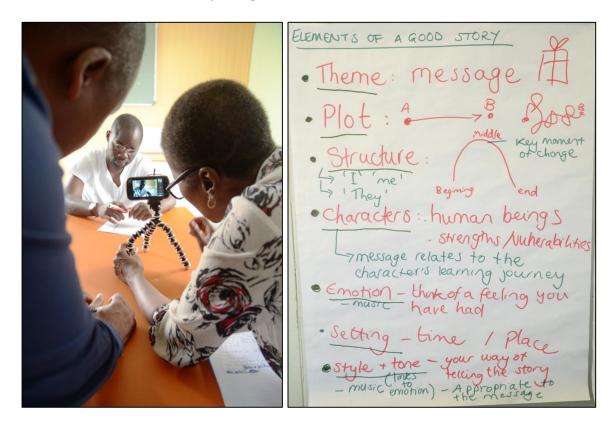
Story-driven Participatory Video for Mobile Technologies

'Work-in-progress' Facilitation Guide



This 'work-in-progress' Facilitation Guide developed March 3-13 in Cape Town, South Africa, through a PV practitioner training with Sonke Gender Justice staff/activists.*

This guide is a <u>supportive resource</u> for those who participated in the Story-driven Participatory Video workshop. It is currently not designed as a comprehensive, off-the-shelf facilitation training manual for Story-driven Participatory Video.

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^{*}Tamara Plush, University of Queensland's Centre for Communication and Social Change, and Thea Shahrokh, Institute Development Studies, developed this facilitation guide to support the people trained as practitioners in the Story-driven PV workshop. Thea and Tamara facilitated and funded the workshop and a PV equipment kit for the trained practitioners through their organisations. The workshop received additional support from Sonke Gender Justice and the Sustainable Livelihoods Foundation in Cape Town.

INTRODUCTION: Storytelling processes are known for their transformative power for both the storyteller and the listener. This connection to the personal and the dialogue that ensues can foster mutual understanding and serve as a catalyst for social change. However, despite its value, visual storytelling practitioners can find it difficult to incorporate the personal in collaborative, community-driven storytelling processes such as participatory video (PV). It is with such intent that we—as researchers and visual storytelling practitioners—partnered with Sonke Gender Justice community mobilisers in Cape Town to explore Story-driven PV.

We describe 'Story-driven Participatory Video' as a facilitated community engagement and mobilisation process that uses filmmaking as a catalyst for awareness-raising, personal and group development, confidence-building and strengthening voice. The main intention is that the storytelling and filmmaking process spurs dialogue that feeds into wider social and behaviour change efforts. In other words, the approach is not about teaching people how to make their own films; but rather a community engagement and mobilisation process that rests on four cornerstones: **group development and relationship building**; **appropriate technology**; **personal and collective storytelling**; and **dialogue**.

To develop a facilitation process for Story-driven PV, we first met with Sonke staff members to discuss using PV in their context in Cape Town. We wanted to share our understanding of Story-driven PV, and to discover how they wanted to use the approach in their work on health, violence and gendered inequalities in local townships. Through the visioning meetings, they challenged us to explore incorporating mobile phone technology into the PV process since mobile phones are commonly owned by Sonke staff and by those with whom they work. We also saw value in this approach. Because many of the Sonke staff own Smartphones, they would immediately have access to the main filmmaking tool. They could also access supportive equipment much easier and cheaper than if using a video camera. We were also interested in the limitations of Smartphones; and how to work within them.

For example, as an emerging technology, using mobile phones within the approach proved technically challenging based on the diversity of operating systems and the fact that most people have android phones rather than iPhones. (This is important because the iPhone has quite a bit of supportive equipment and apps for making videos. Android phones are more limited.) As well, we wanted any app technology that the community would use to be free so they could use the filmmaking learnings for their own videos. While we initially hoped to edit the films on the mobile phone, we discovered that free software was too basic to create the quality of film we knew the participants would want from the collaborative filmmaking process. As well, a larger editing screen is important in PV in ensuring everyone can be involved in the editing process. Thus, you will see within the Facilitation Guide that we have two editing processes:

- 1) In some of the learning activities, we recommend basic phone editing using free software. Doing this passes on such skills to community participants that they can use to make simple films.
- 2) For the final film, we have designed the process so the film footage is shot on a Smartphone; but the footage is edited on a laptop using the free Windows Movie Maker. This ensures that the film the group envisions can be realised (with added narration; music; transitions; etc.).

This Facilitation Guide is a supportive resource for those who are skilled community engagement and mobilisation, who are facilitators and who participated in the Story-driven Participatory Video workshop. It includes the process we used in our training with Sonke Gender Justice staff; and also additional activities that we think will be helpful to the process. It is not designed to be for off-the-shelf facilitation.

It is also important to note that in the work-in-progress Facilitation Guide we have not given specific dates and times of the process. Rather we have presented a facilitation framework for practitioners. This is because we believe Story-driven PV works best as a process that fits within on-going community engagement and mobilisation activities. As such, the process can be done in a workshop setting; or as a longer process of engagement. That said, we strongly believe that each phase should be completed before moving to the next phase to ensure the full benefit of the process for group development, relationship building, story emergence and dialogue. An important aspect to always keep in mind that making the film is only one part of the process. In addition to a focus on group development, how the participants want to use their film for dialogue should have equal weight in any process (supported with time and resources). We believe this should not be taken lightly when planning to use Story-driven Participatory Video.

We have tried to make the Facilitation Guide easy to use by the practitioners we trained. Next to each activity, we have selected icons that represent the four areas we are focusing on in the methodological approach. We believe having a balance in the process helps in the transformative nature of the approach: 1









We have also included the handouts that we used so the facilitators can make copies for participants. These are in the booklet, but also on the USB drive attached to the Guide. Please do not remove this USB from the kit! The USB drive also includes videos and other supportive materials for the facilitation process. We will also post resources to www.transformativestory.org/story-driven-pv.

