

Research

Good documentary storytelling, with few exceptions, depends on good research. You need to find a subject, understand your story, and be sure you're presenting a balanced and accurate point of view—at least, you do if you want to get the program to a general audience. Remember that balance and accuracy do not mean you can't, as the filmmaker, take a particular position, or that your subjects can't take one. But if you expect the audience to take you seriously, you must allow them to weigh the evidence for themselves, which means that you need to research and present that evidence. This is true for what may seem like a surprising range of filmmaking styles.

- In an interview by Jason Silverman, filmmaker Alan Berliner describes working on his personal documentary, *The Sweetest Sound*. "I began where I always begin, with a tremendous amount of research, with a passion to understand the total landscape of whatever subject I'm entering."
- Susan Froemke and assistants at Maysles Films spent about six months researching poverty and looking for potential stories in several states, including Wisconsin, Maine, Iowa, and Missouri, before they settled on the stories and characters of *Lalee's Kin*, filmed in the Mississippi Delta.
- Filmmaker Jay Rosenblatt creates unusual documentary stories from bits of old films and "found footage." In press material submitted to the San Francisco Jewish Film Festival, Rosenblatt says that it took about eight months to do the research for *Human Remains*, a half-hour film about the banality of evil. In it, he presents black-and-white footage

of five of the 20th century's most notorious leaders—Hitler, Mussolini, Stalin, Franco, and Mao—over reminiscences voiced by actors but scripted from actual quotes and/or factual biographical information. “One of the challenges,” Rosenblatt notes, “was to find images of the dictators that didn’t include hats or uniforms, since they had to look . . . like the guy next door.”

Do all documentaries require research? No. Liane Brandon’s memorable and deceptively simple film, *Betty Tells Her Story*, while evoking powerful themes, began when the filmmaker heard something of interest in a colleague’s story and asked her to tell it on camera. Not everything has to involve experts and advisors and location scouting. But many films, if not most, do involve research to some degree. With that in mind, here are a few suggestions.

Ask Questions, Dig Deeper

Whether you’re looking for a story or finding the best way to tell it, a good film is one that surprises, challenges, and often, informs. This means that the information going into that film needs to be surprising. All too often, documentaries just repeat information that everybody knows. The easiest way out of that trap is to stop and challenge yourself. “Energy equals mass”—what does that *mean*? The Apollo 13 space mission—why was it named Apollo? “Everybody knows” that Rosa Parks was the tired seamstress who didn’t feel like giving up her seat on that bus in Montgomery in 1955, right? It’s a nice story, this downtrodden woman who has reached her breaking point. What if you found out that she was an active member of the Montgomery chapter of the NAACP, a group fighting for civil rights? Suddenly she’s not so much a victim of oppression as an activist who sees an opportunity to fight it. You’re telling better history and bringing fresh details to an old story that everybody *thought* they knew.

Good research is a sequence of questions, answers, and more questions. As mentioned previously, why start a project if you just want to prove a point? We’ve all seen films like this, where the filmmakers are out to prove that strip mining is bad or that a certain election was rigged. Have you ever seen a group of people telling each other what they already know and agreeing with each other

since no one disagrees? That’s how stimulating your film is going to be.

If you want to change someone’s mind, or at least raise doubts, hopes, and ideas, you have to trust in that person’s ability to make an informed decision. Give him or her *information* that will lead to that decision. That kind of information comes from a research process that is open-minded.

Do Your Own Research

One of the problems of faster and cheaper filmmaking is that original and up-to-date research is often beyond the scope of a project’s resources and budget. It’s much easier for producers to rely on a few authoritative articles or books rather than explore what’s new in a field, who’s doing innovative work, or what a more diverse group of storytellers might add to the audience’s understanding of familiar topic. The same tired experts are approached time and again to speak about the same subjects, in part because the producers have already seen them on TV and know both what they look like and how well they speak on camera. But why tell the same story again, particularly if there’s a newer or more complex angle you could explore? It may take more effort to gather and master up-to-date information and balance it with previous understanding of an issue—but as a documentary filmmaker, especially if your work has a life beyond broadcast (many documentaries end up being used by classroom teachers and community organizers, for example), this is exactly what you want to be doing.

