A STRATEGIC FRAMEWORK TO GUIDE INVESTMENTS IN NARRATIVE CHANGE

Best Practices for Media Contexts and Beyond

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Erica L. Rosenthal, Ph.D., Ksenia Korobkova, Ph.D., Dana Weinstein, M.A., Eun Jung (Kristin) Jung, M.A., Veronica Jauriqui, M.A., & Adam Amel Rogers, M.C.M.

Design by Veronica Jauriqui

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BACKGROUND

In recent years, there has been increasing interest, particularly in the philanthropic world, in what has come to be known as **narrative change**. Narrative change refers to strategies that harness the power of narratives — in entertainment, in news, in movement spaces, and in the broader culture — to shift public mindsets and generate culture change toward equity and justice.

At the **USC Norman Lear Center**, we have spent nearly 25 years studying and leveraging narratives to address a variety of health and public interest topics, particularly in the context of scripted TV and film. Our **Media Impact Project** (MIP) studies the content, audiences, and impact of media and entertainment narratives, while our **Hollywood, Health & Society** (HH&S) program serves as a free resource to the entertainment industry, providing expert information to promote accuracy in storytelling.

PROJECT OVERVIEW

Funders interested in narrative change often approach us with some variation of the following **‘million dollar questions’**:

- How do we really know our narrative change strategies are working?

- Given the long time horizon for large-scale culture change, what kinds of impact are realistic to expect in the short- to medium-term?

- Are there best practices that can be culled from existing evidence to shed light on the conditions under which narrative change strategies are most impactful?

In an effort to chip away at these questions, MIP embarked on a learning project with support from the **California Health Care Foundation**. The project consisted of:

1. In-depth interviews with narrative change funders, practitioners, experts, and leaders;

2. A synthesis of twenty years of research on the audience impact of entertainment media, with a focus on scripted television and film in the United States and Canada;

3. A case study of ten years of investments in — and outcomes of — HH&S' work with the entertainment industry; and

4. Deep-dive qualitative analyses of investments in HH&S on two topics: *maternal health* and *nuclear threats*.

STRATEGIC INVESTMENT FRAMEWORK

Across all research activities, 25 best practices emerged. These represent evidence-based factors — culled from 20 years of audience impact research, expert opinion, and HH&S data — that make narrative change efforts more likely to be successful. We structured the 25 factors into a five-level taxonomy called the Strategic Investment Framework for Narrative Change Through Media and Beyond. Within this Framework, the factors include thought questions for stakeholders to consider, with guidance based on their responses.

1. Appendix A indicates the weight of evidence supporting each factor and the extent to which it is applicable primarily to entertainment/media efforts or broader narrative change. Appendix B lists the supporting evidence for each factor.

The Framework is designed to be used as a forward-looking tool to help funders and organizations using — or considering — narrative change strategies to make more informed decisions around the risks and potential impact. It is not intended to tell funders whether to invest in narrative change over a different strategy. While developed based on data and evidence largely from entertainment contexts, the framework can be applied to narrative change efforts more broadly.[1] Our hope is that the learnings presented here can inform the development, funding, strategy, implementation, and measurement of narrative change efforts in the entertainment context and beyond.

Figure 1. Strategic Investment Framework (Beta Version, October 2023)
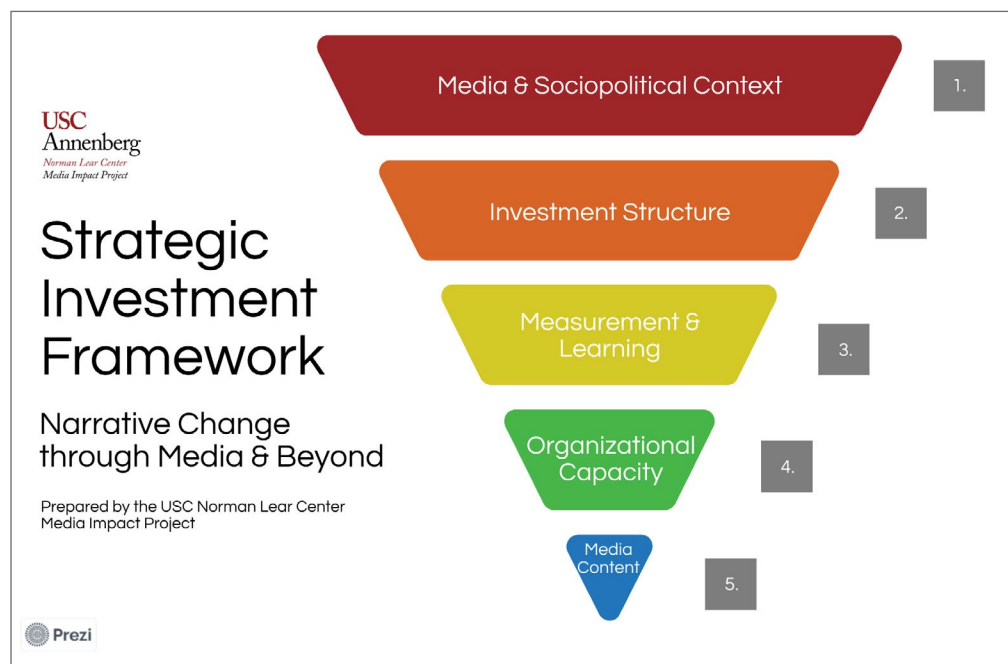
◼ INTRODUCTION

WHAT IS NARRATIVE CHANGE?

2. Kalra, N., Farfan, C. B., Robles, L., & Stachowiak, S. (2021). *Measuring narrative change: Understanding progress and navigating complexity.* ORS Impact. https://www.orsim-pact.com/DirectoryAttach-ments/3102021_103034_594_ORS_Impact_Measuring_Nar-rative_Change_2.0.pdf

In recent years, there has been increasing interest, particularly in the philanthropic world, in what has come to be known as **narrative change**. Broadly, narrative change refers to strategies that **harness the power of narratives** — in entertainment, in news, in movement spaces, and in the broader culture — to **shift public mindsets and generate culture change** toward equity and justice. The definition of narrative change we will use throughout this report was based on work by ORS Impact[2] and adapted based on findings from this research:

"A concerted effort to challenge, modify, and/or replace existing narratives that perpetuate inequities, increasingly used by nonprofit and advocacy organizations as a means to advance social impact goals."

NORMAN LEAR CENTER

At the USC Norman Lear Center, we have spent nearly 25 years studying and leveraging narratives to address a variety of health and public interest topics, particularly in the context of scripted TV and film, but also in unscripted and documentary, social media, music, video games, and journalism.

Hollywood, Health & Society provides expert information to promote accuracy in entertainment storylines.

Our Hollywood, Health & Society (HH&S) program serves as a free resource to the entertainment industry, providing expert information to promote accuracy in storytelling. While this work was inspired by international entertainment education efforts, HH&S does not "place" storylines in entertainment or tell content creators how to make their stories more impactful. Entertainment value is always paramount.

Since their inception in 2001, HH&S has worked with over 1,000 TV series and pilots on more than 60 networks and streaming services. They've received approximately 5,000 inquiries from content creators, whom they've connected with over 2,000 subject-matter experts. In a ten year period from 2012-2021 alone, HH&S held 2,065 consultations, which resulted in 1,393 confirmed aired storylines.

The Media Impact Project studies the content, audiences, and impact of media narratives.

Alongside their outreach to the entertainment industry, HH&S has long partnered with academics on research to understand the content of entertainment narratives and their impact on knowledge, attitudes, and behavior. This small research department within HH&S has grown over the years into the Lear Center's research arm, known as the [Media Impact Project](#) (MIP). MIP collaborates with advocacy organizations, philanthropy, government agencies, and media corporations to study the content, audiences, and impact of media narratives on a wide range of topics including climate change, mental health, disinformation, health equity, criminal justice, and representations of historically-excluded communities (e.g., immigrants, Native Americans).[3]

PROJECT RATIONALE

As attention to narrative change initiatives has grown, there has been a corresponding increase in demand for understanding whether narrative-oriented projects are on the path to making large-scale cultural shifts. Our work both studying the power of entertainment and helping to shape it gives us a unique vantage point on efforts to leverage entertainment narratives for pro-social goals. In recent years, MIP has undertaken a number of projects with the goal of leveraging data and insights to inform grantmaking and developing shared learning tools in the narrative change space.

Funders interested in narrative change often approach us with some variation of the same 'million dollar questions.'

At MIP, we have been fielding questions from funders about considering, creating, and measuring the conditions that maximize the potential for social impact. These include:

- How do we really know our narrative change strategies are working?

- Given the long time horizon for large-scale culture change, what kinds of impact are realistic to expect in the short- to medium-term?

- Are there best practices that can be culled from existing evidence to shed light on the conditions under which narrative change strategies are most impactful?

Frequent critiques in the narrative change field include overemphasis on theory, lack of alignment around best practices, and inaccessible evidence of impact.