In closing, we want to give a special thank you to the Sonke Gender Justice participants-Precilia Chuloi, Nomazizi Cishe, Suleiman Henry, Malwande Luzipho, Abdillahi Ahmed Mohamed, Saint-Expedit Ondzongo and Thulani Velebayi. We especially give our appreciation to Dean Peacock and Rukia Cornelius at Sonke for their support of the staff in their participation; and to the Sustainable Livelihoods Foundation. We also want to thank Keegan Lakay and the support staff at the Sonke Gender Justice Wellness Centre for their help in setting up and making the workshop run smoothly. We also appreciate the funding for the workshop and supportive equipment for the participants from the University of Queensland and the Institute of Development Studies. Huge thanks to them as well. We sincerely wish you all the best in using Story-driven Participatory Video in your work!

Tamara Plush, University of Queensland Centre for Communication and Social Change Thea Shahrokh Institute of Development Studies

¹Icons from the Noun Project. The icons can be used for free through Creative Commons license as long as you give the artist's credit: ICONS: Group: Igor Neburov; Storytelling: Anuar Zhumaev; Technology: By Daeun Song; Dialogue: By Pham Thi Dieu Linh.

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Participatory Video for Raising Voice

To frame the guide, we wanted to share a definition of participatory video that grounds us in the understanding that the method is more than community members making films. It is a community engagement and mobilisation effort aimed to bring about social change and justice.

'Participatory video for raising voice is a creative, transformative learning method and tool that can—through reflexive filmmaking processes—raise awareness; socially and politically mobilise; develop and empower individuals and groups; foster equitable relationships; amplify voice for engaged dialogue and listening; and accelerate social change and justice.'²

Facilitation Preparation

We caution against treating participatory video as a one-off process, detached from your ongoing engagement and work with the communities you are most closely connected to. It is these ongoing relationships, understanding of the context, and commitment to follow-up that will ensure a more transformative process for all involved—one that contributes to the longer term goals of the people involved.

Participant Selection

Prior to using Story-driven Participatory Video, it is important that participants fully understand and are interested in engaging in the wider process into which the PV is embedded. To support the ethical selection of participants, please follow these principles for selection:³

- Transparency: Be upfront and clear about your process, your expectations and your approach. Tell potential participants how you plan to use the stories developed. If they will have ownership of where and how the final films will be shown (which is ideal), be sure this is agreed by the donor/organisation that may be funding the project.
- **Responsibility**: Take responsibility for making sure that you plan for your participant's needs. This includes their emotional well-being as they may be discussing tough issues; or may need support for the dialogue that arises through the film (especially if they are challenging power in their film).
- Respect: Respect privacy and confidentiality at all times; especially in making the film as issues may arise in the process that may or may not make it into the external film. For any distribution, participants must be well informed about the use of their story, and a consent form must be explained properly and signed. Respect also extends to the integrity of the participant's story. The participant must remain in control of their process, and their storytelling.
- **Group size:** Generally, it can be difficult to train more than 12 participants in one workshop; even if making two films. It is important to think about the number of participants in relation to the length of time needed for each of the activities; and how many facilitators are working with the group.
- Qualified facilitators & sufficient equipment: Facilitators must be qualified in Story-driven PV, and you must have enough facilitation support to help participants when they need it. It is important to remember that having two groups will require at least two facilitators (one lead facilitator to work with each group); two Filmmaking Equipment Kits; and potentially support trainers/assistance.

²Definition from PhD research findings by Tamara Plush at the UQ Centre for Communication and Social Change (forthcoming 2016).

³Adapted from Digital Storytelling (DST) participant selection handout by Joanna Wheeler.

Here are some pre-requisites for participation that must be made clear:

- Participants must make themselves available for the full duration of the workshop!
- Participants must respect the confidentiality and privacy of their fellow participants.
- Participants must be interested in telling a collective, collaborative story. The story may be based on personal experiences; but it is usually a story about an individual within the group.
- Participants must be conversant in facilitation language (or translation must be made available).

Technical Preparation

Technically, facilitators should ensure they have purchased and pressed all their equipment (phones and laptops have necessary apps and software; all equipment charged before the workshop starts). The following are recommended apps and software for running the process on an android phone and PC:

- Free mobile phone video apps for android phones: Video Maker & Smart Voice Recorder
- Free computer video editing software for PC: Windows Movie Maker
 Download the free Microsoft Movie Maker software Run wlsetup-web.exe. This will install Microsoft
 Windows Essential. http://windows.microsoft.com/en-AU/windows-live/movie-maker-get-started. (Note: If you have an organisational laptop and must get IT department permissions, schedule time to do this.)
 - o Select "Choose the Programmes you want to install."
 - Uncheck all programmes except "Photo Gallery and Movie Maker"
 - Click install. This will take some time to install.

Facilitators should also make sure that all their equipment is charged (including the external phone speaker) prior to the workshop. They should have necessary cords, adapters, cables, etc. to ensure the process runs smoothly. They should also have all workshop materials prepped for each session. For participants, those who have mobile phones should bring them; along with the power source and laptop connection cable. If possible, ask them to download the free apps for basic video editing prior to the workshop Video Maker for android or Windows Movie Maker for windows phones.

Workshop Design Preparation

Theoretically, in the Sonke training, we introduced four areas of Story-driven PV practice. Facilitators should keep these areas in mind as they go through process and ensure all areas are addressed to foster the transformative and empowering potential of the methodology.

- **Group Development**: Builds and strengthens group identity; supports narrative therapy; builds confidence; engages group as part of wider mobilisation efforts.
- Storytelling: Harnesses the transformative power of creativity and storytelling.
- **Appropriate Technology**: Uses the most appropriate technology for the context (in this case, building on the strengths and limitations of mobile phone filmmaking).
- **Dialogue Creation**: Focuses on sparking dialogue and spaces for active listening as a catalyst for social change.

It is important to think of all of the different components of the workshop as valuable learning tools and processes for the participants. Each element should be seen in relation to the 'whole' of the participatory video process. At the same time, facilitators need to invest their energy in ensuring that each activity connects to the overarching goals of learning and empowerment for all group members.

