

## Video Production Planning Worksheet

This planning worksheet presents various considerations to think through when creating a video, whether working with a video producer or developing a video on your own. The purpose of this worksheet is to plan the video production process in general. The worksheet will also help ensure clear communication if you choose to hire an outside video producer. It will help you to articulate your vision, to understand the feasibility of your ideas and possible limitations to production, and to work collaboratively with a video producer and other staff to realize the final product. Although you won't have answers to each item below at the start of your planning process, these considerations will help you ask more informed and targeted questions if you need to identify and engage a video producer.

### Sections:

1. Purpose
2. Scope
3. The Shoot
4. Postproduction
5. Technical Requirements

### Section 1. Purpose

<b>1. What is the goal? What is the story or the message we are trying to communicate? Is there a call to action we want stakeholders to respond to? What are the main ideas we want to include? What are the key takeaways we want stakeholders to remember?</b>
<b>2. Is video the best communication format for what we are trying to accomplish? <i>[If yes, continue to the questions that follow.]</i></b>

<b>3. Who is our audience? Who are we trying to reach using video? How does that influence which messages and content we include?</b>
<b>4. Does this video fit into a larger strategy of our organization or department?</b>
<b>5. Are there existing videos that can serve as models for what we are trying to create? <i>[Look at a variety of videos such as demonstrations, interviews, and documentaries to get ideas; research organizations similar to yours that have produced videos; look at the work of producers in your area.]</i></b>

## Section 2. Scope

<b>1. What is our budget?</b>
<b>2. What footage and visuals (e.g., photos, logos, graphics, titles, text, b-roll<sup>1</sup>) should we use?</b>

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<sup>1</sup> B-roll is supplemental or alternative video footage that is intercut with the main video footage and is meant to provide context to illustrate what is being talked about. An example might be footage of students in a classroom environment while a person who is being interviewed for the video (but doesn't appear in the b-roll footage) is talking about the importance of classroom participation.

<b>3. How long should the video be?</b>
<b>4. Do we need to hire a crew, actors, or other staff?</b>
<b>5. Will we interview people for footage? Will we use voice-over?</b>

### Section 3. The Shoot

<b>1. Who will work with the producer, coordinate the shoot, and address other logistics (e.g., shooting schedule, location, permits, props, release forms)?</b>
<b>2. Who will write the blocking script<sup>2</sup>?</b>
<b>3. Who will prepare the staff, actors, interviewees, etc.?</b>

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<sup>2</sup> A blocking script is a structured way to map out what appears on the screen and the content of each scene in a video. This includes individuals and groups on camera, visuals, text and titling, animation, and b-roll footage, and how long each of these elements will appear during each scene. The blocking script also includes the actual spoken-word script for any narration that is heard during each scene in the video.

## Section 4. Postproduction

**1. Who will review the footage and provide feedback to the editor? Who will review the final cut? [Look at the questions below to determine who is best suited to fill these roles.]**

Things for reviewers to keep in mind:

- What is your general impression of the video?
- Is the video message clear?
- Is the content accurate?
- What sections are most effective?
- Are the footage and imagery effective?
- Which moments are least effective? What footage could be cut?

**2. Who will maintain the files of the footage, audio, graphics, photos, output, and relevant documents (e.g., signed release forms, a blocking script, etc.)?**

## Section 5. Technical Requirements

**1. If we are shooting the video ourselves, do we need video equipment (e.g., camera, lighting, microphones)?**

**2. Will we need captions or transcripts for the final product?**

**3. Will the captions need to be in multiple languages?**

**4. Where will the final video live or appear (e.g., YouTube, Vimeo)?**