Don’t Be Afraid to Ask Basic Questions

Although you should gain a thorough grounding in your subject, you can’t possibly, in a few days or weeks or even months, become an expert. Don’t, in the interest of appearing “professional” to your advisors or experts, fake an understanding that you don’t have; if you’re confused, speak up. Your expertise is in knowing how to communicate a complex subject to a general audience; it’s important that you understand the subject well, and that’s why the experts are there. Most people who have spent their lifetimes mastering a subject are also passionate about it, whether it’s professional football or nuclear physics, and enjoy sharing their knowledge with



Bayard Rustin, late 1940s, from *Brother Outsider: The Life of Bayard Rustin*. Photo courtesy of the estate of Bayard Rustin.

others, particularly when the person asking the questions is prepared and professional.

WHEN DO YOU RESEARCH?

The amount of research you do, and when you do it, varies from project to project and depends, to some degree, on your chosen topic, your approach, and your strategies for fundraising. Some public funding sources, such as the National Science Foundation or the National Endowment for the Humanities, as well as some private foundations, require that your grant application include

evidence that your film project is built on a solid and current academic foundation. Projects that are funded “in house”—by public or commercial broadcasters directly—may be less rigorous in their up-front requirements, but producers will still need to do at least some research in order to effectively pitch their ideas and make their programs.

With many films, therefore, research begins with the development of the initial proposal(s), but begins again—and at greater depth—once financial support is available. (As discussed in Chapter 8, support may come in stages: development, scripting, production, post-production, etc.) Research generally is ongoing through the development of outlines and shooting treatments, and continues as needed until the film is complete. A flurry of fact checking often occurs in the last weeks of editing.

ADVISORS

The input of academic and non-academic advisors can be crucial to a project. These people offer their insight and experience behind the scenes; some of them may also be asked to appear on camera as experts, if that fits the program’s style. On any film that’s intended to be the least bit authoritative about a subject, advisors can help tremendously by getting you up to date quickly on current research in the field and directing you to people, places, and content to be explored. They can help you to see how such a film might contribute to the public’s understanding of a subject and who, beyond a general audience, might be able to use the film (in classrooms, for example).

It’s useful to seek out advisors and experts who represent a variety of viewpoints. If you’re doing a film about the role of First Ladies over the years, for example, you might find biographers of specific First Ladies as well as scholars whose specialties cover presidential history, American history, women’s studies, and political history. You might also look for non-academic experts, such as a former or current First Lady or someone who has worked closely with her. Advisors tend to be paid an honorarium for their services; the work might include a couple of meetings as well as reviews of outlines and/or treatments and other consultation on at least one, if not two, cuts of the film as editing is underway.

Good advisors—and they are often extraordinary—understand that they are advisors and you are a filmmaker and that their job is to push for content and inclusion and yours is to try to tell the strongest and most accurate story you can. What a film can do best is excite viewers about new and complex material; it's up to library and web resources to satisfy the hunger you may create for extensive detail. You won't and can't do everything the advisors want, but if you have truly considered their expertise and understood their concerns, chances are you've found a way to address them that also serves your purposes as a filmmaker.

When do you approach advisors? As Jon Else summarizes, "You read the ten most important and widely respected books about the subject, and then you read the two fringe books at either end of the subject. Then you do the basic primary research; you figure out who are the ten important living people and what are the ten important available documents or pieces of stock footage. And then you call the experts."

As mentioned, some of the people you'll be contacting as advisors may turn out to be people you want to interview. It's good to avoid confusing these roles initially because what you need at the moment is background help. If someone asks whether or not he or she will also be asked to appear on camera, you can honestly say that it's too soon to tell.

