



Model System Researcher's Guide to Video Production

Purpose	This guide provides tips to Model System researchers who plan to develop videos. These guidelines are based on best practices and experiences of the Model Systems Knowledge Translation Center (MSKTC) in producing hot-topic module videos.
Format	This tool outlines a four-stage process to video production, including conceptualizing the video, assembling the team to produce the video, and technical considerations.
Audience	This tool is designed for Model Systems researchers and staff to work with video production teams or to produce videos using in-house expertise.
Resources	A sample blocking script and a sample permission and release form appear at the end of this document. A link to the MSKTC Writing and Testing Plain Language tool is included for guidance on writing clear and effective video scripts.

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Introduction

Video refers to the use of visually based products to meet a wide variety of communication, training, reporting, and documentary needs. Video can be a powerful tool to help communicate, inform, and instruct. It is a ubiquitous communication medium that is widely available, grows exponentially each year, and provides easy-to-access platforms. Video is a good option if there is something visual to show, a clear message, and someone engaging to tell it. Video projects can range in terms of size and complexity. Video can be produced with custom graphics, photography, and animation. To review a glossary of terms used throughout this document, see https://en.wikipedia.org/wiki/Glossary_of_video_terms. General uses for video include the following:

- Promotions
- Product-based demonstrations
- Training
- Research

General types of videos include the following:

- Panel discussions
- Individual interviews
- Documentaries (e.g., community, schools, conferences, events, seminars)
- Demonstrations
- TED Talks
- Interactive videos
- “Live” video streaming

Proper planning is essential for video production. Three factors—time, quality, and cost—will determine what is possible.

Getting Started

First, determine whether video really is the best format for you to reach your Model System's goals because video production often can be costly and time intensive. For instance, if the subject is explaining steps in a process or trying to convey technical or complicated information without anything visual to show, it may be better to have a written product. If clear statistics can tell a story and don't need much background or explanation, perhaps an infographic would be better than a video.

Once you have decided that a video is the best method to use, communicate and plan early. Identify the goal of the video and develop a vision for the video's content and appearance. If the video involves participants discussing topics that the video covers, develop protocols with interview questions for the participants. Last-minute requests and deadlines often are the reason that video projects cannot be done internally or drive up the cost for contractors/producers.

To start, consider some of the following key questions:

- What is the main objective for your video?
- How does your video fit into a larger strategy?
- Who is your audience?
- What ideas need to be in the video?
- What key takeaways do you want viewers to remember?
- Who should appear in the video?
 - What specific content should they share?
 - Are all speakers both knowledgeable and charismatic on video?
- Is there a call to action? Do you want the viewer to do something specific after watching the video?
- Do you have specifications about which footage or visuals should accompany those ideas (whether from interviews or a voice-over)?
- Do you have or want any graphics, photos, or other visuals in the video?
- What is your ideal video length? How many videos do you need?
- Where will the video appear?
- What is your deadline?

Stages of the Video Production Process



Video Producer

The Model System center video production team should consider engaging professional video producers to ensure high-quality products. The video producer may be external to the Model

System center, or internal if sufficient expertise and technology are available to enable high-quality video production. When working with a video contractor, it is critical to know what you want for the final video and maintain open communication. Understand the production process and be sure the producer comprehends the work of your Model System center and the specific requirements of the project.

- Clarify the overall goals of the video by asking yourself and your team the key questions.
- Review work samples from potential producers and see if their style matches what you want.
- Choose a producer that fits your needs. Then, use the tips that follow to make the process smooth and productive.

Identify Participants

For videos that involve interviews or other speaking roles, the Model System center video production team should conduct an in-person or telephone screen to identify those who are best suited to participate or make a recommendation about the candidate(s) who should participate.