4. Potts, E., Lowell, D., & Manne, L. (2022). *Spotlight on impact storytelling: Mapping and recommendations for the narrative and cultural strategies ecosystem*. Liz Manne Strategy. https://buff.ly/3rqMjku

5. Moore, M., & Sen, R. (2022). *Funding narrative change, an assessment and framework by the Convergence Partnership.* The Convergence Partnership. https://convergencepartnership.org/wp-content/uploads/2022/09/Funding-Narrative-Change.pdf

At the same time, recent landscaping efforts in the field have highlighted the need for less theory and greater attention to the "how" of narrative work.[4] In a world of limited resources, this question represents a need among practitioners and funders of narrative change for actionable insights about what is already known, in order to effectively strategize and plan narrative change projects. Another recent report in the field, Funding Narrative Change, shows that there is a lack of alignment around 'best practices' to advance change in the field.[5]

Evidence of impact that would support these approaches exists, but is often siloed in paywalled academic journals, rendering it inaccessible to those who can most use it, including funders of and those engaging in on-the-ground narrative change efforts. It is also inaccessible in the sense of being written solely with an academic audience in mind and often indigestible to practitioners.

PROJECT OVERVIEW

In an effort to begin to chip away at these 'million-dollar questions' and respond to the critiques, we embarked on a learning project in 2022 with support from the **California Health Care Foundation**.

The ultimate objective of this effort was to develop an evidence-based framework to help funders and organizations thinking about narrative change strategies to make more informed decisions around the risks, as well as the potential for impact. Importantly, the framework was not designed to tell funders if they should choose an investment in narrative change over a different strategy, but it can illuminate the conditions under which narrative change strategies are most likely to be successful. Additional objectives included:

- Understanding the **impact expectations of key stakeholders** in the narrative change field;

- Identifying **key indicators of incremental progress** toward narrative change; and

- **Distilling best practices** — factors, features, and processes associated with greater impact.

To this end, we conducted four research activities.

1. **Interviews** with narrative change funders, practitioners, experts, and leaders;

2. **Review and synthesis of twenty years of research** on the audience impact of entertainment media — with an emphasis on scripted TV and film — in order to distill 'best practices';

3. **A case study of ten years of investments in** — and outcomes of — HH&S to further identify factors associated with success; and

4. **Qualitative deep dives into recent investments** in HH&S on two topics — maternal health and nuclear threats.

The remainder of this report delves into findings from each of these research activities, and culminates in a presentation of our **Strategic Investment Framework for Narrative Change**.

INTERVIEWS WITH NARRATIVE CHANGE EXPERTS AND LEADERS[6]

We began this learning project by forming an advisory group of ten narrative change funders and experts and holding a listening session. Building upon this listening session, we conducted a series of in-depth interviews with advisory group members, supplemented by additional funders, experts, and practitioners.

The objectives of this activity were to:

- Learn about the **state of the narrative change field**;

- Better understand **barriers to and opportunities for success**; and

- Identify **areas of alignment and misalignment** between funders and practitioners.

METHODS[7]

Between July and October 2022, we conducted semi-structured interviews with 23 narrative change experts and leaders:

- Nine representatives from **funding and philanthropic organizations** with experience investing in narrative change strategies, particularly through entertainment and other media. These included the Pop Culture Collaborative, Robert Wood Johnson Foundation, MacArthur Foundation, the Future of Life Institute, SCAN Foundation, Open Society Foundations, Omidyar Network, and the Centers for Disease Control.

- Nine representatives from **practitioner organizations** that leverage entertainment for narrative change. These included: the Sierra Club, Caring Across Generations, Define American, Liberation Ventures, MTV Entertainment Studios, the Natural Resources Defense Council, the Center for Cultural Power, Hollywood, Health & Society, and two organizations that chose to remain anonymous.

- Five narrative change **experts and consultants**: Liz Manne (Story Strategy Group), Brett Davidson (Wingseed), Mandy Van Deven (Both/And Solutions), Nikki Kalra (ORS Impact), and an expert focused on the social impact of media and pop culture who chose to remain anonymous.

KEY FINDINGS

Narrative change is gaining traction as a social change strategy, but challenges remain.

Our interviewees relied on different definitions of narrative change, but there was near consensus that the approach is gaining ground and influence as a powerful strategy to promote social justice and social change.

> *"[As Rashad Robinson of Color of Change has pointed out], narrative change is not just about the presence of narratives, but how they're made powerful. I think that's definitely something that has been central to thinking through narrative change, particularly in terms of the kinds of changes that are meaningful and how we do this work."* **(Nikki Kalra, ORS Impact)**

Interviewees also highlighted similar issues and challenges in the field, including long time-horizons to achieve culture change, infrastructure needs, and lack of control over outcomes. The tactics and approaches they discussed were also similar, including working with entertainment media, social media, and community-based and policy-focused organizations.

Narrative change strategies have contributed to numerous 'wins' over the years.

Interviewees highlighted a number of historical narrative change 'wins', including the U.S. marriage equality campaign, anti-tobacco work, normalization of seatbelt use and designated drivers, Black Lives Matter, and #MeToo.

> *"The marriage equality fight was a big win. Based on our research, the Pop Culture Collaborative team found that while people credit* Ellen *and* Will & Grace*, it actually was a narrative systems strategy, activated by a narrative network of creators, social justice movements, industry leaders, politicians, journalists, and more that created this [cultural] surround sound experience."* **(Tracy Van Slyke, Pop Culture Collaborative)**

They credited a number of factors with facilitating these both historical and current narrative change 'wins,' including:

- Large-scale funding and duration;
- Trust-based investments in narrative power, relationships, and infrastructures;
- Distributed cross-sector and organizational collaboration;

- Activation of multiple social spheres, such as social movements and mass media;

- Message saturation — the diffusion and spread of target narratives across various channels, social spheres, and media products;

- Consideration of meta-narratives that cut across topics;

- Connecting narratives to the external context; and

- Emphasis on entertainment value.

Many experts urge a focus on deep narratives and mindsets that cut across topics.

Narrative change definitions used by interviewees varied in scope, with some focused on specific topics (e.g., climate) and others focused on mindsets underpinning attitudes toward topics (e.g., individualism).

- In discussions of public health and entertainment consulting, topics surfaced often, especially in terms of raising awareness on particular health issues (e.g., organ donation) or encouraging storytellers to seed stories in topic clusters that seemed abstract to them (e.g., the climate crisis).

- In broader discussions of policy and philanthropy, interviewees were more likely to consider **issue clusters** or **deep narratives that underpin mindsets and orientations** across topics.

    "[Funders will say], 'I'm funding climate" [or] "I'm funding health or a particular disease.' [But] if we really want to make a narrative shift, we have to find the underlying connections, because all of these issues are connected. Climate's connected to racial justice is connected to health, and [therefore] we have to fund in a connected way, rather than in silos." (Brett Davidson, Wingseed)

Key challenges include long time-horizons and the difficulty of achieving message saturation.

Participants across interviewed groups brought up the challenge of the **long time-horizon** to see the fruits of narrative change efforts, highlighting that this time-horizon challenges current norms in philanthropy. For example, they suggest it can take two to three years to measure impact from a new TV show or film, and sometimes upwards of 20 years to see the large-scale culture change impact (e.g., anti-tobacco work in the U.S. and other major public health campaigns).

Another frequently mentioned challenge was **achieving message saturation in a fragmented media environment**. To achieve broad culture change, interviewees saw attracting large, ideologically diverse audiences, which can be difficult in the contemporary media environment. It was suggested by some that there is not likely to be another *Will & Grace*, and thus media-driven narrative strategies need to evolve. In addition, interviewees pointed to powerful opposition forces driving harmful narratives and disinformation.

Experts call for trust-based philanthropic models, greater experimentation, and incremental measurement approaches.

Overall, interviewees across groups called for new philanthropic models to **center trust and enable collaboration across sectors**. They stressed the importance of measuring narrative changes incrementally, cumulatively, and holistically through innovative tools (e.g., social listening). Although there was general agreement, there were also differences in the challenges and needs raised by funders and practitioners:

- Funders were more likely to highlight **dissemination and relationship-building** as considerations for establishing connections and channels to shift narratives. They also mentioned **resistance from foundation leadership** to innovative and time-intensive narrative change work. They suggested that impactful examples — such as research studies and examples of other funders' buy-in — can be effective at lowering this resistance.

- **Practitioners** called for new philanthropic approaches that **focus on trust and encourage flexible, experimental, and iterative work**, such as message testing. They also highlighted a **lack of control** over project timelines and outcomes, such as whether a media project gets greenlit, and they wanted funders to better understand the inherent unpredictability of the entertainment industry.

> *"There's a bit of a disconnect between the way grantmaking is set up and how this work [actually] happens, or the amount that is in our control. . . For example, I've decided not to [produce our own content], because we can [have control] and make the best content, but who's going to see it? So now we mostly [partner with other folks creating content], [but] the minute that becomes the case, we don't have much control over timelines or even whether something actually gets made."* **(Ishita Srivastava, Caring Across Generations)**

8. A detailed report on our review of research can be found here: Korobkova, K., Weinstein, D., Felt, L., Rosenthal, E. L., & Blakley, J. (2023). *Lights, Camera, Impact: 20 Years of Research on the Power of Entertainment to Support Narrative Change.* USC Norman Lear Center Media Impact Project. https://learcenter.s3.us-west-1.amazonaws.com/NormanLearCenter-Narrative-Change-Research-Review.pdf

9. While entertainment-driven efforts do not represent the entirety of narrative change strategies, these approaches have been extensively and rigorously studied. A recent report indicates that popular culture strategies are the most well known engagement framework for philanthropy (Moore & Sen, 2022). Many of the factors that contribute to the power of entertainment narratives are also relevant to other narrative contexts.