Advisors' Meetings

On some larger-budget documentaries and documentary series, funds are raised to enable at least one in-person gathering of filmmakers, advisors, and invited experts. These meetings might take place as the funding proposal is taking shape, and maybe again as production gets underway. With *EYES ON THE PRIZE* and other major series produced by Blackside, Inc., production also began with what was called "school." Production teams, researchers and others joined invited scholars and other experts in panel discussions that continued over a period of several days and were invaluable in setting out the work ahead.

If you can afford them, in-person meetings spark an exchange of information and ideas that isn't possible when the filmmaker speaks individually to this advisor, then that one. Valuable information can result from their interaction not only with you but with each other.

PROFESSIONAL CONFERENCES

Another way to conduct a lot of research quickly, as well as find potential advisors or candidates for on-screen appearances, is through attending professional conferences in the field and subject matter you're researching. For a film she's currently developing to help teachers and other education professionals understand and protect the civil rights of gay and lesbian students, filmmaker Liane Brandon and some colleagues attended an all-day conference that allowed them, as a group, to immerse themselves in nearly 40 sessions on the subject. Brandon took a similar approach when researching her documentary, *How to Prevent a Nuclear War*. "I spent a year just meeting with different grassroots groups to see what they were doing, what they thought was effective, who was doing it, how they did it," she says. The diversity of the groups she met also allowed her to select individuals who could represent a variety of perspectives on screen, in terms of age, occupation, and location.

TELEPHONE RESEARCH

Some of your research, whether searching for people, fact-checking, or just trying to get a handle on a subject, will inevitably be done by phone. Be as prepared as possible for these calls. Knowing as much as you can (within time limitations) about the person you're calling and his or her area of expertise will sharpen your questions and make the call more productive.

FACT CHECKING

Fact checking means being able to footnote your treatment and eventually, your script. Any fact stated, whether by you as the filmmaker or by someone on camera, needs to be verified through not one but two credible sources. Why do this? Because *everybody* makes mistakes. If you've ever read or watched a news story about something you know well, you'll have seen firsthand that there are often errors. Nonfiction books, too, contain inaccuracies, whether on the part of the author or in the underlying material.

Errors of interpretation are also common, if more slippery. Have you ever been at a rally that seemed packed, only to hear it described on the news as a “small number” of protesters? Or sat through an afternoon in which the majority of speeches were credible and coherent, and the radio coverage featured a couple of speakers who clearly had no grasp of the issues? The reports may be factual, but do they accurately represent the events? Another example: A writer profiling an anti-poverty activist might point out that the activist grew up in a town that, she notes, is “a wealthy suburb of New York.” The fact may be true, but 50 years earlier, the town was still quite rural and had not yet become a bedroom community for the city. And even then, the activist was from a family living well below the means of other townspeople. Yet the reporter has used factual material to create the false impression, whether intentionally or not, that the activist grew up wealthy—an impression that has a direct bearing on any portrayal of the activist’s current work.

Suppose you’re making a film about this activist’s life. Because you’re using multiple sources, you should realize that the picture being painted by this reporter doesn’t match others that you’re seeing. You should also be doing your own reality checks. Is it really possible that the description of a town in 2003 also applies to the same town in 1953? Furthermore, even if the majority of townspeople *were* mega-wealthy back in 1953, can you really know, without checking, that the activist’s family was also wealthy?

Suppose you’ve plowed ahead without considering this, however, and have become attached to the idea of using the man’s childhood in a wealthy town as a motivating factor behind his work on behalf of the poor. Maybe you’ve even talked to experts (unfamiliar with the activist in question) who explain that growing up wealthy can plant seeds of guilt in the minds of certain children. So the information and motivation end up in your narration, whether they are accurate or not.

This is a relatively minor example of a situation in which having advisors on your side can be invaluable. A biographer of the activist, if given a chance to read a treatment of your film or screen a rough cut, will respond to narration such as, “He grew up in the wealthy community of X,” and cry foul. This doesn’t mean that you have to remove the fact; it does mean that you will need to put it into more accurate context.