PV for Mobile Technology Equipment: Recommendation

Participatory Video Filming Kit

- Mobile phone with Video Maker (android) or Windows Movie Maker (windows)
- Mobile phone power cord
- Mobile phone connector cables to laptop
- Mobile phone tripod
- Additional photo/video tripod
- Headphones
- iRig microphone
- Speaker for mobile phone
- Photography reflector
- Black / dark umbrella
- Bag for equipment (with lock, if possible)



Equipment kit example without phone/accessories

Participatory Video Workshop Needs

- Workshop Materials: Pens, Paper, Individual Cards, Flipchart paper, Sticky Notes, etc.
- Laptop for screenings/editing with necessary adapters
- Projector
- Computer speakers with good sound quality
- External hard drive (good to have a drive dedicated to each project to store all the files!!!)
- Story Cubes
- Extension cords if needed
- A venue that has secure access to electric/power

Participatory Video Screening Equipment

- Laptop to show film
- Computer speakers
- Projector / Screen

A Quick Note on the Facilitation Guide

Hello PV facilitators. We wanted to quickly mention that the following facilitation guide includes some prescriptive steps. This is because it mirrors specifically how Tamara and Thea conducted the facilitation training session with Sonke Gender Justice staff (including a few activities we would have liked to include). We thought this would be the most helpful to you as facilitators and practitioners of the method. However, as you practice and become more at ease with the methodology, we know you will want to adapt PV to the particular context of the project in which you are working. This is why we wrote the guide though Phases and included many of the methodological principles and intentions behind the activities. Please keep this in mind as you build your practice as facilitators of Story-driven Participatory Video for community engagement and mobilisation. We hope this gets you started; and can be used as a foundation for adapting to your context. All the best! Do great work and have fun! Tamara and Thea

PHASE 1: Introducing storytelling and mobile filmmaking

One intention of PHASE 1 is to create a safe space for individual expression in the process of collective storytelling. The focus is on the group getting to know each other; building trust and building respect between participants. Another intention is to introduce basic mobile filmmaking. Facilitators should approach this process through cycles of learning to help build the confidence of participants in using technology, which can be scary at first.

Intention	Session Activities	Resources
	Objectivity and subjectivity: Introductory storytelling exercise This session should introduce the group to each and strengthen relations within the group. It aims to:	Sparking_creativit y.docx (exercise 1: Objectivity and Subjectivity)
	 Help the group and facilitators to understand cultural norms, challenge mainstream assumptions and assumptions that the group may have about each other. 	(handout / USB)
	 Help the group start sharing and articulating personal information about themselves, in an fun and non-threatening way 	
	PV activity overview Define and write down group expectations and group-defined ground-rules through the activity. (You can refer back to this through the activity). Discuss how ownership of final films is through their consent; and create a safe space to show (or not show publically) any videos made through the process. If you will take photos of the process, ensure consent by the participants to do so.	
	River of Life To help people locate themselves within the wider story of their lives, have them draw a 'River of Life.' The topic should be something they identify with and related to the topic/group. For example: 'Show a part of your life journey as a river of how you came to be part of this group.' Have each person discuss. (This helps with group development and storytelling.) A couple examples of the River of Life exercise is at: http://pubs.iied.org/pdfs/G02828.pdf and http://www.kstoolkit.org/River+of+Life	River_of_life.docx (handout / USB)
	Set group expectations Following on from the River of Life exercise, it is important to work with the group to understand their expectations for the process that they are about to be a part of. This can both help ensure any major points of clarification are made visible early on, AND help the facilitator to work with the aspirations of this particular group. These expectations can be a reference point for reflection and learning throughout the process.	
	Note on Internal hierarchies: Participatory video work is undermined when there is a hierarchy within the group. Thus make sure that ground rules are established and that opportunities exist for everyone to take part at all levels. Support participation of those being excluded, and do not let people dominate.	
	What is participatory video? Discuss the difference between traditional video (documentary or journalism approach where a filmmaker or journalist uses video to tell a story primarily through their own eyes) and participatory video (groups making a video through their eyes. PV is used as a social change process that can build group awareness and confidence; and spark a dialogue that needs to be had to improve the lives of participants).	Participatory_Vide o.docx (handout / USB)



Video examples

Show video examples. We used the Plan Vietnam video because Tamara had facilitated the process. Thus, she could explain how the child filmmakers used the video as part of a wider process by the children to engage in dialogue about how they were impacted by flood with the aim to change practices in their community; and for Plan advocacy. For the Sonke facilitators, they could use the videos made in the training and talk about how they used them to create dialogue with people they work with and the impact. In doing so, it is important that the participants do not think they are creating a film to promote Sonke services (as the Sonke videos do); but for themselves as part of citizen mobilisation efforts.

Plan_Children_Fil mmakers.mp4 (USB)

Sonke videos from PV facilitation training





Storytelling exercise

To transition into storytelling, use the Sparking Creativity handout to plan an exercise for supporting the group to explore collective and individual story creation in a fun and engaging way.

Sparking_creativit y.docx (Exercise 2: Telling a story with an object) (Exercise 3: Freewriting) (handout / USB)

- Telling a story with an object: Working with metaphor and symbolism;
- Freewriting: Exploring creativity through the written word

00

Technology line

To introduce the technology, ask the group to line up from 1-10 according to their level of confidence in using technology this supports facilitation and reflecting group dynamics. Take a photo (to compare to the technology line on the last day). Once people have lined up, partner one person with more skills with one person with less skills for the next activity.

Note: Although you are not introducing editing now, this can be a good time to check in with everyone about their phone models; and to download the editing app they will need on their phone to learn basic editing later (**Video Maker** for android; **Windows Move Maker** for Windows phones). Once all phones are prepared, introduce mobile filmmaking.

Mobile_Phone_Fil ming_Tips1.mp4 (USB)







Introduction to mobile phone filmmaking: Filming basics

Show the films on tips on how to make films with a mobile phone. Have the participants do the following exercise:

- 1. Explain to the group how to point the camera at the person and ask a question. Be sure to have them look at their camera to know where the camera is; and how it needs to be held so the image is right-side up.
- 2. Have them ask the person to pause before answering so the camera operator can press record. The filmmaker asks: 'If you could be an animal, what would it be and why?' Switch people, and ask the same question again.
- 3. Copy all of the videos and watch back on a laptop with speakers. Discuss with the group what they learned about each other.
- 4. Ask the group what they saw for technology (focus on light and sound).

