

A Fresh 2025 Introduction to Documentary Budgeting and Scheduling (With New Templates!)

By Robert Bahar

Note: This article fully updates the older Documentary articles “A (Revised!) Introduction to Documentary Budgeting”(2019) and “Don’t Fudge on Your Budget”(2008). A free, fully updated Google Sheets budget/schedule template accompanies this article and can be accessed [here](#). All dollar amounts in this article and in the budget template are in USD (U.S. dollars).

In 2008 and 2019, in *Documentary* magazine, I published documentary budgeting articles and budget templates that have been read and used widely all over the world. I’m thrilled to return with a big update that includes: (1) a fully revised budget template that has been updated for 4K and streamer deliveries; (2) for the first time, a schedule template; (3) numerous new budget line items related to accessibility for film crews, participants, and audiences; and (4) a bigger reorganization to make the template more flexible and universal. The article has also been expanded and extensively rewritten.

Before diving in, it is important to acknowledge that filmmakers come to budgeting from many different professional experience levels, documentary traditions, film cultures, and degrees of funding access, as well as from diverse communities, lived experiences, and geographies. Budgeting perspectives vary greatly, and the point of offering a template is not to suggest that one size fits all—it does not!—but to offer a versatile tool that can be adapted for as many uses as possible.

This article is written for both producers and directors. Although budgeting and scheduling are traditionally handled by producers, many documentaries are initiated by a single filmmaker who is, by necessity or desire, both director and producer. And even across a wide range of documentaries with bigger teams, the director will likely handle some producing functions at some point and will certainly participate in decisions that hinge on budget and schedule.

Now let's begin!

[PART I. Why You Need a Budget and Schedule](#)

[PART II. The Triangle of Quality: Your Film, Its Budget, and Its Schedule](#)

[PART III. Preparing for Budgeting: Project Assumptions and the “Finish Line”](#)

[PART IV. Budgets and the Uncertainty of Fundraising](#)

[PART V. Documentary Budget Levels at Pitch Forums and Beyond](#)

[PART VI. Accessibility](#)

[PART VII. The Schedule](#)

[PART VIII. The Budget: Line by Line](#)

[PART IX. Finance Plan](#)

PART I. Why You Need a Budget and Schedule

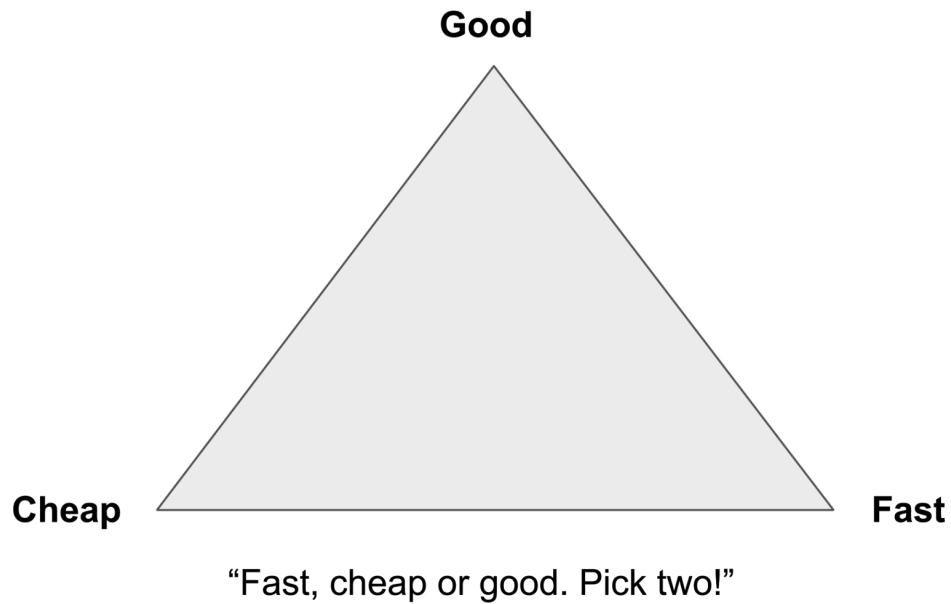
As documentary filmmakers, we may yearn to immerse ourselves solely in the creative process: to pursue real people, stories, issues, or ideas that fascinate us, and to find creative, cinematic ways to bring them to the screen. Yet it quickly becomes clear that there are crews to be hired, workflows to suss out, and money to be raised and spent. Like it or not, we are in “show business,” and success in making documentaries is partly “show” (the film and filmmaking itself) and partly “business” (budgeting, scheduling, financing, marketing, distribution, and impact).

This is perhaps more obvious for certain kinds of projects, such as a big documentary financed by a global streaming platform or a co-production among established partners. But more delicate, personal, “independent” documentaries are show business too. A passion project made by a lone filmmaker in a small town needs its own bespoke production plan. So, too, does the emerging filmmaker who has cultivated access to an amazing story, working with borrowed equipment and slowly honing filmmaking skills along the way. For these slow-cooked projects, budgets and schedules may need to be revised dozens of times as they evolve, but it is rare to get to completion without them.