Following are key traits to look for in participants. Please modify them based on your visions and goals for the videos. The candidates should be:

- Willing to answer questions about the topic area;
- Willing to be filmed;
- Willing to sign a release form allowing the MSKTC and Model System center to use footage and still photos; and
- Diverse (in age, racial/ethnicity, gender, socioeconomic status, time of injury).
- In addition, ideal candidates with a speaking role should be:
 - Friendly/likeable;
 - Have an interesting story to tell;
 - Have a visually interesting hobby, which may help make the story-based videos more engaging;
 - Gregarious; and
 - Articulate.

Preproduction

Before filming occurs, consult with the production team on key elements, such as content, budget, and logistics. Develop a shared creative vision for the project and a clear understanding of roles. Follow these key steps:

- **Get to Know Each Other's Vision.** Set up some time to talk with the videographer about the video project. Discuss the scope, potential approaches, ballpark budget, and what both of you envision.
- **Clarify Roles.** Video projects can be complex, so it is important to decide on roles and set expectations about them. You will need to identify key personnel and outline their responsibilities. You will need a video production team that typically includes a producer and a videographer. The producer is in charge of the managerial responsibilities that guide the video production process. The videographer is in charge of equipment and filming but also may edit the video later.

In addition, think through these questions:

- Is this a one-person project or will you need a larger video production team?
- Do you want the video production team to provide raw footage (unedited video) or only the final product?
- Do you want the video production team to write a script, come up with questions to ask, or provide a storyboard or blocking script (assuming the production team member knows the subject matter of the video)? Or would you or someone from your Model System center prefer to do this task?
- Will the video production team be doing any interviewing, or do you prefer that someone from your Model System center does the interviewing?
- Does the video need to be shot in a certain way, such as at a specific video frame rate (the most common ones are 24p and 30p)?

Content

- Decide on the key messages for the video.
- Decide whether to communicate that content through a script or interview questions.
- Decide who will deliver the content through either voice-over or interview(s).

- Decide on potential footage, b-roll (video of scenes and settings that support the audio narrative), graphics or other imagery, and animation. Think about what will be most visually appealing and help bring the story to life. For example, if you want an infographic, decide on what key data or statistics should be included in the infographic.

For instructional videos, develop scripts before the videos are produced. Consider the following:

- It is important to use plain language when developing scripts. The MSKTC has developed a knowledge translation (KT) tool on how to write in plain language: https://msktc.org/Knowledge_Translation. The MSKTC provides plain language editing support to Model System centers.
- To ensure objectivity, please make sure the scripts are free from endorsing and promoting any commercial products.
- If videos involve participants discussing topics that the videos cover, develop protocols with interview questions for the participants (see Appendix A for an example of a block script planning tool, which can help you plan your video, including the script and visuals that will appear in the video).

Materials

The producer should provide some written items to help with preparation, which may include the following:

- A basic overview or plan for the video project
- A blocking script that details the audio content or narration and the accompanying footage or visuals
- A shot list
- Interview questions or a script. If you are using a script, make sure that anybody who needs to review it has thoroughly done so before any filming is done. Reviewing the script will help avoid any unnecessary retakes, which will increase the cost.

Budget

Once you have a plan for the project, the producer should provide a detailed budget that includes specific costs and terms. The producer may break down the proposed budget in several ways, but the common items include the number of hours for filming and editing, producing, scripting, recording voice-over, and interview transcription; music (if applicable); motion graphics (if applicable); and travel costs.

- Costs vary considerably depending on the complexity of your video project, including the length of your video, how many people you will interview, how many scenes you want, and the location(s) for the shoot. Graphics also can be costly to develop.
- Be sure to include potential costs for additional editing, especially if more edits are needed after the review process.
- If contractors will be hired to produce the video, they may charge additional fees if shoots or filming schedules are delayed or cancelled. Make sure to clarify the costs associated with any potential changes to the schedule or other incidentals before production begins.

Logistics and Technical Decisions

Designate someone from your Model System center to help with logistics. Why is this important?