Note: This exercise is not to teach technical filmmaking skills, but rather for to have the group play with the technology in a fun way so they feel more comfortable with it. Thus, as a facilitator, you should not put too many rules during this exercise. This allows people to figure out some of the strengths and limitations of mobile filmmaking on their own before the more technical teaching begins.

Mobile_Phone_Fil ming_Tips2.mp4 (USB)

For the exercise, you need phones with a video camera and connection cable (one for every 2 people). The phones do not need editing software.



Introduction to mobile phone filmmaking: Light & Sound

- 1. Repeat the prior exercise with a question that the group wants to ask each other (should be something fun rather than really personal at this stage).
- 2. Explain about the importance of light; showing them the problems with backlighting and how to make sure they have light on the face of the subject in the film. (Do not bring the reflector in yet since there is only one person filming in this exercise.)
- 3. Explain about sound. Have them identify where the microphone is on the camera. Have them focus on getting good light and sound this time.
- 4. Copy and watch back on laptop. Discuss what they learned about each other from the content of the answers and technical learnings.



Introduce a prompt question to develop the theme of the story and film

A prompt question can be used to structure the theme storytelling process that will evolve in PHASE 2. If the PV activity is related to a particular theme, a question can be constructed that relates to this theme. However, most importantly the prompt question needs to be one that enables people to tell a good story based on their personal experience. Some key considerations for identifying a question include:

- That it has to be open to interpretation.
- That it is not conceptual.
- That it takes participants into a real life situation rather than trying to answer a research question.
- That it works for all of the participants.
- That it draws on people's different daily experiences.
- That it emphasises that it is a personal story by using 'you' and 'your.'

Facilitators can use participatory tools to determine this question with the group collectively, or it can be brought into the process by the facilitators in order to prompt the storytelling process. This needs to happen in advance of PHASE 2.

Collective_theme_ building.docx (handout / USB)

This activity is KEY in ensuring each person's individual story is part of the collective discussion later for creating the group film.

Example questions:

- Tell us a story of how you think you can change things in your community?
- Tell a story that articulates/captures how you feel as a citizen?



Review

Have group reflect on what they learned about filmmaking/storytelling and ask questions.

Reflection_review. docx (handout / USB)

PHASE 2: Framing the story from the personal to the collective

The intention of PHASE 2 is to provide space for personal stories to emerge; to identify the broad theme the group will focus on for their collective story; to begin the collective storytelling process; to introduce the story arc; and to connect back to the personal within the broader story. The group will also learn more basic filmmaking skills during this phase to bridge to the more technical aspect of the next phase.

Intention	Session Activities	Resources
	Group check-in Before moving ahead, check with the group to see if there are any reflections or questions. As facilitators, review the 'expectations' set by the group.	
	Shooting for simple editing exercise: Stability Use the Disappearing Game for a group development exercise, to start the session in a fun way, and to teach basic mobile phone filming skills. Record the activity on a facilitator's phone (the PV activity phone) using the tripod and camera stand. Edit the video during a break so it can be played back to the group later. You can edit the video on the phone or a computer.	Disappearing_Gam e.docx (handout / USB)
	Individual storytelling This individual storytelling exercise is the group's introduction to stories and speaking about issues and ideas that are important to them. It is important that plenty of time is given to this part of the process to ensure the group is grounded in their own experiences and knowledge, and that they start to build a strong relationship with storytelling.	Story_Arc.docx (handout / USB) Storytelling_circle. docx (handout / USB)
	The following activities provide important lessons on storytelling, in particular the question of structure. This will be important for the stories told through the PV film, so please check in with participants to ensure they understand.	
	1. Introduce the story arc: What is the beginning, middle and end of the story and why? How do you identify the beginning, middle and end? (handout)	
	2. Have each individual prepare their story to respond to the prompt question (agreed in PHASE 1) in 3 sentences (use 3 cards) that capture the beginning/middle/end.	
	3. Use a storytelling circle so each participant can share their story in turn. The facilitator asks storytelling circle questions. This process supports mutual learning on the process of story development within the group. (handout)	
	Questions for prompting discussion in storytelling circle: What is the story about? What is the most memorable moment in the story? What confuses you/do you want to hear more of? Is there a story arc?	
	Developing the main story theme The theme is the message of the story; what the group is trying to tell us.	Collective_theme_ building.docx (handout / USB)
	At this point in the process, you are working with the group to transition from individual personal stories towards a group storytelling project. Central to this shift is reflection and analysis of the individual stories in order to identify shared themes that resonate across the group.	
	Have the group discuss the main themes that they heard in the individual stories. Facilitate a discussion about which theme the group would like to address, exploring why this is important, and how it relates to the wider	

processes of social change that the group is trying to contribute to.

If you are working with one group, by the end of this session the group will have identified their theme to work with. If you are working with two groups, you can use this exercise to select two priority themes. The group members can them self-select into the theme that they would like to build a video with (maintaining a balance in the group).





Collective storytelling: Visual Story Cards

Have the group start development on their collective story though a collaborative discussion on the theme. They discuss the overall scenario of what they would like to talk about in relation to the theme by putting the broad ideas on four Visual Story Cards (this can be done through stick figure drawings).

Key questions to ask in building the story starting with 4 Visual Story Cards are:

- Where is the dramatic moment: the actual moment in time when something changes/or momentous occurs? (i.e. the key moment)
- What do you think should happen before this key moment?
- How could the story begin?
- What happens after the key moment (the conclusion/ending)?

Note: At this point, you should stress that they are using the 4 Story Cards to create a ROUGH ideal of the story they want to tell. They spend more time on the story in later sessions to determine if it will be the final story (PHASE 4). Thus, they should focus more on a broad idea of the story they want to tell rather than too many details.

