participant fully understands their participation, with a clear proposal, outlining goals and potential impact.
- Tri-council guidelines and other kinds of ethics review (Indigenous communities²⁰, school boards, etc.)
- Standard liabilities and indemnities in contracts. It is the responsibility of the producer to ensure accuracy.
- Open honest dialogue is imperative. Take suggestions as to what the audience wants to see instead of only what the producer wants to impart.
- Questions about appropriation must be considered, particularly when documenting communities that have historically been research subjects and their cultural knowledge captured and disseminated without their permission.

²⁰ For example, see the Onscreen Protocols & Pathways guide released earlier this year by imagineNATIVE and the Indigenous Screen Office (<http://www.imagenative.com/publications>)

- Partners and collaborators need to understand the Research Ethics Board (REB) requirements. Doc producers often feel that consent only needs to be given once at the beginning, and this is problematic if research participants want to remove themselves from projects after it has started.²¹
- By building relationships with all participants and with land, community, etc. It is an ongoing process.
- Although powerful storytelling is key to the success of many documentaries, it has to be done in ways that respect the participants which in turn may affect the narrative arc.
- Each sector may have different definitions and requirements for ethical conduct. Such as clearances, training, etc. Again open communication and a clear proposal which outlines the processes to follow will help establish what these should be for a collaborative project.

Question 2: How do you ensure community knowledge/local experience & science-based research is accurately represented?

- Multiple level reviews, fact check within reason for limited staff, knowledge of producer.
- Good research, some pre-screenings with authorities and community and sometimes vetting by a lawyer.
- Find interviewees who are local experts on the subject matter.
- Each collaborator reviews for their own components.
- Adherence to codes of conduct and journalistic standards and practices as required by co-producers, broadcasters or distributors.
- Broadcaster vets projects and teams. They watch rough cuts and fine cuts and request changes.
- Distributors assume that the producer has sought some peer kind of review.
- Industry rules such as Canadian Broadcast Standards must be upheld.
- Apart from legal or contractual obligations there is nothing really except personal integrity.
- Checking research sources and double checking statements by participants.
- We may need to establish a peer-review process for knowledge-based documentary media productions.

²¹ Editor's note: Some academic respondents wished to express that an REB-regulated consent process is non-negotiable.

Part 5: NEXT STEPS

The primary purpose of the DOCTalks Guide is to establish a process of engagement to foster positive relationships between cross-sector collaborators with the goal of creating and funding knowledge-based documentary media projects that can be mobilized and distributed to various audiences - local, regional, national and international.

As outlined in the DOCTalks Guide, there are numerous opportunities for cross-sector collaborations to occur across the country, but there are also some challenges. To ensure DOCTalks can effectively manage cross-sector expectations and relationships while encouraging more participation in the engagement process, we are advocating a go-slow approach over the next two years.

We see the DOCTalks Guide as a navigational tool to help strengthen cross-sector collaborations. The Guide will enable cross-sector participants to better understand the process of creating, funding and distributing knowledge-based documentary media that are mutually beneficial and achieve the desired goals. The Guide will also enable cross-sector collaborative practices to be tested and enhanced by piloting a variety of documentary media projects over the next two years and by sharing this knowledge and experience in an updated Version 2 DOCTalks Guide.

To those ends, DOCTalks plans to work with all interested cross-sectors to move the process forward.

Promoting Cross-Sector Collaborations

With the release of the DOCTalks Guide (Version 1), we want to meet with interested cross-sector collaborators to see how they can engage and participate in the process of creating, funding and distributing knowledge-based documentary media across Canada.

The annual DOCTalks Festival & Symposium is the best opportunity for cross-sectors to gather, network, discuss the Guide, and learn more about creating, funding and distributing knowledge-based documentary media in Canada.

DOCTalks officials are also open to meeting with officials from all six cross-sectors to discuss the Guide in greater detail and their participation. These meetings will enable the mutual exchange of knowledge and information between cross-sectors and assist with relationship building.

