**Production (Film and TV) National Occupational Standards**

# Key Purpose – DO YOU AGREE WITH THIS AS THE KEY PURPOSE?

# To produce moving image content that can be used across multiplatforms

# Production Process – DO YOU AGREE WITH THE FUNCTIONS BELOW?

The Standards within the Production suite are grouped together because there are many similarities in the functions required in the production of film and television, scripted and non-scripted content. Moreover, the different areas of production all follow the same stages from outset to promotion of the final product. Some functions occur throughout the process, and are recorded where they first appear in the cycle e.g Clear copyright materials, Control production expenditure.

These stages are as follows:

# Standards by functional areas – REVIEW AS MANY OR AS FEW OF THIS UNITS AS YOU WANT AND TRACK ANY CHANGES

**Under each of these areas is a selection of relevant Standards:**

**DEVELOPMENT**

P1 Generate ideas for a film or television production

P2 Secure content and access for a film or television production

P38 Prepare financial resourcing projections for a production

P3 Deliver a script for a scripted production

P4 Deliver a script for a non-scripted production

P5 Secure financial resources for the film or television production

P6 Identify and negotiate copyright issues

P7 Clear copyright materials

P8 Ensure compliance with regulations and codes of practice

P9 Assess the viability of the project in conjunction with distributors and sales agents

**PRE – PRODUCTION**

P10 Research for a film or television production and present the findings

P11 Obtain archive material for production

P12 Plan and schedule the production

P13 Control the overall planning of the production

P14 Select crew and suppliers to meet production requirements

P15 Organise pre-production activities on a film or television production

P39 Research and assess locations for production filming

**PRODUCTION**

P16 Co-ordinate production resources – kit and equipment

P17 Control production materials, equipment and supplies

P18 Co-ordinate activities to support production personnel

P19 Co-ordinate production documentation

P20 Identify and recommend contributors for a production

P21 Identify and select supporting artists and contributors for a production

P22 Manage contributors during production

P23 Co-ordinate logistics for cast and crew

P24 Control the shooting activites for a production

P25 Assist management of production filming

P26 Produce a location shoot for a production

P27 Assist factual productions

P28 Manage the changes to the schedule on a production

P29 Monitor and control the progress of the production

P30 Assist gallery operations and the production of multi-source recorded productions

P31 Assist live multi-source television productions

P32 Control production expenditure

**POST-PRODUCTION**

P33 Supervise the post-production process

P34 Assist with the post-production process

P35 Supervise the edit of a television production

**DELIVERY**

P36 Provide release material for the delivery of the production

P37 Oversee the delivery of a production upon completion

# Production Standards Format

The Production Standards are formatted to enable companies, individuals, colleges, universities and training providers to identify the key requirements, in terms of knowledge and performance, needed to demonstrate competence in any production department.

Each Standard contains the following information:

**Overview**

This section gives a broad description of the function to which the Standard refers, and places the function and the Standard in context for the reader.

**Knowledge and Understanding**

This section details the knowledge that is needed in order to fulfill the requirements of the Standard. Some knowledge is very specific to the Standard whilst other knowledge may be broader and may apply to more than one Standard. The section is entitled *knowledge and understanding* to highlight the need for an individual to understand concepts and ideas as well as specific facts in order to complete aspects of their work successfully.

**Performance Statements**

Performance statements detail what an individual must be able to do in order to be competent in a Standard. Each performance statement illustrates a specific performance outcome, and is accompanied by an evaluative statement that enables performance to be assessed.

These Standards can then be combined, as required, for a wide range of purposes including:

* to describe the requirements of a particular job
* to describe the requirements of an area of production
* to design the content of relevant education and training provision
* to allow individuals to identify areas for self-development

These Standards describe what is involved in working in film and television production, and notably, what is considered to be best practice.

# Supporting suites

There also exist additional suites of Standards which should be referred to alongside the Film and Television production suite. These provide specific competence and knowledge also required of those working in production.

* Digital Production Skills
* Production Accounting
* Generic Creative Media
* Camera
* Sound
* Animation
* Post Production
* Editing
* VFX

# P1 Generate ideas for film or television productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves originating, developing and presenting ideas, drawing on your knowledge, experience and understanding of industry requirements.  It is about initiating ideas, developing existing ones by suggesting improvements and understanding how viable ideas are realised within different media and formats. You may work alone or in collaboration with others.  You will need to demonstrate knowledge of the marketplace, current and future trends and how your idea works within those parameters. You will also need to consider any legal, ethical and moral considerations where necessary.  This Standard is about knowing how to package the idea and present it to potential investors.  You will also need to be sure that the idea represents your/the production company’s own brand and that of potential investors. You will need to be committed to the idea and ensure that this is evident in your development of the proposal.  This Standard is for those involved in generating ideas for productions, including production managers and editorial staff. | **What you must be able to do**   1. research and analyse data and information from relevant sources to generate ideas 2. develop ideas that have the potential and substance to meet production and market requirements 3. suggest ideas or improvements to ideas that take account of format, style, budget and potential audience 4. outline the differences and similarities between ideas and similar productions to verify the originality of ideas 5. develop outline proposals and detailed treatments that use clear and persuasive language 6. create taster materials when they will help to pitch ideas to others 7. adapt treatments to meet schedule and budget requirements 8. use information from reliable sources to confirm that there are minimum risk factors to projects and the production company 9. comply with all relevant regulations and codes of practice when developing ideas 10. suggest named cast and crew who you consider suitable for the realisation of productions 11. include appropriate information when pitching ideas to producers, funders and commissioning editors to secure funding investment and distribution 12. determine the potential for optimum multi-platform production and distribution 13. discuss and negotiate with relevant people during the idea development process | **What you need to know**   1. sources of ideas and how to access them 2. current trends and developments, as well as the changing needs of the industry 3. different genres and what is expected in each one 4. all aspects of production, from development to delivery 5. the creative and budgetary requirements of investors 6. how budget, technical and logistical factors can impact upon ideas and schedules 7. how to check that ideas are original and do not contradict regulations or policies 8. how to create effective taster materials and when it is beneficial to do so 9. the impact that production requirements, editorial policy and the potential audience will have on the success of ideas 10. the regulatory framework and codes of practice for productions 11. key legal and ethical considerations which affect the use of information in productions 12. how to minimise factors of risk to productions and production companies 13. how to out-source development know-how and market awareness and when it is appropriate to do so 14. the value and benefit of working with sales agents and distributors 15. how potential distribution and optimum multi platform plans can work for ideas 16. how to create and pitch effective packages for potential investors 17. how to work with others in an encouraging and constructive manner through the development process |

# P2 Secure content and access for film or television productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves securing the ideas or content for film and television production, drawing on your knowledge, experience and understanding of industry requirements.  You will need to know how to obtain content, agreement for use of formats or access to individuals, and ensure the production company owns the necessary legal rights.  You will need to know how to liaise and negotiate terms with agents, representatives, lawyers or format holders and when the most appropriate opportunity to do so is.  This Standard is for those involved in securing rights and access such as production executives and legal teams. | **What you must be able to do**   1. use information from reliable sources to identify the owner of rights to ideas or content 2. work on an ongoing basis with agents, representatives and lawyers in relation to securing content or access to content 3. negotiate with relevant parties to secure necessary legal rights to content or format 4. secure the underlying rights of ideas or content at appropriate times 5. verify that all paperwork relating to legal rights is correct and stored in secure locations 6. confirm that expenditure is within allocated development budgets for optioning and securing rights 7. use information from reliable sources to identify and check copyright implications and any potential regulatory or legal problems 8. check that any legal and ethical constraints have been considered at appropriate times 9. use reliable information to confirm that there are minimum risk factors to projects and the production company | **What you need to know**   1. discrete methods of identifying who owns the rights to ideas or content and information to use to do so 2. how to obtain options and underlying legal rights to content or formats 3. how to check legal documents are correct and safely stored 4. how to gain access to, liaise and develop relationships with agents or representatives 5. how to work with lawyers to negotiate the best deal for the production company 6. all aspects of production, from development to delivery 7. any legal and ethical considerations which could affect the use of the chosen content in productions 8. how to minimise factors of risk and vulnerability to the project and the production company 9. the budget available for purchasing options and legal advice |

# P3 Deliver scripts for scripted productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves ensuring that commissioned scripts are of the required standard, and that they conform to the agreed brief. It is about advising on all script related matters associated with the production, and managing the relationship between the writer and the production.  It is also about delivering an authentic and quality script or adaptation which has been created in collaboration with all relevant parties  You need to be mindful that the creative process is, by its nature, not tangible. You therefore have to manage a range of creative relationships in a flexible and collaborative manner in order to create a well-formed script.  This Standard is for those involved in script-writing including script editors and writers. | **What you must be able to do**   1. provide writers with sufficient information to enable them to meet the style, content, form and any special considerations associated with production briefs 2. generate creative ideas and story ideas relevant to production briefs 3. ensure that the treatment of established characters and continuity within story lines is consistent 4. make sure any drafts are carried out to meet requirements within deadline 5. inform script writers of the financial implications of editorial decisions 6. refer to senior management at appropriate times to resolve doubts or competing views that may arise in relation to scripts 7. co-ordinate and communicate all script changes to relevant people 8. verify that all scripts are prepared in required formats 9. confirm that all reasonable action has been taken to avoid copyright infringement, libel or defamation and negative checks have been carried out | **What you need to know**   1. where to obtain information on budget limitations for script development 2. how to assess the financial consequences of editorial decisions 3. the legal implications associated with the production process, including copyright law and agreements with industry guilds 4. how scripts should be structured and presented 5. how to work creatively with writers on plot and characterisation 6. how to assist writers to turn good ideas into creative writing for film and television 7. how to work sensitively with writers to nurture their script writing abilities 8. how to balance the needs of the production with those of the script writers 9. how to ensure that the writer achieves the correct tone and content for characters and location in scripts 10. how to manage the development process to deliver quality scripts on time and on budget |

# P4 Deliver scripts for non-scripted productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves writing scripts, cues or links for a non-scripted production or briefing other writers, so that they can deliver what is needed. This could apply to broadcast, online publication or multi-platform use.  It is about writing drafts, checking the final written material for accuracy and suitability for its purpose, and suggesting amendments and alterations in a helpful and constructive way.  It is also about ensuring that the tone and style of the writing is appropriate for the production.  You need to be mindful that the creative process is, by its nature, not tangible. You therefore have to manage a range of creative relationships in a flexible and collaborative manner in order to create a well-formed script.  This Standard is for those involved in non-scripted production development including production executives, series producers and production managers. | **What you must be able to do**   1. produce briefs which provide accurate and clear information about research findings 2. produce briefs that follow agreed treatments for broadcast or online publication 3. check that briefs contain only essential details and provide relevant sources for further advice and information 4. allow enough time for items to be written within agreed deadlines 5. ensure that content is adapted when required to reflect changes to productions 6. confirm any changes with decision-makers 7. use information from appropriate sources to verify that written contributions are factually accurate 8. write contributions in a style and length appropriate to agreed treatments for programmes, voice-overs, links, cues or multi-platform use 9. make clear suggestions for correction, amendment or improvement at appropriate times 10. ensure work is completed within agreed timescales and budget limits 11. make sure content complies with research findings, agreed treatment, intended use and production style and format 12. verify that writiten content and audio visual elements complement each other 13. check that written content complies with legal and ethical considerations relevant to productions 14. refer potentially sensitive material to appropriate people | **What you need to know**   1. how to produce an agreed brief, script or treatment 2. how to usefully assist writers 3. the common potential legal and ethical issues that can arise in the written form, and how to develop content or scripts to avoid those problems 4. the timescales, budgets and editorial requirements for drafting content 5. to whom to refer potentially sensitive material 6. the appropriate writing styles for different types of delivery platforms 7. how to create appropriate briefs for different length duration 8. how to check scripts and content for accuracy 9. how to work collaboratively with others including how to constructively suggest improvements or alternatives |

