

STUDIO HOLDER  
Project Portfolio Checklist 2020  
For Feature Films, Short Film Production & Content for Digital Platforms

<b>DEVELOPMENT</b> <i>(Required Assets and Associated Deliverables)</i>			
<b>PORTFOLIO by ROLE / DEPARTMENT</b>			
Item	When Is This Done?	Person(s) Responsible for Completion?	Completed?
<b>PRODUCTION PACKAGE</b> (a PDF portfolio made during Development including ALL the items as listed below) - <i>Average Production Package page length for shorts are 25-30 pages in length. Longer PDFs for features.</i>	Development	Producer	
<ul style="list-style-type: none"> <li><b>Logline</b> (1-2 sentences)</li> </ul>	Development	Producer	
<ul style="list-style-type: none"> <li><b>Target Audience / Market</b> (3-4 sentences)</li> </ul>	Development	Producer	
<ul style="list-style-type: none"> <li><b>Treatment</b> (1-2 sides of A4)</li> </ul>	Development	Producer	
<ul style="list-style-type: none"> <li><b>Line Budget</b> (Forecasting overall cost of the film, per department)</li> </ul>	Development	Producer	
<ul style="list-style-type: none"> <li><b>Prospective Screenwriter Bios</b> (3-4 choices for shorts, 5-8 for features - include your reasons for suggesting them for the project, their previous work/credits, headshots / showreels where possible)</li> </ul>	Development	Producer	
<ul style="list-style-type: none"> <li><b>Prospective Director Bios</b> (3-4 choices for shorts, 5-8 for features - include your reasons for suggesting them for the project, their previous work/credits, headshots / showreels where possible)</li> </ul>	Development	Producer	
<ul style="list-style-type: none"> <li><b>Prospective Key Cast Bios</b> (2-3 choices for shorts, 4-6 for features - include your reasons for suggesting them for the project, their previous work/credits, headshots / showreels where possible)</li> </ul>	Development	Producer	
<ul style="list-style-type: none"> <li><b>Visual Inspiration</b> (Moodboard of film screenshots, photography and other images <b>AND/OR</b> Text/Prose describing the visual aesthetics, mood and tone of the film)</li> </ul>	Development	Producer	
<ul style="list-style-type: none"> <li><b>Finance Plan</b> (Detailed prose and breakdown on where the film's funding is coming from, list all sources/pools of investment, grants, funds etc). This details how the Line Budget for the production will be achieved.</li> </ul>	Development	Producer	
<ul style="list-style-type: none"> <li><b>Crowdfunding Strategy</b> (if used or if appropriate)</li> </ul>	Development	Producer	

Phase	Development	Pre-Production	Production	Post-Production	Marketing & Distribution
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<ul style="list-style-type: none"> <li><b>Producer's Statement</b> (detailed information, at the end of the production package, to show investors/supporters and creative collaborators if appropriate, why should you be producer for this project?)</li> </ul>	Development	Producer	
<b>DRAFT(S) OF SCRIPT</b>	Development <i>(and ongoing until production)</i>	Writer / Producer / Director	
<b>Development Phase Completed?</b>	Development	Producer	
<b>PRE-PRODUCTION, PRODUCTION, POST-PRODUCTION</b> <i>(Required Assets and Associated Deliverables)</i>			
<b>PORTFOLIO by ROLE / DEPARTMENT</b>			
Item	When Is This Done?	Person(s) Responsible for Completion?	Completed?
<b>Producer / Production Manager</b>		(Production Department)	
<b>PRODUCTION PORTFOLIO</b> including ALL paperwork from the various departments as in this document.	END OF PROJECT	Producer	
<b>Cast, Crew &amp; Production Personnel Contacts List</b>	Pre-Production	Producer	
<b>Master Production Calendar</b> (development, pre-production, production, post-production, marketing & distribution)	Pre-Production	Production Manager + Producer	
<b>Full breakdown of Funding</b>	Pre-Production	Producer	
<b>Budget from Greenlight Meeting</b>	Pre-Production	Producer	
<b>Final Cost Statement</b> (using budget template) + analysis of variance from GL budget	Pre-Production	Producer	
<b>Shooting Script</b> (clean copy)	Pre-Production	Producer	
<b>Any other contracts</b> (e.g composers, copyright materials such as stills of film clips)	Pre-Production	Producer	
<b>Diagram of workflow</b> , showing path from shoot to delivery)	Pre-Production	Producer	
<b>Release Forms</b>	Production	Producer	
<b>Progress Report Sheets</b> (one for each shooting day, as emailed to exec producer)	Production	Producer	
<b>Original Copies of all Receipts, Bank Account Statements and Financial Documents</b>	ALL PHASES (including Production)	Producer	
<b>Post-Production Script</b> (i.e the script of the film as it appears in its final form)	Post-Production	Producer	