- Video production can include complicated logistics.
- It is helpful to have a person from your Model System center who knows the people and content to help with scouting locations, arranging interview schedules, reserving conference rooms or a studio, and exploring what activities to film.
- Decide on a production process and schedule together: Discuss deadlines and what works best for providing input and review. Recognize that certain reviewers, especially senior-level managers, may have challenges in completing quick reviews because of their busy schedules.
- Make sure to realistically factor in feedback time when working with contractors, who may not be aware of potential delays. Some questions to ask include the following:
 - Do you want the contracted production team to provide a blocking script or a written overview with the concepts, audio, and visuals they plan to use? Or would you prefer to see a rough cut, or first draft, of the video?
 - How many reviews do you want? Keep in mind that too many reviewers can impede the schedule. However, key stakeholders should be included in the review process.
- Secure cooperation with:
 - The hosting organization.
 - Communications and other offices that require clearance for video projects.
- Provide options for filming dates.

- Confirm filming dates with all participants and the Model System center video production team.
- When appropriate, make arrangements for filming at different locations for action activities (e.g., a person with a spinal cord injury, traumatic brain injury, or burn injury may be filmed at home; persons with other injuries may be filmed talking to a therapist or engaging in a physical fitness or health activity; professionals may be filmed in different areas throughout the workplace).
 - Please note that filming in some locations may require special permission. It is important to secure permission once dates and venues are confirmed.
- Reserve filming rooms within your facility.
- Check with your institution about what consent forms and permission and release forms are required for participants of the video production.
 - If your Model System center wants to use raw footage, please check with your institution on its consent forms.
 - If you plan to brand the videos as Model System and MSKTC resources, please include appropriate language from the MSKTC media release form in Appendix B on the consent forms. Because each Model System center's Institutional Review Board (IRB) regulations may vary, please discuss with your IRB and the MSKTC about the specific language needed on the release form.

It is a good practice to obtain signatures and collect the signed consent forms and/or permission and release forms following your institution's requirement before filming to confirm participation (see Appendix B for a sample form).

The Shoot

With all the preproduction logistics decided, the next stage is the actual production (also known as the shoot).

- The producer should send out relevant details, such as location and filming schedule, especially if the shoot has multiple interviews and/or activities.
- Include sufficient time for a videographer to set up and break down the equipment, which may take between 30 minutes and an hour or more for each shoot.
- Decide on who will be present at the filming and interviewing.
- Assign a point of contact to the filming crew each day to answer questions and escort the crew between filming locations.

- Arrange for a professional makeup artist and/or hair stylist (this could be done by the producer) to be on-site for the shoot.
- Make sure you collect the release forms (see Appendix B for a sample that can be edited).
- When answering interview questions, participants should not endorse or promote any commercial products; also, no commercial logos should be in the background.
- Trust the videographer to use his or her skills and artistic vision to capture the best footage.

Preparing Interviewees

In video, subjects express themselves through not only words but also body language, gestures, and facial expressions. What they say will be remembered best if it is delivered in a natural, energetic, and sincere way. Remember that they know their work better than anyone else, so have them relax and enjoy this opportunity to share their knowledge and insight. If they are passionate and enthusiastic about the topic, chances are that viewers also will be enthusiastic.

- **Prepare for the Interview but Don't Memorize.** Subjects want to be comfortable with their topic and key points, but an overly rehearsed interview often will appear stiff and distant. Instead of rehearsing or memorizing, reflect on what viewers need to remember. Think about a key point, statistic, or one-liner that subjects want to emphasize.
 - Interview questions will be determined well in advance of the video session. Be sure to finalize your bullet points with the producer several days before filming is scheduled.
 - Avoid unnecessary detail. Rather, think about key points to deliver your message simply and succinctly. Think about the main ideas, such as the following:
 - » Why is this issue so important now?
 - » Why should people care?
 - » What information do viewers need to understand?
 - » What are the main findings?
 - » What is the main takeaway message?
- **Check Facts and Remember to Cite Any Research or Statistics.** It is good to have a statistic or two prepared that supports the message. If citing research or data, always prepare how to cite it and try to do so in a clear, understandable way. Make sure that facts are verifiable and make it clear when something is an opinion.