# P5 Secure financial resources for film or television productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard covers the procedures behind securing funding for the production.  It is necessary to identify which funding sources are realistically available to you and/or the production company. These could include sponsorship, product or prop placement, crowd funding, tax breaks, national or regional financial incentives or co-production treaties.  You will need to know how to budget a production, and be aware that an initial budget may have cuts enforced upon it.  Financial resources could be for development funding and/or funding for some or all of the production depending on the circumstances and constraints in place.  This Standard is for those involved in securing production financing. | **What you must be able to do**   1. evaluate all available evidence to ensure projected costings are accurate 2. base decisions about securing financial resources on available financial information and production requirements 3. consult experts at appropriate times to verify production details 4. use reliable sources of information to research and identify possible investors and relevant forms of funding for productions 5. identify valid tax breaks and financial incentives which may be available to the production company 6. collaborate with potential co-production companies at appropriate times to secure funding from outside the UK 7. specify criteria and procedures to be followed for contingency purposes in accordance with organisational requirements 8. check that all necessary documentation relating to planned productions is presented in line with organisational requirements 9. make a case for funding that promotes understanding and highlights clear advantages to investors 10. identify areas of budgets which can be negotiated or relinquished in order to secure funding 11. check that any funding proposals meet planned objectives, targets and are in line with specific broadcaster tariffs 12. negotiate financial arrangements and production rights to ensure the best deal for productions and the production company 13. hold and maintain records on all contracts and agreements in line with organisational requirements 14. approach distributors and sales agents for expertise on market and audience viability at the earliest opportunity 15. include valid information about market and audience viability in finance packages | **What you need to know**   1. how to evaluate an initial budget using industry tools and accurate calculations of costs 2. the potential markets for production ideas and those which would be most attractive to potential investors 3. the main sources and ranges of investment which are available in the appropriate sector 4. when and how to use product placement and props placement to finance productions 5. when and how to use sponsorship to finance productions 6. when and how to use crowd funding to finance productions 7. tax breaks and financial incentives available to productions 8. how to identify where non-UK sources of funding exist for potential co-productions 9. how co-production treaties operate 10. the different tariffs applied by broadcasters to productions 11. how to negotiate rights and which areas of the budget can be released in order to secure it 12. artistic and audience demands projects can claim to fulfil 13. how to estimate the timescales, technical demands and their implications on production schedules and budgets to enable the preparation of full proposals 14. the importance of having, and being able to make use of, contingency planning for finance 15. how to prepare and present a clear rationale to potential investors or partners for funding 16. negotiation strategies to use when agreeing financial arrangement 17. how to research sources and investment and identify the most appropriate to approach 18. how to approach distributors and sales agents at the earliest opportunity to assess the project for market and audience viability |

# P6 Identify and negotiate copyright issues

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves ensuring that copyright issues relating to all relevant materials are identified and concluded before production commences.  It is about ensuring that systems are in place so that copyright issues relating to archive, intellectual property and music are monitored throughout the production process.  This Standard is for those involved in identifying and negotiating copyright issues including Production Managers and legal teams. | **What you must be able to do**   1. use information from reliable sources to identify the original sources of materials within productions which may be subject to copyright 2. assess the use of materials against current copyright regulations 3. obtain information and advice from specialist sources when materials are subject to complex or unusual copyright regulations 4. agree terms, conditions and extent of use of copyright materials with copyright owners or license holders 5. confirm that terms, use and cost of copyright materials meet production requirements, are within the budget, and are consistent with standard industry rates 6. verify that copyright clearances have been obtained from appropriate people, 7. make sure that clearances are obtained within production timescales and that payments are within budget 8. confirm that accurate records of copyright clearances are kept in line with organisational procedures 9. suggest alternative clearable and less expensive materials when it is not possible to obtain copyright clearance for originals | **What you need to know**   1. how to identify copyrighted material, as well as the source and ownership of materials 2. how to access sources of specialist advice on copyright 3. the different types of copyright and the type of materials they apply to 4. the rights, territories and clearances required by broadcasters and all parties 5. what to cover in negotiations with copyright owners and licence holders regarding the conditions of use of copyright materials 6. how the use of material from and in different countries may affect copyright regulations 7. accepted rates for copyright fees 8. Chain of Title, where appropriate for feature films 9. laws of copyright and intellectual property as they apply to film and TV production 10. organisational processes for storing copyright clearances 11. where to access alternative sources of materials |

# P7 Clear copyright materials

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves researching and contacting copyright owners, and obtaining clearances as directed by producers. It is about carrying out negative checks, and maintaining accurate records of all agreements.  Works may include literary, dramatic, musical or artistic works. It may also include sound recordings, films, broadcasts, sports, satellite and cable programmes and published editions. This Standard also covers works broadcast or published on the internet.  This Standard is for those involved with clearing copyright materials such as Production Co-ordinators. | **What you must be able to do**   1. clarify what rights and territories need to be cleared for broadcasters and co-funders 2. identify how copyright regulations affect the use of materials 3. consult with relevant people and documents to identify the materials to be cleared the context in which they are to be used and the extent of their use 4. use appropriate sources to identify the source of copyright 5. contact owners and licence holders to obtain their terms, conditions and the likely costs in line with organisational procedures 6. obtain information and advice from specialist sources where materials are subject to complex or unusual copyright regulations 7. obtain clearances and permissions as agreed with producers 8. undertake negative checks on character names, addresses, professional status and business names 9. keep accurate records of all clearances, and their contracts, and of all negative checks to be passed to producers, broadcasters or co-funders 10. confirm clearances with legal departments of broadcasters, studios and funders when required | **What you need to know**   1. what the different types of copyright are and what sort of materials they apply to 2. copyright and contractual requirements which relate to the use of proprietary materials from libraries and from other outside sources 3. people and documents to consult about copyright requirements including scripts, directors, producers 4. how to identify the extent of use including audio materials, visual materials and the duration and full, accurate information of any musical pieces that are required 5. sources of information copyright ownership 6. the rights, territories and clearances required by the broadcaster and all parties 7. what should be covered in negotiating the terms and conditions of use of copyright materials 8. how the use of material in the context of the programme affects copyright regulation 9. accepted rates for copyright fees 10. sources of information on professional associations with whom to clear negative checks 11. the differences in clearances for title music and incidental music 12. how to maintain and store accurate documentation of all clearances, contracts and negative checks 13. how to confirm that all clearances are in place |

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# P8 Ensure compliance with regulations and codes of practice

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves monitoring and controlling compliance with legal regulations, non-statutory requirements and codes of practice. It is about identifying sensitive and contentious aspects of productions and taking appropriate action, obtaining specialist advice where necessary.  It is about ensuring discretion and maintaining confidentiality when dealing with sensitive information  It is also about identifying sources of specific information and how to access this.  You will also need to be aware of regulations around using premium rate voting services and competitions for any live or pre-recorded programmes.  This Standard is for all working on productions. | **What you must be able to do**   1. confirm that the content of production materials conform to legal regulations and relevant codes of practice 2. identify content that may contravene codes or rating systems 3. identify and refer any sensitive or contentious aspects of production material to appropriate people 4. obtain specialist advice when you are unsure whether production material is legal or consistent with codes of practice 5. maintain confidentiality of sensitive information in line with organisational procedures 6. take appropriate action to secure compliance and to protect the interests of productions, when there is a failure to comply with legal or non-statutory requirements 7. confirm that necessary steps have been taken to ensure public interaction with productions meets regulations | **What you need to know**   1. relevant legal, moral and ethical codes of practice for production content including those of broadcasters’, regulators, films 2. diversity and equality legislation 3. relevant employment and contractual regulations such as right to work legislation, working time regulations, child performer regulations 4. how to identify information that is sensitive to productions and people and organisational procedures to follow 5. relevant reporting requirements 6. the implications of current legislation and regulations covering Data Protection 7. current legislation covering premium rate voting services and competitions for live and recorded programmes 8. relevant health and safety regulations 9. codes and rating systems in the UK and abroad 10. the time and place of transmission or exhibition, in order to ensure that the regulations are not breached 11. the use of premium rate phone lines for voting services and competitions 12. the legal and ethical requirements for public interaction with the production 13. sources of further specialist information and advice, and when and how to access them |

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# P9 Assess the viability of projects in conjunction with distributors and sales agents

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves approaching distributors and sales agents at the earliest opportunity to assess the business viability of projects.  It is about understanding the distribution process and being able to work collaboratively with those who will be selling projects.  It is important to know what distributors and sales agents do and the differences in selling a product to a market and to an audience. The more prepared you are in production, the more able the distributor and sales agents will be able to act on your behalf once post production is completed.  It is about understanding that marketing the production is part of the concept generation and not outside the stages of filmmaking.  You will need to be aware of when you have approval rights and when you will have consultation rights.  This work goes through distribution to delivery of the final production.  This Standard is for those working with distributors and sales agents for productions. | **What you must be able to do**   1. approach distributors at the earliest opportunity to assess content and stories for business potential 2. demonstrate how content can recoup on any potential investment 3. research available information and data on exhibition statistics for similar projects and genres 4. approvemarketing campaigns, trailers, tasters, behind the scenes materials and posters when required 5. provide distributors with assets throughout the production process 6. contract cast and crew to accommodate distributors promotional requests 7. attend markets with sales agents to promote projects to potential distributors | **What you need to know**   1. how to identify the story, content and potential audience 2. how content can potentially create return on investment 3. how to research exhibition data to ascertain potential viability of projects 4. how to consider short and long term business implications 5. the role of marketing at at stages of production including concept generation 6. how to ensure all contractual deliverables are met 7. how to ensure best possible promotion for productions 8. what distributors and sales agents do 9. the differences in selling products to a market and an audience 10. how to work with distributors to approve marketing campaigns 11. when you will have approval rights and when you will have consultation rights. 12. how publicity works and what it can and cannot achieve 13. how trailers work and how they should be structured for maximum effect 14. how to create assets including behind the scenes and electronic press kits for distribution company use 15. how to contract cast and crew to accommodate distributors’ promotional requests 16. how sales agents work and how to identify which markets will be best for productions to attend |