REVIEW OF 20 YEARS OF EVIDENCE OF AUDIENCE IMPACT[8]

In response to calls for greater focus on the "how" of narrative change work, we conducted a research review to **summarize and synthesize 20 years of evidence for the audience impact of entertainment media[9] — with a focus on scripted TV and film — in order to distill best practices for those interested in harnessing narrative for social change.** Whereas previous literature reviews and meta-analyses have focused solely on peer-reviewed literature or largely prioritized explicit health campaigns (e.g., entertainment-education interventions), we broadened the scope of our analysis to include both peer-reviewed and gray literature addressing a wide range of health and social issues, and varying along the continuum from impact-focused interventions to entertainment storylines that emerged organically.

METHODS

Our research review was guided by three questions:

1. What does research show about the **audience impact of entertainment media**?

2. What **structural, narrative, and production factors are associated with greater or lesser impact**?

3. How can this research **inform the work of the practitioners, supporters, and funders** of narrative change efforts?

Our analysis foregrounded published empirical studies and meta-analyses to gather robust available evidence that links entertainment media and audience social impact. Criteria for inclusion were:

- Studies that used and specified empirical research methods
- Studies in the U.S. and Canada, published in English
- Published in the time period from 2000 to 2020

We **prioritized scripted entertainment** targeted at adult audiences, but included unscripted media where evidence for scripted media was sparse, and included children's media to establish the history of narrative change approaches.

We relied on several data sources including:

- Academic research studies, scoping reviews, and meta-analyses;

- Reports, briefs, white papers in the narrative change field and in the media impact field;

- Bibliographies of key articles;

- Suggested sources from experts and practitioners; and

- Conversations with field experts and researchers.

The report went through several rounds of feedback and revision with narrative change experts.

KEY FINDINGS

Our analysis shows there is extensive evidence for the impact of popular media on audiences' knowledge, attitudes, beliefs, policy support, and behavior. **While attitude and behavior shifts alone are not necessarily evidence of narrative change at the scale of culture, they can be viewed as incremental indicators of progress toward culture change goals.**

We identified four main topic clusters.

1. **Stereotypes and belonging:** Popular media affects our understanding of who we are and sways our views of other social groups. "Meeting" characters unlike us on the screen can lead to reduction in prejudice toward members of historically-excluded communities. Analyzed case studies include *Will & Grace*, *Superstore*, *The Fosters*, and *Little Mosque on the Prairie*.

2. **Public health:** Decades of research demonstrates that TV shows and movies affect how we view and act on health issues. We review the ways in which TV shows like *Grey's Anatomy* and *Numb3rs* can encourage viewers to change behavior, like signing up to be organ donors, through immersive storytelling and role modeling.

3. **Social policy:** Through deep engagement in popular shows like *Homeland*, *Quantico*, *Law & Order: SVU*, and *24*, viewers shifted their support for or against various public policies and social norms — from torture in counterterrorism to sexual assault intervention.

4. **Nature, climate, and science-related issues:** There is relatively little empirical research on scripted entertainment addressing climate or environmental issues, so here we include unscripted content in our analysis. The existing evidence shows that movies like *The Day After Tomorrow* and *Interstellar* are associated with viewer inspiration to consider and care for the environment.

Based on this research, a number of best practices emerged at the media project, audience, and infrastructure levels.

Across topics, we noted several common **attributes, features, and strategies** that research suggests are associated with greater audience impact. These factors can be categorized at three levels: the media project level, the audience level, and the infrastructure level.

Figure 2. Categorization of Factors Associated with Audience Impact

1 **POWERFUL MEDIA**
Designing and producing media with the potential to engage, transport, and reach target audiences

2 **EMPOWERED AUDIENCES**
Knowing, engaging, and empowering audiences

3 **THE POWER OF INFRASTRUCTURE**
Building infrastructures surrounding the media content that can facilitate impact
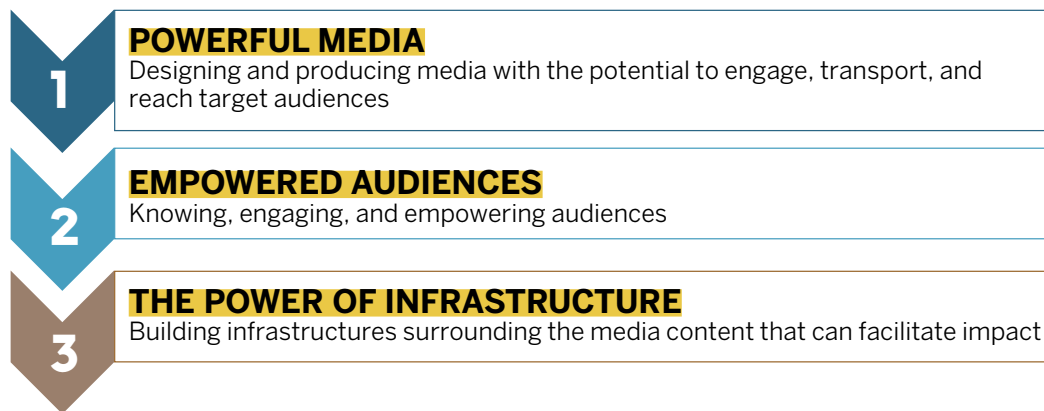
At the **media content or project level**, research highlights several factors that contribute to greater impact:

- Stories that **transport** audience members, have characters they can **identify** with, and have a **consistent storyworld**;

- Message **repetition, cumulative exposure** to the core narrative, and **saturation**; and

- Providing **transmedia resources** such as epilogues and public service announcements (PSAs).

Additional factors emerged around better understanding **how different audiences engage with and interpret media**:

- Identifying **subsets of target audiences**;

- **Testing messages** to see how they land; and

- Thinking about **how and when these audiences will engage** with the media content.

At the infrastructure level, factors associated with greater impact include:

- Elevating the **voices of affected communities**, particularly in **decision-making** that happens behind the scenes;

- Engaging **subject matter experts and relevant organizations**; and

- Alignment with the **sociopolitical context** — building upon current cultural conversations, social movements, and news coverage.

10. Additional highlights from this analysis can be found here: USC Norman Lear Center Media Impact Project (2023). *Exploring factors associated with impact in entertainment-driven narrative change: A case study of Hollywood, Health & Society projects, 2012-2021.* https://learcenter.s3.us-west-1.amazonaws.com/Norman+Lear+Center+Case+-Study+of+HH%26S.pdf

NARRATIVE CHANGE CASE STUDY:
HOLLYWOOD, HEALTH & SOCIETY[10]

Initially established with a grant from the Centers for Disease Control, the Lear Center's **Hollywood, Health & Society** (HH&S) program provides entertainment content creators with accurate and up-to-date information for storylines on health, safety, and security topics. Over the course of more than 20 years, HH&S has leveraged entertainment media to inform audiences on topics ranging from health issues to climate change to nuclear threats to systemic racism.

HH&S provides free services to engage entertainment content creators.

Because HH&S is fully supported by philanthropic and government funders, they are able to provide a comprehensive slate of services at no cost to content creators. These include:

- **Briefings and consultations** between content creators and subject-matter experts

- **Events** and panel discussions

- **Newsletters** and **social media** campaigns

- **Public service announcements** (PSAs)

- Provision of **topic-specific information** and resources, such as tipsheets

- Production of **original short-form video content**

HH&S and their funders do not pay for or "place" issues or storylines in entertainment. Rather, by virtue of their relationships with the entertainment industry, including the Writers Guild of America (East and West), the Directors Guild of America, the Producers Guild of America, and the Television Academy, HH&S has consistently been able to facilitate the airing of accurate storylines that reach millions of viewers.

Funders often seek to understand the social return-on-investment of HH&S and other narrative change efforts.

Funders considering investing in HH&S — or other narrative change practitioner organizations — often seek to understand the **return-on-investment (ROI) in**

social impact terms. To this end, we analyzed ten years of investments in HH&S in order to develop a simple ROI metric for HH&S and further articulate factors related to the investment and the broader context that are associated with greater returns.[11]

METHODS

We reviewed and analyzed 10 years (2012-2021) of investments in — and outcomes associated with — HH&S work.

These represented:

- **38** grants from **17** funders

- A total investment of **$11 million**

- **9** topic categories: maternal health, reproductive rights, mental health & addiction, aging, climate, nuclear threats, social determinants of health, HIV, multiple health topics (CDC[12])

This case study was carried out through four activities.

- **Formative research** to identify key indicators related to investments in HH&S, contextual factors, and outcomes. This included review of 83 HH&S grant reports and interviews with staff members.

- Development of simple **return-on-investment** (ROI) metrics for HH&S projects — consultations and storylines per $100k invested.

- **Pattern analysis** of associations between identified factors (contextual and investment) and ROI outcome metrics.

- Qualitative research to **contextualize and validate** quantitative findings with HH&S staff insights, HH&S event survey results, impact studies, and external data sources.

KEY FINDINGS

Our formative research identified three key outcomes of HH&S work, along with a number of factors related to the investment and the external context.

