

## APPENDIX 5: BUDGETING

A number of considerations go into creating a budget for a documentary.

### ***Who Is Paying?***

The first consideration is who is paying to get the documentary made. If this is strictly your project and you are paying the bills, then what you are concerned with is the out-of-pocket cost. If you have your own camera equipment and editing facilities, you don't need to budget for these — or for your time, either — except to determine what the actual cost or fair value of the documentary might be.

On the other hand, if you have either a sponsor, a client, or a funding agency, then *everything* becomes a cost, including your time and the use of your equipment. You budget to be sure you don't spend more than you'll receive.

### ***Small Crew or Large Production?***

Almost all of my experience is in making behavioral documentaries with a crew of three or four people. And the production budget is basically so much per day for crew, equipment, film or video, steaks, sodas, and mileage.

But if you are undertaking a reenactment, a historical documentary, or a biography with re-creation of events, you'll need to budget like a feature film. The only way to do this is to get an experienced production manager to do your budget for you, once you have a completed script.

### ***Union or Nonunion?***

Unless you are doing a large reenactment or are a signatory to a union contract through other work that you've done, your first documentary will probably be nonunion.

A union shoot probably will cost more due to union work rules. You may be required to hire more people than you would use in a nonunion, independent production. And you'll have to pay for travel time, meals, and overtime, as well as union benefits such as health and welfare. On the other hand using a union crew generally assures a certain level of technical competence. But if you are a union signatory, you undoubtedly already know this.

If you are nonunion and independent, then the cost of everything is the best cost you can negotiate.

### ***Live or Archive?***

Where will the footage come from that will be used in your documentary? Will you be shooting it live? Or will it mostly be archival footage? Live productions mean shooting days, followed by review of footage, followed by editing. Productions based on archival footage replace shooting days with the costs of finding, duplicating, and licensing the footage that will be used.

In today's documentary milieu, it can cost far more to make a documentary out of old footage, when you have to buy rights to it, than to go out and shoot everything brand-new.

### ***Above- and Below-the-Line Costs***

The budgets for feature films and for some other productions are divided into above-the-line and below-the-line costs. People accustomed to using this system of budgeting tend to think in these terms. It won't be important in planning a documentary unless a funder or sponsor asks you for an above-the-line and below-the-line break-out of your budget.

Above-the-line costs are generally contractual expenses that are negotiated on a run-of-the-production basis. These include the purchase of the script and property rights and the salaries of the

producer, director, and cast.

Below-the-line costs are all those costs associated with the production that are calculated on the basis of use. This includes salaries for the crew, cost of equipment and supplies, travel, editing, processing, and postproduction costs, and salaries not agreed upon as above-the-line costs before production starts.

## A BUDGETING CHECKLIST

Over the years I've developed a number of checklists to try to be sure I account in advance for everything I'm going to have to pay for on a production. I've consolidated these into the checklist that follows. I have tried to make this as comprehensive as possible, so there undoubtedly will be many items on the list that you won't need for a specific production. More important, don't blame me if I've left out something that you do need, because every production is different. Treat this checklist as a starting point and a memory jogger and then add to it the specifics of your production to create your own budgeting system.

At the request of readers, I have posted this checklist on the website for this book:

[www.makingdocumentaryfilms.com](http://www.makingdocumentaryfilms.com)

so you can download it and modify it for your own needs.

### I. General (run-of-the-production) expenses

- A. Production Company
  - 1 Producer
  - 2 Director
  - 3 Producer's assistant/secretary
  - 4 Bookkeeper
  - 5 Office rent
  - 6 Telephone
  - 7 Utilities
  - 8 Furniture and equipment
  - 9 Supplies
  - 10 Licenses
  - 11 Other
- B. Transportation
  - 1 Travel costs
  - 2 Vehicles
- C. Legal
  - 1 Contracts, releases, etc.
  - 2 Rights
  - 3 Copyright
- D. Insurance
  - 1 Office and equipment
  - 2 Errors and omissions
  - 3 Liability
  - 4 Production or negative insurance
  - 5 Completion bond if required
- E. Payroll company
  - 1 Tax, benefits, workers' compensation, etc., throughout the production

### II. Preproduction Expenses

- A. Research
  - 1 Text researcher

- 12 Cost of books, research materials, microfilm reproduction, photocopying, etc.
- 13 Archival researcher
- 14 Cost of viewing and duplicating footage and stills for review
- B. Script
  - 1 Scriptwriter
  - 2 Interviews
  - 3 Storyboards if needed
- C. Production planning
  - 1 Director of photography
  - 2 Casting
    - a. Casting director
    - b. Record casting sessions
  - 3 Locations
    - a. Location coordinator
    - b. Location research
  - 4 Others
    - a. Sound
    - b. Art director
    - c. Production manager
    - d. Etc.
  - 5 Travel
  - 6 Payroll company
    - a. Tax, benefits, workers' compensation, etc.