See:

Storyboard_Examp le_A4.pptx (handout / USB)

Note: This is an example of a full storyboard.
However, the 4
Visual Story Cards are similar in their use of stick figure drawings to represent the story visually on A4
Cards





Connecting personal to collective story development

Once the group has finished their 4 Visual Story Cards, the facilitator should lead a discussion that prompts each individual to connect their personal feelings to the group story being developed. Lay out or post the 4 Visual Story Cards so everyone in the group can see during the discussion:

- One helpful question here is: Why is it necessary to tell this story?
- Another question might be: Is there anything from the 3-sentence story you each told earlier that is important for this story?

The facilitator should take notes and discuss the more emotive elements that are brought up through this discussion. Note that where the storyteller reaches an emotional high point, their voice rises and their body language becomes more expansive, they may look around to see if people are paying attention. Help draw out this peak emotion out in the way that the story is being articulated.

Use this discussion as a way to help the group locate the key elements of their story. The information from this discussion can be used in PHASE 4 to help the group identify and include a more detailed identification of characters, the key moment that is happening in the collective story, and how the characters and the key moment interrelate.

Note: Often, at first, a group draws a very broad, sweeping story (which is good). Connecting the personal and group emotion and the story's key moment helps in the story-development phase as they more clearly identify the important emotive aspects of the story. The discussion and your notes can also link into the Foundational Elements exercise in Phase 4 that helps the group determine why they want to tell this story; and the change they hope to see through its telling.





Transition to technical

At this point, it is valuable to step back from the story development for reflection; and to learn more technical skills. Learning more technical skills is important in mobile filmmaking, as the phone's strength's and limitations have an impact on the type of story that can be told. For example, because you cannot use a microphone, it is difficult to shoot wide scenes with actor narration and capture good audio. Thus, you may want to write a voice-over; or decide to film a close-up scene.

This can be a good time to show the edited Disappearing Game.



Review

Have group reflect on what they learned about filmmaking/storytelling and ask questions. We would suggest focusing on the storytelling component as the next phase it quite strongly technical and it is important that the group feels really confident in their storytelling approach and the way the story is evolving at this point.

Reflection_review. docx (handout / USB)

Note: Use the reflection document from PHASE 1 as a reference to develop your own questions that are pertinent to this phase based on what is emerging through the process.

PHASE 3: Technically bringing a story to life

The intention of PHASE 3 is to focus on four of the eight technical areas for mobile phone filmmaking: Light, Sound, Stability and Framing. It will also highlight how people can, for personal use, edit their own films using their phones.

Intention	Session Activities	Resources
	Storytelling energiser Use Story Cubes to help the group understand and creatively tell stories. This exercise also helps the group to think about what it means to collectively tell a story, and some of the challenges of this.	Sparking_creativit y.docx (Exercise 4: Story Cubes) (handout / USB)
	Group check-in Before moving ahead, check in with the group to see if there are any reflections or questions.	
	Technical overview Introduce the eight technical areas for mobile phone filmmaking that they will learn: Light, Sound, Stability, Framing, Music, Ethics, Editing, Movie Export for Distribution. You can print and post the icons PowerPoint for reference. Introduce the equipment that you will use in making their film (go through each piece of equipment in the kit). Explain the importance of using the equipment, and then return it to the bag.	8_PV_Technology _Elements.pptx (handout / USB)
	Note: It is good to have an equipment list with the bag that the group can use to make sure all equipment is turned off, returned and placed in the same place/pockets it came from.	
	 Technical training: Roles, Framing, Light, Stability & Sound Introduce framing of a story. Use the 5-shot handout to explain how different framing helps create a video sequence. Show how this has been interpreted into a video with the example in Cambodia. Use the Four-Shot Exercise to teach Light, Framing, Sound (This exercise can take a few hours as you go through the same exercise 3 different times; adding more technical elements of filmmaking each time). Use the Roles 4 Mobile Filming handout to understand the different roles that people should rotate through in the exercise. Note: In the film, we are having the actor drawing for the scene because it gets people thinking about drawing (good for storyboarding later). As well, the process 	Five_Shots_Examp le.docx (handout / USB) Five_Shots_Video. mp4 (USB) Four_Shots_Exerci se.docx(handout / USB) Roles_4_PV_Mobi
	provides a visual element that you can use for the title and/or credits page. The process also helps teach continuity. Because a drawing is progressive, the shots must be filmed in order to avoid problems of continuity in the sequence.	le_Filming.docx
	In-camera editing exercise This is a good time to show the participants how they can use their own phones to edit their own movies (for personal use). This is not part of the PV process, but you may want to teach this for personal benefit of the group members. To do this, use Video Maker on android phone to edit the 4 scenes shot in the last exercise. To edit with VideoMaker, open the app. Click the plus to add the title photo. Then click the plus sign to add the footage. At the end, add the credit photo. Trim the start and end of the clips by dragging the arrows at the start/end of each clip. Export as a movie to show on the phone and a computer.	

Note: Video Maker is one of the few free editing apps for android phones of quality. However, it cannot make high quality movies. One problem we found was that when you export a movie with a person speaking AND with a music track, the narration no longer syncs up. Thus, we do not recommend the program for final editing. This is one reason we decided use Windows Movie Maker on a laptop the edit our final film.	
Group stretch For a nice break, have the group spell C-O-C-O-N-U-T with their bodies to keep the energy flowing. You can build in other energisers throughout working with the group.	
Review Have group reflect on what they learned about filmmaking/storytelling and ask questions.	Reflection_review .docx (handout / USB)
Note: Use the reflection document from PHASE 1 as a reference to develop your own questions that are pertinent to this phase based on what is emerging through the process.	

PHASE 4: Developing the story content

The intention of PHASE 4 is to fully develop the collective story from the 4 Visual Story Cards, into a final storyboarded script for filming. This phase will specifically focus on building the **Foundational Elements** for the story: who should hear the story; what should they see, think and feel; and what dialogue does the group want between themselves and those who watch the film. The discussion can also bring up possible actions they hope can occur through this dialogue. The phase will revisit the story circle; focusing this time on the collective story.

