BETTER SAFE THAN SORRY

Even with the existence of industry safety guidelines and a location code of conduct, efforts must continually be made to be aware, cautious and thorough. Although this behavior will most certainly prevent many potential problems, be assured that no production company, regardless of size or stature, is totally immune from accidents, grievances, lawsuits and insurance claims. Be careful! It's easy to get so busy on a shoot, that from time to time, a few small details fall between the cracks. And small details can quickly turn into big problems that come back to haunt you later on.

To best protect your backside, and that of the company, you should:

- Keep careful inventories and note when something is lost or damaged.
- Put as much information on the back of the production report as possible, including the slightest scratch anyone might receive. When a day passes and there are no injuries, indicate by noting "No injuries reported today" on the back of the production report.
- When someone is injured, complete a workers' compensation (Employer's Report of Injury) report as soon as possible, and get it to the insurance agency. Also attach a copy to the daily production report.
- Have an ambulance on the set on standby when you're doing stunts that are even the least bit complicated or dangerous. Always know the location of the closest medical emergency facility (and post it on the call sheet every day).
- When you're experiencing difficulties with a specific employee, keep a log detailing dates and incidents.
- Confirm all major decisions and commitments in writing; if an official agreement or contract isn't drawn up, write a confirming memo detailing the arrangement.
- Don't sign an agreement and contract until your attorney has reviewed it.
- Don't sign a rental agreement for the use of equipment, motor homes, facilities, etc. until you or someone you trust can check out the quality of what's being rented, and you know exactly what you are getting.

Favors involving any type of exchange are nice (i.e., the company uses a crew member's car in a chase sequence in exchange for repairs to the car) but can also backfire on you. All such agreements should be backed up with a letter in writing stating the exact terms of the exchange and releasing the company from any further obligations.

PRE-PRODUCTION CHECKLIST

You have your script and your financing (or studio deal), and you're ready to go. The following list will help you keep track of what you've done and what remains to be done.

Starting from Scratch

- □ Prepare a preliminary schedule and budget
- ☐ Find a good attorney who specializes in entertainment law
- ☐ Establish company structure (i.e., an LLC or partnership)
- ☐ Obtain necessary business licenses from city, county and/or state
- ☐ Apply to the IRS for a Federal ID number
- ☐ If you've established a corporation, get a corporate seal and minutes book
- ☐ Obtain workers' compensation and general liability insurance
- ☐ Sign all union and guild signatory papers (as applicable)
- ☐ Secure a completion bond (if applicable)
- Open bank accounts (signature cards and corporate resolutions)
- ☐ Apply for all applicable incentive programs and/or tax subsidies (and complete any cultural test if required)
- ☐ Find production offices and stage(s) as needed
- □ Start lining up staff and crew

Legal

Note: A production company's legal or business affairs department or an outside entertainment attorney would routinely do this work.

- Secure the rights to the screenplay (literary purchase agreement)
- ☐ Assignment of rights
- □ Distribution agreement
- □ Writers agreement
- □ Life story rights agreements (if applicable)
- □ Review all financing and distribution agreements
- □ Sales agency agreement
- □ Security interest documents and filings
- □ Loan documents (equity investors)
- □ Completion agreement
- □ Interparty agreement
- Laboratory pledge holder agreement
- □ Laboratory access agreement
- □ Make sure script is registered with the WGA
- Negotiate (or review) and prepare the contract for the writer of the screenplay
- □ Order all copyright and title reports
- Prepare contracts for the producer, director, director of photography, production designer, casting director, costumer designer, co-producer, associate producer, line producer, composer and editor
- ☐ Prepare minors' contracts and all related documentation pertaining to the employment of minors
- Review contracts regarding literary material to make sure all required payments are made

HERBY'S SUMMER VACATION

XYZ PRODUCTIONS 1234 Flick Drive Hollywood, CA 90038 Tel: (323) 555-3331 - Fax: (323) 555-3332

CONTACT LIST

5/11/XX

ANIMAL HANDLERS CUDDLY CREATURES	9870 Forest Hills Drive Sherman Oaks, CA Contact: Barry	(661) 555-7430 (661) 555-7432 - fax Barry@cuddly.com
ART SUPPLIES		
GRAPHICS PLUS	7540 Colorful Ave. Los Angeles, CA Contact: Rose	(310) 555-4332 (310) 555-4333 - fax Rose@graphicsplus.com

ATTORNEYS BACKGROUND CASTING BANK CAR RENTALS CASTING CATERING **CELLULAR PHONES** CLEANING SERVICE CLEARANCES **COLOR COPIES** COMPUTER RENTALS COMPUTER SUPPORT CONSTRUCTION VENDORS COPIER RENTAL COURIER/MESSENGER SERVICE CRAFT SERVICE SUPPLIES CRANE

CREW GIFTS
DRAFTING EQUIPMENT & SUPPLIES

DUMPSTERS
EDITING ROOMS
EDITORIAL EQUIPMENT
ENVIRONMENTAL CONSULTANT

EQUIPMENT (Camera, Electric, Grip, Condors, etc.) EXPENDABLES

FAX MACHINES FILM COMMISSIONS FILM STOCK FLORIST HAZMAT PACKING & REMOVAL

HELICOPTER CO.