- Number of **consultations** connecting content creators with subject matter experts

- Number of **aired storylines** resulting from consultations

- Number of **viewers of aired storylines**

According to HH&S staff interviews, these outcomes are seen as important indicators of progress by their funders. These indicators can be viewed as incremental indicators of progress toward entertainment-driven narrative change in relation to a particular topic category.

Formative research revealed thirteen **key investment factors**, five related to the investment structure and eight related to the allocation of resources:

- Investment structure factors include the number of funders, duration of investment, and grant flexibility.

- Resource allocation factors include the percentage of HH&S activities funded, number of events, and number of tipsheets produced.

We also identified three **external factors**: writers' interest in the topic, favorability of the sociopolitical context, and the quality of HH&S' existing relationships with the writers and showrunners.

We generated two ROI metrics for each topic: consultations and storylines per $100,000 invested.

The investments in HH&S over 10 years generated an average of 19.0 consultations and 12.8 storylines per $100,000. Viewership of HH&S-informed storylines was dropped from analysis because it was not consistently reported across grants.

For each of the nine topic categories, we calculated two ROI metrics:

- **Consultations** per $100,000 (total of 2,065)

- **Storylines** per $100,000 (total of 1,393)

The topics with the most consultations per $100k were "multiple health topics" (CDC), mental health & addiction, climate, maternal health, and nuclear threats. The same set of topics generated the most storylines per $100k, along with aging.

Pattern analysis revealed apparent associations between investment and external factors and key outcomes.

We found evidence of correspondence between seven of the thirteen investment factors and ROI outcomes (asterisks indicate patterns that were consistent with HH&S staff members' initial hypotheses).

Table 1. *Investment Factors and Associated HH&S Outcomes*

Investment Factors	Outcomes
More funders	More consultations per $100K invested
Longer average grant length	More storylines aired per $100K invested
More grant flexibility*	More consultations per $100K invested
More topics included*	More consultations and more storylines aired per $100K invested
More HH&S activities funded*	More storylines aired per $100K invested
More tipsheets created	More consultations and more storylines aired per $100K invested
Creation of topic-specific webpage	More consultations and more storylines aired per $100K invested

We found evidence of correspondence between all three external factors and ROI outcomes.

Table 2: *External Factors and Associated HH&S Outcomes*

External Factors	Outcomes
A more favorable sociopolitical context*	More storylines aired per $100K invested
High quality of existing HH&S relationships in relevant topic category	More storylines aired per $100K invested
Greater writer interest in the topic(s)*	More storylines aired per $100K invested

Investment structural factors associated with positive outcomes include pooled funding, longer grants, greater grant flexibility, and coverage of multiple topics within a project.

- Topics that had **more funders** or pooled funding corresponded to more consultations. This association suggests the potential promise of strategies like pooled funding and co-funding — strategies also highlighted as important in interviews with narrative change field members.

- Topics with **longer grants**, on average, had more storylines per $100k. Longer-duration grants could have seen more positive outcomes because writing, producing, and airing storylines takes time. Staff interviews indicated that it can take up to two years to see consultations come to fruition with aired storylines.

- Having more **grant flexibility** appears to correspond to more consultations. Working with more flexible grants allows HH&S more autonomy in how time and funds are prioritized, according to staff interviews. As highlighted in interviews with narrative change field members, trust-based and flexible funding allows organizations to respond to external changes and shift course if needed.

- Having **multiple topics** within projects appears to correspond to more consultations and storylines. Projects that allowed the coverage of multiple issues or more general issues were linked to more positive outcomes than projects that were narrowly focused on a single issue, according to staff interviews.

Resource allocation factors associated with positive outcomes include funding more HH&S activities and topic-specific resources.

- Funding more **HH&S activities**, such as consultations, events, travel, production of tipsheets, and social media work, corresponded to more storylines. According to staff interviews, this may have been in part because HH&S was able to utilize different outreach channels and reach more members of the entertainment industry.

- Creating a **topic-specific HH&S webpage** and more **tipsheets** appear to correspond to more consultations and storylines. Sharing and producing internet-based resources for creatives could have led to more reach, according to HH&S staff interviews. Our research review also speaks to the potential power of sharing online resources since audiences have more access to information, beyond in-person events or briefings.

External factors associated with positive outcomes include a favorable sociopolitical context, relationships with content creators, and writer interest.

- A **sociopolitical context** favorable to the topic appears to correspond to more storylines. For example, as the Ukraine conflict became publicized, entertainment industry interest in the nuclear threats topic grew, according to staff interviews and reports. Thus, the presence of the topic in the news and public consciousness could facilitate relevant storylines being more likely to make it to air.

- Topics on which HH&S reported high-quality existing **relationships with shows** had more storylines. Social capital brought in by HH&S could play a role in outcomes. HH&S has long-standing and trust-based relationships with some creators, executives, and TV shows — especially in the medical space — that could help facilitate more interactivity and contact and thus, potentially, more aired storylines.

- Greater **writer interest** in engaging with a given topic appears to correspond to more storylines. Creators use their lived experiences to inform their storytelling and production choices, according to staff interviews. Their interest is often piqued by major contemporary events. **According to staff interviews, after the rise of the Black Lives Matter movement, writers expressed more interest in covering topics from the lens of race and racial disparity in America, for example, looking into maternal health issues with a focus on the experiences of Black women.**

13. Additional highlights from our qualitative deep-dives into two HH&S investments can be found here: USC Norman Lear Center Media Impact Project (2023). *Topic Specific Entertainment-Driven Narrative Change: A Deep-Dive Case Study of Hollywood, Health & Society's Work on Narratives of Nuclear Threats* (2015-2022). https://learcenter.s3.us-west-1.amazonaws.com/Lear+Center+Case+Study_Nuclear+Threats.pdf

USC Norman Lear Center Media Impact Project (2023). *Topic Specific Entertainment-Driven Narrative Change: A Deep-Dive Case Study of Hollywood, Health & Society's Work on Maternal Health* (2016-2023). https://learcenter.s3.us-west-1.amazonaws.com/Lear+Center+Case+Study_Maternal+Health.pdf

QUALITATIVE DEEP DIVES:
MATERNAL HEALTH & NUCLEAR THREATS[13]

To build upon our case study of HH&S investments over ten years and further flesh out factors associated with impact, we conducted **deep-dive qualitative analyses** into two of HH&S' more successful topics, in terms of consultations and storylines per $100k invested. These were **maternal health** (funded by the California Health Care Foundation, 2017-2022) and **nuclear threats** (co-funded by three funders, 2016-2021).

The two topics were chosen because HH&S had undertaken a number of activities on both topics in similar timeframes and the work was directly linked to major aired storylines on prominent TV shows. The dissimilarity between the two topics also allowed for greater exploration of factors that emerged through other research activities as being associated with impact, including writer interest and the importance of sociopolitical context.

METHODS

We conducted two qualitative deep dives examining HH&S work alongside contextual factors and media coverage.

The organizing research questions were:

- How did the **media coverage of the topics** — and target narratives — shift before, during, and after the investment, across various streams of media?

- What **factors** were associated with the successes and challenges of these investments?

The analysis was carried out through four research activities, utilizing multiple data sources.

1. **HH&S outcome analysis:** We reviewed HH&S grant-related materials to identify consultation information, storylines, PSAs, impact metrics, audience impact studies, and the sociopolitical context surrounding the investment.

2. **Media landscape analysis:** We analyzed the frequencies of relevant terms in news and online searches during the relevant time period (2016-2023 for maternal health; 2015-2022 for nuclear threats). Data sources included LexisNexis, the Stanford Cable TV News Analyzer, and Google Trends.

3. **Scripted entertainment analysis:** We analyzed the frequencies of relevant terms in scripted TV and film, using the Norman Lear Center Script Database (2016-2022[14] for maternal health; 2015-2022 for nuclear threats).

4. **Impact factor analysis:** We reviewed emergent findings with an eye toward impact factors identified in previous research activities.

All activities were informed by in-depth interviews with members of three stakeholder groups: funders, practitioners, and creatives.

KEY FINDINGS: MATERNAL HEALTH

Over the course of nearly five years (2017-2022), CHCF invested $380,000 in HH&S outreach to the entertainment industry. The goals of this investment were to generate storylines and contribute to public awareness of issues related to **maternal health**, specifically:

- Maternity care through **non-medical interventions** (e.g., the use of midwives, doulas);

- The importance of **maternal mental health**; and

- **Racial disparities in maternal health outcomes** in the U.S. (the focus of the most recent investment from 2020-2022).

HH&S consulted on key storylines on *New Amsterdam* and *The Good Doctor,* which reached more than 14 million viewers.

During the investment period, HH&S held 61 consultations between content creators and experts in maternal health topics, which resulted in 31 aired episodes, which were seen by up to 160 million people.[15]

Key maternal health storylines facilitated by HH&S included *New Amsterdam* "Catch" (2021) and *The Good Doctor* "Dr. Ted" (2021), which reached more than 14 million viewers combined. They also consulted on a PSA for *The Good Doctor* that resulted in a 20-fold increase in visits to the Return to Zero website, which provides critical pregnancy loss resources.