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<b>List of front and end credits</b> exactly as they appear on the master of the completed film	Post-Production	Producer	
<b>Director</b>		(Production Department)	
<b>Script Breakdown / Marked-Up Script</b>	Pre-Production	Director	
<b>Shot List / List of Planned Setups / Floorplans</b>	Pre-Production	Director	
<b>Storyboard</b> (if used)	Pre-Production	Director	
<b>Casting lists and notes, notes on rehearsals</b> (if any)	Pre-Production	Director	
<b>DVD or QuickTime of Test Shoots</b>	Pre-Production	Director	
<b>1st AD (AD Department)</b>		(Production Department)	
<b>Shooting Script Breakdown</b>	Pre-Production	1st AD	
<b>Cast &amp; Crew Availability</b>	Pre-Production	1st AD	
<b>Movie Magic shooting schedule</b> (strip schedule)	Pre-Production	1st AD	
<b>Movie Magic shooting schedule</b> (full day-by-day version)	Pre-Production	1st AD	
<b>Movie Magic day out of days</b> (Cast)	Pre-Production	1st AD	
<b>Risk Assessments</b>	Pre-Production	1st AD	
<b>Call Sheets</b> (one for each shooting day, distributed to Cast & Crew)	Production	2nd AD	
<b>Script Supervisor</b>		(Continuity, Own Department)	
<b>Script Timing</b> (from pre-production period, broken down by scenes)	ALL PHASES	Script Supervisor	
<b>Continuity Breakdown</b> (as per Story Days & Scene Order)	Pre-Production	Script Supervisor	
<b>Continuity Synopsis</b>	Pre-Production	Script Supervisor	
<b>Rehearsal Timings</b>	Production	Script Supervisor	
<b>Shoot Timings</b>	Production	Script Supervisor	
<b>Marked-up / Lined Script for Editor - left and right pages</b> (if in doubt consult Pat P Miller's book)	Production	Script Supervisor	
<b>Daily Continuity Log Sheet</b> (with preferred takes marked)	Production	Script Supervisor	
<b>Daily Progress Report</b> (for Producer)	Production	Script Supervisor	
<b>Casting Director</b>			

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<b>Casting Schedule</b> (Research & Casting Prep, Auditions, Confirmation of Cast & Rehearsals)	Pre-Production	Casting Director	
<b>Creative Brief for Casting</b>	Pre-Production	Casting Director	
<b>Character Profiles</b>	Pre-Production	Casting Director	
<b>Talent Research</b>	Pre-Production	Casting Director + Casting Assistant(s)	
<b>Casting Call</b> (Long & Short Variants)	Pre-Production	Casting Director	
<b>Auditions Schedule</b>	Pre-Production	Casting Director + Casting Assistant(s)	
<b>Notes on casting meetings &amp; interviews</b>	Pre-Production	Casting Director	
<b>Actor's Agreements &amp; CVs, including actors' details</b> (addresses, email addresses, agents &c)	Pre-Production	Casting Director	
<b>Full List of Digital Film Deliverables sent to all actors and extras</b>	Post-Production	Casting Director	
<b>Director of Photography / Cinematographer</b>		(Camera & Lighting Department)	
<b>Reference Material</b>	Pre-Production	D.O.P	
• <b>Presentation / Moodboard</b>	Pre-Production	D.O.P	
• <b>Moodreel</b>	Pre-Production	D.O.P	
<b>Shot List / Storyboard</b>	Pre-Production	D.O.P	
<b>Camera Plan</b> (including Lighting plan and planned setups)	Pre-Production	Gaffer & D.O.P	
<b>List of Camera Equipment</b> (including lenses & filters)	Pre-Production	D.O.P	
<b>List of Lighting Equipment</b>	Pre-Production	Gaffer & D.O.P	
<b>List of Grip Equipment</b>	Pre-Production	Key Grip & D.O.P	
<b>List of Consumables used</b> (gels, black-wrap, trace &c)	Pre-Production	Camera Trainee / Camera Team	
<b>Notes on any stock or other camera tests</b> + DVD or QuickTime	Pre-Production	D.O.P	
<b>Digital / Negative Report Sheets</b>	Production	2nd AC (Clapper/Loader)	
<b>Notes of any special instructions for processing &amp;c.</b>	Production > Post	D.O.P	
<b>Copies of any correspondence with lab</b>	Post-Production	2nd AC (Clapper/Loader)	