Delivering Your Message

Subjects can use the following tips to help them deliver their message:

- **Sit Up Straight.** Maintain good posture and don't slouch. If you do not feel completely comfortable in the interview chair, let the videographer know before shooting begins.
- **Focus.** Think of the interview as a conversation and look directly at the interviewer.
- **Speak Clearly and Simply.** Imagine that you are explaining something to a friend, family member, or stranger who does not know the topic. Talk in simple terms and avoid jargon, long sentences, and complex terms.
- **Explain Yourself.** Explain a concept or technical term when you first introduce it.
- **Avoid Acronyms.** Don't use acronyms or initialisms the first time you mention them; rather, spell out the concept and explain it the first time. After that, use the acronym sparingly and primarily for things that are commonly referred to by the acronym. For instance, say "spinal cord injury" instead of "SCI" or the "National Institute on Disability, Independent Living, and Rehabilitation Research" instead of "NIDILRR" the first time you use it.
- **Restate Part of the Question in Your Answer.** Most often, interview questions will be edited out of a video, so it is important that you set up your answer. For instance, if the interviewer asks, "What are the most important qualities in a good leader?," you should say, "The most important qualities in a good leader are vision and understanding" instead of just "vision and understanding."
- **Avoid Common Phrases.** Don't start sentences with "so," "as I was saying," or "as we discussed." Such phrases will be cut out in the editing process. Instead, simply say what you want to say.
- **Take a Break.** Feel free to pause and catch your breath. It's often helpful to relax for a moment and get your thoughts together.
- **Stay Hydrated.** Take a sip of water; it will clear your mouth and help you project better.
- **Feel Free to Repeat Yourself or Add Additional Context.** If you are not comfortable with an answer or statement that you made, feel free to say it again. Also, let the interviewer know if there's something you want to add or express in a different way.
- **Humanize the Issue.** Tell viewers why the issue matters and give them a sense of how it affects real people. People often respond best to emotion and other people.

- **Show Your Enthusiasm.** Feel free to move your hands and gesture as you would normally do in conversation. Avoid speaking in a monotone. By projecting lots of energy, you will draw viewers into the topic. Energy is contagious, so use it!

Looking Good on Camera

Video often can be up close and personal. As such, subjects want to look their best. Dab powder on shiny skin, for instance, and adjust or remove anything visually distracting. Some lipstick and basic makeup can make for a more polished look.

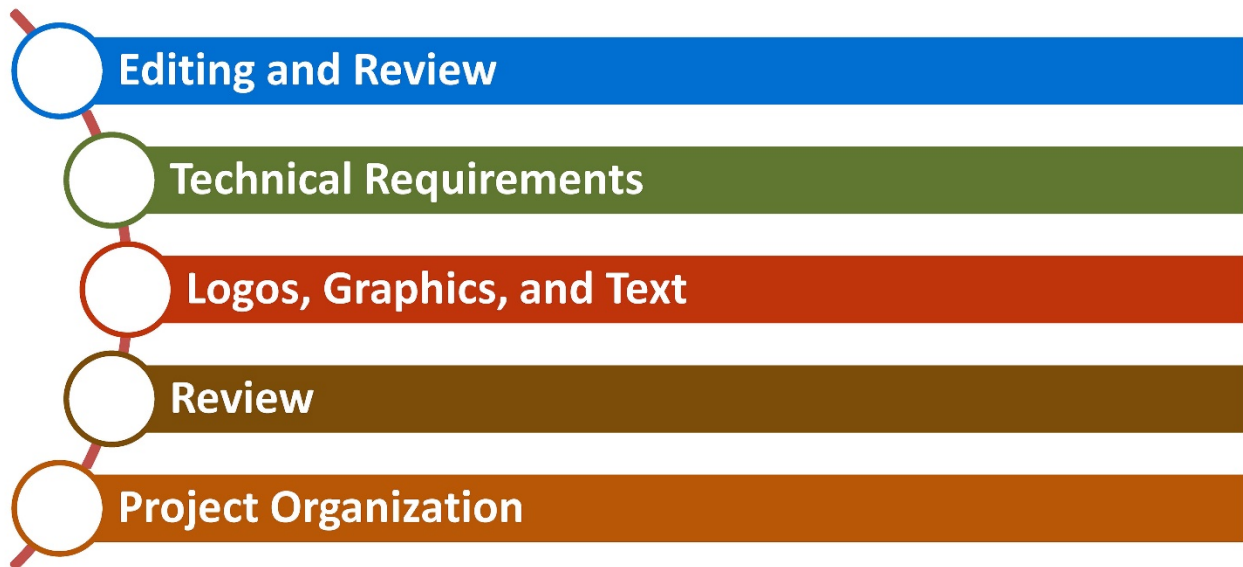
For the audio, subjects will most likely need to have a small lavalier microphone taped inside of their jacket, coat, shirt, or blouse. This process can get personal because the wire may need to be snaked down the front or back of a shirt or blouse to hide the wire and the microphone. Subjects should be prepared to help the videographer get the microphone positioned properly, so the best audio quality can be captured.