NEW AMSTERDAM [NBC]: "CATCH" (APRIL 20, 2021)

The episode featured three distinct storylines involving maternal health disparities:

- A Black mother diagnosed with cancer, who was learning to breastfeed her new baby before being separated for radiation;

- A Black woman who was in denial of her pregnancy due to sexual assault trauma; a psychologist and midwife intervene to stop a court-ordered C-section and to assist with the birth;

- A Black lawyer who insists on having a vaginal birth after an unwanted C-section (VBAC). The medical director addressed systemic racism and risk rates for women of color, applying a white woman's score to the VBAC calculator to allow for a successful vaginal birth.

THE GOOD DOCTOR [ABC]: "DR. TED" (MAY 10, 2021)

The episode featured a pregnancy loss storyline, as the main character's girlfriend, Lea, experiences pregnancy complications and ultimately miscarries, having to undergo a surgical abortion.

In addition, HH&S held **six events** featuring prominent experts, TV writers, and people with lived experience in support of maternal health equity. One of these events, the "Black Mothers Matter" panel, featured Charles Johnson, whose wife Kira Dixon Johnson, died during childbirth in 2016, with reports of mistreatment due to her race. The panel also featured an executive producer from The Resident, which had recently aired an **episode — "If Not Now, When" (2019) — on Black maternal mortality that was explicitly inspired by Johnson's story.**

Figure 3. The "Black Mothers Matter" Panel

Photo by Michael Jones

News mentions of maternal, health, and race increased nearly five-fold between 2016 and 2022.

Analyzing multiple media streams together reveals trends in target narratives of maternal health, race, and equity alongside HH&S outreach on the topic and key sociopolitical events. News mentions of the keywords "maternal," "health" and "race" **increased nearly five times between 2016-2022**, with documented spikes in news coverage and online searches following George Floyd's murder in 2020 and the overturn of Roe v. Wade in 2022.

The number of scripted TV storylines addressing the intersections between maternal health and race peaked in 2021.

Maternal health keywords appeared frequently in scripted TV and film, with **17% of all scripts featuring at least one maternal health keyword during the analysis period.** We found over 14,000 individual mentions of maternal health keywords. The most frequently mentioned keyword by far was "birth" (6,432), followed by "newborn" (787), and "labor and delivery" (429).

Similarly, **18% of scripts included at least one race-related keyword**. However, there were few scripts that combined race and maternal health keywords in a way that reflected target narratives. We identified **13 storylines in the analysis period that explicitly focused on the**

intersections between race and maternal health. The majority (7) of these key storylines aired in 2021 — potentially in response to #BlackLivesMatter and COVID-19, which brought discussions of race and health equity to the forefront. While infrequent, these storylines reached millions of viewers through popular shows including *Grey's Anatomy*, *New Amsterdam*, and *The Resident*.

KEY FINDINGS: NUCLEAR THREATS

Over the course of six years (2015-2021), three funders — the Nuclear Threat Initiative, N Square, and the Ploughshares Fund — co-funded HH&S outreach for a total of about $290,000. The goals of this investment were to generate storylines and raise public awareness of **nuclear threats**, including:

- Representing **nuclear threats as a current issue**, rather than a historical one;

- Showing that nuclear weapons **create risk, rather than reduce it**; and

- Demonstrating that nuclear threats are a **human-made problem** that can have a collective human solution.

HH&S consulted on key storylines on Madam Secretary and Bull, which reached nearly 15 million viewers.

During the investment period, HH&S held 40 consultations between content creators and experts in maternal health topics, which resulted in 19 aired episodes, which were seen by up to 132 million people.

Key nuclear threat storylines facilitated by HH&S included *Madam Secretary* "Night Watch" (2018) and *Bull* "Espionage" (2021), which reached nearly 15 million viewers combined. They also conducted an **impact study of the *Madam Secretary*** storyline, which found exposure was associated with **increased knowledge of nuclear threats, but primarily for left-leaning audience members.**

MADAM SECRETARY [CBS]: "NIGHT WATCH" (MAY 20, 2018)

The episode illustrated what would happen if Russia launched a nuclear attack on the U.S. with the president ordering a counterstrike that would cause nuclear winter. The strike is aborted with only seconds to spare after it is discovered to be simulation gone awry. Secretary of State Elizabeth McCord (Téa Leoni) squares off against the administration and Pentagon officials over long-standing and outdated nuclear launch policies and advocates to end the hair-trigger alert on land missiles.

BULL [CBS]: "ESPIONAGE" (OCTOBER 14, 2021)

In this episode, TAC defends a journalist accused of espionage after his girlfriend is revealed to be an undercover FBI agent to whom he leaked details about movement of nuclear materials at a military base. Bull suggests he confess in an effort to explain how thousands of people would get sick due to radioactive leaks at the facility. But instead of incriminating himself, the case turns when it is discovered that there has been illegal wiretapping by the accusers.

In addition, HH&S held **17 events** featuring prominent experts, politicians, actors, and TV writers. One notable event, "New Momentum for Saner Nuclear Policy," featured actor/producer Michael Douglas, Rep. Ted Lieu (D-CA), and former Ploughshares president, Joe Cirincione, among others, and received coverage in entertainment industry trade publications.

News mentions of nuclear- and threat-related keywords together peaked in 2017, at the height of the North Korean nuclear threat.

Analyzing multiple media streams together reveals trends in target narratives related to nuclear threats alongside HH&S outreach on the topic and key geopolitical events. News mentions and online searches of the keywords "nuclear" and "threat" together peaked in 2017, at the height of nuclear threat discourse around North Korea. Other spikes between 2015-2017 and 2021-2022 correspond to coverage of the Iran Deal and the Russian invasion of Ukraine.

The number of scripted TV storylines mentioning nuclear keywords likewise peaked in 2017.

Nuclear keywords appeared frequently in scripted TV and film, with **nearly 8% of all scripts featuring at least one keyword during the analysis period.** Similar to news, scripts featuring nuclear keywords peaked in 2017. There were 9,804 individual mentions of nuclear-related keywords in 4,892 scripts. The most common keywords were nuclear, atomic, and nuke(s), comprising over 80% of all mentions during the analysis period.

FACTORS ASSOCIATED WITH IMPACT

16. The factors of media saturation and incorporation of multimedia campaigns surfaced primarily in the Nuclear Threats' analysis.

Through this analysis, we identified nine factors associated with impact, of which seven aligned with the our previously identified factors:[16]

- Writers' interests

- Favorability of the sociopolitical context

- Media saturation

- Grant flexibility and trust

- Relationships with the media industry

- Incorporation of multimedia campaigns

- Partnerships with subject matter experts

- Entertainment value

- Representation of affected communities

"Hiding the medicine in the hamburger is a thing on any television show […] You need 'topspin,' like interesting characters or stuff that's compelling [enough] for executives to take a chance. You gotta get them hooked on the hamburger." (*New Amsterdam* writer/producer)

In addition, two novel impact factors emerged:

- **Writers' views of dramatic potential and relevance:** TV writers' views of how dramatic a topical story could be and how it would fit into their show's storyworld mediated their creative decisions. For example, issues of maternal health were seen as a natural fit for medical shows like *Grey's Anatomy* and *New Amsterdam*.

  "Honestly, I believe in that [message], and if I didn't, I probably wouldn't have written the episode — I just thought it was a good message to put out into the universe. But I couldn't just do that, otherwise that would be [akin to] propaganda. [Ultimately, the storyline] made sense and was a perfect [fit] dramatically." (writer/producer)

- **Stakeholders' values and priorities:** Value alignment between industry decision makers, creatives, and philanthropy plays a role in successful narrative change projects. In the Nuclear Threats' deep dive, interviewees mentioned that being on the same page about the importance of nuclear nonproliferation helped the process of getting relevant storylines on the air. In the Maternal Health analysis, interviewees emphasized the theme of decision maker values and priorities, as TV show and network decision makers set the tone for the topics and narratives storylines can cover.

  "[Hollywood] storytelling is dictated by the shows that are greenlit by Hollywood. So, if the percentage of creatives and creators of shows is still predominantly male, you're relying upon a group that may or may not have the capacity to care about maternal health." (writer/producer)

PULLING IT ALL TOGETHER:
A STRATEGIC FRAMEWORK TO GUIDE INVESTMENT IN NARRATIVE CHANGE

17. An interactive beta version of the Strategic Investment Framework can be found here: https://prezi.com/view/qodZnpO5XSmnc6q9Ruby/. See Appendix A for a draft of the full Framework content and Appendix B and Appendix C for a detailed accounting of how evidence from the four research activities maps onto the 25 factors.

18. Although the field is still aligning on terminology, the factors in the framework rely on language in pooled definitions: *Stories* and *messages* refer to takeaways and organizing ideas for the audiences. *Narratives* are collections of stories that shape and reflect our sense of the current and possible realities. See Korobkova, K., Weinstein, D., Felt, L., Rosenthal, E. L., & Blakley, J. (2023). *Lights, Camera, Impact: 20 Years of Research on the Power of Entertainment to Support Narrative Change.* USC Norman Lear Center Media Impact Project. https://learcenter.s3.us-west-1.amazonaws.com/NormanLearCenter-Narrative-Change-Research-Review.pdf

Across all four research activities, 25 best practices emerged. These represent evidence-based factors — culled from 20 years of audience impact research, expert opinion, and HH&S data — that appear to contribute to greater success of narrative change efforts. Based on these 25 factors, we developed the Strategic Investment Framework for Narrative Change Through Media and Beyond (Figure 4).[17]

This Framework is designed to be used as a forward-looking tool by funders and others considering — or already using — narrative change strategies for projects in service of particular narrative or culture change goals. Importantly, it is *not* intended to help funders decide whether to invest in narrative change over other approaches. What it can do, however, is illuminate the conditions under which these strategies are most likely to be successful, and when they might be a heavier lift requiring greater investment of time and resources. This can help stakeholders to make more informed, holistic decisions about the potential risks and benefits of these approaches given any particular combination of conditions. While developed based on data and evidence largely from entertainment, much of the Framework can be applied to narrative change efforts more broadly.