HOSPITALS HOTELS

INSURANCE AGENCY INSURANCE DOCTOR

LABOR RELATIONS

LAB

LEGAL

LOCATION CONTACTS

LOCKSMITH

MAKE-UP & HAIR SUPPLIES OFFICE FURNITURE

OFFICE SUPPLIES

PAYROLL SERVICE

PHONE SYSTEM

PHOTO LAB (1-HR)

FIGURE 6.3

	OST OFFICE		Contact phone company for phone numbers and
PC	OST PRODUCTION		phone, fax and DSL lines
PREVISUALIZATION			Arrange for a temporary phone system
	RINTING		
	RODUCT PLACEMENT		Copier machine
	ROP HOUSES ROPERTY MANAGER		DVD/Monitor
	ROSTHETICS/MAKEUP FX		Computers and printers
	ENTAL CARS/VANS		Production and accounting software programs
	ESEARCH LIBRARY		Fax machine(s)
	AFE		Office supplies
SA	ATELLITE VENDOR		Bottled water
SC	CRIPT DUPLICATION		Coffee maker
	CRIPT RESEARCH		
	CURITY		Microwave oven
	ET DEC VENDORS		Refrigerator
	HPPING SERVICES HREDDING SERVICE		Extra keys to the office (keep a list of who has keys)
	GNS		Cell phones for key personnel
	DUND EQUIPMENT		Prepare and post departmental envelopes
	DUND TRANSFERS		Prepare a restaurant menu book
	PECIAL EFX VENDORS		Secure a cleaning service
ST	TLL FILM		
ST	TILL PHOTO LAB		Establish an account with a courier/messenger service(s)
	CHNICAL ADVISOR		Prepare logs for courier runs and FedEx shipments
	LECINE		Prepare sign-out sheets for keys, scripts, etc.
	LECOMMUNICATIONS		Set up recycling receptacles and procedures
	NTS ANSPORTATION VENDORS		DEF PRO DESCRIPTION PRODUCTION SECURITION & DESCRIPTION DESCRIPTION DE L'AUTONNE DE
	AVEL	D	
	IIONS & GUILDS	Pa	aperwork
	BUAL EFFECTS		Have letterhead and business sands winted I
	ALKIE-TALKIES		Have letterhead and business cards printed and
	ARDROBE HOUSES		distributed to those who need it (the art department
WI	ATER DELIVERY SERVICE		Will generally provide a logo/artwork)
AAL	THE DELIVERY SERVICE		will generally provide a logo/artwork)
WE	EATHER SERVICE		Prepare fax cover sheets
WE	EATHER SERVICE DRKERS COMPENSATION		Prepare fax cover sheets
WE	EATHER SERVICE		Prepare fax cover sheets Prepare a map of how to get to the production office
WE	EATHER SERVICE DRKERS COMPENSATION		Prepare fax cover sheets Prepare a map of how to get to the production office and/or stage
WE WC FIC	EATHER SERVICE DRKERS COMPENSATION GURE 6.3—cont'd		Prepare fax cover sheets Prepare a map of how to get to the production office and/or stage Prepare a phone extension list to be placed next to
WE WC FIC	EATHER SERVICE DRKERS COMPENSATION GURE 6.3—cont'd Review permits and other documents having potential		Prepare fax cover sheets Prepare a map of how to get to the production office and/or stage Prepare a phone extension list to be placed next to each phone in the office
WE WC FIC	EATHER SERVICE DRKERS COMPENSATION GURE 6.3—cont'd Review permits and other documents having potential legal significance		Prepare fax cover sheets Prepare a map of how to get to the production office and/or stage Prepare a phone extension list to be placed next to each phone in the office Set up production files
WE WC FIC	EATHER SERVICE DRKERS COMPENSATION GURE 6.3—cont'd Review permits and other documents having potential legal significance		Prepare fax cover sheets Prepare a map of how to get to the production office and/or stage Prepare a phone extension list to be placed next to each phone in the office Set up production files Assemble supply of production forms
WE WC FIC	EATHER SERVICE DRKERS COMPENSATION GURE 6.3—cont'd Review permits and other documents having potential legal significance Prepare (or approve) all necessary release forms		Prepare fax cover sheets Prepare a map of how to get to the production office and/or stage Prepare a phone extension list to be placed next to each phone in the office Set up production files Assemble supply of production forms Prepare a crew list
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WE WC FIC	Review permits and other documents having potential legal significance Prepare (or approve) all necessary release forms Prepare contracts for principal cast If applicable, prepare nudity riders		Prepare fax cover sheets Prepare a map of how to get to the production office and/or stage Prepare a phone extension list to be placed next to each phone in the office Set up production files Assemble supply of production forms Prepare a crew list Prepare a contact list