Subjects should wear something comfortable and flattering that expresses their personal style. A good option might be something they would normally wear to work. But feel free to ask subjects to bring a couple of options to see what looks best on camera. The following are some general pointers for subjects:

- **Wear This**
 - Wear solid colors, pastel colors, or soft shades.
 - Blues, greens, grays, and earth tones often work well with video.
- **Don't Wear This**
 - Avoid loud prints, fine lines, and small patterns (e.g., gingham). For technical reasons, such prints, lines, and patterns can cause a shimmer of light that is recorded by the camera but distracting to the viewer.
 - Avoid clothing that might pucker, slip, or need to be constantly adjusted. Because recordings are done in multiple takes, it is important that clothing look uniform and unchanged from take to take.
 - Avoid high-contrast colors like black and white. Such colors may blend into backgrounds too easily and will create a strange effect (e.g., a head floating in space).

Avoid large or noisy pieces of jewelry (e.g., bracelets that jingle). The noise caused by jewelry clinking will be picked up by the microphone.

Postproduction



Editing and Review

After shooting the video, the next step for the video production team is to review all the video and begin excerpting the best versions of the clips and takes that are to be matched with the blocking script (essentially the blueprint for the video). The production team usually has a way of providing video to stakeholders for review. Ask in advance what process the production team will use so that reviewers are prepared.

Technical Requirements

- Will you need closed captions created for your video (which will help meet Section 508 of the Rehabilitation Act)? Closed captioning usually involves using an online service (e.g., Rev.com) to generate the caption files (which can be edited and cleaned up). The resulting file will have the extension .SRT, which is a file format that YouTube, Vimeo, and other video-hosting services can use to provide closed captions.
- Will you need the video translated into other languages? Similar to closed captions, online services (e.g., Rev.com) can create other language caption files. Although the audio will still be in English, viewers can turn on captions in other languages as appropriate.
- Decide how the final video will be delivered. For instance, video could be on an external hard drive or thumb drive, or transmitted through a platform such as Vimeo. Also, determine with the producer whether you want only the final video or all raw video that

was shot (keeping in mind that raw video could take up hundreds if not thousands of gigabytes of storage and may not be useful to you anyway).

Logos, Graphics, and Text

- Provide the producer with any needed logos, graphics, and text, including proper titles.
- Provide the producer with correct titles for anyone who appears in the video. Do not include acronyms for titles.

