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**Convening Toolkit:
Documentary Career Sustainability**

TOOLKIT OVERVIEW

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- Sample breakout session worksheets for needs analysis and asset mapping (Pages 8-11)

Helpful tips from the field:

- Begin to plan a convening at least three to four months in advance. Though most funders are unable to provide funds on this short of a timeframe, it's not too late to secure funds for subsequent years in advance if you already know there will be plans to convene annually.
- Create a shared timeline to ensure enough time is scheduled for your organization, partners, facilitators, and attendees to plan for all aspects of the convening, from logistics to developing a visible distribution strategy for the disseminating findings from the convening.
- Develop a visible distribution strategy for the disseminating findings from the convening, which includes involving local, regional and national networks in advance. For example, IDA's [Documentary Magazine](#) has previously featured articles reporting out from a convening.
- Schedule a convening in tandem with a local or regional event, such as a festival or conference, and leveraging those partnerships for support and in-kind exchanges. Additionally, this reduces the cost of attendance if your anticipated participants will already be nearby for an intersecting event.
- Consider a range of potential partners to organize convening logistics and identify attendees. Partners may serve as a resource for space, funding, logistical support, and field knowledge.
- Make sure the convening agenda allows enough time for a rich and productive conversation. Think of this event as a dual purpose field-building opportunity to network and strategize. In order to achieve this, it is recommended to make this a full or multi-day event to give participants enough time to build relationships, reflect collectively, and articulate pathways to a shared solution.
- Hire a dedicated facilitator who can assist with planning the convening, framing the day's conversations, and devising and implementing a plan to report out on convening findings.
- Ensure the facilitators have enough documentation of the conversations, essential for later analysis in order to report on the stated needs and opportunities. This toolkit includes two worksheets for participants, convenient for facilitators to collect at the end of a session. Staff from other organizational partners or students from university can act as additional note takers.

- Identify and invite a range of potential participants, including those directly engaged with the field, those new to the conversation, as well as those with potentially untapped resources in your region. Think of this as an opportunity to cultivate a wider range of stakeholders.
- Work with partners to develop a well-rounded invitation list. In addition to identifying well-established players in your regional documentary ecosystem, include your local and state film commissioners, representatives from your state arts and humanities agencies, local government, public broadcasting entities, local businesses, representatives from colleges and universities, and representatives from foundations and issue-aligned nonprofits. Phone calls and e-invitations will ensure a range of stakeholders are welcome and present at the event.
- Remember to include diverse voices—for example, individuals working on issues at the intersection of Media Arts and accessibility.

The end of your convening should not mean the end of the conversation. Here suggestions for documenting the day and sharing out findings:

- Consider having a reporter on site – whether from a local news outlet, a service organization, or a field resource such as *Documentary Magazine* or the D-Word.
- Use note takers as well as a facilitator throughout the day to document the findings. Utilize the provided worksheets to gather input from participants that will inform the summary.
- After the convening, the facilitator may compile the findings and summarize the most relevant issues as well as suggested action items.
- Keep in touch with your participants! We recommend starting a listserv, scheduling follow-up conversations about next steps, and providing additional opportunities for participants to network.

SAMPLE AGENDA

Summit on Documentary Career Sustainability in the (insert region)

Location, Date

12:00 – 12:45pm	Lunch and Opening Remarks: <i>Two keynote speakers introduce the national conversation around documentary sustainability and what it means for you in your region. Can use sample PowerPoint presentation and ice breaker exercises to see who is in the room.</i>	Speaker #1 Organization Speaker #2 Organization
12:45 – 1:15pm	Additional Introduction from Host Organization <i>If this convening intersects with a concurrent festival or conference, can have representative from host organization address the room and their role in this conversation around sustainability, specific to the region.</i>	
1:15-2:00pm	Panel Conversation around Budget Transparency <i>The purpose is to share and discuss concrete numbers about creating and distributing documentary work. Suggested panel format is to include 1-2 filmmaker perspective and 1-2 representatives from local, regional or national affiliate or service organization.</i>	1-2 filmmakers 1-2 Org Reps
2:00-3:00pm	Breakout Sessions – Mapping Asset & Needs <i>Small groups organized by like entities (institutions and makers). Identify existing resources and remaining needs experienced by both media makers and institutions within the current ecosystem. Worksheets provided, with further instruction for organizing moderating breakout sessions, to be collected by discussion moderators for later analysis.</i>	Identify group moderators and assign groups in advance
3:00-4:00pm	Breakout groups report back and discuss <i>Moderators summarize key findings and recommendations, leading to conversations as a group about next steps/tangible action items. Having a note taker is encouraged, to be collected for later analysis.</i>	Moderators report on behalf of their group
4:00-5:00pm	Debriefing and unstructured networking to continue conversations	
5:00-5:30pm	Closing notes	Speakers from Opening Remarks

Save the Date – Sample Email Invitation

Dear [---],

As a critical member of the documentary film community, you are invited to join colleagues and industry leaders for **[Documentary Career Sustainability Summit Title]**. The event is being organized through a partnership between the **[Partners]** and moderated by **[Moderators]**. This convening will be held on **[date/time]** in conjunction with the **[Intersecting event/festival/conference, if applicable]**.