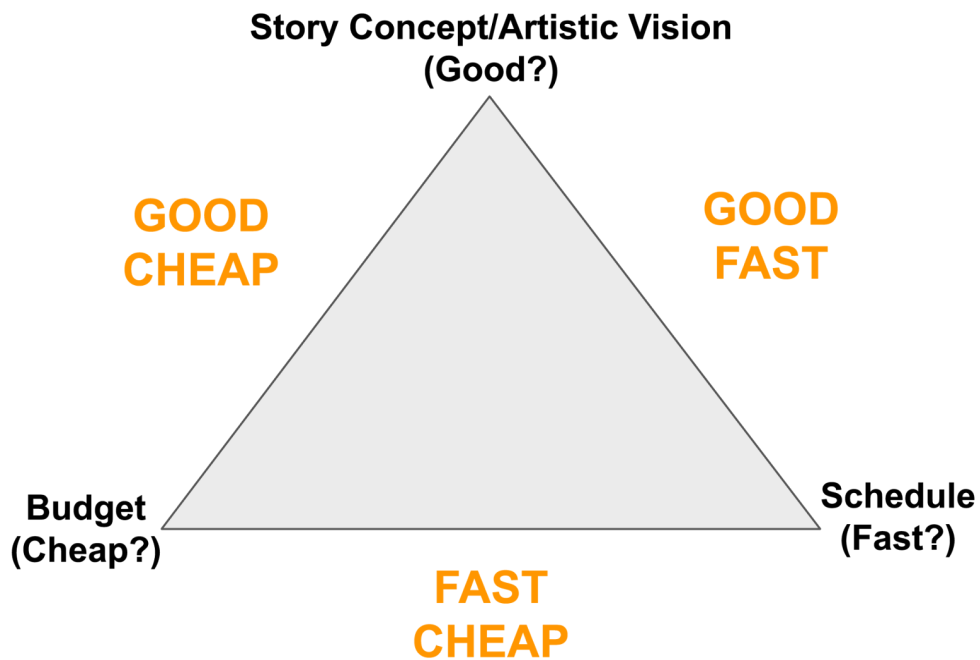
For every documentary, then, well-thought out, realistic budgets and schedules offer an invaluable map of the filmmaking process and are essential to managing it. They also help potential funders or partners evaluate a project’s viability and track its progress.

PART II. The Triangle of Quality: Your Film, Its Budget, and Its Schedule

To understand just how intertwined a film is with its budget and schedule, there’s an adage that I love called the “Triangle of Quality”: “Fast, cheap, or good—pick two!” This means that if you want something cheap and fast, it’s probably not going to be good. If you want something fast and good, it’s not going to be cheap. Want good and cheap? Go slow. This can be expressed visually:



For film production, I’d call the “corners” (technically, vertices) of this triangle (a) the story concept/artistic vision, (b) the schedule, and (c) the budget. Changes to any “corner” of this triangle will always affect the other two.



The Triangle of Quality helps us see that before you can make a budget or schedule, you must first articulate your story concept and artistic vision. Are you making a longitudinal vérité film over many years? A personal or poetic essay? An urgent investigation? An all-archival film or a docufiction hybrid? As your concept crystallizes, you'll need a schedule. No budget can exist without a schedule, and every schedule change will affect the budget.

For some projects, the tradeoffs between story/vision, budget, and schedule will be clear. A high-profile film scheduled to premiere on the anniversary of a major historical event will likely need to be of high quality and require a fast schedule, so it will probably have a high budget. In contrast, an emerging filmmaker with less access to funding or collaborators may need to rely on time as their secret weapon. Most projects are a mix, and understanding this triangle will help you keep things in balance.

PART III. Preparing for Budgeting: Project Assumptions and the “Finish Line”

To prepare for budgeting and scheduling, list the key project assumptions. How long will the film be? What formats will you shoot and deliver on? Where will you shoot?

Approximately how many shoot days are planned, and across what length of time? Who are your key crew such as producer, director, DP, and editor? How much archive, animation, or other kinds of material will be needed? What is the expected edit period and the desired time for color grading and sound mix? Are there external schedule constraints or a rigid delivery date? As we will see later, several of these assumptions are so important that they will be written at the very top of the budget. (This also serves as a warning: if these assumptions change, the schedule and budget will too!)

It's worth noting that many projects start with an assumption about the budget level itself. If you know that you're making a nights-and-weekends project and plan to self-finance \$20K of hard costs, or that you're working with a contractually fixed \$425K, or that

you'll have \$1.5 million from a global platform, those are important assumptions for budgeting!