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- Procure a supply of headshots from actors' agents for □ Have conceptual designs and storyboards prepared, hair, makeup, wardrobe, stunts, extra casting, assistant clearly defining each effect directors and office copy Determine methodology and exact elements required Hang a set of the main casts' headshots on the wall in to accomplish desired effects the production office, labeled with their names and Send breakdown, designs and storyboarded scenarios their characters' names (so the office staff knows out to visual effects houses for bids who's playing which part) □ Determine time and expense necessary to accomplish Schedule wig fittings and hair coloring each effect Schedule prosthetic fittings and molds, if necessary □ Adjust script to accommodate budgetary and schedul-Schedule actors for lessons (if special skills are ing limitations if necessary required for their roles) □ Select visual effects houses to create needed effects (i.e., Schedule workouts, tanning sessions, etc. (if required) creatures, animation, computer-generated characters) Schedule rehearsal(s) and read-throughs Have effects supervisor prepare a schedule inte-Schedule hair and makeup tests grating pre-production, production and post produc-Make sure minor performers have work permits tion activities and all work to be done at effects Hire studio teacher/welfare worker(s), as needed houses □ Determine which portion of each visual effects shot Line-up an extras casting agency Interview stand-ins and photo doubles will need to be shot during production (i.e., process Obtain a good supply of extra vouchers (union and plates) and coordinate with the UPM and first assistant director, so requirements can be integrated into the nonunion) shooting schedule Script and Schedules □ Determine what special equipment you'll need to order to be used during production (i.e., motion con-Finalize script trol camera, blue screen) Type script changes □ Line up additional, specially trained crew to work on Duplicate script the portions of effects that are scheduled to shoot dur-Distribute script and all revisions to cast, crew, staff, ing production studio/parent production company, insurance agency, Have effects supervisor prepare a contact list, includcasting agencies, research company/department and ing which effects houses are doing which effects, product placement agencies/department phone numbers, and names of who is supervising the If for television, send scripts to network executives work at each of the houses and Standards & Practices Note: Complicated stunts and special effects to be shot Prepare a revised shooting schedule during production should be assessed and planned Prepare a one-line schedule during the early stages of pre-production as well. Prepare a day-out-of-days Preparation involves many of the same steps as those □ Prepare a script synopsis listed above. Have the script timed Prepare Breakdowns Cast-Related Atmosphere ☐ Secure SAG bond (if applicable) Production vehicles □ Finalize casting Picture vehicles □ Prepare a cast list Stunts Send cast list to SAG Locations ("Location List") П Station 12 cast members Special effects П Prepare cast deal memos Visual effects □ Prepare SAG contracts Travel ("Movement List") □ Schedule designated cast for medical exams Continuity breakdown □ Fit wardrobe Schedule of second-unit days ☐ Hire a stunt coordinator
- ☐ Hire a dialogue coach, if needed Make sure actors' dressing rooms and mobile homes

☐ Have stunt coordinator line up stunt doubles

are properly outfitted

□ Check actors' deals for perks, and make sure they have everything they're contractually due

Product placement wish list Special equipment (condors, Technocrane, mobile lighting systems, camera remote heads, etc.)

