

# UAB School of Medicine Videography Guide

## Considerations Before You Begin

Prior to filming there are several considerations you should take into account. Below is a list that can help guide a conversation with the key stakeholders involved in the project. A preliminary meeting to talk through these items is advised.

- **Define the communication goals for the end product.** Consider your toolkit, alternative media, and prior statistics for similar projects. Is video the best/only choice?
- **Identify the specific audience.** Who are they, and how will they hear or see the message? UAB Medicine Marketing is most likely to undertake videos with a focus on patients and the referring physician community. SOM is most likely to focus on student or faculty recruitment.
- **Develop a preliminary communication plan.** Think through where the video will be housed and how it will be promoted.
- **Determine the available budget and specify the source of funding.** For a professionally made video, cost can be estimated at \$1,000 per finished minute. The funding source will help determine subsequent protocols for permissions. Any project funded by a University account requires pre-approval through the UAB Toolkit's Marketing Approval Process.
- **Identify the key stakeholders.** In addition to the unit that has initiated the request (your "client"), other communicators will need to be looped in. The funding source and audience will guide you to the teams who need to be aware and involved in video projects. *For patient-facing videos, UAB Medicine Marketing must be involved.* Notify these teams early, and keep them updated along the way as needed.
- **Specify your timeline.** Timelines may vary based on specific considerations. Plan on 10-45+ working days, depending on availability, cooperation, and approvals.
- **Consider your project partners.** Videos in partnership with external agencies may require legal consultation. Discuss this with department leaders and UAB legal prior to moving forward. Video ownership, production, and housing are things to be discussed.
- **Define success of the video project.** List the statistics and ROI metrics you will report back to the team, and after what allotment of time.

## Project Kick-Off

For professional videos in which you intend to hire a vendor, certain steps must be taken to obtain permission to film and ensure a proper contract is created to work with and pay the vendor. Below is a step-by-step guide to help you along the way.

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1. Review the UAB approved vendor list and select one you wish to work with. If your desired vendor is not currently listed, you can discuss options with Andrea Reiber. Before work begins, the vendor must be added to iSupplier.
2. Set up an initial discovery meeting between the vendor and “client” (and potentially other key stakeholders in the organization).
3. Host a discovery meeting to develop the scope of the project. Use the above “Considerations” section to help guide the meeting. Ultimately you want everyone to walk away with these key items agreed upon:
  - **Main purpose/theme of video.** Ensure the videographer knows what brand toolkit to use and any creative elements you want. Determine whether there will be interviews, if b-roll is needed, etc.
  - **Target audience.** Scripting, shots, tone should all cater to the target audience.
  - **Filming time and location list.** Be sure you understand how many days the videographer needs to capture the footage and where these filmings are going to take place. Consider the foot traffic, potential for PHI exposure, noise levels, lighting, etc. Consider doing a walkthrough of potential locations at the time of day you plan to film.
  - **Talent list** of who will appear in the video.
  - **Timeline** of project.

## Protocols and Notifications

After doing the proper prep work for your video project, the next step is to begin working through the pre-approvals and permissions to actually begin your filming. Below are the steps as defined by UAB and UAB Medicine. *\*Note: if you are working with UAB Medicine, they will assist you through this process and some steps may not be necessary.*

1. Request a quote from the vendor based on the scope of the project. After the kickoff meeting, the vendor should have what they need to provide you with a PDF quote for the project.
2. Get the quote approved by the “client,” with understanding that a formal Marketing Approval Process will be required for project launch. Ensure you are clear on how this project will be paid for and who your contact is to process payment after completion of the project.
3. Complete a [Creative Services Order form](#) and send it to the vendor for signature.
4. If the project will be funded by a University account, complete the [Marketing Approval Process \(MAP\)](#) online form. Attach the completed Creative Services Order form and the vendor quote. The MAP online form is a UA System requirement and cannot be circumvented for any reason. If

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the video involves patient-facing content, inform UAB Medicine of the project.

5. University Relations will review the MAP request. Either more information about the project will be requested, or you will receive email authorizing you to start the project.
6. Save the signed UAB vendor contract in your files.

## Lights, Camera, Action!

Once you are approved to begin filming and you have secured the budget needed, you can begin to think about the logistics of filming on campus. Below are some best practices.

1. **Work with the vendor and “talent” to schedule filming days.** Ensure the vendor remains in the loop and understands what will be filmed when so that all proper equipment is brought on film day.
2. **Alert various campus stakeholders of the film days via email.** Below is a list of those you should contact:
  - University Relations representative with the location, time, and date.
  - For filming in the operating/procedure rooms, contact VP of Surgery Administration (Brenda Carlisle - Main Hospital; Norm Weller - Highlands; Amy Beard - CEH). Ensure they know what you intend to film and when/where. Ask for an operating room escort to help with compliance for film day.
  - When filming in ambulatory space, notify the clinic/nurse managers as called for by the script and copy Billy Connolley and Patricia Pritchett. Provide details for filming and arrange for an escort or help as needed.
3. **Carefully plan for compliance to be a key consideration of the entire filming process.** Utilize the medical and/or research experts on scene to direct safety and security protocols. If you have compliance concerns about the shoot, elevate them to UAB Medicine Marketing or your assigned compliance officer.
4. **Complete day-of filming prep.** Each filming day will be different, but below are some things to consider and plan to do.
  - Plan to escort the videographer/crew and coordinate/direct the shoot.
  - Complete a [“call sheet”](#) with talent contact info and times for filming.
  - Print and bring individual or multi-line media release forms to cover all identifiable persons. Multi-line media release forms are only approved for employee use.
  - If patients will be involved, ensure the patient video consent form is completed **prior to filming**. Employ the clinic staff/faculty to help with this as needed.

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- Consider parking arrangements for videographers. Email William Bryars (TKC & Whitaker Building) or Stan Cordrey (hospital parking) for loading/parking accommodations.
- Consider building access; does your badge get you into all planned locations?
- **IMPORTANT:** For infection prevention, evaluate the health status and personal protective equipment of your vendors and all “talent” involved. Does the vendor have scrubs/PPE? Vendors and talent need to complete the [UAB Healthcheck](#) (at least verbally), and wear their provided screening sticker. Follow all current safety protocols such as masking, physical distancing, and frequent handwashing.

## Post-filming Checklist

After filming, several rounds of edits and approvals will likely occur. Liaise with your videographer and key stakeholders to ensure this process moves as smoothly as possible. Some things to consider are listed below:

- Scan any consent forms collected and store in secure locations such as department servers. In all patient facing videos, UAB Medicine Marketing and University Relations want a scanned copy of the consent forms emailed to them.
  - *Tip: At the top of the consent form, write the name of the video that they are in and perhaps a description of the person. Also, name the file appropriately. This helps identify individual participants after time has passed. File the consent form in multiple areas.*
- Consider who needs to approve your draft video: “client(s),” stakeholders, compliance leadership, brand managers. For any video containing Operating Room footage, Brenda Carlisle must be a part of the approval process.
- Begin executing your communication plan with the final video file.
- Remember to save the final, high-resolution video file to a secure location for future reference.
- Check back on video performance statistics at planned intervals.