The 25 factors are organized into a five-level taxonomy.[18]

- The Framework begins broadly, describing factors pertaining to the **media and sociopolitical context** in which the potential investment will occur.

- It then moves to more specific factors related to the **structure of the planned investment, measurement and learning plans**, and the **organizational capacity** of the potential grantee.

- Finally, at the narrowest level, it hones in on factors related to the **media content** being developed or leveraged for narrative change.

Figure 4: *Overview of the Strategic Investment Framework (Beta Version, October 2023)*
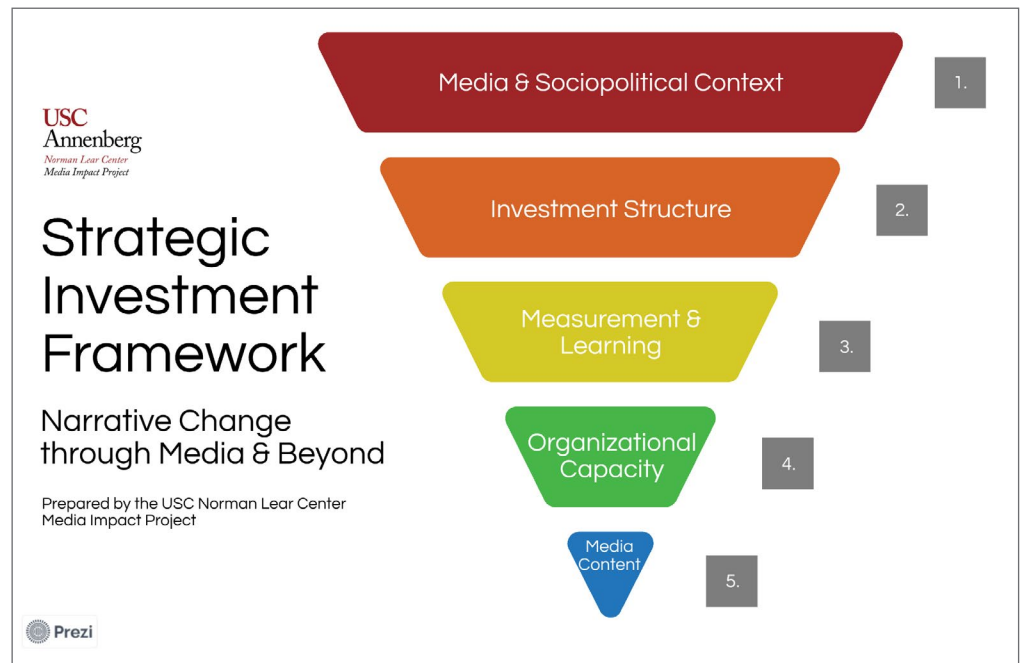
Within this Framework, each of the 25 factors is framed as a thought question for stakeholders to collaboratively consider.

19. Appendix A (Framework content) indicates the weight of evidence supporting each factor, the extent to which the factor is applicable primarily to entertainment/media efforts or broader narrative change, and a preliminary mockup of recommended Action Steps: based on user responses. Appendix B and Appendix C list the supporting evidence for each factor.

20. We envision this Framework will be further developed and iterated to include more tailored guidance based on users' responses.

The current beta version (October 2023) provides the following information for each factor:[19]

- An assessment of the **weight of evidence** supporting the factor, based on the four research activities described in this report; and

- An indication of whether the factor is **specific to entertainment** (or media) contexts or more broadly relevant to narrative change; and

- A preliminary mockup of recommended **action steps** based on users' responses to thought questions.[20]

By drawing upon this vast evidence-base, our hope is that the learnings presented here can inform the development, funding, strategy, implementation, and measurement of narrative change efforts in the entertainment context and beyond.

APPENDIX A:
TEXT VERSION OF STRATEGIC INVESTMENT FRAMEWORK

LANDING PAGE

This interactive **Strategic Investment Framework**, currently in beta version, is designed to help those using — or considering using — narrative change strategies:

- **Evaluate the conditions** associated with the success of narrative change investments;

- **Consider how light or heavy of a lift** a narrative change project is likely to be, based on the conditions in place; and

- **Identify ways to strategically design a narrative change strategy** to maximize the likelihood of success.

Although the Framework is not intended to tell funders whether to invest in media- or entertainment-driven narrative change strategies, its **core objective is to help decision makers holistically understand the factors and conditions that maximize the likelihood of success of narrative change investments.**

The Framework was developed based on findings from a two-year learning project, supported by the California Health Care Foundation. This project included four research activities: interviews with narrative change experts, a review of 20 years of audience impact research, a case study of a narrative change program, and qualitative deep-dives into investments on two topics. From this research, twenty-five evidence-based factors emerged. These factors are structured into five levels:

1. **Media and sociopolitical context**

2. **Investment structure**

3. **Measurement and learning**

4. **Organizational capacity**

5. **Media content**

LEGEND

For each of the 25 factors, the Framework provides the following:

- **Applicability:** An assessment of whether, based on the analyzed evidence, the factor is:

  🎭 specific to **entertainment/media contexts**; or

  🌍 applicable to **broader contexts** in which narrative change strategies may be applied (e.g., news, social media, political advocacy, local movement organizing).

- **Weight of Evidence:** The amount of evidence supporting the factor, where the number of red circles ⬤⬤⬤⚪ corresponds to the number of research activities from the learning project that provide supporting evidence.

- **Organizing Question:** A question prompting users to consider the extent to which the factor might facilitate — or present barriers to — success on the project under consideration.

  ⊕ indicates a positive response (e.g., yes/high/strong/very much)

  ⊖ indicates a negative response (e.g., no/low/weak/not a lot)

  ⑦ indicates an uncertain response (e.g., I don't know/unsure)

- **Action Steps:** Based on the user's response to the organizing question, the Framework provides guidance on next steps, including ways to bolster the factor in question, to consider other relevant factors, or to learn more.

  - **Conducive to success:** Indicates that a factor associated with success has been incorporated into plans for the project or is strongly evident in the broader context. This suggests successful implementation of a narrative change strategy may be a lighter lift.

  - **Pause and consider:** Indicates that a factor associated with success is absent or lacking from plans for the project or missing from the broader context. This suggests successful implementation of a narrative change strategy may be a heavier lift. Funders and others might consider strengthening this factor or leveraging other relevant factors that may facilitate the success of the project

  - **Want to learn more?** Indicates that it is unclear whether the factor has been incorporated to plans for the proposed project or the extent to which the factor is evident in the broader context. Funders and others might consider engaging in additional research or learning. Relevant resources are provided.

Users of the Framework are encouraged to consider the aggregate of factors holistically — as a way to better understand the conduciveness of the context, conditions, and project design to eventual success — rather than making investment decisions based on the presence or absence of any one factor.

FRAMEWORK TEXT

1. MEDIA AND SOCIOPOLITICAL CONTEXT

- **FACTOR: Favorability of the Sociopolitical Context**

  Applicability: 🌏

  Weight of Evidence: ⬤⬤⬤⬤

  Organizing Question: How favorable is the sociopolitical context to this narrative?

  Action Steps:

  - **[If +] Conducive to success:** Based on the evidence, a more favorable sociopolitical context suggests it may be a lighter lift to achieve success.

  - **[If -] Pause and consider:** Consider leveraging timing, co-funding, diverse collaborations and other strategies to strengthen this factor and/or strengthen related factors to increase the potential impact of the investment.

  - **[If ?] Want to learn more?** <List of relevant resources>[21]

- **FACTOR: Media Saturation**

  Applicability: 🌍

  Weight of Evidence: ⬤⬤○○

  Organizing Question: How saturated is the media landscape with messages competing with or opposed to this narrative?

  Action Steps:

  - **[If -] Conducive to success:** Based on the evidence, less saturation of competing or oppositional messages suggests it may be a lighter lift to achieve success.

  - **[If +] Pause and consider:** Consider leveraging other factors connected to media saturation and the sociopolitical context in order to increase the potential impact of the investment.

  - **[If ?] Want to learn more?** <List of relevant resources>

21. The beta framework presented in Appendix A and Appendix B includes draft labels and placeholder text (in gray) as a preliminary outline for a web-based interactive tool to be customized.

- **FACTOR: Interest of Content Creators**

Applicability: 🎭

Weight of Evidence: 🔴🔴🔴⚪

Organizing Question: How interested are content creators in this narrative?

Action Steps:

- **[If +] Conducive to success:** Based on the evidence, high interest of content creators in the target narrative suggests it may be a lighter lift to achieve success.