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# P10 Carry out and present research for film or television productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves identifying relevant information and people in order to fulfil the research brief. This could be locating contributors or undertaking additional, in-depth research into a period of history or location.  It is about keeping contact lists up to date, and finding suitable people who can assist in the process. It involves collating and assessing information from various sources, and ensuring that legal, compliance and copyright considerations are taken into account.  It is about presenting research findings clearly to decision-makers.  This Standard is for those involved in researching productions. | **What you must be able to do**   1. identify potential sources of information relevant to research briefs 2. establish initial contact with relevant people to identify their potential input, taking legal, ethical, equality and diversity considerations into account 3. gather appropriate information from written or online sources 4. ensure that you work within relevant codes and regulations 5. maintain accurate and comprehensive records of information sources, updating contact lists where necessary, and retaining copies of previous contact lists 6. devise questions based on research and findings 7. use appropriate methods of questioning to elicit required information 8. ascertain what additional information is required and where it can be found 9. check any inconsistent or contradictory information with appropriate sources 10. evaluate the information you have gathered for its suitability, selecting material which will best realise research briefs 11. verify sources and contributors for productions in line with organisational requirements 12. present an accurate summary of your findings to appropriate decision makers , 13. present findings in agreed format and within stated deadlines | **What you need to know**   1. the different types of research resources which are available, and which are suitable for particular productions 2. the commercial, legal, ethical, equality and diversity considerations that apply when contacting people 3. codes of practice and other regulations that apply 4. who to contact for information 5. ways of keeping accessible and comprehensive records of contacts 6. the implications of current legislation and regulations covering Data Protection 7. how to approach potential sources of information and make initial contact in an appropriate manner 8. the style and delivery of asking questions 9. how to check sources for their validity and accuracy 10. how to create and maintain accurate notes and records of findings 11. how to ascertain what additional information is required and how to obtain it 12. How to verify sources and contributors for a production 13. formats and deadlines for presenting findings 14. who to present findings to and what information they need to know 15. how to present findings clearly and succintly 16. what factors to take into account when assessing the suitability of information |

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# P11 Obtain archive material for productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves selecting archive footage, still pictures and audio material for productions within time and cost limits.  It is about presenting your recommendations, and arranging for material to be included in productions, both by obtaining permissions and licences, and by arranging for material to be transferred to appropriate formats.  This Standard is for those responsible for obtaining archive material including production co-ordinators. | **What you must be able to do**   1. assess the need to use archive material, against alternative means of meeting production briefs 2. identify the kind of archive materials needed to meet the production briefs within the time, format, budget and legal constraints of productions 3. contact likely sources of materials needed to establish their existence and availability 4. offer and agree realistic alternatives with decision makers when the kind of material needed is not available 5. ensure the format of material being obtained meets the needs of productions 6. identify costs, limitations, copyright and other legal constraints on the use of materials, 7. obtain permission to use materials when appropriate 8. select materials which meet the needs of productions and are within time and budget constraints 9. give relevant production personnel the opportunity to evaluate selected materials before agree final selection 10. negotiate and agree costs and other associated charges with suppliers 11. order final selection of material without delay in the correct technical format and in time to meet production deadlines 12. confirm any licensing agreements in writing in line with organiational processes 13. inform appropriate decision makers of costs, limitations and any legal constraints on selected material 14. keep accurate records in line with organisational processes 15. credit sources in line with editorial policy 16. prepare supporting paperwork with full and accurate details of materials to be transferred 17. arrange delivery of transferred material to edit suites within agreed deadlines 18. identify the implications of problems that arise and discuss them with operators and decision makers in order to resolve them | **What you need to know**   1. why it is important to specify requirements clearly and concisely 2. the legal and ethical considerations affecting the use of archive material in productions 3. relevant editorial guidelines, including those concerning taste and decency 4. sources of material available, and how to access them 5. what options there may be when certain material is unavailable 6. various technical formats and how to identify them 7. types of copyright and what sort of materials they apply to 8. how to secure licences and permissions, and what should be covered in terms and conditions 9. how the use of material from and in different countries may affect copyright regulations 10. which forms of agreement to use 11. why it is important to classify and record the movement of materials 12. the editorial policy on crediting sources 13. how and when to inform decision makers of any constraints on archive material 14. possible problems and how to resolve them 15. how to ensure secure transport of materials to post production facilities as required 16. records that need to be kept including those relating to the movement of materials and copyright details |

# P12 Plan and schedule productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard is about producing production schedules that allow sufficient time for objectives to be met, and for resources to be used efficiently.  It involves making allowances for factors likely to delay the production, and keeping accurate and up to date plans and schedules. These could include contract agreements and compliance with regulations, diversity requirements, religious and cultural holidays, cultural differences, the geographical climate and available shooting hours.  You will need to have a strong understanding of what the Director’s vision is and how he or she intends to capture that for the production.  This Standard is for those involved in planning and scheduling a production, including production managers. | **What you must be able to do**   1. allocate sufficient time to each stage in the production process to enable objectives to be met and for effective use of resources 2. identify major responsibilities and sequence and duration of activities and tasks to deliver productions within budget and on schedule 3. identify and confirm an appropriate geographical base for shooting and production base 4. collaborate with relevant other departments to determine the main elements and timescales required to meet creative briefs 5. use reliable information to check when cast and crew are available for work 6. use appropriate tools to devise shooting schedules 7. develop plans and schedules that take account of factors which are likely to cause delays to production activities 8. make realistic contingency plans to deal with any delays which may arise 9. verify with appropriate people that necessary permissions and clearances have been obtained 10. check that production plans and schedules are accurate and that contain all essential information 11. present clear plans and schedules in appropriate formats 12. distribute plans and schedules to relevant people without delay, encouraging them to identify and express any concerns they have about the feasibility of plans and schedules 13. suggest realistic solutions, when difficulties in implementing plans are identified 14. communicate changes to schedules to all relevant people without delay 15. create or approve appropriate risk assessment documents 16. provide specific requirements and access for those with differing needs 17. confirm that schedules take account of health and safety of cast and crew 18. store production schedules in a secure location in line with legislation and regulations | **What you need to know**   1. how to identify information about creative brief and directors’ vision including the budget, and the proposed delivery date for the production 2. how to create a production schedule using the appropriate tools 3. how to chose the most appropriate geographical location for the shoot and base for productions 4. the required sequence and likely duration of activities in the different stages of the production process 5. the nature and importance of activities which occur in the different stages of the production process 6. things that affect the availability of cast and crew including religious or cultural holidays 7. guidelines relating to selecting cast and crew 8. the procedures for collecting data for a production such as diversity or carbon impact 9. how different production environments, types and scales of production are likely to affect the scheduling of activities 10. the likely impact of overseas filming or shooting on schedules, such as travel times, time differences, climate and shooting hours 11. when permissions and clearances need to be obtained and how to go about obtaining these 12. the types of contingencies that can occur, and how to allow for these in the schedule 13. factors that should be included in a production schedule 14. who should receive copies of the schedule and when 15. the sorts of difficulties that might arise in implementing the schedules, and how these may be resolved 16. who needs to be informed of changes to a schedule 17. how to carry out a risk assessment for the production 18. any special requirements for individual’s differing needs and how to communicate these to cast and crew 19. the implications of current legislation and regulations covering Data Protection |

# P13 Control the overall planning of productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves the overall planning of productions once schedules are in place.  It is about ensuring that appropriate plans and schedules, covering all stages of productions, are produced and agreed. It is also about identifying the people, places, equipment and materials needed.  It involves ensuring that suitable monitoring and reporting systems are in place.  It is about identifying factors that may affect the shooting process. These could include contract agreements and compliance with regulations, religious and cultural holidays, cultural differences, the geographical climate and available shooting hours.  This Standard is for production managers. | **What you must be able to do**   1. identify the major responsibilities, stages, and tasks required to deliver productions within budget and on schedule 2. work with colleagues and departments to determine the main elements and timescales required to meet creative briefs 3. use production planning methods appropriate for the type of production 4. discuss and agree realistic alternatives and budgetary changes with colleagues when proposed plans are likely to exceed budget or when departmental requirements exceed artistic or technical limits 5. identify and confirm the most appropriate locations and base for productions 6. identify factors which may cause delays to production activities and develop contingency plans to deal with them 7. confirm with relevant colleagues that production plans are fit for purpose 8. establish monitoring and reporting systems that meet production and organisational requirements 9. store production documentation in line with regulatory and organisational procedures 10. communicate information with all relevant people at appropriate times 11. ensure there are appropriate risk assessments for productions | What you need to know   1. what the creative brief is, including the budget, and the proposed delivery date for the production 2. resource requirements, including people, equipment and materials 3. who the investors are 4. where appropriate, the likely impact of overseas filming or shooting on resource requirements 5. sources of information on the current prices of resources, and how to make the best use of available resources 6. how to use production planning packages 7. the main production periods and the activities within them 8. how to work with the locations department to identify the most appropriate locations and base for the production 9. the importance of maintaining accurate records of estimates 10. how to work with other departments in a constructive manner that promotes good working relationships 11. the responsibilities, stages, tasks and target dates required for the production 12. how various factors might affect the timing and sequence of tasks, 13. the availability of performers and contributors 14. how to revise the budget and schedule following technical recces and production meetings where necessary 15. how to create or approve risk assessments for the production 16. the implications of current legislation and regulations covering data protection 17. aspects of productions that require risk assessments and how to create them or approve those carried out by other people |

# P14 Select crew and suppliers to meet production requirements

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard is about confirming specifications for crew, facilities and technical services required for productions.  It is about inviting suppliers to bid for contracts, and selecting crew and suppliers who can satisfy the production’s requirements and meet deadlines. It involves negotiating contracts through to signature. These suppliers could include hire of technical equipment and facilities houses.  This Standard is for those involved in selecting crew and suppliers including production managers, production co-ordinators and assistant directors. | **What you must be able to do**   1. interview and select proposed crew that have availability and suitability to meet production requirements 2. obtain tenders, estimates and quotations from potential suppliers of resources 3. assess the cost and quality of estimates from potential suppliers against production requirements and budget 4. identify potential suppliers of facilities and technical services and select those that can meet production requirements and deadlines 5. negotiate contracts within union, organisational guidelines or trade agreements and which are within budgetary parameters 6. arrange contracts which meet legal and regulatory requirements and which include full and accurate details of individual’s or supplier’s contribution 7. check that safeguarding checks and vetting have been carried out in line with local requirements 8. confirm that all contracts are signed by all relevant parties 9. monitor crew and suppliers’ performance to ensure that contract terms are being fulfilled 10. confirm that crew and suppliers have their own insurance when required 11. arrange any insurance and certification required to include cover for hazardous working 12. arrange production insurance policies and completion financing to meet requirements 13. complete accurate documentation that shows that crew and suppliers are aware of the relevant health and safety requirements, and that they have suitable qualifications and certificates confirm that vehicle operators hold relevant operating licences and comply with all pertinent regulation | **What you need to know**   1. how to access sources of information on potential suppliers 2. how to access sources of information on potential crew members 3. how to identify creative teams appropriate for the production 4. guidelines relating to selecting cast and crew 5. the procedures for collecting data including diversity 6. how to negotiate rates and contracts with crew and suppliers 7. how to operate a tender or bidding process in line with organisational requirements 8. how to create contracts and confirm they are accurately signed by relevant parties 9. health and safety requirements, including the relevant Working Time Regulations 10. the most appropriate means to monitor performance in the workplace 11. the necessary certification and permits that are required 12. the taxation requirements that may apply 13. how to confirm insurance and certificates are in place and up to date 14. the available budget for crew and suppliers 15. the implications of current legislation and regulations covering data protection |