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Location Manager		(Locations Department)	
Script Breakdown for Locations	Pre-Production	Location Manager	
Locations Budget	Pre-Production	Location Manager	
Plans - Schedule & Itinerary for Location Scouts	Pre-Production	Location Manager	
Location Scouts	Pre-Production	Location Manager	
<ul style="list-style-type: none"> <li>Location Scout: Stills</li> </ul>	Pre-Production	Location Manager	
<ul style="list-style-type: none"> <li>Location Scout: Test Footage (if any)</li> </ul>	Pre-Production	Location Manager	
<ul style="list-style-type: none"> <li>Location Scout: Notes</li> </ul>	Pre-Production	Location Manager	
Original Location Contracts, permissions & correspondence	Pre-Production	Location Manager	
Tech Recces	Pre-Production	Location Manager	
Movement Orders	Production	Location Manager	
Loc Dept Meetings and Notes	Pre-Production	Location Manager	
Sound Recordist		(Sound Department)	
Script Breakdown for Sound	Pre-Production	Sound Recordist	
Plan showing microphone positioning	Pre-Production	Sound Recordist	
Sound Equipment List	Pre-Production	Sound Recordist	
Sound Report Sheets	Production	Sound Recordist / 1st AS (Assistant Sound)	
Numbered list of wild tracks and atmospheres	Production	Sound Recordist	
Production Designer		(Art Department)	
Art Department Calendar (incl. Research, sourcing/buying, builds/set dressing/deconstruction and returns)	ALL PHASES	Production Designer + Art Director	
Script Breakdown for Art Department (+ story days)	Pre-Production	Production Designer	
<ul style="list-style-type: none"> <li>Breakdown for Set</li> </ul>	Pre-Production	Production Designer	
<ul style="list-style-type: none"> <li>Breakdown for Props</li> </ul>	Pre-Production	Production Designer	
<ul style="list-style-type: none"> <li>Breakdown for Wardrobe/Costume</li> </ul>	Pre-Production	Production Designer	
<ul style="list-style-type: none"> <li>Breakdown for Hair &amp; Make-Up</li> </ul>	Pre-Production	Production Designer	
Reference & Research Materials (i.e Moodboard, Moodreel etc)	Pre-Production	Production Designer + Art Director	

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<b>Drawings / Plans of Set</b>	Pre-Production	Production Designer + Art Director	
<b>Drawings / Photos of Costumes</b>	Pre-Production	Production Designer + Art Director	
<ul style="list-style-type: none"> <li><b>List of Sets (and constituent build materials/notes)</b></li> </ul>	Pre-Production	Production Designer + Art Director	
<ul style="list-style-type: none"> <li><b>List of Props (and constituent materials/notes)</b></li> </ul>	Pre-Production	Production Designer + Art Director	
<ul style="list-style-type: none"> <li><b>List of Wardrobe/Costume (and constituent materials/notes)</b></li> </ul>	Pre-Production	Production Designer + Art Director	
<ul style="list-style-type: none"> <li><b>List of Hair &amp; Make-Up (and constituent materials/notes)</b></li> </ul>	Pre-Production	Production Designer + Art Director	
<b>Design for front and end credits</b> (if appropriate)	Pre-Production	Production Designer	
<b>Editor</b>		(Post-Production Department)	
<b>Project Requirements Sheet</b>	Pre-Production	Producer + Editor	
<b>Post-Production Schedule</b> - in collaboration with producer	Pre-Production + revised in Post-Production	Editor	
<b>Workflow summary</b> - in collaboration with producer	Pre-Production	Editor	
<b>DIT Log Sheet</b>	Production	DIT (provided to Editor)	
<b>Rushes Log Sheet</b>	Post-Production	1st Assistant Editor or Edit Assistant > Editor	
<b>Marked up script</b> (L&R pages)	Post-Production	1st Assistant Editor or Edit Assistant > Editor	
<b>Editing notes</b>	Post-Production	Editor	
<b>Full Credits List</b>	Post-Production	Editor	
<b>Copy of record report sheet for final master</b>	Post-Production	Editor	
<b>Lab report</b> (you should receive this from lab with processed neg)	Post-Production	Editor	
<b>Screenshots and/or Backups of Editing Projects</b> <ul style="list-style-type: none"> <li>.AAFs</li> </ul>	Post-Production	Editor	
<b>List of Film Deliverables</b> (Masters, Versioning etc)	Post-Production	Editor	
<b>Sound Editor</b>		(Post-Production Department)	
<b>Script marked up for post-production sound</b>	Post-Production	Sound Editor	
<b>Test recordings and soundscapes</b>	Post-Production	Sound Editor	