- **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors such as strategic partnerships and multi-pronged strategies.

- **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Representation of Affected Communities**

Applicability: 🌍

Weight of Evidence: 🔴🔴⚪⚪

Organizing Question: How represented are members of affected communities on creative and decision making teams?

Action Steps:

- **[If +] Conducive to success:** Based on the evidence, representation of affected communities (communities closest to the target narrative) on creative and decision making teams suggests it may be a lighter lift to achieve success.

- **[If -] Pause and consider:** Consider strengthening this factor (e.g., through outreach and strategic partnerships) and leveraging other factors related to the media and sociopolitical context.

- **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Alignment of stakeholders and decision makers**

Applicability: 🌍

Weight of Evidence: 🔴⚪⚪⚪

Organizing Question: How aligned are stakeholders and decision makers' values and priorities within the project?

Action Steps:

- **[If +] Conducive to success:** Based on the evidence, alignment of values and priorities of stakeholders and decision makers around the target narrative suggests it may be a lighter lift to achieve success.

- **[If -] Pause and consider:** Consider strengthening this factor (e.g., through outreach and strategic partnerships) and leveraging other factors related to the media and sociopolitical context.

- ○ **[If ?] Want to learn more?** <List of relevant resources>

2. INVESTMENT STRUCTURE

- ● **FACTOR: Co-Funding**

  Applicability: 🌎

  Weight of Evidence: 🔴🔴⚪⚪

  Organizing Question: To what extent are other funders investing in this narrative?

  Action Steps:

  - ○ **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - ○ **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors.

  - ○ **[If ?] Want to learn more?** <List of relevant resources>

- ● **FACTOR: Investment Duration**

  Applicability: 🌎

  Weight of Evidence: 🔴🔴⚪⚪

  Organizing Question: To what extent is this a long-term investment?

  Action Steps:

  - ○ **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - ○ **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - ○ **[If ?] Want to learn more?** <List of relevant resources>

- ● **FACTOR: Grant Flexibility**

  Applicability: 🌎

  Weight of Evidence: 🔴🔴🔴⚪

  Organizing Question: How much flexibility will the grantee have?

  Action Steps:

  - ○ **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - ○ **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - ○ **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Multi-pronged Strategies**

  Applicability: 🌎

  Weight of Evidence: 🔴🔴⚪⚪

  Organizing Question: To what extent are multi-pronged strategies incorporated into the investment to spread target narratives across multiple platforms, channels, and spheres?

  Action Steps:

  - **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Inclusion of Multiple Topics**

  Applicability: 🌎

  Weight of Evidence: 🔴🔴⚪⚪

  Organizing Question: To what extent does the proposed investment cover multiple topics?

  Action Steps:

  - **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Measurement & Learning**

  Applicability: 🌎

  Organizing Question: To what extent does the investment support measurement and learning? → see 3. Measurement & Learning

- **FACTOR: Number of Activities Funded**

  Applicability: 🌎

  Organizing Question: How many different programmatic activities are supported by this investment? → see 4. Organizational Capacity

3. MEASUREMENT & LEARNING

- **FACTOR: Guidelines or Best Practices**

  Applicability: 🌍

  Weight of Evidence: ●●○○

  Organizing Question: To what extent are there frameworks or guidelines for best practices that can help practitioners in this project?

  Action Steps:

  - **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Research Tools & Approaches**

  Applicability: 🌍

  Weight of Evidence: ●●○○

  Organizing Question: To what extent does the proposed investment incorporate innovative and impact-oriented research tools and approaches?

  Action Steps:

  - **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Message Testing**

  Applicability: 🌍

  Weight of Evidence: ●●○○

  Organizing Question: To what extent does the proposed investment include message testing across audience subgroups?

  Action Steps:

  - **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Community-Based Research**

Applicability: 🌍

Weight of Evidence: 🔴⚪⚪⚪

Organizing Question: To what extent does the proposed investment include research that prioritizes the voices of affected communities?

Action Steps:

- **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

- **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

- **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Sharing of Learnings**

Applicability: 🌍

Weight of Evidence: 🔴⚪⚪⚪

Organizing Question: To what extent does the proposed investment promote field-wide sharing of learnings?

Action Steps:

- **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

- **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

- **[If ?] Want to learn more?** <List of relevant resources>

4. ORGANIZATIONAL CAPACITY

- **FACTOR: Partnerships with subject matter experts & organizations**

Applicability: 🌍

Weight of Evidence: 🔴🔴🔴⚪

Organizing Question: How strong are the proposed grantee's partnerships with subject matter experts and relevant organizations?

Action Steps:

- **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

- **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

- **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Relationships with Media Industry**

  Applicability: 🎭

  Weight of Evidence: 🔴🔴🔴⚪

  Organizing Question: How strong are the proposed grantee's relationships with the media industry?

  Action Steps:

  - **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Diverse Collaborations**

  Applicability: 🎭

  Weight of Evidence: 🔴⚪⚪⚪

  Organizing Question: To what extent is there a plan to collaborate with diverse media creators or community-based organizations?

  Action Steps:

  - **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Narrative Power-Building**

  Applicability: 🌎

  Weight of Evidence: 🔴🔴⚪⚪

  Organizing Question: To what extent does the proposed grantee engage in narrative power-building?

  Action Steps:

  - **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Multimedia Elements**

  Applicability: 🌍

  Weight of Evidence: 🔴🔴🔴⚪

  Organizing Question: To what extent does the proposed grantee develop multimedia campaigns and resources, such as tipsheets or web pages dedicated to the narrative?

  Action Steps:

  - **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - **[If ?] Want to learn more?** <List of relevant resources>

5. MEDIA CONTENT

- **FACTOR: Entertainment Value**

  Applicability: 🎭

  Weight of Evidence: 🔴🔴🔴⚪

  Organizing Question: How strongly does the proposed content prioritize entertainment value?

  Action Steps:

  - **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Repetition of Core Narratives**

  Applicability: 🌍

  Weight of Evidence: 🔴🔴⚪⚪

  Organizing Question: To what extent does the proposed project incorporate repetition of core narratives?

  Action Steps:

  - **[If +] Conducive to success:** Based on the evidence, when this factor is strong/favorable, it may be a lighter lift to achieve success.

  - **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

  - **[If ?] Want to learn more?** <List of relevant resources>

- **FACTOR: Distribution Plan**

Applicability: 🎭

Weight of Evidence: 🔴🔴⚪⚪

Organizing Question: To what extent is there a distribution plan that considers target narratives, audiences, and channels, as well as timing and strategic release of content?

Action Steps:

- **[If +] Conducive to success:** Based on the evidence, when this factor is strong/ favorable, it may be a lighter lift to achieve success.

- **[If -] Pause and consider:** Consider strengthening this factor or leveraging other factors

- **[If ?] Want to learn more?** <List of relevant resources>

APPENDIX B:
EVIDENCE SUPPORTING EACH FACTOR IN THE STRATEGIC INVESTMENT FRAMEWORK

1. MEDIA AND SOCIOPOLITICAL CONTEXT

FACTOR: Favorability of the Sociopolitical Cont

Organizing Question: How favorable is the sociopolitical context to this narrative?

Supporting Evidence: ●●●●

- Research shows media that builds upon current cultural conversations, social movements, and coverage of events may be more likely to gain traction.

- Experts suggest narrative projects that connect to the current sociopolitical context, including news coverage and social movements, are more impactful.

- A narrative change case study found investments were more likely to produce entertainment storylines when related narratives were already circulating.

- A deep-dive qualitative analysis showed that news coverage of related sociopolitical events helped amplify target narratives.

FACTOR: Media Saturation

Organizing Question: How saturated is the media landscape with messages competing with or opposed to this narrative?

Supporting Evidence: ●●○○

- Experts suggest investments that consider and respond to the amount and entrenchment of opposition messages to the target narrative are more likely to achieve impact.

- A deep-dive qualitative analysis found that competing topics and issues can draw public attention away from target narratives.

FACTOR: Interest of Content Creators

Organizing Question: How interested are content creators in this narrative?

Supporting Evidence: ●●●○

- Experts suggest content creators are more likely to write about what they know, which emphasizes the need for diverse creative teams.

- A narrative change case study found that narratives associated with greater writer interest had more storylines, on average.

- A deep-dive qualitative analysis revealed that writers' interest in a given topic and

views of its dramatic potential can inform whether a storyline makes it to air.

FACTOR: Representation of Affected Communities

Organizing Question: How represented are members of affected communities on creative and decision making teams?

Supporting Evidence: ●●○○

- ○ Experts suggest having diverse representation on multiple levels of the project is essential to changing power dynamics and ultimately shifting the narrative.

- ○ Research shows that elevating the voices of affected communities could mitigate the potential of spreading harmful messages.

FACTOR: Alignment of stakeholders and decision makers

Organizing Question: How aligned are stakeholders and decision makers' values and priorities within the project?

Supporting Evidence: ●○○○

- ○ A deep-dive qualitative analysis showed that value alignment between various stakeholder groups — including content creators, funders, grantees, experts, studio executives, etc. — was key to facilitating aired content and impact.

2. INVESTMENT STRUCTURE

FACTOR: Co-Funding

Organizing Question: To what extent are other funders investing in this narrative?