# P15 Organise pre-production activities on film or television productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves organising pre-production activities from the production office, as well as organising and preparing for the shoot. This is to ensure that the pre-production stage runs as smoothly as possible.  It is about understanding priorities, and knowing how to plan for contingencies. It involves making various plans and arrangements, communicating with relevant bodies, and liaising with appropriate authorities.  This Standard is for those involved with pre-production activities including production managers, production co-ordinators and assistant directors. | **What you must be able to do**   1. break scripts down to ascertain production needs 2. set up and equip production office and assistant director’s office so they are suitable to meet production requirements 3. liaise with relevant departments to ensure that equipment, people and facilities are in place to match the schedule requirements for the base 4. plan and schedule pre-production activities to meet production requirements 5. arrange production meetings and technical recces to meet requirements 6. supervise the implementation of pre-production activities against plan 7. develop and implement appropriate contingency plans to address factors that may affect the time-tabling of activities 8. negotiate with education authorities, agents and production office so that that child licenses are obtained 9. identify chaperones and tutors to meet requirements 10. check the accuracy of schedules against casting advice notes 11. organise and carry out selection processes to obtain appropriate background contributors 12. distribute extras’ breakdowns and costume fittings lists to the appropriate departments without delay 13. communicate changes to scheduled activities to all relevant people without delay 14. communicate and confirm details of call sheets with all relevant departments 15. create and store Health and Safety files and all other necessary certifications in line with organisational procedures | **What you need to know**   1. how to break down a script for relevant information 2. how to identify what resources are required for productions 3. how to suitably equip a production office 4. pre-production activities that need to be planned and scheduled including rehearsal schedule, fittings schedule and tutoring 5. how to identify training and tutoring requirements of cast and crew 6. how to evaluate and select suitable training providers 7. how to create and manage a pre-production rehearsal and fittings schedule in order to satisfy the needs of various departments 8. how to arrange production meetings and technical recces as required 9. what various departments will require in pre-production in relation to cast members 10. factors that may delay production and pre-production activities 11. the importance of meeting deadlines 12. licensing laws governing child working permits, and the appropriate bodies and timescales involved in processing them 13. the different approaches taken by each Local Education Authority and when necessary arrange court appearances to confirm responsibility for minors 14. who should receive extras’ breakdowns, rehearsal schedules and fitting schedules 15. special requirements at unit base for location filming in a variety of circumstances and filming conditions 16. special requirements for foreign filming and how to prepare carnets 17. arrangements for UK work permits for cast and technicians 18. the importance of compiling accurate contact details of, and information about, cast and crew 19. the need for accurate supporting documentation 20. how to prepare the Health and Safety file and any other certifications 21. the implications of current legislation and regulations covering data protection |

# P16 Co-ordinate production resources – kit and equipment

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves co-ordinating production resources for the project. It is about liaising with all departments to ascertain their needs, and agreeing priorities with senior personnel.  It involves making bookings and processing orders, checking prices and making arrangements for obtaining the resources needed. This is particularly important for location filming.  You will need to make sure the production offices run in accordance with any guidelines or stipulations around low carbon impact and complete the required documentation and processes when sending equipment overseas.  This Standard is for Production Co-ordinators. | **What you must be able to do**   1. set up appropriate systems for managing production resources 2. collate and compile information about resources required by different departments and at different stages of the production process 3. arrange for resources to be shipped overseas in line with production requirements 4. complete shipping documents to meet destination requirements 5. advise insurers when freighting resources and distribute a shipping schedule with deadlines and advice to all relevant people 6. ascertain from all departments whether they require resources to be purchased and waiting for them on foreign locations 7. liaise with location personnel to ensure that these materials exist in location and are of adequate quality. 8. work in line with customs requirements of destination and departure points 9. conduct discussions with departments in a manner which promotes good working relationships 10. compare prices from a number of alternative suppliers, and obtain what is needed at the lowest price available for the quality required by productions 11. determine what resources are needed and which suppliers to use in line with organisational policies and legal obligations 12. confirm with production managers that requirements are within budget limits 13. confirm who is responsible for moving and storing resources with all relevant parties 14. procure recording materials and storage media in consultation to meet camera departments requirements 15. keep a log verifying that the amount and movement of stock and camera equipment is accurate 16. note any special additional resources used on the daily production report, and report any losses or damages 17. monitor and report a low carbon footprint throughout the production | **What you need to know**   1. the importance of using production resources effectively 2. the nature and priority of the activities which occur in the various stages of the production process 3. the quantity and types of resources required for different stages of the production process 4. how different environments, formats and types and scales of production affect the nature and quantity of resources required 5. what resources will be required for any overseas filming or shooting 6. how to research and identify best value when ordering production resources 7. the organisational policies and legal requirements which apply to obtaining resources 8. the appropriate documentation to use when ordering resources 9. arrangements for moving and storing resources 10. the relevant customs requirements for overseas delivery 11. the appropriate documentation to use when returning resources to suppliers (return notes) when reporting a loss or damage claim. 12. how to ensure the production maintains a low carbon footprint and the means by which to achieve this 13. the requirements of post production facilities throughout the production process |

# P17 Control production materials, equipment and supplies

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves setting up systems for buying, hiring, moving and storing the resources needed for productions.  It is about explaining to all who need to know how these systems work. It is about ensuring that suitable suppliers are found, that resources are ordered and delivered by agreed deadlines, and that equipment and materials are handled and moved safely.  You may need to access specialist advice on storage for some resources if they are fragile, valuable or potentially dangerous.  This Standard is for those working in the production management team. | **What you must be able to do**   1. analyse production schedule and brief to identify the resources required for each stage in the production process 2. obtain tenders, estimates and quotationsfrom potential suppliers of resources that meet production needs and 3. assess the cost and quality of estimates from potential suppliers against production requirements and budget 4. agree and confirm in writing details of price and of any other relevant terms and conditions of supply 5. offer suitable contracts which meet legal requirements and which include full and accurate details of suppliers’ contributions 6. identify potential shortfalls or delays in delivery, or discrepancies in stock levels, and take prompt remedial action 7. clarify and agree with all relevant parties the roles and responsibilities for moving and storing materials, equipment and supplies 8. check that materials, equipment and supplies are stored in a safe and secure location, and that arrangements for storing dangerous and hazardous substances and materials meet legal requirements 9. access specialist advice on storage for resources that are fragile, valuable or potentially dangerous 10. identify the likely implications of the need for insurance cover for hazardous working and for vehicles appearing on camera 11. document accurate details of insurance cover 12. maintain an up to date equipment list 13. implement procedures to ensure that equipment and materials on hire or loan are returned in an acceptable condition after use 14. comply with local laws and regulation when using production resources 15. confirm that all production equipment is covered by adequate production insurance 16. obtain loss or damage reports in appropriate formats regarding any equipment that is lost, damaged or stolen 17. compare insurance cover and an equipment lists to ascertain special insurance requirements | **What you need to know**   1. different types of monitoring systems and their likely suitability to different productions 2. the production’s system requirements 3. what resources and potential suppliers are required 4. methods of obtaining resources and when best to apply them 5. what organisational policies and legal requirements apply to obtaining resources 6. what documentation to use when ordering resources 7. how to deal with delays in delivery or transport 8. how to obtain and record information on stock levels and movements 9. how to create and maintain and equipment list 10. the necessary details to record for insurance cover 11. the materials and equipment may require special handling 12. sources of specialist advice on storage of fragile, valuable or dangerous resources 13. sources of information on legal requirements relating to dangerous and hazardous substances, and how to access these sources 14. what recording systems to use, including financial management information 15. the requirements for returning hire equipment, including the financial implications of returning hired equipment late, or in a damaged condition |

# P18 Co-ordinate activities to support production personnel

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves the day-to-day running of the production office and the various activities necessary to support productions.  It is about compiling the daily progress report, organising travel and accommodation, and keeping the production team supplied with current information.  Where child performers are concerned, it also involves liaising with schools and parents, and making appropriate arrangements for chaperones and tutors.  It also requires you to liaise with all departments to determine their particular requirements and then ensure that these are met.  This Standard is for those working in the production management team. | **What you must be able to do**   1. compile daily progress reports using information from relevant departments 2. distribute daily progress reports to all appropriate people 3. organise travel and accommodation for cast and crew to meet requirements 4. confirm that call sheets are distributed as agreed with production office 5. make clear revisions to scripts following any agreed changes distribute these to cast and crew and at appropriate times 6. keep investors, insurance companies and completion bond guarantors supplied with accurate and up-to-date scripts and other pertinent information 7. ensure that appropriate licences are arranged with education authorities for any working children involved with productions 8. confirm availability of cast and crew with relevant agents and ensure they provide any changes to schedules without delay 9. confirm that any necessary clearances have been provided and that any cast members with criminal records are aware of their civil restrictions 10. provide advice to production teams regarding children’s working and tutoring hours and apply for dispensations when required 11. keep a record of children’s hours in line with legal and production requirements 12. book chaperones, tutors or sign language interpreters to meet requirements 13. confirm that post production daily requirements are met and that they receive everything they need to progress 14. organise shipping or delivery of content to post production facilities at the end of each day’s shooting 15. identify and confirm requirements of unit medics and organise additional medical assistance and resources when required 16. carry out movement orders to show the travel of personnel 17. keep passport details of all cast and crew members and auxiliary people in a secure location for travelling and insurance purposes 18. check that you have required medical statements of health from relevant cast and crew 19. check that psychological testing is carried out to meet requirements 20. arrange insurance cover for all cast and crew to cover all activities required by productions 21. liaise with animal trainers and veterinarians to organise required animal documentation 22. check drivers’ have the correct documentation for driving vehicles on set | **What you need to know**   1. the information required in daily progress reports, and to whom reports should be distributed 2. how and when to organise travel and accommodation requirements for cast and crew 3. the information required on a regular basis by production teams 4. the implications of current legislation and regulations covering data protection 5. how to distribute daily call sheets in liaison with the Assistant Director’s department and production office 6. how to amend scripts and highlighti revisions 7. how to comply with right to work legislation 8. the legal requirements for working with children, including clearances and working hours and how these differ across regions and internationally 9. who requires a disclosure and barring check and how to obtain appropriate certification 10. how to liaise with parents, schools and education authorities to obtain children’s licences 11. how to locate and book chaperones, tutors and sign language interpreters 12. when it is appropriate to arrange for psychological testing to be carried out on cast and participants 13. that a unit medic is available and confirmed on required days and that additional medical support is available if necessary 14. how to issue movement orders to all people travelling in the UK or overseas 15. how to organise crew vaccinations, visas and required travel documentation for all cast/crew going on overseas locations 16. the legal requirements for working with animals 17. the appropriate information when working with animals including feeding, transportation and guarding requirements 18. how to liaise with the post production team throughout production to ensure they have everything they need |

# P19 Co-ordinate production documentation

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves producing relevant production documentation for film or television productions. These will include schedules, scripts, call sheets, technical requisitions, camera sheets, cast and crew lists.  It is about obtaining information on progress of productions, collecting all the information needed for production support documentation, and issuing it promptly in the required format to all those who need it in line with legislation and regulations covering data protection.  It involves ensuring that the information is accurate and up-to-date and informing people when there are changes.  It is about communicating production schedules to production colleagues, and giving any instructions needed.  This Standard is for Production Co-ordinators. | **What you must be able to do**   1. confirm what information is to be included in support documentation and the format required with appropriate people 2. obtain the information to be included from relevant sources 3. check that the information you have collected is accurate and up-to-date 4. check that any calculations in the information are correct 5. identify any changes to documents from earlier versions 6. produce clear and accurate support documentation in required format and which contain all relevant information 7. circulate support documents without delay to all those who require them, informing them about any changes from earlier versions 8. communicate the requirements of production plans, schedules and scripts to production team members in time for them to take appropriate action 9. maintain up-to-date information on production progress 10. compare progress against plans and schedules on an ongoing basis 11. compile accurate information for daily progress reports 12. co-ordinate relevant information for call sheets 13. maintain the confidentiality of sensitive information in line with organisational and regulatory requirements | **What you need to know**   1. the production requirements, including changes to previous schedules 2. sources of relevant information on production progress 3. who needs the information contained in the support documentation 4. the different types of support paperwork which are required at different stages of a production. 5. standard formats for presenting information, and when they should be used 6. the deadlines and procedures for circulating paperwork 7. the requirements for storing production documentation including the implications of current legislation and regulations covering data protection , including artistes’ contact details 8. who needs the information about the production plan and schedule, and when they need it 9. the information required on a call sheet 10. how to work closely with colleagues on shoots |