Establishing DOCTalks Chapters

The purpose of each DOCTalks Chapter will be to produce and showcase projects that use cross-sector collaborations to create, fund and distribute knowledge-based documentary media - long form documentary films, short videos, podcasts, immersive learning technologies, interactive websites, social media.

Chapters will also provide a professional forum to test, enhance and promote the DOCTalks Guide for cross-sector collaborative practices in communities across Canada. Currently, there is interest to establish DOCTalks Chapters in Atlantic Canada (NB, NS, NL, PEI), but hope to hear from others that want to establish a chapter in their community.

Initiating Funding Models

There is a significant amount of cross-sector funding that could be directed towards the creation and mobilizing of knowledge-based documentary media if the appropriate funding models are put in place. DOCTalks is currently in discussions with several cross-sector funders to initiate a funding model, with the goal of implementing and expanding this funding model, and developing other potential funding models over the next two years.

Develop a Vision for Knowledge-based Documentary Media

Proliferation of reality TV and lifestyle shows have eliminated and displaced knowledge-based documentary media programs on public and private broadcasting networks and channels over the last twenty years. But new opportunities for documentary storytelling have also arisen due to an ever-changing digital media landscape.

Since 2013, DOCTalks has worked collaboratively to address all of these programming issues and identify new opportunities by fostering the creation and funding of knowledge-based documentary media content. To that end, the DOCTalks Guide is a navigational tool that will enable a systematic approach to produce knowledge-based documentary media by leveraging the talent, experience and financial resources that all six cross-sectors can offer and share between them - documentary producers, academic researchers, charities, governments, broadcasters, foundations & funders.

If Canada hopes to address some of the most pressing issues facing society, then it will need to develop a cultural and economic framework to creatively tell real stories, about real people, living in real communities, addressing real issues, and creating real change in society.

To that end, in association with all cross-sectors participants, DOCTalks would like to develop a vision and a more coordinated approach for the creation, funding and mobilization of knowledge-based documentary media for social, cultural, educational and economic purposes.

Appendix: CROSS-SECTOR PARTNER CASE STUDIES

Case Study 1:

ACADEMIC RESEARCHER & DOCUMENTARY PRODUCER

PROJECT TITLE:

Men are bullied too

PROJECT RATIONALE:

Because of the devastating impact that workplace bullying can have on the health and lives of those targeted, Dr. O'Donnell is passionate about preventing and addressing this issue. One approach to tackling the problem is via education and awareness. While academic conferences and presentations are an important, often they are not being accessed by individuals who need the information such as targets and employers. An increasingly critical medium for the dissemination of health information is the Internet and, in fact, it is estimated as many as 70% of Canadian adults access the Internet for this purpose (Statistics Canada, 2005). Given this reality, the development of evidence-based electronic resources is vital. While academic researchers have expertise in disseminating the results of their work using traditional approaches, few have training or expertise using more non-traditional approaches such as social media, websites, film and video clips, and so on. Based on the research publication: O'Donnell, S., & MacIntosh, J. (2016). Gender and workplace bullying: Men's experiences of surviving bullying at work. Qualitative Health Research. doi: 10.1177/1049732314566321

CROSS-SECTOR PARTNERS:

Academic Researcher: Dr. Sue O'Donnell, Faculty of Nursing, University of New Brunswick & Documentary Producer: Nick Wilson Videography (Nick Wilson)

PROJECT DURATION: 2013-2014

PROJECT BUDGET & FUNDING:

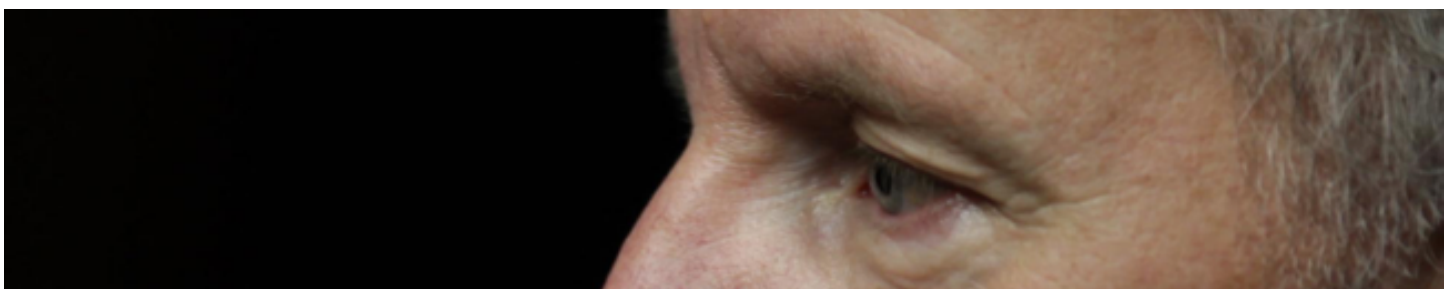
Total budget \$4,250. Funds raised from University of New Brunswick (\$4,250 - from Canadian Institutes of Health Research: Institute of Gender and Health, Sex and Health Trainee Knowledge Translation Supplement.)

FILM DISTRIBUTION:

1. Online: <https://vimeo.com/100370073> & https://www.youtube.com/watch?v=da0FSdU_hNg
2. Yamada, D. (2017, June 9). Male targets of workplace bullying. Minding the Workplace, <https://newworkplace.wordpress.com/?s=Male+targets+of+workplace+bullying&submit=Search>
3. Research and film, Men are bullied too, feature of blog post. O'Donnell, S. (2014, October 15). Men's experience of workplace bullying. The Good Men Project Blog: <https://goodmenproject.com/featured-content/men-are-bullied-at-work-too-kerj/> (Invited guest blog post.)
4. Workplace Bullying Institute. (2014, July 17). Men are subjected to workplace bullying too. Workplace Bullying Institute Blog: <http://www.workplacebullying.org/men/> Research and film, Men are bullied too, feature of blog post
5. The film has been screened among numerous academic, professional and public audiences.

SYNOPSIS:

As a result of bullying men experience significant physical, mental and social consequences. They also find it difficult to successfully persist at work amid continual bullying. Contrary to stereotypical assumptions, men need and want support to manage workplace bullying and its consequences and the film highlights this need from the perspective of men.



Appendix: CROSS-SECTOR PARTNER CASE STUDIES

Case Study 2:

CHARITY & DOCUMENTARY PRODUCER

PROJECT TITLE:

Every Living Thing – experiencing a bioblitz

CROSS-SECTORS PARTNERS:

New Brunswick Museum (Dr. Don McAlpine) & Flower Power Production Inc. (Lloyd Salomone)

PROJECT DURATION: 2013 to 2017

PROJECT BUDGET & FUNDING:

Total Budget (\$99,239). Funds Raised by New Brunswick Museum – (\$54,524 from Echo Foundation, New Brunswick Environmental Trust Fund, New Brunswick Museum). Funds Raised by Flower Power Production Inc. – (\$44,715 from New Brunswick Tourism Heritage & Culture Film, TV & Multimedia Initiative & Promotional Programs, CBC Television License, HRT Croatia Television License, Canadian Film Production Tax Credits, New Brunswick Wildlife Trust Fund, Indiegogo Crowdfunding)

LEGAL AGREEMENTS & INTELLECTUAL PROPERTY RIGHTS:

The New Brunswick Museum (NBM) and Flower Power Production Inc. (FPPI) did not sign any formal legal agreements. Their working relationship was based on mutual respect and trust. They collaborated to source and raise funds that each partner was eligible for, with all funds provided to FPPI to complete the documentary media project. FPPI retained creative control and documentary media content copyright as required by agreements signed with television broadcasters. NBM officials reviewed all content to ensure the knowledge imparted was scientifically accurate and professionally represented the scientists' work.