A note about fact checking: primary sources can be as biased or inaccurate as secondary sources. This is why you will want to double- or even triple-check the facts, especially those central to your story.

THE TELLING DETAIL

Facts are not just something to ensure accuracy; they can also be the lifeblood of the “telling detail” that will enrich and inform your storytelling (depending, of course, on the kind of film you’re making). Facts can be a source of humor and irony; they can illuminate character, heighten tension, and underscore themes. So throw the line in the water, pull up what you can, organize it and file it, and then throw the line back in. Bess Myerson is known as the first Jewish Miss America. She was also the first to have a college degree. Which detail will you choose to use? Hold onto them both, for now. Famed Norwegian playwright Henrik Ibsen liked to read the comics. Russian author Fyodor Dostoevsky loved ice cream. Are these useful details? Maybe. They certainly add a human face to authors who’ve attained a certain stone-like presence in literary catalogues.

As you do your research, begin to keep track of the details and tidbits that strike your fancy, as well as the ones that answer questions essential to your storytelling. Find a way to keep track not only of the information but also its source. Make sure to note the source material as completely as possible, so that (a) you don’t have to track it down again and (b) you could track it down again if necessary.

STATISTICS AND OTHER FORMS OF DATA

Statistics must be scrutinized and put into context. It’s always a good idea, when you come upon a statistic you want to use, to trace it back to its source. Suppose you find an article in a magazine that says that a certain percentage of teenagers in the 1950s smoked. Somewhere in the article you may be able to find the source of that information, such as, “according to the National Institutes of Health.” You should always question someone else’s interpretation of raw data, meaning that if you really want to use

this statistic, you need to go back to the NIH data yourself. Maybe it was X% of all 17-year-olds who smoked, or maybe it was X% of 17- and 18-year-olds in Philadelphia. People often misinterpret statistical information, whether intentionally or not. The interpretation may satisfy your story, but don't trust it until you can get it corroborated by someone with sufficient expertise.

CHRONOLOGIES

Chronologies are one of my favorite tools for storytelling, especially in the early stages of a film. I begin by going through the material that directly relates to my story and charting in sequence what happens and when. This helps me to see the story more clearly, without the overlay of someone else's narrative. Second, I add other columns to my notes that indicate what's happening in the world beyond my immediate story. (There are various "Timetables of History" available in bookstores.) By putting these chronologies together, I can see new areas of research to be explored.

For example, the first Miss America pageant was held in 1921. Prior to that, according to scholars, beauty contests were held in the pages of America's newspapers. But this wasn't possible until the photographic half-tone was invented—in 1880, I find out when I look that up. What else was happening between then and 1921? A flood of immigration and migration was increasing the ethnic and racial diversity in America's growing cities, sparking differences of opinion about what constituted an American feminine "ideal." Add to all of this the emergence of mass media and a consumer culture, and the stage is set for the first official Miss America pageant in 1921. But note the date. A year earlier, in 1920, American women had finally won the right to vote. Is this relevant?

The truthful answer is, "Not necessarily." So while you can note the interesting dateline, you can't draw any conclusions about it. Cause and effect is a slippery slope; the fact that two things happen in succession does not mean there is a link. This is an excellent example of the kind of question you explore with your advisors, which is just what the production team of *Miss America: A Documentary Film* did.

The extent of the chronology depends entirely on the project. There were several chronologies done for the series *I'LL MAKE ME A*

WORLD: A CENTURY OF AFRICAN-AMERICAN ARTS. The initial chronology was a grid. There were ten columns, left to right, one for each decade of the century, and then six rows down, one each for literature, theater and dance, music, the visual arts, African-American political history, and American social and cultural events. As the series developed, separate chronologies were made for each story. The lives and vaudeville career of Bert Williams and George Walker, for example, was charted by month and year alongside events in American history.

This may not work for everyone, but I find that a chronology helps me to keep track of a story, look for a structure within it, and find some telling details that might enrich it and prevent mistakes. A song commonly believed to have been popular among soldiers during the First World War may, in fact, have been written in 1919—which a good chronology will show you is *after* the war's end.