# P20 Identify and recommend contributors for productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves identifying and contacting potential contributors, and arranging for their appearance on the production within time and cost limits.  It is about interviewing people, both over the telephone and face-to-face, to assess their suitability for inclusion in productions, and making recommendations to decision makers.  It is about being aware of legal, ethical and contractual responsibilities to contributors and adhering to standards of good practice.  This Standard is for Researchers working on productions. | **What you must be able to do**   1. establish the type and diversity of contributors needed for productions with appropriate people 2. identify potential contributors from reputable sources 3. contact potential contributors to arrange interviews, in sufficient time to meet production requirements 4. make and confirm arrangements to suit the convenience of potential contributors and production needs 5. conduct interviews with potential contributors in line with organisational procedures 6. produce accurate and contemporaneous notes of all conversations with contributors and potential contributors 7. assess interviewees for their potential to contribute to productions and their suitability for a broadcast programme 8. verify contributors in line with production requirements 9. recommend and justify contributors who are most likely to meet the requirements of productions 10. use organisational procedures to confirm with contributors that they are required, informing them of travel and access arrangements 11. make appropriate financial, travel and accommodation arrangements for contributors 12. check with contributors if they have any access requirements or special needs in line with organisational procedures 13. record and retail accurate details of contributors as required by your organisation 14. make arrangements for contracts to be issued when required 15. obtain release forms and record authorisation to use material on multiple platforms in line with organisational requirements 16. contract any required children in accordance with relevant laws and regulations 17. propose alternatives when chosen contributors are unavailable, keeping producers informed at all times | **What you need to know**   1. methods of contacting potential contributors 2. how to use reputable agencies and sources to locate potential contributors 3. how to verify sources and contributors in line with production requirements 4. the characteristics that make potential contributors suitable for a broadcast programme 5. how to structure interviews and phrase questions to elicit the required information 6. how to maintain a courteous and informative manner both in person and on the telephone 7. the legal, ethical and contractual and financial implications related to interviewing particular people 8. how to produce accurate and contemporaneous notes of all conversations undertaken 9. the relevant aspects of laws covering child performance 10. why it is important to maintain and retain comprehensive and accurate records of interviews 11. methods of presenting your recommendations to decision makers 12. the release and consent requirements that are necessary, and why they are important 13. how to licence child contributors and any chaperone arrangements that are required 14. how to make travel and accommodation arrangements 15. the access and special needs requirements of contributors that need to be considered 16. the arrangements needed for using animals 17. how to contract with contributors |

# P21 Identify and select supporting artistes and contributors for productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves identifying the number and nature of supporting artistes and contributors needed for the production.  It is about assessing and selecting supporting artistes, including conducting auditions, and checking that the cost and availability of preferred supporting artistes is within the production budget and timescales.  It is about acknowledging factors of good practice and knowing how to access relevant information on what they are.  This Standard is for those working in the production management team. | **What you must be able to do**   1. estimate and agree the number and types of supporting artistes or contributors needed for productions with relevant people 2. identify the timing and duration of performances or contributions from shooting scripts and schedules 3. identify supporting artistes and contributors likely to meet requirements 4. check and confirm the availability of supporting artistes to attend auditions when required 5. find suitable artistes and contributors when those originally contracted are no longer available 6. use a method of selection which is appropriate to the required role or contribution 7. check the availability and cost of supporting artistes and contributors 8. select the supporting artistes and contributors who offer the greatest potential for meeting the requirements of productions 9. negotiate and agree the final number of supporting artistes you can have in line with the budget 10. confirm fees with supporting artistes or their agents and arrange for contracts to be issued 11. check with supporting artistes if they have any access requirements or special needs. 12. keep records of contracts and store them in a secure location in line with regulatory and organisational requirements | **What you need to know**   1. the requirements and characteristics for supporting artistes or contributors 2. sources of information about supporting artistes or contributors, and how to access them 3. the commercial and aesthetic criteria to use in selecting supporting artistes and contributors 4. when and how to contact supporting artistes or their representatives 5. contractual arrangements and procedures, legal and ethical requirements and obligations relating to the engagement of supporting artistes and contributors 6. the role of casting directors and how to appoint them 7. requirements and regulations which affect the eligibility of supporting artistes for employment in different countries 8. requirements and regulations to be taken into consideration when employing young people 9. requirements and regulations to be taken into consideration when employing people with differing abilities and backgrounds 10. the access and special needs requirements of supporting artistes that may need to be considered 11. the implications of current legislation and regulations covering data protection |

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# P22 Manage contributors during productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves greeting and briefing contributors before a production is recorded, supporting them as necessary, and escorting them from studios or locations on completion. It is about preparing for interviews and monitoring their quality, and checking their content against editorial policy and the production brief.  You will need to produce and retain comprehensive notes where necessary.  This Standard is for those working in the production management team. | **What you must be able to do**   1. identify and greet contributors and introduce them to relevant production personnel 2. provide for any access or special needs requirements of contributors in line with organisational procedures 3. give contributors clear information about any relevant studio or location practices or regulations that apply to them 4. look after contributors whilst on location or in the studio in line with production requirements 5. give contributors clear information about what is required from them and information about any changes to planned running order, timing or content, in enough time for them to adapt 6. develop an accurate interview plan to meet requirements 7. brief presenters or interviewers on the contributor’s performance, or the focus of interviews at appropriate times 8. make an accurate record of questions and answers, with timings when required 9. monitor the quality of interviews and performances, checking content against editorial policy and the production brief, and suggest changes or improvements 10. obtain consent or release forms from contributors, when required storing these in line with regulatory and organisational requirements 11. oversee contributor’s transport and payment arrangements in line with production requirements 12. escort contributors from studios or locations when their work is completed in line with production requirements | **What you need to know**   1. who the contributors are, and what arrangements have been made to receive them 2. why it is important to remain courteous to contributors 3. the access and special needs requirements of contributors that need to be considered 4. which studio or location practices the contributors need to know 5. the production brief and editorial policies 6. the scope of briefing information to be given to contributors, and how this may vary with different productions 7. how to deal effectively and sensitively with contributors of different temperament and morale 8. the duty of care towards contributors 9. how to monitor interviews and performances and recognise signs of duress 10. how to suggest changes and improvements sensitively to both the contributor and interviewer 11. how and when to obtain consent or release forms 12. how to obtain authorisation to use the material on multiple platforms and multiple times e.g repeats 13. the implications of current legislation and regulations covering Data Protection 14. how to make payments to contributors 15. how to escort contributors from the studio or location when their work is completed |

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# P23 Co-ordinate logistics for cast and crew

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves acting as the main point of liaison between members of the production crew, the production office, and cast.  It is about compiling daily call sheets, selecting extras, liaising with costume and make-up for call times, and ensuring that artistes have their call times for the next day.  This Standard is for 2nd Assistant Directors, Production Co-ordinators and Production Secretaries. | **What you must be able to do**   1. consult with appropriate departments to prepare, compile and amend daily call sheets 2. liaise with the production office at appropriate times to issue call sheets 3. confirm that appropriate arrangements have been made for travel and accommodation for non-local artistes 4. establish next day requirements of costume, make-up, caterers and other relevant departments and use this information to finalise call times for the following day 5. communicate daily call times to all relevant people and departments 6. inform cast and crew that you are the main point of contact in line with production requirements 7. give colleagues clear and accurate information about what is required of them in providing information for schedules and call sheets 8. notify crew and cast of any last-minute changes to call sheets after wrap without delay 9. maintain constant communication links with the production office in line with production requirements 10. negotiate with cast and crew about tasks above and beyond their regular duties in line with production requirements 11. co-ordinate the constant movement of contributors through required departments in line with production requirements 12. ensure contrbutors are ready when required in relation to the call sheet and needs of the set 13. prepare and implement plans to ensure that long-term scheduling needs are on target | **What you need to know**   1. how to offer support to cast, crew, and contributors, including chaperones and tutors where appropriate 2. how to deal effectively with cast, crew, and contributors of differing temperament 3. how to select and use appropriate production tools 4. how to read casting advice notes in relation to the schedule 5. how to select and book background extras 6. what is required by costume, make-up, art department and facilities in relation to cast 7. the production requirements on set 8. likely causes of delays and re-scheduling 9. the importance of informing the production office of any changes to the call sheet and progress on set, including prompt call on wrap 10. how to co-ordinate the movement of artistes and supporting artistes on set to ensure they are ready at the required time 11. which activities need to be co-ordinated on both a daily and long term basis to ensure effective running of a production 12. how to negotiate with cast and crew in a sensitive manner |

# P24 Control shooting activites for productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves managing the production set and creating an effective relationship between directors and all other people.  It is about interpreting the director’s needs and creative vision and translating this into tasks to be undertaken by the various departments. It is also about managing the crew to achieve this.  It involves producing a risk assessment for every shoot day, having identified, with others, the potential risks to crew health and safety.  This Standard is for 1st Assistant Directors, Floor Managers or Production Managers. | **What you must be able to do**   1. agree and confirm production vision and goals with directors and heads of department at appropriate times 2. discuss and agree best methods to realise creative vision with director and heads of department 3. give the team fullinformation about director’s creative vision 4. hold regular production meetings, and manage recce discussions and outcomes to ensure director’s needs are met 5. identify potential risks to cast and crew’s health and safety and take appropriate measures 6. communicate all health and safety procedures to cast and crew at the start of each day to meet organisational requirements 7. document and distribute relevant risk assessments to all crew members before shooting commences 8. confirm smooth communication between all cast and crew 9. resolve technical problems as they occur, and achieve satisfactory results in collaboration with others 10. ensure that the director’s requirements are met by delegating tasks to appropriate people during shooting 11. brief the production about on-set requirements for next day’s call sheet at appropriate times 12. identify potential causes of delay to schedules, and suggest and organise viable solutions 13. monitor on set activity to ensure the efficient use of resources 14. alert producers or production managers to any problems which may have serious implications to production  schedule or budget | **What you need to know**   1. how to develop a strong relationship with directors, heads of departments and crew 2. how to identify potential risks that concern the crew’s health and safety 3. what documentation is required for risk assessment purposes 4. how to manage the crew to achieve the best results 5. how to resolve problems in conjunction with technical experts 6. which tasks should be delegated, and when 7. what key information different departments need in order to realise the director’s vision 8. how creative and technical decisions might impact on the budget and schedule 9. how to plan ahead whilst managing day to day activities 10. how cast, crew, and location availability impact on re-scheduling decisions 11. how filming activities impact on health and safety and how this is communicated to the crew on a daily basis 12. how and when to alert production to any issues which impact upon the schedule or budget |