### **III. Production Expenses**

- A. Crew and equipment (if contracted as a package)
- B. Crew (individuals as needed)
  - 1 Assistant director
  - 2 Director of photography
  - 3 Camera operator
  - 4 Camera assistant
  - 5 Sound recordist
  - 6 Sound assistant
  - 7 Electrician/gaffer
  - 8 Grip(s)
  - 9 Scriptwriter, if needed during production
  - 10 Production assistant(s)
  - 11 Editor, if needed during production
  - 12 Makeup artist
  - 13 Property person
  - 14 Wardrobe person
  - 15 Driver(s)
  - 16 TelePrompTer operator
  - 17 Other
- C. Talent
  - 1 Host/spokesperson

- 2     Featured actors
- 3     Extras
- 4     Animals
- D.    Equipment
  - 1     Camera and support
    - a.     Camera(s)
    - b.     Film magazines
    - c.     Lenses
    - d.     Matte box, filters, etc.
    - e.     Batteries and charger(s)
    - f.     Tripod(s)
    - g.     Dolly, Steadicam, crane, jib-arm, etc.
    - h.     Special mounts (car, helicopter)
    - i.     Special rigs such as underwater housing
    - j.     Video recorder(s)
    - k.     Video playback
    - l.     Video assist
    - m.     Monitor(s)
    - n.     Slate, connectors, etc.
  - 2     Sound
    - a.     Recorder(s)
    - b.     Microphone(s)
    - c.     Wireless system
    - d.     Audio mixer
    - e.     Microphone boom or fish pole
    - f.     Cables and connectors
  - 3     Lighting and grip equipment
    - a.     Grip truck
    - b.     Lighting instruments
      - 1)     Spot/flood
      - 2)     Broad
      - 3)     Soft lights
      - 4)     Battery lights
      - 5)     Other
    - c.     Grip stands, sandbags
    - d.     Shiny boards
    - e.     Cables
    - f.     Clamps, gels, dichroic filters, etc.
    - g.     Background paper
    - h.     Large color-correcting gels for windows
    - i.     Generator
  - 4     Miscellaneous
    - a.     TelePrompTer
    - b.     Communication (walkie-talkies, headsets, etc.)
    - c.     Trailers, honey wagons, etc.

- 5 Transportation
  - a. Cars
  - b. Vans or trucks
- 6 Props and wardrobe
  - a. Props as needed
  - b. Wardrobe items
  - c. Vehicles
- 7 Location and studio costs as required
  - a. Location fees, including “mindere” such as police officers when required
  - b. Licenses as needed
  - c. Studio rental
  - d. Set construction
  - e. Set decoration
  - f. Storage and transportation
- 8 Film Processing
  - a. Laboratory processing of film
  - b. Transfer and sync sound
  - c. Work print or transfer to video
  - d. Video dubs for review
  - e. Shipping
- 9 Travel
  - a. Travel costs
  - b. Rooms
  - c. Per diem
  - d. Shipping equipment and supplies
- 10 Supplies
  - a. Film or video medium
  - b. Audiotape
  - c. Batteries for everything
  - d. Gaffer’s tape, camera tape, shipping tape, etc.
  - e. Replacement lamps
- 11 Meals and snacks
  - a. Cast and crew meals as required
  - b. Snacks and drinks available during production
- 12 Contingencies
 

A percentage of the production budget set aside to handle unexpected and unbudgeted expense
- 13 Payroll company
  - a. Tax, benefits, workers’ compensation, etc.

**IV. Postproduction Expenses**

- A. Stock footage and stills
  - 1 Work tape
  - 2 Reproduction quality
  - 3 Rights
- B. Review of footage

The director, along with the editor (if the director is not doing the editing) and possibly the producer, will want to review what has been shot to select the best takes, eliminate the unusable footage, and begin to organize the structure of the documentary. Budget time for this.

C. Editing Facilities

The production company may have editing facilities available, or may rent a film editing room or editing system or a video offline editing room or system by the week or month until postproduction is complete.

D. Offline editing (video) or rough cut editing (film)

- 1 Editor
- 2 Assistant editor
- 3 Offline (rough cut) editing equipment
- 4 Supplies
  - a. Splicing tape for film, cores, split reels, marking pencils, etc.
  - b. Mastering and work media for video -- today this is videotape, tomorrow it may be something else

E. Graphics and special effects

- 1 Animation
- 2 Computer graphics, etc.
- 3 Special photographic or video effects
- 4 Character generator
- 5 Other

F. Music

- 1 Composer
- 2 Library music
  - a. Selection
  - b. Rights
- 3 Music director
- 4 Audiotape as required

G. Audio postproduction

- 1 Record narration
- 2 Voice talent
- 3 Looping if required
- 4 Record music
- 5 Record sound effects
- 6 Audio sweetening and effects (video)
- 7 Sound mix (film)
- 8 Audio layback
- 9 Audiotape and/or video media as required

H. Online editing

- 1 Online facility by the hour
- 2 Mastering medium
- 3 Work medium
- 4 Protection master
- 5 Video sweetening

- 1 Dubs for review

I. Completion on film

- 1 Negative cutting
  - 2 Answer print
  - 3 Release print
  - 4 Internegative
  - 5 Release print from internegative
  - 6 Shipping and insurance
- J. Payroll company
- 1 Tax, benefits, workers' compensation, etc.
- V. Distribution Expenses**
- A. Prints for release as required
- 1 Theatrical standard
  - 2 Television network standard
  - 3 DVD authoring
  - 4 Manufacture of initial quantity of release copies, including labels and boxes
  - 5 Shipping

Use this checklist as a starting point. Specific items will change as the technology changes and as your approach to making documentaries evolves. The most important thing is to have a reference point for creating the budget for the documentary. There is so much to do, and there are so many different costs involved, that without some kind of checklist you can easily forget to include something that could cost a lot of money you didn't plan on spending.

And you'll have to live with that.