Schedule of train, boat or helicopter days (whatever might be applicable)

Timelines (as applicable)

Budgetary – Accounting	□ Route dailies
 □ Open bank account (if not already in place) □ Collect departmental budgets □ Finalize budget □ Select payroll company □ Prepare cash flow chart 	 □ Schedule screening of dailies □ Prepare a tentative post production schedule □ Submit lab access letter □ Have script supervisor meet with editor regarding routing of daily notes and any special requests editor may have
☐ Send script, budget, and schedule to the completion bond company	Locations
 □ Prepare start paperwork packages □ Open vendor accounts □ Prepare a chart-of-accounts 	 ☐ Hire a location manager ☐ Complete location agreements ☐ Submit signed location agreements to accounting and copies to the production office and assistant directors ☐ Issue certificates of insurance to property owners
 □ Send script and budget to the insurance companies for bids □ Secure insurance coverage □ Secure a certificate of insurance from payroll company to show proof of workers compensation coverage □ Make sure Errors and Omissions (E&O) insurance application is submitted or follow all necessary clearances procedures (if an E&O application won't be submitted until the completion of principal photography) 	Dusiness owners Obtain permits Hire fire safety and police officers as necessary Set up security Arrange for intermittent traffic control, if needed Post for parking Prepare maps to locations
 □ Provide information for risk management survey □ Decide on specific endorsements to meet the needs of your picture □ Secure special coverages for aircraft, boats, railroad, etc □ If necessary, secure special coverages for working in a foreign country □ Prepare certificates of insurance for vehicles, equipment and locations □ Send travel breakdown to the insurance company □ Send stunt and effects breakdown to the insurance company, along with the resumes of the stunt coordinator and effects supervisors □ Secure animal mortality insurance for key animals you're planning to use in the show □ Have a supply of workers' compensation accident forms and insurance information for office, second assistant director and company nurse □ Procure a supply of loss/damage and auto accident claim forms □ Select a doctor approved by the insurance company for necessary physicals 	Procure heaters, fans and air conditioners as needed □ Procure layout board and drop cloths □ Locate closest medical emergency facilities □ Locate closest hotels/motels, if necessary □ Set up phones, power and utilities □ Locate parking lot(s) if shuttling is necessary □ Arrange for extra tables, chairs and tents □ Allocate areas for extras, dressing rooms, eating, hair, makeup, school room, rest area for minors and parents, special equipment, animals, etc. □ Allocate parking areas for equipment, vehicles and VIP cars □ Locate alternative sites to be used as cover sets □ If needed, hire service to clean locations after each one is wrapped □ Do final walk-through with property owners, have them sign Location Release form Distant Locations – see Distant Location Checklist in
Post Production–Related	Order
 □ Hire a post production supervisor □ Select lab, telecine and sound house □ Set up accounts for lab, sound transfers, telecine, supplies, etc. □ Order editing equipment □ Set up editing room(s) □ Get bids from sound effects houses □ Book dates and facility for predubbing and final mix 	 □ Raw stock (or digital tape stock for shooting on HD) □ Camera equipment □ Empty cans, camera reports, black bags and cores (from lab) □ Steadicam package □ Video assist equipment □ HD monitors (if applicable) □ Digital imaging equipment (if applicable)

	Grip and lighting equipment Grip, electric and camera expendables Dolly(s), crane(s) and condor(s) Generator(s)		Secure all necessary bonds and permits Have someone on the other end to handle the receiv- ing and distribution of items shipped
	Sound equipment	Tra	avel/Housing
	DAT tapes (or DVDs) for the sound mixer Walkie-talkies, bullhorns and headsets Cellular phones, BlackBerrys, wireless Internet products Make-up/hair hydraulic lift chairs Portable DVD and monitor (if dailies are shown on set) Catering		Hire travel coordinator, if necessary Hire a housing coordinator, if necessary Look into the best flights and shortest routes to and from all locations Scout out the availability of hotels, motels and rental units as required
Tra	nsportation		Establish travel needs with an in-house travel coordinator or outside travel agent
	Motor home(s), trailers and star wagon(s)		Negotiate with hotels and motels on group rates and amenities
	Honeywagon(s) Camera car(s) and process trailer(s)		Assemble list of rental agents for cast and crew looking for alternate housing
	Water truck Production trailer		Contact actors' agents regarding travel and housing
	Hair and makeup trailers Wardrobe trailer		Secure rental homes, condos and apartments for cast
	Crew cabs and vans Grip and electric truck		and VIPs as necessary Make sure that all those traveling internationally have
	Camera truck Sound/video truck		passports that are valid for at least six months past the date of departure
	Prop truck Set dressing truck		Provide those traveling with the latest travel and air- line guidelines and laws
	Effects truck and trailer Fuel truck		Schedule flights, ground transportation to and from airports, meet and greet services, rental cars and hotel
	Picture cars		accommodations as required.
SI	hipping		orders to reflect reservations made
	Get bids on shipping from freight forwarders who		Trepare movement uses
	specialize in shipping for the entertainment industry Select a shipping company	Α	nimals
	Hire a shipping coordinator if necessary Secure a customs broker if necessary		Contact a company that trains animals for film, TV and commercials
	Determine mode(s) of transportation Determine most time- and cost-effective routes		Contact the American Humane Association for guide- lines in the proper care, use, handling and safety of
	Create a master shipping schedule Instruct crew as to how to pack, label and manifest	E	
	items to be shipped		applicable Research quarantine guidelines as necessary
	trailers need to be ready for shipping		o 11 against permits veterinary and health
	Arrange for the shipping of weapons		certificates
			Make arrangements for the housing and feeding of animals if necessary
	E . 11' 1 " sweether a shipper" status with the airlines for		If they don't come through the company you're get-
	the production or for your shipping company rep as necessary		ting your animals from, locate and hire competent: Animal handlers Trainers
	nets, certificates of registration, temporary bonds, etc.)		□ Wranglers