Intention	Session Activities	Resources
	Storytelling energiser Use the Story Cubes exercise again to help the group build confidence in creatively telling stories.	Sparking_creativity .docx (Exercise 4: Story Cubes) (handout / USB)
	Group check-in Before moving ahead, check in with the group to see if there are any reflections or questions.	
	It is important to reflect at this point that PHASE 3 has been quite technical; and to highlight that the process will move back into focusing on story-development. Now is a good time to ask the group to commit to that objective.	
	Five Foundational Elements of the story This activity is called the Foundational Elements because it provides the pillars from which a powerful PV film can be built. In creating these foundational elements the group should keep the theme of their story in their mind, and how this has supported the story they have started telling.	Foundational_Elem ents_Icons.pptx (handout / USB) Foundational_Elem ents_Example.pdf (handout / USB)
	Bring out the 4 Visual Story Cards created in PHASE 2. Reference those in this activity. Use the five Foundational Elements Icons (cut out separately) for this activity. Facilitate the group in using sticky notes to address (see example):	
	• Who needs to hear our story? (Be specific For example, do not just write 'policy makers' or 'community,' elaborate on who more specifically: What language do they speak; where do they live; mainly male/female/trans; ages; where can you access them; etc.)	
	What do you want this group see? (Are there any specific visuals that are needed to convey the story?)	
	What do you want this group to think? (Be specific; Are there any key messages/ideas. For example, 'They should know that married people can get STIs; not only single people.')	
	What do you want this group to feel? (The main emotional reaction the group hopes will come through the film.)	
	What dialogue do you want be sparked by the group film? (What conversation and dialogue does the group want to have with the film to bring about change with those watching the film?)	Listening_and_dial ogue.docx (handout / USB)
	In developing the Foundational Elements it is important to take into account the relations of power within and between all levels and stakeholders involved (community, participants, facilitators, partner organisations, and donors). This implies a deep understanding of the context, and its local politics and dynamics. Read the handout for more information and look at www.powercube.net for guidance on analysing power.	





Story mapping

Providing guidance to storytellers on storytelling approaches and techniques helps them develop their own powerful narrative. Facilitators can encourage participants to explore key elements such as characters, style and tone, and think about engaging all six senses to help make the story come alive.

Key_elements_goo d story.docx (handout / USB)

By introducing the key elements of a good story you can support the participants to strengthen the depth and quality of their stories:

• Plot, structure, theme, style and tone, characters, setting, emotion

These elements can be mapped onto the 4 Visual Story Cards (developed in PHASE 2) using sticky notes/post-its to help strengthen the key elements of a good story.





Refining the story

At this point, you should review where the group's story is at in its development knowing it can still be changed and will now be expanded upon. Using the 4 Visual Story Cards, review the four scenes to discuss the key moment of the story. You want to relate the story back to the personal emotions that connected people to the story to see if you can bring this into the story. Work with the group to finalise the main key moment that needs to be part of the film.

If a group is struggling to identify their key moment this could be supported through visualising, drawing, or dramatising the moment. This can help draw out the surrounding narrative of the story, the characters, and the setting. If you do this, have a discussion about the visualisation, drawing or drama in relationship to the story.

Once you have done this with one of the cards—or with a new card if the key moment has evolved—add, remove, revise the main story cards based on their personal connections to the story, story mapping and the Foundational Elements exercise. In doing so, the group should be able to answer the following questions:

- What is your story about?
- What is the main theme/message of the story?
- Why is it necessary to tell this story?
- What does this story tell the listener about the theme?
- What is the KEY MOMENT in your story when something changed?
- Do you open by grabbing the reader's interest in hearing this story?
- Do you end in a way that suits your objective?





Developing the story outline

Based on this discussion, develop a written outline for the story that includes short scenes of action as related to the story's beginning, key moment and resolution. Relate each scene back to the Foundational Elements:

Story_Outline.docx (handout / USB)

• A helpful question is: What is the intention behind each scene as it relates to what you want people to see, think or feel?

For example: If your story is about the stigma and pressure men might feel at home against helping their wives with the housework, it might be important that the listener thinks: "I can still be a man and help with housework." Thus, the story needs to convey this within action or the narration.

To develop a written outline of the story use a table to move through each scene of action, we have created a table that you can use (see the handouts). It looks like this:

On the left column describe		
the main action happening in		
the story		

On the right, write down the intention of each scene as it relates to the Foundational Elements of what the group wants the listener to see, think and/or feel





Story review through a storytelling circle

The story outlines are then shared between the two groups, or if only one group, with the facilitator in order to get feedback and constructive engagement on how to strengthen the key moment of the story. This is similar to the Storytelling Circle in Phase 1, but now looking at the more developed story to help refine it before filming.

The other group (or the facilitator) answers the following questions:

- What is the most memorable moment?
- What confuses you, what do you want to hear more of?

This is also an important point to ensure that the language the group is using is accessible and engaging, and the use of jargon is removed.





Technical training: Ethics

Discuss ethics in general. Review the story outline for possible concerns around ethics. Relate to issues that might come from knowledge gathering, film creation, challenging power, etc. This should include issues around including children in filming scenes (and what is necessary for consent), how people are being shown/represented in the film, consent for adults, any potential for harm that could come once films are shown for participants, etc.

Here is an interesting S. Africa academic article about PV and ethics: http://www.sajournalofeducation.co.za/index.php/saje/article/viewFile/734/32
5

Ethical_practice.do cx (handout / USB)

Ethical_practice_p hotography.docx (handout / USB)

Youh_envisioning_ safe_schools_with _PV.pdf (USB)





Storyboarding with A4 cards

At this point, the group is ready to transfer their outline and what they wrote on the 4 Visual Story Cards (on sticky notes) into a storyboard. A storyboard is a visual representation of all the different scenes in your film. Each group storyboards the story they want to tell in as much detail for each scene as possible. We recommend that the group creates the storyboard on cards (rather than flipchart paper) with sticky notes. This way the cards/sticky note information can be modified more easily to move scenes around, to change narration.

- Draw each scene and the action (can be stick figures). Identify any emotions being conveyed.
- Show the framing in the scene (keeping in mind mobile phone limitations).

Storyboard_Examp le_A4.pptx (handout / USB)

- Show where the scene will take place (the actual physical location; ensuring that it is quiet enough to film your scene there as you want).
- Include the script narration (what the actors will say; or the voice-over narration).
- Explain who are the actors in the scene (the people in the film).
- Decide who will operate in the filmmaker roles.
- List any props or technical resources needed for planning.