In addition, by listing the major events in your story in chronological sequence, you can sometimes see possible points of attack—places to begin the story—and from there you can think about what moments you might drive toward and why, and which events can serve as backstory.

One final benefit of a chronology is that everyone can share it; the production team sees the timeline and is grounded in it just as you are. Note that chronologies should also be fact checked.

PRINT AND INTERNET RESEARCH

I love the Internet. It's a tool that puts unbelievable amounts of information into your hands almost too easily. But the Internet *augments* libraries; it doesn't replace them. Keyword and subject searches on the Internet are limited by your ability to come up with the right combination of magic words, spelled correctly (or the way they were *misspelled* by someone else) to find what you want, and if you don't come up with those words, you'll wind up empty-handed. Perhaps even more frustrating, web searches can land you at sites that are not sufficiently credible.

Libraries and bookstores are also great places to go when you're looking for ideas or you have a topic in mind but aren't sure how to approach it. By wandering among the shelves, you can cast a fairly wide net, finding books and connections you

might not have considered and information that you wouldn't have known to search for on the web. Even better, you can find material such as magazines and newspapers that significantly predate the limits of most web databases. Furthermore, you can see this material in the context of everything else on the page and in the issue; you can see the price of shoes and mattresses at the time, read reviews of whatever entertainment form was being offered, and look at the way stories in general were covered. Not only do you get a better sense of the period (whether the 1970s or the 1870s), you also get ideas for visual storytelling and narrative context.

Be Organized

You'll need to keep track of the material you're citing. If you are taking notes on published text, make it clear that you are copying. Note the source, put it in quotes—do whatever it takes to make sure that six months from now, you don't go back to this material, think that you've written it yourself, and incorporate it into narration, only to find out that you've lifted entire sentences from Stephen Hawking or Alice Walker.

A few other tips:

- Note the source. An article that's not referenced is a waste of everyone's time. On the copy of the document itself, note the bibliographic data. It's also useful to note which library you found it in and even write down the call numbers. Otherwise, you may very well find yourself having to look it up again.
- Be sure you've got the whole article. If you're photocopying an article or printing one off a microfilm reader, check to be sure that the entire piece is actually readable. If it's not, try again or take out a pen and fill in the gaps. *If an article is footnoted, photocopy the footnotes.* It's very frustrating to the producer to find great material in the body of an article and not be able to use it without sending the researcher back to the library.
- Don't editorialize. Do not, as the researcher, take it upon yourself to annotate the photocopy (unless you're asked to do so). Pages and pages of underlined and highlighted material can be annoying. Steer the production team to relevant passages, but let them form their own impressions.

- Be organized. For example, do your best to keep bibliographies in alphabetical order. It will save you from looking up the same source more than once, by mistake, as you go down the list. Make use of file folders, so that you don't end up with a massive stack of paper that you will find yourself sorting through over and over.
- Neatness counts. Research is a lot of work, and everybody gets tired. But you must take the time to write legibly, or at least to copy any scribbled notes within a short period of time, before you can no longer decipher them. And if you're keeping a research notebook, keep it current.
- A plea on behalf of libraries—never mark up in a library-owned book or magazine. Never bend the pages down, and if you must spread the book face down to photocopy, do it gently.
- Go a step further. If you're doing research for someone else, get the material you've been asked to retrieve and then look through it. As mentioned, photocopy footnotes if they accompany an article. But then scan those footnotes to see if there's additional material you could pick up while you're at the library. Does a more current book by the same author come to your attention? If there's a reference to a primary source within a secondary source, can you dig up the original material? Come back with these unexpected treasures and you will make the producers very happy. Primary sources, especially, tend to be wonderful finds that take more than Internet digging.
- Again, be cautious about what you find on the Internet. It's an amazing tool. In a matter of minutes, it's possible to learn the population in Sioux City, Iowa, in 1910, or learn how many American presidents were married to a woman named Eleanor. But there is an awful lot of beautifully produced but less-than-useful information on the web, too. An impressive-looking history of the civil rights movement might turn out to have been produced by Mr. Crabtree's eighth-grade social studies class; a scientific-looking report on the "myths" of global warming might have been produced both by and for the oil industry. As you search the web, pay careful attention to the source of the material and read everything with a skeptical eye.