S	pecialty Items	
	Technical advisor(s) Rear screen/process photography Blue or green screen for visual effects shots Motion control camera	E
Pr	Stock footage Cycs and backdrops	
		K
a lesta	Telephones Security Power Heaters, fans, air conditioners Generator (if necessary) Dressing rooms School room Rest area for minors and parents Tables and chairs Area for background talent Make-up and hair Darkroom Access to lot medical department or nurse/medic on set The assistant directors will prepare a portable file box (or egal-size accordion file) with the following paperwork to by on the set at all times. This box should contain the llowing:	C M That to
Сс	ppies of:	in
	All signed location agreements All permits Actors' deal memos SAG guidelines	fre of
Bla	anks of:	•
	Location agreements Workers' compensation accident report forms Automobile accident report forms SAG contracts (a few of each kind) SAG Time Sheets (Exhibit Gs) SAG Taft/Hartley report forms	

Crew start paperwork packages – regular and loanout

Conduct

Certificates of insurance

Copies of safety guidelines and Filmmaker's Code of

Release forms (an assortment) Extra vouchers Walkie-talkie sign-out sheets ktra copies of: Staff and crew lists Call sheets Scripts and script changes Miniature-sized scripts Cast lists Contact lists Shooting schedules Day-out-of-days Maps to the locations Crew cell phone numbers eep on the set at all times: A complete first-aid kit Aspirin/Tylenol Several flashlights An assortment of office supplies A designated set mobile phone A small copier machine (if you have the room and the

Petty cash envelopes

CREATING YOUR OWN PRODUCTION MANUAL

and printer

additional cost is within your budget), laptop computer

The best way to establish your company's policies is to have your own production manual. Having a company manual provides a substantial degree of professionalism to the smallest of production units. Assemble your manual in large three-ring binders, and make sure all staff and freelance production personnel receive one. Keep a record of who manuals are given to and when revisions are made.

The manual should contain the following:

- A complete listing of company operating procedures, including crew startup and payroll reporting procedures
- A contact list containing the names, addresses, and phone numbers of the company's insurance representative, outside legal advisor, travel agent, vendors, storage facilities, labs and post production facilities, applicable union and guild representatives, payroll service, permit service, script research service, music clearance service, messenger service, equipment rental houses, repair contacts, IT and telecommunication reps, etc.
- A company staff list, including department designations and phone number extensions
- Samples of the forms and releases you wish to be used on all company shows

- Pertinent union and guild rates and regulations, including rules governing the employment of minors
- Insurance guidelines, contacts, forms and claim reporting procedures
- Safety guidelines
- Filmmakers' code of conduct
- And anything else relevant to your company operations

FOR YOUR OWN GOOD

Start a show as healthy as you can be. Make sure to get plenty of sleep and exercise, eat well and take plenty of vitamins as soon as you know you're going to be starting a new show and through as much of pre-production as you can manage. If you haven't already heard or have experienced it first hand, productions tend to be grueling, and are even more so when you're on a tight budget and schedule and expected to do the work of three. You'll need all the energy and stamina you can muster up, so your body can withstand varying degrees of stress, long

hours and sleep deprivation. Your fitness will also have a lot to do with your tolerance quota when it comes to dealing with a wide assortment of personalities, egos and last-minute changes – not to mention all the rabbits you'll be continuously expected to pull out of your proverbial hat.

Get your routine doctor appointments out of the way and stock up on all your prescriptions and supplements before you go into production.

Thanks to my friends Jerram Swartz, Ira Shuman and Ron Lynch for their help with this chapter and for all their helpful notes.

FORMS IN THIS CHAPTER

- Asset Inventory Log
- Equipment Rental Log
- Mobile Phone/BlackBerry Sign-Out Sheet
- Walkie-Talkie Sign-Out Sheet
- Distribution Log
- Crew Information Sheet