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<b>List of sound FX to be sourced</b>	Post-Production	Sound Editor	
<b>Dubbing chart/screenshots of ProTools project</b>	Post-Production	Sound Editor	
<b>Music Cue Sheet</b> (listing all used with details of sources, performers, recordings and permissions granted).	Post-Production	Sound Editor	
<b>MARKETING &amp; DISTRIBUTION</b> (Required Assets and Associated Deliverables)			
<b>Distribution Strategy and Schedule</b>	Pre-Production	Producer	
<b>Marketing &amp; Distribution Budget</b> - to include:	Pre-Production	Producer	
<ul style="list-style-type: none"> <li><b>Festivals Budget</b> (Submission / Entry Fees, Courier/Shipping Fees, Cast &amp; Crew Travel, Accomodation, Other Fees).</li> </ul>	Pre-Production	Producer	
<ul style="list-style-type: none"> <li><b>Marketing Budget</b> (Poster Campaign, Social Media Ad/Promo Campaigns, other digital &amp; printed publicity, materials and fees).</li> </ul>	Pre-Production	Producer	
<b>Unit Stills Photography</b> - Raw Photos, Selected & Edited	Marketing & Distribution	Producer	
<b>BTS</b> (Behind-The-Scenes) <b>Unit Videography</b> (if any)	Marketing & Distribution	Producer	
<b>Cast Stills and Prior Work</b>	Marketing & Distribution	Producer	
<b>Director Pic, Bio and Prior Work</b>	Marketing & Distribution	Producer	
<b>IMDb Submission Updates</b>	Marketing & Distribution	Producer	
<b>Premiere Details</b> (incl. Venue Details, Venue Contacts, Invitation Contact List)	Marketing & Distribution	Producer	
<b>Poster</b> (in ONE-SHEET and QUAD format/dimensions + Social Media variants)	Marketing & Distribution	Producer	
<b>Electronic Press Kit (EPK)</b>	Marketing & Distribution	Producer	
<b>Press Articles &amp; Reviews</b>	Marketing & Distribution	Producer	
<b>Trailers &amp; Teasers</b>	Marketing & Distribution	Producer	
<b>Final Film Master for Online/VOD Release</b>	Marketing & Distribution	Producer	
<b>PORTFOLIO COMPLETION</b>			

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<b>PRODUCTION PORTFOLIO</b> including ALL paperwork from the various departments as listed above.	END OF PROJECT	Producer	
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**PORTFOLIO DELIVERY**

- As of January 1, 2020: All Studio Holder productions (including partnered productions with other production companies) must present their finished film production portfolio in the following format:
  - **X1 digitally-collated .PDF document** sent to [contact.studioholder@gmail.com](mailto:contact.studioholder@gmail.com) containing the following:
    - (All Pages in Portrait orientation and A4)
    - COVER SHEET PAGE must be the Studio Holder **Project Requirements Sheet**
    - This is immediately followed by the **Project Portfolio Checklist** containing every document and asset required. Reasons for not including an item from the checklist must be duly noted in the appendices below.
  - If the .PDF is too large to send in an email, please send to the above address using [www.filemail.com](http://www.filemail.com)
  - **X1 printed portfolio** sent to Studio Holder's production office for long-term archival.
    - (All Pages printed single-sided, in portrait orientation, on A4 paper)

**APPENDICES:**

Please write notes here on the portfolio's state of delivery (i.e if any items could not be completed).

**ABOUT THIS CHECKLIST:**

This independently-published checklist is the culmination of research and continuing professional development (CPD) as a result of contact made to, and between, various independent filmmakers, students at leading UK film schools and specialist institutions teaching film production, film school lecturers and freelancers.

Studio Holder acknowledges that this is not the definitive checklist for working in high-end drama / projects (*backed and supported by major motion picture studios or for any of the major broadcasters in the UK*), but this checklist is a strong basis for clear, professional and up-to-date production practice which freelancers and independent filmmakers should utilise in order to achieve best production practices.

Members Consulted include (as of academic year 2019-2020 *and at the time of this checklist's publication*): Students at The National Film & Television School (NFTS), Westminster Film School (University of Westminster), Ravensbourne, Kings' College London.

Testimonials about this resource are available.

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