Supporting Evidence: ●●○○

- ○ Experts suggest co-funding is an effective way to provide practitioners with the scale of resources needed, while spreading out individual risks for funders.

- ○ A narrative change case study found that investments with a greater number of funders generated more consultations with content creators.

FACTOR: Investment Duration

Organizing Question: To what extent is this a long-term investment?

Supporting Evidence: ●●○○

- ○ Experts suggest narrative change is a long-term strategy that requires multi-year investments to match the long time horizon for impact.

- ○ A narrative change case study found that investments with longer average grant lengths were more likely to lead to a high number of aired storylines.

FACTOR: Grant Flexibility

Organizing Question: How much flexibility will the grantee have?

Supporting Evidence: ●●●○

- Experts suggest flexible, trust-based investments that allow practitioners freedom to experiment, take risks, and iterate are key to effecting narrative change.

- A narrative change case study found that investments with more perceived grant flexibility generated more consultations with content creators.

- A deep-dive qualitative analysis highlighted that trust-based and flexible funding allows grantees to leverage their expertise and resources, while leaving room to adapt as circumstances change.

FACTOR: Multi-pronged Strategies

Organizing Question: To what extent are multi-pronged strategies incorporated into the investment to spread target narratives across multiple platforms, channels, and spheres?

Supporting Evidence: ●●○○

- Experts suggest that the use of multi-pronged strategies -- incorporating narrative approaches in policy, advocacy, organizing, popular media, and strategic communications -- can facilitate the impact of narrative change work.

- A deep-dive qualitative analysis found investing across multiple media streams and social spheres can complement entertainment-based investments to help spread target narratives.

FACTOR: Inclusion of Multiple Topics

Organizing Question: To what extent does the proposed investment cover multiple topics?

Supporting Evidence: ●●○○

- Experts suggest focusing on over-arching narratives (e.g., individualism vs. collectivism) which may address multiple topics (e.g., race, health, climate).

- A narrative change case study found that investments which covered a number of topics generated more consultations and storylines.

FACTOR: Measurement & Learning

Organizing Question: To what extent does the investment support measurement and learning?

- See **3. Measurement & Learning**

FACTOR: Number of Activities Funded

Organizing Question: How many different programmatic activities are supported by this investment?

- See **4. Organizational Capacity**

3. MEASUREMENT & LEARNING

FACTOR: Guidelines or Best Practices

Organizing Question: To what extent are there frameworks or guidelines for best practices that can help practitioners in this project?

Supporting Evidence: ●●○○

- ○ Experts suggest sharing and building on field-wide learnings is a key way forward in the narrative change field.

- ○ Research shows that there are several common elements in impactful media projects, from character relatability to inclusive storytelling.

FACTOR: Research Tools & Approaches

Organizing Question: To what extent does the proposed investment incorporate innovative and impact-oriented research tools and approaches?

Supporting Evidence: ●●○○

- ○ Experts suggest novel research tools and approaches such as power analysis, discourse analysis, and social listening, could be useful for measuring incremental impact.

- ○ A deep-dive qualitative analysis showed how impact-oriented strategies and tools, such as public service announcements (PSAs), provided an effective way to gauge the reach and impact of media content.

FACTOR: Message Testing

Organizing Question: To what extent does the proposed investment include message testing across audience subgroups?

Supporting Evidence: ●●○○

- ○ Experts suggest incorporating experimental and iterative work that includes message testing with the target audience.

- ○ Research shows that analysis of audience reception of particular messages can facilitate social impact and reduce the chances of unintended consequences.

FACTOR: Community-Based Research

Organizing Question: To what extent does the proposed investment include research that prioritizes the voices of affected communities?

Supporting Evidence: ●○○○

- ○ Research shows the power of audience impact research that prioritizes the voices and perspectives of communities with relevant lived experiences.

FACTOR: Sharing of Learnings

Organizing Question: To what extent does the proposed investment promote field-

wide sharing of learnings?

Supporting Evidence: 🔴⚪⚪⚪

- ○ Experts suggest the field would benefit from the ability to learn from successful frameworks, methods, and approaches used by others in the field.

4. ORGANIZATIONAL CAPACITY

FACTOR: Partnerships with subject matter experts & organizations

Organizing Question: How strong are the proposed grantee's partnerships with subject matter experts and relevant organizations?

Supporting Evidence: 🔴🔴🔴⚪

- ○ Experts suggest investments that prioritize strategic collaborations across organizations and fields are more likely to gain traction and success.

- ○ Research shows engaging subject matter experts and relevant organizations enhances the accuracy, authenticity and reach of media projects.

- ○ A deep-dive qualitative analysis found that effective partnerships between subject matter experts and relevant organizations were key to fostering storylines aligned with target narratives.

FACTOR: Relationships with Media Industry

Organizing Question: How strong are the proposed grantee's relationships with the media industry?

Supporting Evidence: 🔴🔴🔴⚪

- ○ Experts suggest relationship building within the entertainment industry is a prerequisite for effecting entertainment-driven narrative change.

- ○ A narrative change case study found that investments in topics that leveraged existing relationships within the entertainment industry generated more storylines.

- ○ A deep-dive qualitative analysis found that strong relationships with entertainment content creators were key to fostering storylines aligned with target narratives.

FACTOR: Diverse Collaborations

Organizing Question: To what extent is there a plan to collaborate with diverse media creators or community-based organizations?

Supporting Evidence: 🔴⚪⚪⚪

- ○ Research shows that strategic collaborations can aid in the reach of stories and the saturation of messages across stories, platforms, and social spheres.

FACTOR: Narrative Power-Building

Organizing Question: To what extent does the proposed grantee engage in narrative power-building?

Supporting Evidence: ●●○○

- ○ Experts suggest considering the capacity, narrative, and organizational resources needed to build narrative power as critical to facilitating narrative change.

- ○ Research shows that building narrative power for marginalized groups, both on- and off-screen, can lead to more authentic storytelling and audience engagement.

FACTOR: Multimedia Elements

Organizing Question: To what extent does the proposed grantee develop multimedia campaigns and resources, such as tipsheets or web pages dedicated to the narrative?

Supporting Evidence: ●●●○

- ○ Research shows the provision of transmedia resources (e.g., websites, PSAs, social media) can facilitate greater audience engagement and impact.

- ○ A narrative change case study found investments that produced educational tipsheets and dedicated web pages had more consultations with content creators and storylines.

- ○ A deep-dive qualitative analysis showed that PSAs and social media campaigns were an effective way to reach new audiences.

5. MEDIA CONTENT

FACTOR: Entertainment Value

Organizing Question: How strongly does the proposed content prioritize entertainment value?

Supporting Evidence: ●●●○

- ○ Experts suggest telling a "good story" without being didactic is key to achieving impact through media.

- ○ Research shows stories that transport audience members, have characters they can identify with, and have a consistent storyworld are more likely to have impact.

- ○ A deep-dive qualitative analysis highlighted the importance of prioritizing the entertainment value of content, which may engross current audiences and help bypass both audiences' and industry decision makers' resistance to portrayals of social issues.

FACTOR: Repetition of Core Narratives

Organizing Question: To what extent does the proposed project incorporate repetition of core narratives?

Supporting Evidence: ●●○○

- ○ Experts suggest repetition of messages across channels and spheres leads to message saturation, and ultimately, helps facilitate narrative change.

○ Research shows that message repetition, cumulative exposure to the core narrative, and saturation contribute to audience impact.

FACTOR: Distribution Plan

Organizing Question: To what extent is there a distribution plan that considers target narratives, audiences, and channels, as well as timing and strategic release of content?

Supporting Evidence: ●●○○

○ Experts suggest having a distribution plan and capacity in place is important to reach target audiences in a fragmented media landscape.

○ Research shows that impact is enhanced by strategic collaborations, industry buy-in, and the social context that facilitates greater reach. Social context includes alignment between growing social movements and popular conversations that can enhance the potential for narrative impact.

APPENDIX C:
SOURCES OF SUPPORTING EVIDENCE FOR STRATEGIC INVESTMENT FRAMEWORK

Level	Factors	Expert Interviews	Research Review	Narrative Change Case Study	Qualitative Deep Dives
Media & Sociopolitical Context	Favorability of sociopolitical context	X	X	X	X
	Media saturation	X			X
	Interest of content creators	X		X	X
	Representation of affected communities	X	X		
	Alignment of stakeholders and decision makers				X
Investment Structure	Co-funding	X		X	
	Investment duration	X		X	
	Grant flexibility	X		X	X
	Multi-pronged strategies	X			X
	Inclusion of multiple topics	X		X	
	Measurement and learning	X	X		X
	Number of activities funded			X	

Level	Factors	Expert Interviews	Research Review	Narrative Change Case Study	Qualitative Deep Dives
Measuring & Learning	Guidelines or best practices	X	X		
	Research tools & approaches	X			X
	Message testing	X	X		
	Community-based research		X		
	Sharing of learnings	X			
Organizational Capacity	Partnerships with subject matter experts and organizations	X	X		X
	Relationships with media industry	X		X	X
	Diverse collaborations		X		
	Narrative power-building	X	X		
	Multimedia elements		X	X	X
Media Content	Entertainment value	X	X		
	Repetition of core narratives	X	X		
	Distribution plan	X	X		