# P25 Assist management of production filming

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves providing the required range of support to performers and contributors for production filming.  It is about liaising between departments and contributors, distributing information and appropriate paperwork to ensure that the production runs smoothly and cast and crew are in the correct location at all times.  It is also about knowing where key individuals are at all times and ensuring they are on set at the required time.  It involves dealing with a range of people and knowing how to work with different personalities to achieve the agreed goal. It is also about explaining the filming process to those who may be unfamiliar and putting them at ease.  This Standard is for Production Co-ordinators, 1st Assistant Directors, 2nd Assistant Directors and Production Managers. | **What you must be able to do**   1. confirm that call sheets and other paperwork for crew have been distributed when required 2. brief cast at appropriate times on studio or location codes of practice, and any health and safety requirements 3. co-ordinate transport to ensure the swift and effective movement of cast and crew between set and base 4. ensure that signs and notices explaining and specifying access requirements and restrictions are clear and visible 5. keep the production and relevant people informed of shot progress, and of any potential delays and changes to schedules 6. relay clear cues as directed to artistes and contributors 7. make sure background action is set upas directed 8. co-ordinate runners on set, giving instruction or delegating supervision f relevant tasks to meet production requirements 9. maintain accurate records of artistes on set, and of meal and wrap times in line with contract requirements 10. confirm that adequate transport is available at the required times during the filming day 11. give relevant departments advance warning of the final set so they can prepare for the wrap 12. stand in for, and take over floor in line with instructions from production management | **What you need to know**   1. departmental requirements from cast and crew 2. details of any location codes of practice or health and safety requirements to communicate to cast 3. needs of artistes and crew during stand by, rehearsals and takes 4. how to communicate sensitively with artistes and contributors 5. the demands which will be placed on production personnel 6. the importance of communications and issuing these to relevant people 7. how to communicate sensitively, effectively and efficiently with artistes, contributors and on set departments 8. how to set up, or assist in setting up, background actionthe importance of promptly passing on information regarding cast’s release times 9. how to store information relating to the production securely and in line with production requirements 10. the implications of current legislation and regulations covering data protection 11. the importance of acting promptly on instructions 12. the implications, for a variety of departments, of decisions made on set 13. factors likely to cause delay to production activities 14. how to relay cues 15. what is required in terms of background action 16. the importance of monitoring the whereabouts of cast and crew when they are not on set 17. how to cater for cast and crew with access or specific needs 18. budgetary implications on the use of contributors 19. how to take over the management of the floor if instructed by production management |

# P26 Produce a location shoot for productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves producing a location shoot. This can be a complete programme or inserts to be included in a programme.  It is about planning the shots, structuring the story, and working with the camera and sound crew on location. It is also about understanding camera formats and overseeing the transfer or transportation of data to the post-production facilities.  You will need to be organised to ensure that equipment is not mislaid, lost or broken.  You will need to demonstrate awareness of required timings for productions and ensure these are met. If the shoot is for a programme insert, you will need to know the style, format of the production and the length of piece required.  You may be working alone or you may need to plan for accurate crew and resources to meet production needs. It is important to ensure you work effectively to the agreed schedule and timings in order to capture the required shots.  It is also necessary to take environmental factors, such as heat, cold, rain or sand, into consideration when storing data as these may have an adverse effect on what has been captured.  This Standard is for those who work on location and can apply to Sound, Photography, Production or Director roles. | **What you must be able to do**   1. decide how to tell the story to comply with both content and style requirements of productions 2. select interviewees and contributors that are suitable for productions 3. approve the choice of locations against production requirements and check that relevant permissions have been secured 4. plan the content, structure, backgrounds and shot sizes of interviews to meet production requirements 5. plan location shots to create the most powerful images and revealing actuality possible 6. ascertain duration, aspect ratio and format the insert is to be shot in to meet production requirements 7. give crew or presenters a full briefing before the shoot, remaining open to their suggestions 8. decide on the equipment and materials needed, ordering and checking them before the filming day if filming alone, 9. log and label all data in line with production requirements 10. capture and store data in a secure and appropriate manner 11. create multiple copies of captured data to meet production requirements 12. give clear directions to contributors, crew or presenters at appropriate times 13. make decisions that enable schedules to be maintained without compromising finished items when delays occur 14. choreograph presenters’ pieces to camera to meet production requirements, deciding which supplementary questions are needed, and which questions need to be repeated as reversals 15. communicate exact technical requirements of the shoot to cast and crew prior to shooting 16. ascertain in advance if crew need to be unobtrusive and plan how to ensure this happens 17. ensure that appropriate procedures are followed to produce footage which is of broadcast standard 18. ensure that contributors and location owners sign consent and release forms at appropriate times 19. wrap locations, ensuring that they are left as you found them 20. pack and return equipment and materials to appropriate people straight after use 21. confirm that post production personnel have received the captured data in the appropriate format 22. confirm that an accurate and current risk assessment has been carried out 23. produce effective photo stills and PR material for marketing the programme | **What you need to know**   1. the technical factors of the shoot, including shooting format, shooting time base and aspect ratio, which need to be communicated to the crew in advance of the shoot 2. how, when and why a camera should be colour-balanced 3. if shooting widescreen, why and how to frame each shot to protect for transmission in television format 4. how to log and label data correctly 5. how to make the best use of time and resources to enable you to maintain high production values, whilst bringing the programme in on time and within budget 6. how to ensure that you comply with privacy and trespass laws on location 7. the need to be flexible and to respond to unfolding events on location 8. what shots you need to make a sequence which will cut together, and which will have no continuity problems 9. framing, composition, depth of field, and the capability of different lenses and cameras 10. how to ensure data is captured and stored appropriately on location 11. to create multiple copies of captured data and ensure they are not subject to weather or environmental issues. 12. when it is appropriate to use radio microphones, and the appropriate ones to use for the job 13. the expertise of contributors, crew and presenters and how to show that you recognise it 14. when lights are needed and where they should be safely and effectively positioned 15. exposure latitude, difficult light conditions and the impact of mixing interior and exterior light 16. how to get the best performance out of presenters and interviewees 17. how to interview contributors on camera 18. how to disguise the identity of an interviewee when necessary 19. the dangers of flashing images, and how to edit such sequences to ensure compliance with industry standards 20. how to undertake a risk assessment of the location and the importance of repeating this if necessary 21. how to ensure that data is passed efficiently to post production personnel 22. the marketing requirements for the production and how to capture effective publicity stills for future PR purposes |

# P27 Assist factual productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves checking and confirming plans and schedules for factual productions, and monitoring progress in shooting against schedule.  It is about checking the availability of contributors, facilities and services to maximise the time spent filming. It is also about informing relevant people when there are changes to the schedule during the shoot.  It involves accurately noting the appropriate reference for each take and its identity, content and timing, and checking the shoot’s log for completeness**.** It is about distributing the appropriate notes to the people who need them.  It involves monitoring the appearance, positioning, and actions of the presenters and contributors for continuity. When speech is scripted, it is about checking what the presenter and contributors say against the script.  This Standard is for members of the production team. | **What you must be able to do**   1. check, confirm and communicate plans and schedules to appropriate members of the production team 2. inform relevant people without delay when there are changes to previously agreed plans or schedules during the shoot 3. ensure that contributors and location owners have signed consent and release forms when required 4. monitor shooting progress against schedules on an ongoing basis 5. note the implications of shoots which proceed faster or slower than scheduled, and take appropriate action to maximise time spent filming 6. check and reconfirm the availability of contributors, facilities and services on a regular basis in order to maximise the time spent filming 7. keep accurate notes of, and report to the production team, any decisions made during the shoot which affect the shoot’s output or the schedule for future shoots 8. keep accurate and legible notes of the appropriate reference, identity, content and timing for each take or re-take 9. keep accurate notes of interviewers’ questions during recording 10. brief interviewers during the recording of reversal questions in line with production requirements 11. check the shoot’s log for completeness, and distribute appropriate notes without delay to the people who need them 12. monitor the continuity of the appearance, positioning and actions of presenters and contributors 13. check what presenters and contributors say against script for scripted productions 14. advise relevant people about discrepancies in continuity and script, and their implications for programme integrity | **What you need to know**   1. how to assess the impact of changes on the schedule for current and future shoots 2. how to confirm the plan and schedule and communicate any changes to it with crew members 3. the on-going availability of contributors, facilities and services 4. sources of information to clarify shoot requirements 5. how to procure consent forms and release forms where required 6. how to store documentation in line with organisational requirements and current legislation and regulations covering data protection 7. what information to record and how to record it 8. how to work effectively in order to meet shooting schedules 9. how to find out what the continuity requirements are 10. how to identify undesirable discrepancies in continuity 11. methods of recording continuity and what terminology to use 12. how to ensure that any speech is mapped against the script 13. how to take and record comprehensive notes during the production |

# P28 Manage daily shooting schedules on productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves planning the day’s shoot, ensuring that the best use is made of the available time, and that deadlines are met. It is about ensuring that overtime is only agreed with prior approval, and that artistes are released on time.  You will need to demonstrate a flexible approach, responding to changes as and when they happen. You will also need to ensure this information is passed to cast and crew in the call sheet and revisions are communicated in a timely manner.  This Standard is for Production Manager or 1ST Assistant Director roles in Drama Productions, and Producers or Directors in Factual Productions. | **What you must be able to do**   1. plan the day’s shoot to allow for contingencies and options 2. review arrangements and make adjustments to better meet production requirements 3. manage the shoot to ensure best use of available time 4. ensure that all production targets and deadlines are met 5. communicate with all relevant departments on a regular basis 6. ensure that health and safety regulations are adhered to 7. deal with urgent matters when they occur and in collaboration with appropriate production personnel 8. ensure that overtime is not incurred without reference to line producers or production managers 9. ensure that artistes and supporting artistes are released on time 10. confirm that all relevant information is included in the call sheet and further revisions are passed onto cast and crew at appropriate times | **What you need to know**   1. how Health and Safety requirements impact upon filming activities 2. the implications of the Working Time Regulations on hours of work and overtime arrangements 3. the licensing laws governing child working permits, and the appropriate bodies and timescales involved in processing them 4. contractual arrangements and procedures, legal and ethical requirements, and obligations relating to the engagement of supporting artistes 5. the types of environmental factors that may affect the use of a location 6. the targets and deadlines for the production 7. how to plan for unforeseen contingencies 8. how to communicate this information to the cast and crew |