VISUAL ARCHIVES

Depending on the story you're telling, you may or may not need to explore what's available in terms of stills or motion picture footage in the archives, whether public (such as the National Archives) or private (such as Corbis). Extensive visual research is most commonly done once a film is at least partially funded; the visual research becomes part of the overall research and development leading to a shooting treatment, and often continues as needed (or begins again) as the story takes further shape in the editing room.

Knowledge of at least some of the material available can add a note of veracity to your fundraising material, whether you're submitting a treatment or script. For example, "Grainy black-and-white photos, a recent find in the collection of the McGooey Foundation, show the inventor as a child hammering together a contraption that he clearly meant as a flying machine."

As with the print material, organization of your visual research is everything. Many productions have a separate person (or people) responsible for keeping track of archival material, in part because the effort of acquiring rights to use footage (after it's been definitely selected for use in the film), as well as the logistics of ordering broadcast-quality reproductions, can be significant. In any event, you will have to find some way to keep track of visual images, such as a "stills" notebook that the production team can refer to when searching for images. However you choose to keep this visual record, it is critical that source information be recorded; it's very frustrating to realize that a particular image is perfect, only to find that the researcher doesn't remember the source or whether it was photocopied from a book or printed from the web.

Archival stills and motion picture footage, no less than print materials, should be subject to scrutiny as to veracity and completeness. Sure, that footage undeniably shows teenagers looting a store, but you can't tell from the few kids crowding the frame how representative their behavior was of the event as a whole. Archival material, whether motion picture or stills, was created for a purpose. To the extent possible, you need to understand what the source of the material is and what else might be available to balance out that one particular viewpoint.

Doing Archival Research

Archival research is a specialty, although plenty of first-timers have made their way to the various film, video, and photographic archives to search through material. (Some searching can now be done online.) As with print materials, it's important to do your own research as much as possible. Archivist Kenn Rabin, interviewed in Chapter 20, says that all too frequently these days, filmmakers research archival material mostly or even solely by screening other films that have used archival material on the topic. This creates problems for a number of reasons. In the first place, it will be very difficult to find out exactly where the shots came from; an edited sequence may have shots and stills from a variety of sources. You have to go to the original source, not the previous filmmaker, for rights. Secondly, you're trusting the journalism of the previous filmmaker, who may be trusting the journalism of a previous filmmaker.

Suppose Producer A uses a shot labeled by the archive as "civil rights protester, Chicago, 1934" to stand in for a shot that doesn't exist (or he wasn't able to find) of Jonathan Miller, leader of a fledgling union of black workers in Detroit in 1937. Suppose Producer B then uses that shot, labels it "Jonathan Miller, labor leader," and uses it for a story that explores the extent to which charges of communism among labor organizers were or were not true. Producer C might take that same footage, drop the "Jonathan Miller," and label the guy "communist sympathizer, 1930s." It gets messy.

MOVING FORWARD

Research of every sort will be ongoing for most of the film's production, but there comes a point when the filmmaker has to decide that it's time to move to the next stage—production. But first, at least some of this information must be put down on paper, whether for your own use (a production treatment), for funding, or for the go-ahead (the "green light") from a supervising or commissioning executive.

Knowing when to stop researching, at least for now, can be tough. There's always more to learn, and the more you learn, the

more you want everybody to know what you've found out. Just because something is fascinating or important doesn't mean it can or should make it into your final, edited film. As Alan Berliner said about working on *The Sweetest Sound* (in the same interview that started this chapter), "one of the hardest things I had to do was let go of everything I knew—to accept that the film could not possibly contain everything I had learned about names."