Review Process

- Designate a lead reviewer. It is confusing for a producer to receive different (and perhaps conflicting) editing requests from multiple people. Designate a point person to help guide the review process or make final decisions if there are conflicting views.
- In providing feedback on the video, think through the following questions:
 - What is your general impression of the video?
 - What sections are most effective? Which moments are least effective? What footage could be cut?
 - Is the video message clear? If not, how could it be improved?
 - Are the footage and imagery generally working?
 - Is the content accurate?
- Make sure that anyone interviewed is included in the final round of the review process. It is an important courtesy for people to see how they are featured before the video is published.
- ***If the video will be branded as a Model System and MSKTC resource, please follow the additional review and consumer testing procedures described in the Model System Video Development and Branding Procedures document.***

Video Project Organization and Footage

Organization is critical for video projects, so request that the contractor organize the video project in a clear, understandable way. Such organization should include bins or folders with the project, footage, audio, graphics, photos, output, and relevant documents (e.g., signed release forms, a blocking script, or storyboards). Make sure that you receive all the footage and other assets at the end of a project that you agreed to up front.

Hosting Videos

YouTube

Videos can be hosted and made available in a variety of ways. The most popular host is YouTube (which also requires a Google account). Because YouTube is the most popular video-hosting platform, videos posted and properly keyworded can be found easily by any viewer (including casual viewers who may not be aware of your organization). Posting videos to YouTube is free; however, such videos will contain ads alongside your video (which may not be desirable). If you have (or will set up) an organizational YouTube account, you may want to pay the fee to eliminate ads from appearing next to any videos in your YouTube channel.

vimeo

Another video-hosting option is Vimeo. Vimeo does not rely on ad revenue to support the platform, so it charges an annual fee (which varies depending on how much video you need to upload and store). Vimeo also supports higher quality video formats. The downside to using Vimeo is that it is not a platform that people usually use to browse videos. If your dissemination strategy relies on casual viewers, Vimeo won't be the best platform. If, however, your dissemination strategy involves other methods (e.g., a link on your website, distribution via a mailing list), then Vimeo might be a good option.

Conclusion

Developing a high-quality, professional video requires careful planning and coordination. Working closely with a video producer can help ensure that your vision for the video will be realized and the final video comes in on budget. Communication is key along every step of the way. By being clear what you want in the end and keeping an open dialogue every step of the way, your final video will be one that meets your goals.

Appendix A—Sample Blocking Script

Key: T = text on screen; I = person(s) on screen; G = group on screen; B = b-roll; V = visual on screen

#	Time	Type	Scene Title	Video/Scene Notes	Narrator	Script
1	5 sec.	T	Intro	Fade-in video title with b-roll of classroom in background with background music.	N/A	N/A
2	1 min.	B, V	What Is MSKTC?	Start with b-roll video and voice-over and transition to on-screen graphic with voice-over describing what MSKTC is.	TBD [Narrator]	MSKTC is. . .
3	45 sec.	V	Etc.	Etc.	Etc.	Etc.

Appendix B—Sample Permission and Release Form

The Model Systems Knowledge Translation Center (MSKTC) supports the Model System Centers Program in meeting the needs of individuals with spinal cord injury, traumatic brain injury, and burn injury. The MSKTC is funded by the National Institute on Disability, Independent Living, and Rehabilitation Research (NIDILRR) under grant number 90DP0012.

In fulfilling the above mission, the MSKTC photographs, audiotapes, videotapes, interviews, and creates transcripts of various people and events of interest to its stakeholders. The MSKTC seeks permission for capture and use of participants' likenesses and words as the following text suggests:

I assign and grant to the Model Systems Knowledge Translation Center the unlimited right and permission to capture, use, copyright, reproduce, and publish any photographs, film, videotapes, electronic representations, sound recordings, and written and/or drawn documents that contain my likeness, my contributed comments, or work conducted with the MSKTC. I understand that the MSKTC will only use these materials for the purpose of developing MSKTC and Model System Centers Program products.

Name (please print): _____

Model System Center (if applicable): _____

By signing below, I am indicating that I have read and understand the above information and agree to its terms in full.

Signed _____ Date _____

More Information

If you have questions about this project or your participation, please contact Dr. Xinsheng "Cindy" Cai (ccai@air.org, 202-403-6929).