Final review through a storytelling circle

This is an important moment of reflection and review based on the 'whole' of the learning process so far before a key transition into the filmmaking.

Using the principles of the storytelling circle that you have done before, the group (or two groups walk each other and the facilitator through their collective story). The review group are basing feedback on the storytelling elements, and the facilitator provides direction on the following:

- Does the group see any editing or filming limitations?
- Are there any other necessary changes based on the information from the Foundational Elements exercise on what the listener should see, think and feel?
- Do you think the story will lead to dialogue and action you want to occur (which was also identified in the Foundational Elements exercise)? If not, what needs to be changed?
- Is the language used hindering or enabling for the final story?
- Are there any ethical concerns that were missed; and should be brought up now?
- Is everyone in the group happy with the story, narration, characters, etc. and clear on moving ahead to filming?





Finalise storyboard cards

Review the storyboard cards again based on the collective storytelling circle discussion. Make any final change to the narration; order of scenes; scene locations; etc. This should be done BEFORE filming begins so all decisions are made through the group process.

Note: What can happen during filming is that people are so rushed that they do not always have time for a facilitated, deliberative group discussion process if they want to change something in the film. In this case, the strongest or loudest voice might dominate during the filming; pulling the decisions away from the group. Thus, it is best to have all decisions made in the storyboard phase.



Review

Have group reflect on what they learned about filmmaking/storytelling and ask questions.

Note: Use the reflection document from PHASE 1 as a reference to develop your own questions that are pertinent to this phase based on what is emerging through the process.

Reflection_review. docx (handout / USB)

Storytelling_circle. docx (handout / USB)

PHASE 5: Technically building the story

The intention of PHASE 5 is to produce all the elements necessary to technically build the story: film the needed content, record any narration, select or record music, decide the title, create title page (if not created in editing), determine text for credits, and gather any other needed visuals.

Intention	Session Activities	Resources
	Storytelling energiser Use the Story Cubes exercise again to help the group more clearly understand how to creatively tell stories	Sparking_creativit y.docx (Exercise 4: Story Cubes) (handout / USB)
	Group check-in Before moving ahead, check in with the group to see if there are any reflections or questions.	
 00	Filming with the mobile phone	Roles_4_PV_Mob
	Have the group get into their roles (which would have been determined in the storyboard activity)	ile_Filming.docx
	2. Have the group film each scene until group is satisfied with the scene (do not delete scenes). Listen back to the audio on the phone with headphones and with a speaker to ensure it is loud enough for the final film. Have the group agree on each scene before moving to the next one.	
	3. Be sure to add time in the scene footage before and after the scene for transitions (handles); making sure the actors to not look at the camera	
	4. Copy all files to computer at the end of each session/day of filming. (We recommend you also have a Hard Drive dedicated to the project – or access to an organisation server – to store all the videos/content from the project.)	
2 00	Additional content creation	
	1. Create the title pages or other graphics as needed (group approval)	
	Determine the text for credits (check spellings/include any licensing information such as Creative Commons)	
	Recording narration If you will add narration to the film, make sure it is recorded in a quiet space using a high-quality recording device. Note that Windows Movie Maker does not accept all audio files (.wav or .mp4 files are good). For the phone, a free recording app you can use is Smart Recorder. Use this with an iRig mobile phone microphone for high-quality narration. Test the microphone with the recorder to know how far to hold the microphone away from the speaker for the best narration and the best microphone setting. While with the narrator, listen back to each recording to approve the final narration (as the files can become corrupted more easily using free apps).	
	Selecting or recording music Determine the music the group wants to use (discussing how music creates different emotions). Discuss how you can use Copyright-free/Creative Commons music on CCMixter to find free music (when you give the artist credit in your film). Do NOT use music with lyrics as it is too distracting with narration. Another option is that the group can record original music. To do this, use a good audio	http://ccmixter.org

	recorder/microphone for the recording (or, at a minimum, an iRig microphone and the Smart Recorder app).	
	Editing with Windows Movie Maker We have provided a brief overview of the editing process for a story-driven film in a separate document.	Editing_Windows MovieMaker.docx (USB)
	Note: We have designed the Story-driven Participatory Video process for minimal editing where the bulk of the film decisions are made through the story creation and storyboard process.	Guide_Windows_ Movie_Maker.pdf (USB)
		MovieMaker- HowTo.wmv (USB)
	Adding subtitles in Windows Movie Maker If you need to add subtitles to Windows Movie Maker, use the Subtitle How-To document on the USB. There is also a video by Tamara on the USB showing and explaining how to do it (which should not be shared publically). It may seem a bit complicated, but it is not so difficult once you practice. Or, you may find one person in the group who is computer savvy, and ask them to do it.	Subtitles.docx (handout / USB) Subtitles.wmv (USB/Do not share publically)
	 Technical training: Export for distribution For exporting from Windows Movie Maker, use these directions for computer playback: Click File. Click Publish Movie. Click This computer, and then click Next. In the File name box, type a name for your movie. In the Publish to box, choose where you want to save your movie once it's published, and then click Next. Choose the settings you want to use to publish your movie, and then click Publish. A good setting for exporting (especially if you might export to YouTube) is to export the video to H264 1920 x 1080; or export it to an .MP4 file. If you want to watch your movie after it has been published, select the Play movie when I click Finish check box. Click Finish. Other types of exporting can be found here: http://windows.microsoft.com/enza/windows-vista/publish-a-movie-in-windows-movie-maker. 	
00	Technology line To see how far the group has come with the technology, ask the group to line up from 1-10 according to their level of confidence in using technology this supports facilitation and reflecting group dynamics. Take a photo (to compare to the technology line on the first day). This can lead into the group review.	
	Review Have group reflect on what they learned about filmmaking/storytelling and ask questions.	Reflection_review .docx (handout / USB)
	Note: Use the reflection document from PHASE 1 as a reference to develop your own questions that are pertinent to this phase based on what is emerging through the process.	