# P29 Monitor and control the progress of productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves making sure that everyone knows what is expected of them, and that they are informed of any changes to schedules.  It is about monitoring the progress of schedules, and communicating with those concerned. It involves identifying any discrepancies between actual and planned progress, and suggesting realistic solutions to problems. It is about justifying any changes to schedules in terms of costs and logistics, and ensuring that all employment, legal and contractual agreements are adhered to.  It is about understanding and managing an array of documentation; this could include wrap reports, continuity reports, cost statements and hot cost reports.  It may also involve effectively resolving any disputes or communication issues between members of the cast and crew in a timely and sensate manner.  This Standard is for Production Managers and Production Co-ordinators. | **What you must be able to do**   1. ensure that everyone knows what they have to do during all stages of productions, by holding regular production meetings 2. establish communication systems which enable the efficient flow of information 3. agree with relevant people that planned schedules are realistic and achievable using information gained from technical recces, 4. identify possible problems, and plan for identifiable contingencies 5. ensure that all employment, legal, health and safety, insurance and contractual agreements are understood and adhered to by everyone and taken into account within planned schedules 6. conduct ongoing risk assessments during productions to meet production requirements 7. gather sufficient information to prepare regular progress reports and make accurate checks of progress against call sheets 8. identify the reasons for, and suggest realistic solutions to any discrepancies between actual and planned progress 9. justify any changes to schedules in terms of cost and logistics to appropriate authorities 10. notify appropriate colleagues of changes to production schedules without delay 11. resolve disputes or communication issues between cast members or crew | **What you need to know**   1. how to manage regular production meetings to ensure there is effective communication 2. any discrepancies between actual and planned progress 3. different types of communication systems, and how and when best to apply them 4. when changes to the schedule or content may be necessary, and how to justify the changes in terms of cost, logistics and health and safety 5. who needs to know about changes to schedules 6. how to manage production documentation including wrap reports, continuity reports, cost statements and hot cost reports 7. employment, legal, insurance, contractual, and health and safety regulations, and how they can affect the schedule 8. what factors could cause delays to productions, and the need for contingency planning 9. effective ways to resolve disputes between cast members and crew 10. how to gather necessary information to prepare progress reports and reference these against the call sheet 11. how to present reasons and justifications for changes to the schedule |

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# P30 Assist gallery operations and the production of multi-source recorded productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves monitoring production activities during recording sessions, and calling correct shot numbers from scripts, in the correct sequence and on time. It is about previewing the next or upcoming shot on source monitors and comparing against script. It involves confirming and implementing directors’ instructions for changes to shots, and communicating these clearly to appropriate people.  It is about calculating the duration of each sequence and whole programmes, counting in and out pre-recorded sequences, monitoring timings, identifying any over- or under-runs, and re-calculating timings when there are changes.  It involves logging takes and producing accurate edit notes.  This Standard is for Script Supervisors and Production Co-ordinators. | **What you must be able to do**   1. input and upload scripts for use in appropriate sytems 2. prepare camera cards and cues, and check these are correct against production requirements 3. call the correct shot number from scripts in the correct sequence, and on time 4. preview and announce next or upcoming shots on source monitors, comparing them with scripts, 5. give standby warnings to video operators, cueing them when required 6. inform directors without delay if there is any discrepancy between the agreed script and the next or upcoming source 7. confirm and implement directors’ instructions for changes to shots, communicating them to appropriate people 8. perform accurate calculations of the duration of programmes and of each sequence 9. monitor sequence timings throughout programmes to meet production requirements 10. count pre-recorded inserts in and out with accuracy 11. perform an accurate and clear count to fixed points within programmes, which is audible to production and technical teams, performers and contributors 12. carry out an accurate comparison of actual timings to estimates 13. report rehearsal timings and any significant discrepancies to appropriate people 14. recalculate timings when changes are made to programme content and running order 15. calculate the time required to meet overall programme length when programmes include items of flexible length and report calculations to programme personnel without delay 16. monitor performance against script, and notify programme personnel about any discrepancies without delay 17. produce an accurate and legible reference for each take, including accurate and concise details of content and timing for each take, and reasons for any retakes in the log 18. distribute records to appropriate people without delay 19. check that information included in captions, social networking and promotional material is accurate and relevant | **What you need to know**   1. how to input and upload scripts 2. the importance of camera cards and cues 3. how to identify shots in sequence 4. how to preview upcoming shots in comparison with the script 5. shot calling methods , how to use them to accuracately and audibly call shots 6. how to calculate timings and monitor sequences 7. how to count accurately 8. who to inform of any discrepancies 9. methods of communicating with programme personnel, and how to use them 10. why and how changes affect the programme running time 11. what technical terms to use 12. how to reference takes 13. what information to record 14. how to report discrepancies or changes to the script 15. how to recalculate changes to programme content 16. how to create an accurate account in the log 17. how to produce and distribute edit notes 18. how captions are used and the importance of checking for accuracy when using them 19. how to use social media to create an immediate marketing presence |

# P31 Assist live multi – source productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves timing the production and liaising with network control and presentation.  It is about calculating the duration of each sequence, and of the whole programme, counting in and out pre-recorded sequences, monitoring timings, identifying any over- or under-runs, re-calculating timings when there are changes, and liaising closely with network control.  This Standard is primarily for Script Supervisors working in Sports, Music, News, Light Entertainment or Outside Broadcast Event productions. | **What you must be able to do**   1. identify programme content that needs to be reported and advise network control 2. calculate the duration of each sequence and the running time of programmes, monitoring them throughout the whole programme 3. check bar counting specialists are available when needed 4. count to fixed points within programmes with accuracy 5. count pre-recorded inserts in and out with accuracy 6. give standby warnings to video operators, cueing them when required 7. notify appropriate people without delay of any significant discrepancies between actual duration of sequences and estimated or rehearsal timings 8. calculate and report alterations to timings caused by changes to programme content and running order to relevant people without delay 9. calculate and report time required to meet overall programme length to relevant people when programmes includes items of flexible length, 10. use methods of timing which are reliable and relevant to the nature of the production 11. ascertain the exact on and off times, and programme running times 12. obtain precise details of visual or audio links 13. communicate clear information about the timing and duration of any planned programme breaks, and any restrictions on their positioning to appropriate members of the production team 14. relay programme opening and closing visual or audio links to network control or presentation to ensure smooth transitions 15. report prompt and precise information about programme over- or under-runs to network control or presentation   P16 advise network control or the duty officer of any  programme content you identify that needs to be  reported | **What you need to know**   1. how to advise network control of content which will be reported 2. how to calculate timings and variations in timings 3. how to count to fixed points 4. when bar counting is needed 5. how to communicate with the production team and the technical team, and with performers and contributors 6. different timing methods and how to use them 7. what counting procedures to use 8. what technical terms to use 9. how to deal with different types of programme content 10. how to deal with over-runs and under-runs 11. liaison procedures and how to use them |

# P32 Control production expenditure

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves the overall management of production expenditure against agreed budget.  It is about monitoring and controlling expenditure against budget and overseeing the preparation of regular financial reports for the commissioner, financier or completion guarantor.  It is also about being able to identify areas of concern in daily expenditure and locating resources to cover these costs.  It involves taking appropriate action when major variations from the budget occur and relaying this information in a timely manner to all relevant people.  This Standard is for Line Producers, Production Accountants and Production Managers. | **What you must be able to do**   1. brief production team members about expenditure control and monitoring systems at appropriate times 2. confirm that relevant people are clear on how to produce expenditure reports and associated information 3. confirm that heads of department have current information about available budget, spending and procedures to follow when they anticipate variations or overspends 4. allocate responsibility for monitoring and controlling expenditure to appropriate people 5. authorise expenditure in line with production procedures 6. ensure that expenditure details are recroded in an appropriate and compatible computer-based package 7. check that expenditure detailed in reports is within budget 8. discuss variations in budget with production accountants when appropriate 9. provide accurate and up-to date financial reports when required 10. report progress against budget to relevant colleagues on the production 11. use reliable and consistent methods of monitoring expenditure against agreed budgets 12. anticipate areas of potential overspend from information provided in daily expenditure reports 13. negotiate and agree any required variations between or within budget headings to meet budget constraints 14. record a clear summary of agreed actions 15. communicate decisions about budgets to appropriate people without delay | **What you need to know**   1. how to interpret expenditure reports, including weekly cost statements, cash flow, cost reports, hot cost reporting and finance plans 2. the importance of effective expenditure control to the production’s efficiency, and your role and responsibilities in relation to this 3. the principles and systems which underpin effective expenditure control 4. how to confirm other people’s commitment to keeping expenditure within agreed budget parameters 5. procedures relating to anticipated variations or overspends 6. the importance of accurate and comprehensive record keeping, and how to set up systems to achieve this 7. the advantages and disadvantages of different budgeting and expenditure control packages 8. the principles of confidentiality in relation to budgets, and what information may be provided to which people 9. financial reporting requirements 10. the importance of monitoring expenditure against budgets, and what constitutes a significant variation from budget 11. production procedures for authorising payments 12. the importance of effective budgetary control to production efficiency, and your role and responsibilities in relation to this 13. how to assemble and present accurate financial reports 14. relevant colleagues with whom to report progress, including financers, completion guarantors and broadcasters 15. how to ensure the stipulations and requirements of the completion bond are being met |

# P33 Supervise the post-production process

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves planning, budgeting and monitoring the progress of the post-production schedule.  It is about liaising closely with the relevant people, and ensuring that they have what they need to work effectively  It involves ensuring that the post-production phase runs smoothly, delegating key activities as appropriate. Knowledge of post production software can be an advantage.  This Standard focuses on the supervisory roles played by production rather than the technical processes under-taken in post-production.  This Standard is for Line Producers, Post Production Co-ordinators and Production Managers. | **What you must be able to do**   1. plan and agree post-production schedules with appropriate people, identifying the main activities to be completed 2. plan deliverables to meet partner or broadcaster requirements when working on co-productions 3. select, negotiate and agree post-production services and crew to meet production requirements 4. convey the requirements of the original creative brief and script to those involved in post-production at appropriate times 5. specify clear outcomes and criteria for editing 6. monitor post production outputs against stipulated requirements on a regular basis 7. monitor financial costs on an ongoing basis 8. review post production sections of budgets on a regular basis and make adjustments when required 9. prepare estimates for costs reports with production accountants when appropriate 10. refer to appropriate people when progress is likely to compromise schedule 11. maintain a network of appropriate contacts to use when faced with problems with post production 12. confirm post production requirements from crew, suppliers, creative talent and executives at appropriate times 13. confirm that all procedures for piracy and clearances are adhered to | **What you need to know**   1. the critical path of the post-production process 2. how to calculate the cost of post production facilities and crew in respect of previously calculated budget parameters 3. the production deliverables required for co-productions 4. post-production services and crew including editors, equipment, soundtrack laying, and dubbing 5. how to budget the delivery items properly 6. any pre-existing relationships between producer or director and the prospective post production crew 7. the uses of, and the need for, various items required and produced by the post production department 8. the processes in the production of titles and special effects 9. the processes of music recording 10. the procedures of creating digital elements on film 11. the final delivery elements and formats required 12. key details of contracts and agreements 13. the procedures and policies for piracy and clearances and how to ensure these are met 14. how to monitor progress with the correct level of involvement without antagonising the creative crew 15. who to refer lack of progress to |

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# P34 Assist with the post-production process