CONTENT & DISTRIBUTION:

1. 45 minute documentary film (English with closed captioning / CBC TV - Absolutely Canada / CBC Curio educational service)
2. 88 minute feature documentary film (English with French subtitles / scientific & community screenings / Vimeo video-on-demand / HRT Croatia Television, language subtitling by the Canadian Embassy in Zagreb)
3. 2 minute film trailer (English - for promotion)
4. interactive website (English - www.everylivingthing.life / for information, promotion, online streaming)
5. social media (English - Facebook & Twitter / for audience development, promotion, online streaming)

SYNOPSIS:

The documentary film, Every Living Thing - experiencing a bioblitz, takes the viewer on an amazing journey in which they share the goals, frustrations, and excitement during four weeks spent over two summers exploring the biological diversity – green plants, fungi, , insects, fish, amphibians, reptiles, mammals and more - that live in the Grand Lake Protected Natural Area in New Brunswick, Canada. The film was produced in collaboration with the New Brunswick Museum's BiotaNB program to mark the UN Decade of Biodiversity (2011-2020). The BiotaNB program is a twenty year biodiversity research project to identify and catalogue as many species as possible in the province of New Brunswick as a baseline for monitoring future change before human encroachment and climate change intensify.



Appendix: CROSS-SECTOR PARTNER CASE STUDIES

Case Study 3:

DOCUMENTARY PRODUCER & ACADEMIC RESEARCHER

PROJECT TITLE:

Till We Meet Again: Moravian Music in Labrador

CROSS-SECTORS PARTNERS:

Documentary Producer: Lazybank Productions Ltd. (Nigel Markham) & Academic Researcher: Dr. Tom Gordon, School of Music, Memorial University of Newfoundland

PROJECT DURATION: 2011-2013

PROJECT BUDGET & FUNDING:

Total Budget (\$143,998). Funds raised by Memorial University of Newfoundland (MUN), School of Music (\$20,299 - from internal sources). Funds raised by Lazybank Productions Ltd. (\$123,699 – from Nunatsiavut Government: Ullatitsaijet & Kamatsiatet, Parks Canada, Altius Minerals, Vale Minerals, Newfoundland & Labrador Film Development Corporation, CBC Television).

LEGAL AGREEMENTS & INTELLECTUAL PROPERTY RIGHTS:

Lazybank Productions Ltd. did not sign any formal legal agreements with Memorial University. MUN funds were used principally for transportation and room and board for the MUN choir and orchestra to travel to and from the Labrador coast. All other funds were raised by Lazybank Productions Ltd.

The working relationship between Nigel Markham and Tom Gordon was based on mutual respect and trust. Lazybank Productions Ltd. retained creative control and documentary media content copyright as required by agreements signed with television broadcasters and the Newfoundland and Labrador Development Corporation. Nigel and Tom had an excellent relationship throughout and both believe that the final product is representative of their original aspirations and objectives. Tom was consulted throughout and given every opportunity to comment and critique the film as the film evolved during the edit but it was understood that the filmmaker had the final responsibility for the film's content and point of view.

DOCUMENTARY MEDIA CONTENT & DISTRIBUTION

1. 52 minute documentary film (English with closed captioning / for air on CBC TV)
2. National Film Board Educational Website
3. National Film Board/Nunatsiavut Government Box set of Labrador Inuit DVD's
4. DVD's Available from Lazybank Productions Ltd.

SYNOPSIS:

In the 18th Century, Moravian missionaries from eastern Europe settled among Inuit on the Labrador coast in eastern Canada. They came to preach Christianity and one of their tools was music. So began the remarkable tradition of sacred music in the northern Labrador communities. Within a few decades, the music of Haydn and Bach was being performed by Inuit choirs accompanied by small string orchestras. Community brass bands were also formed. This film follows the tour of a small choir and instrumental ensemble from St. John's Newfoundland, as they travel the Labrador coast in modern times, to perform with local choirs, and celebrate a musical legacy that remains fixed in the hearts of the people.