PHASE 6: Sparking listening & dialogue

The intention of PHASE 6 is to determine the next steps, responsibilities and resources for the dialogue that needs to be held around the film. In the excitement of making the film, the focus on this phase often is lost or dropped; or a screening is held with little follow through after to keep the dialogue going in ways that help communities engage and/or mobilise around the issue. As part of the transformative process, however, this phase is key in ensuring the films can be a catalyst for social change. The importance of sparking dialogue is built in throughout the process, we have included this phase as vital to support the participants to translate this planning into action. As such, the importance of this phase should be weighted as high as the previous 5 phases in the film's creation in the context in which the films will be used.

Intention	Activities	Resources
	Group check-in Before moving ahead, check in with the group to see if there are any reflections or questions.	
	Mini film screening with group (internal) Story-driven participatory video has enormous potential to contribute to community building. This is achieved through the reflective space it offers within the group. However, because of the nature of video, it can be a powerful catalyst for change because the story can also be shared to a wider audience. By giving people a platform and tools to articulate a collective story with strong personal and emotional connections, Participatory Video can, in itself, be transformative; particularly in severely marginalised communities. This is not only for those telling the story, but for their peers, neighbours, colleagues or NGO workers and activists fortunate enough to see it.	
	The internal mini-film screening with the group is an important moment in the storytelling process. It gives the group the space to have a sense of achievement and to feel individually and collectively empowered. For the screening:	
	 Show the film with the group (ideally projected or on large computer monitor with good, quality speakers). Seeing the film in a bigger screen is more powerful than watching back on a phone. 	
	2. Discuss the film and its content:	
	Did the film tell the story that they set out to tell?	
	Did it relate to the personal connections of the group?	
	 How does the group feel about the film (any fears for distribution that need to be discussed)? 	
	• Is the film in its final state for external showing? (This is the time to make sure there are no objections or problems with final content.)	
	Develop plans for listening & dialogue with the film (external) After the excitement of seeing the final film, the group sometime will want "the whole world" to see the film. However, this may not be possible with the time/resources you have; and also might not be the best approach for dialogue, listening and meaningful change for the participants.	Listening_and_dia logue.docx (handout / USB)
	1. At this point, go back to the Foundational Elements chart that you created in PHASE 4 and look at who the group thought should see the film; and the dialogue it should spark.	

 For planning, map out all the different options for where the film could create dialogue (hopefully with the participants involved). This may or may not be a large film screening; but rather targeted events where the most appropriate discussions for change can be had.

This process should be carefully planned, resourced and executed in a way that helps the film be a catalyst for real change for the filmmakers (not only in the creation of the films; but through the mutual understanding that comes through the dialogue during showings).

For example: if you made a film with unemployed men recently released from prison who are facing stigma in getting jobs from local employment agencies, creating an opportunity to have a dialogue/screening with local recruiters might be more effective than showing it at a community event. As well, perhaps it could help a wider dialogue on the informal economy so could link into wider campaigns.

Review the Listening and Dialogue handout for further guidance on development plans on using the films.

Note: Of course, change is difficult. Thus, there needs to be **an honest discussion** with the participants about what may or may not change as a result of the films; and to recognise that sometimes just having a discussion on an often-taboo topic is one part of a larger effort of change.



Film distribution to the group

As part of the distribution process, it is key to make all the needed copies and distribute the files to the group in a way that they can watch and use it. This might be versions they can upload to their phone; copies on a CD or files on a USB drive.

Ensure that consent processes are reviewed and agreed so that the participants are clear about how they have collectively committed to using the story and that this is reflected in the way that the film will be used moving forward.



Film Distribution for PV listening and dialogue

This section is key for community engagement and mobilisation. It is the part where the group execute the plans that they have created for sharing the film with an external audience as a catalyst for change. This aspect also needs the appropriate funding and resources as you can encounter costs in hosting community meetings; and will be dependent upon where you are showing the film.

For example, if a group is using the film to show at a meeting with police officers in a government office, the showing may require only a laptop with the film, good speakers and transport for participants to reach the meeting. You should work with the group to facilitate this meeting; talking about what you hope to achieve through the dialogue and listening.

If you are doing a larger screening, you may have greater considerations for equipment (and would need to test the video to ensure the quality is high enough to show on a wide screen).

Screening_Tips.do cx

STEPS (in Cape Town) offers great guides for facilitating film screenings to spark a wider dialogue. STEPS often works with films that have been previously or professionally produced; so the context is different. These guides can be used for reference; to review equipment needed for screenings, and to think about how the group participants themselves can facilitate screenings. This can be an empowering part of group development for the participants; and can be linked to wider community engagement and mobilisation efforts.

This is a good example of a guide developed for community facilitators of a film. You could create a similar guide with the participants who can lead the discussions they want to have: http://www.steps.co.za/steps-for-the-future/wp-content/uploads/sites/3/2014/12/SFTF-Youth-Facilitator-Guide.pdf

This is a good overview of the theory behind facilitating group discussion on films (which will be different in Sonke's case since your main focus is often on targeted political change) http://www.steps.co.za/steps-for-the-future/wp-content/uploads/sites/3/2014/08/Facilitators+Manual-1.pdf

This is good information about setting up a public screening and equipment needed: http://www.steps.co.za/steps-for-the-future/wp-content/uploads/sites/3/2014/12/STFT-Guides.pdf

We also recommend you review the Screening document in the handout / USB for additional guidance on discussion and facilitation.



Review

During the screening phase, keep checking in with the group about their learnings and how the process is affecting them (positively or, potentially, negatively). Ethically, it is important that facilitators engage the following principles in supporting the group to take their PV listening and dialogue plans:

- Facilitators must be committed to assisting storytellers in making decisions that will ensure their safety, and, where needed, protect their privacy.
- Project partners must maintain ongoing communication with storytellers, to address any concerns that may arise for them following a workshop.

Note: As mentioned at the start, it is important to embed the PV in areas and projects that are on-going. Thus, the Story-driven PV process can strengthen the relationships you have for on on-going engagement and mobilisation; and support longer-term strategic goals.

Note: We have included additional documents about participatory video on the USB for further reading.