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves liaising with the various departments involved with post-production, and ensuring that their requirements are met within agreed deadlines.  It involves keeping in close contact with everyone involved with post-production, referring upwards to the post-production supervisor or producer, as appropriate.  A basic understanding of the post production process and technical terminology is essential. This includes a knowledge of VFX, tapeless workflows, metadata ingesting and processing.  You will often act as the liaison point between the producer and post production team, managing ever changing schedules and re-pencilling bookings accordingly.  You may also need to know the contractual delivery obligations of the production and work with the post production team to ensure they are met. This includes both physical delivery and paperwork delivery.  This Standard is for Production Co-ordinators and Junior Editors. | **What you must be able to do**   1. maintain an on-going awareness of post-production schedules 2. liaise with relevant people to establish their requirements for the smooth running of the post-production process 3. clarify precise requirements when there is ambiguity or lack of detail 4. carry out activities and tasks for which you are responsibille in line with instructions 5. ensure that all necessary materials and associated paperwork are delivered to post production teams when required 6. confirm that all clearances are in place to meet requirements 7. refer any issues or problems with post production work to appropriate people 8. maintain frequent communications between all departments involved with post-production 9. check availability and price for required equipment, facilities and artistes 10. make bookings and purchases that fall within budget 11. monitor supplies against orders and purchases | **What you need to know**   1. the requirements of the post-production schedule 2. your own level of responsibilities in respect of post-production 3. when to refer upwards and who to refer to 4. when and how to prioritise tasks 5. when and how to co-ordinate appropriate clearances 6. methods of communicating with relevant people 7. how to manage diaries for producers, post production team , facilities and artists 8. how to locate couriers, providers of equipment and facilities, and artistes 9. how to check availability and price 10. how to make bookings and purchases using appropriate purchase orders and booking forms as directed 11. how to monitor supplies 12. how to co-ordinate artiste travel and accommodation when required 13. how to co-ordinate the movements of film materials 14. how to make theatre and preview bookings 15. the post production process and technical terminology for picture and sound post production 16. VFX, tapeless workflows, metadata ingesting and processing. 17. how to arrange post synch sessions when appropriate 18. the process for ensuring credits and thanks are accurate and correct |

# P35 Supervise the edit of TV productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves supervising the edit of a television progamme. This could be for the complete series, individual programme or inserts to be incorporated.  It is about working with the on-line and off-line editors and the dubbing mixer, ensuring all clearances are in place. It also involves working collaboratively with senior personnel to ensure the desired vision is achieved in the final product. You will need to take on board both the technical needs of the post-production team as well as the creative requirements of the production.  You may not have the time or resources to prepare a paper edit. You will therefore have to have other documentation in place to refer to during this process.  You will also need to know the differences in clearances for using programme music and title music.  You will need to check durations and timings if you are working with inserts and liaise closely with the Series Producer and editor. This Standard is for Production Managers and Line Producers. | **What you must be able to do**   1. identify content of all relevant view rushes and takes 2. select and log interviews and actuality that meet requirements 3. compile relevant documentation to refer to throughout the edit 4. work with post production team members to meet post production requirements 5. exchange information with post production team members at appropriate times 6. liaise with the channel or commissioner throughout the edit process 7. ensure that selected voice over take fits the picture in both duration and tone, without deviating from the agreed script 8. ensure commentary scripts are of the required content and length 9. give graphic designers accurate information about requirements for opening titles, credits and captions and approve the finished work 10. write realistic and appropriate publicity material 11. check content for compliance with legal, ethical and regulatory codes, and with the broadcaster’s requirements | **What you need to know**   1. how to structure the item in a way that best tells the story 2. the need for relevant preparation and documentation and the financial implications of starting an off-line edit without these 3. the principles of how the script should complement the pictures 4. how the tone and style of the programme should be appropriate for the programme genre and transmission slot 5. when to liaise with the channel or commissioner during the edit process 6. the use and importance of music in the sound track, and the logistical and financial implications of using different music sources 7. know the differences in clearances for using programme music and title music and whether special permissions are required for titles music 8. how to oversee a voice over recording session 9. how to write scripts for commentary both by yourself and with a presenter 10. what source material may be needed by the graphic artist 11. how to recognise opportunities for publicity stills, copy and online presence 12. what information to include in publicity material including billings 13. the legal and ethical issues that affect broadcast material, and how to seek advice about potentially sensitive material 14. how to work collaboratively with other people 15. how to give clear directions whilst being open to other people’s suggestions |

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# P36 Provide release material for the delivery of productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves preparing information for the public and press, in the form of publications such as fact sheets, pamphlets, and booklets to accompany productions. It also includespublicity material such as production billings, press releases, related websites, text pages and fact sheets.  It is about writing, editing and preparing material for publication, and knowing what information to issue and how best to present it according to the nature of the audience. Such material may be produced during production, as well as post production.  It involves demonstrating an awareness of the legal and ethical considerations surrounding the release of information to the press and public, especially where sensitive or contentious issues are involved.  This Standard is for those involved in marketing productions. | **What you must be able to do**   1. identify and agree the need for and requirements of post-production publications with appropriate people 2. identify with decision makers the resources and timescales needed to produce release material 3. discuss and agree the style, intended audience, content, length and quality of release material with appropriate people 4. collate and assess factual and graphic material for relevance and accuracy 5. prepare draft copies that meet requirements 6. discuss draft release material with decision makers at appropriate times 7. agree final material which balances the needs and interests of the audience with time, costs and legal constraints 8. maintain effective communication with releant people to produce and deliver release material on time and within budget 9. make sure material complies with research findings, agreed content and style, editorial policy and print or website specifications 10. identify and remedy any error or omissions in proofs without delay 11. confirm that all content has been checked for copyright 12. ensure delivery and distribution are carried out as agreed 13. inform relevant people about how release material can be obtained by the general public | **What you need to know**   1. editorial policy and how it affects the use of material 2. intended audience, and the implications for selecting material 3. timescales and resources needed to produce material 4. who you need to liaise with and when including decision makers, designers, printers and publishers 5. the purpose, scope, style and format of material 6. legal and ethical constraints associated with publications including those relating to sensitive or contentious issues 7. how to confirm that copyright checks have been put in place for all released content 8. how to identify and remedy errors and omissions in proofs 9. use of taster and behind-the-scenes materials on social media |

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# P37 Oversee the delivery of productions upon completion

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves ensuring that all contributions have been received, and that master material is available for use.  It is about collating necessary paperwork, keeping copies of delivery materials, delivering them as required, and keeping accurate records. It involves collecting duly-signed contracts and relevant legal documents. These could include certificates of origin, credit lists, errors and omission insurance documents, delivery schedules and sales agents and distributors agreements.  You will be expected to deliver a range of assets including stills photography, interviews with cast and crew and behind the scenes footage.  This Standard is for Producers. | **What you must be able to do**   1. agree the method of delivery of the material and to whom with appropriate people 2. confirm that all relevant master material in acceptable formats has been assembled to enable a post-production script to be produced 3. create and complete relevant documentation in formats that are acceptable to all co-funders 4. collect copies of duly-signed contracts and relevant legal documents 5. confirm that all elements are logged as they are received, 6. take copies of materials to meet requirements 7. confirm that all deliverable paperwork is complete and in the correct order 8. refer upwards when instructions are unclear or elements are missing 9. identify and remedy errors or omissions without delay 10. distribute all elements to those who require them as specified in contracts 11. confirm material has been received in line with organisational procedures 12. monitor and assess appropriateness of distribution contracts and new product delivery systems for projects 13. truncate ineffective distribution agreements in line with organisational requirements 14. reorganise bundle of rights to ensure the greatest on-going effect for projects | **What you need to know**   1. the content and requirements of the post-production script, and the delivery schedule 2. the agreed method of delivery and recipient of the material 3. how to obtain the required documentation as outlined in the deliverables and confirm it is correct and up to date 4. materials that could be required including stills photography, interviews with cast and crew and behind the scenes footage. 5. how to report production information relating to industry monitoring such as diversity and carbon calculators 6. relevant legal documents including certificates of origin, credit lists, errors and omission insurance documents, delivery schedules and sales agents and distributors agreements 7. what master material and associated paperwork is required, and how to locate it 8. when to refer upwards 9. those who require delivery materials, including broadcasters, distributors, exhibitors, and funders 10. how to confirm receipt of materials 11. the process of publishing promotional material on relevant websites 12. how to identify and promptly remedy any errors or omissions 13. with which media to maintain contact 14. how to monitor and re-negotiate distribution agreements in order to achieve the most effective promotion of the project   K15 long term delivery that could be required for projects including re-releases, releases in new territories and working with future distribution models. |

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# P38 Research and assess locations for production filming

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard involves identifying the location requirements for different productions, as well as scouting and recommending appropriate locations.  It is about having a good knowledge of potential sites, as well as the ability to undertake research using relevant sources of information. It involves understanding the needs of the production, and assessing possible locations for their suitability and cost, taking various factors into account including the requirements of the Production Design, Props Department, Physical Special Effects and Hair, Make-up, Costume and Wardrobe teams.  This Standard is for Location Managers. | 1. identify the number, types and sequence of locations required for productions 2. confirm the accuracy of your evaluation of location needs with appropriate people 3. identify and use appropriate sources of information to assist your research 4. arrange a feasibility study of any unknowl locations to check their suitability against requirements 5. liaise with relevant authorities to identify the availability of potential locations 6. take clear and descriptive photographs or video of potential locations when required and store them for future use 7. make detailed notes to enable you to make reasoned assessments of each location 8. ascertain the need for permissions and licences associated with each location 9. identify the costs associated with using each location 10. record any problems or difficulties identified with the use of each location in line with production procedures 11. note any climatic, physical, environmental, access and health and safety factors likely to affect the use of locations 12. consider any legal, health and safety, or ethical implications of using a location against requirements 13. recommend locations that balance production needs against financial and logistical constraints 14. recommend contingency arrangements to cover extremes of weather or non-availability of certain locations | 1. the budget parameters you are working within 2. how to interpret the script taking into consideration the need for using different locations 3. sources of information about locations and how to access them 4. how to ascertain the ownership of locations 5. how to establish contact with the relevant people within local authorities 6. the types of organisations and individuals from whom permissions are required for the use of locations 7. different types of licences that may be needed when using certain locations 8. the location budget for the production 9. the likely requirements of each department for access, egress and power source 10. types of environmental factors that may affect the use of a location 11. legal or ethical factors that may affect the use of a location 12. the health and safety aspects of a location 13. how to present your recommendations |

# P39 Prepare financial resourcing projections for film or television productions

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| **Overview** | **Performance criteria:** | **Knowledge and understanding:** |
| This Standard covers the procedures behind preparing the initial financial resourcing requirements for a production at pre-production stage.  You will need to draw up a realistic projected finance plan taking into account the needs and desires of the creative team.  You will need to know how to budget a production, and be aware that an initial budget may have cuts enforced upon it.  The Finance Plan will need to reflect who is responsible for which areas of cash-flow and which areas are to be met by specific sources of investment.  Financial resources could be for development funding and/or funding for some or all of the production depending on the circumstances and constraints in place.  This Standard is for those involved in production financing. | **What you must be able to do**   1. calculate what costs and resources are required to meet proposed ideas as set out by creative teams 2. evaluate all available evidence to ensure projected costings are accurate 3. make appropriate decisions based on financial information and production requirements 4. consult experts to verify the details of productions when required 5. specify contingency criteria and procedures which meet production requirements 6. check that all necessary documentation relating to planned productions is presented in line with organisational requirements 7. identify areas of budgets which can be negotiated or relinquished in order to secure funding 8. check that any funding proposals meet planned objectives and targets and are in line with specific broadcaster tariffs | **What you need to know**   1. how to create an initial budget using industry tools and accurate calculations of costs 2. the main sources and ranges of investment which are available in the appropriate sector 3. tax breaks and financial incentives available to the production 4. the different tariffs applied by broadcasters to productions 5. how to estimate the timescales, technical demands and their implications on the production schedule and budget to enable the preparation of a full proposal 6. the minimum funding required given the estimates of costs, resource requirements and time schedules 7. how to estimate a range of all production and legal costs 8. the importance of having, and being able to make use of, contingency planning for finance 9. how to budget, where necessary, for multi platform content |