This half-day event will bring together key stakeholders, such as industry leaders and public sector representatives, independent makers, film festivals, service organizations and other funding and distribution partners. Through panel discussions and breakout groups, the dialogue will focus on brainstorming tangible, collaborative opportunities to support a more sustainable documentary ecosystem, with a special emphasis on regional impact. The event will draw on the findings presented in the [***State of the Field: A Report from the Documentary Sustainability Summit***](#), published in partnership by the National Endowment for the Arts (NEA) and the International Documentary Association (IDA).

To secure your place for this critical discussion, please RSVP via **[link to event registration, via Eventbrite or other service, here]**. We'll follow up soon with a more detailed agenda, optional reading and list of participants. In the meantime, you can get a head start by reviewing a collection of [***Documentary Sustainability Resources***](#) on the NEA's website.

If you have additional questions, please email **[convening organizer]**.

We look forward to seeing you!

Sample Language for Online Event Invite

[Documentary Career Sustainability Summit Title]

This half-day event will bring together key stakeholders, such as industry leaders and public sector representatives, independent makers, film festivals, service organizations and other funding and distribution partners. Through panel discussions and breakout groups, the dialogue will focus on brainstorming tangible, collaborative opportunities to support a more sustainable documentary ecosystem, with a special emphasis on regional impact.

The event will draw on the findings presented in the [*State of the Field: A Report from the Documentary Sustainability Summit*](#), published in partnership by the National Endowment for the Arts (NEA) and the International Documentary Association (IDA). Additional [Documentary Sustainability Resources](#) are available on the NEA's website.

Details:

Event Date, Time, Location.

About the Event:

- Registration is required for attendance.
- The summit will begin promptly at noon, plan to arrive 15 minutes early.
- This venue is ADA compliant.
- For general questions about the event, please email **[convening organizer]**.

Images:

[Organizing Partners' Logos]

[NEA Sustainability Report Cover Image – Included in Toolkit]

Needs Analysis & Asset Mapping

THE FOLLOWING PAGES INCLUDE HANDOUTS FOR BREAK OUT SESSIONS

INCLUDES:

- **Moderator Instructions**
- **Breakout Session Worksheets**
 - Worksheet #1: Needs & Asset Mapping for **Media Makers**
 - Worksheet #2: Needs & Asset Mapping for **Organizations**

Moderator Instructions

Worksheet explanation:

- One sheet to fill out and turn in to moderators.
- Sheet can be modified into a two sided work sheet to provide more writing space.
- Remind participants to write somewhat legibly, as this is a contributing record to help steer the regional conversation.
- Have attendees take a picture for their own records. Build time to do so.

Outline of time:

- **Step 1 (5 minutes)**
Overview of exercise and worksheet value.
Have participants review questions and begin jotting down responses using the worksheet.
- **Step 2 (20 minutes)**
Moderators go around the room to hear from participants which two questions spoke to them the most and hear their response. (Modify as needed based on group size.) As participants go around and share responses, moderators summarize using provided notepads.
- **Step 3 (5 minutes)**
Summarize & finish writing responses on worksheets/notepads. Have attendees take a picture for their own records before turning in to moderator.

If there is time, share final question to gather additional thoughts for consideration:

What role can you play moving forward?

Tips:

- Keep people focused on this discussion in a regional scope.
- Make sure everyone has a chance to talk and are being respectful listeners.
- If someone is taking up too much time, remind them of the limited timeframe the group is working within.
- If the conversation is becoming circular, point out that you have enough information on that particular topic/perspective and will convey that in the summary. Ask if anyone has anything new to contribute to the richness of the discussion before moving on to a new topic.

Needs Analysis & Asset Mapping (*Independent Media Makers*)

Discussion Goal: Inspire regionally focused dialogue in pursuit of strategies towards a sustainable and healthy ecosystem for the documentary community and a vital creative economy.

Questions for Discussion:

Sustainability can mean something different for everyone. What will it take for you as an individual professional in the field to be sustainable?

What are specific sustainability challenges or barriers in your community?

What are untapped resources that are specific to your community or networks?

In relationship to cross-sector networks (outside of the professional documentary community), what networks do you have access to that can help move this conversation forward? What stakeholders might not be involved in this conversation that could be?

What do you need or what will it take to address stated challenges or barriers? How can we work together as a team to tackle these challenges?

Final thoughts for consideration: What role can you play moving forward?

Needs Analysis & Asset Mapping (*Institutions/Organizations/Funders*)

Discussion Goal: Inspire regionally focused dialogue in pursuit of strategies towards a sustainable and healthy ecosystem for the documentary community and a vital creative economy.

Questions for Discussion:

What are the most important sustainability issues that you are able to address?

Are there any specific challenges or barriers that you currently encounter (or anticipate encountering) while addressing these sustainability issues?

What are untapped resources that are specific to your community or networks?

In relationship to cross-sector networks (outside of the professional documentary community), what networks do you have access to that can help move this conversation forward? What stakeholders might not be involved in this conversation that could be?

What do you need or what will it take to address stated challenges or barriers? How can we work together as a team to tackle these challenges?

Final thoughts for consideration: What role can you play moving forward?