Alongside your project assumptions, it's also helpful to note any legal or access issues that have come up, issues with participants or crew, competing projects, or other issues, all of which can affect story/vision, budget, schedule, and overall strategy.

Setting the Finish Line

Beyond the project assumptions, it's crucial to establish the "finish line," or how much of the life of the film to include in the production budget and schedule.

If you have been commissioned to make a film for a network, platform, or client, the "finish line" may be clear: you need to deliver a contractual set of deliverables, participate in publicity efforts, and move on.

If, however, you are producing independently and will be seeking distribution, you may well want to budget for all of the costs—and schedule sufficient time—for premiering your film at a major film festival (or perhaps national and international festival premieres), promoting it there, and, hopefully, delivering it to prospective buyers. But even that "finish line" may not be enough. What if those "prospective buyers" don't materialize? Or if hybrid distribution, based on deep connections with your audience, turns out to be a better choice for your film anyway? And no matter the distribution path, what about a website, publicity, social media, or impact campaign?

In these cases, if you are presenting a budget to grant makers who want to support the project's full life cycle, or to equity investors who are hoping that it will premiere at a big fest and secure a stellar distribution deal (an increasingly tough proposition in today's marketplace), then you will want to at least budget/schedule through the festival premiere(s) and domestic distributor/international sales delivery, because that is

everyone's shared "finish line." That said, if your funding comes partly from broadcasters or traditional film funders, it's possible that they won't allow for any other aspects of the film's life (such as festivals or an impact campaign) to be included in the production budget and that you will need to have a separate budget for these.

It's worth noting that impact campaigns and hybrid distribution usually need detailed budgets of their own, and the strategy for the production budget is usually to include funding for an initial impact brain trust/consultation with potential allies, or a thorough distribution consultation. Those can lay the foundation for full impact or distribution budgets/plans. (Doc Society's [Impact Field Guide & Toolkit](#) is a great resource for planning and budgeting impact campaigns.)

Finally, sometimes the "finish line" moves. After a major sale, for example, re-editing might be requested before the project goes into distribution. In these cases, some kind of supplemental budget is usually negotiated.

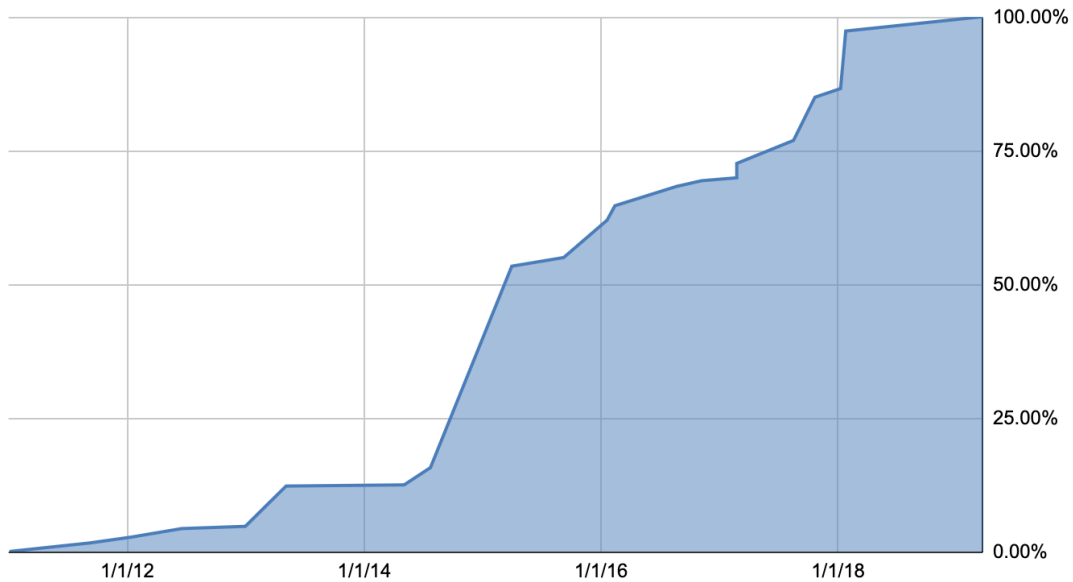
PART IV. Budgets and the Uncertainty of Fundraising

A good budget reflects, and must serve, the fundraising process. For commissioned films with a single backer, or co-productions where all the funding is put together before production begins, the full budget might be guaranteed upfront. This makes the budgeting process (and everything else) much easier.

But for most independent filmmakers, funding comes in phase-by-phase—if it comes at all. A little bit of development funding supports the creation of a fundraising sample/teaser, the teaser unlocks production funding, an early rough cut garners postproduction funding, etc. The process is risky, there are stops and starts, and often a filmmaker ends up self-funding various parts of the process and underpaying themselves. (Hence the challenging "career sustainability" questions facing our field, and many filmmakers' great frustration at spending more time on fundraising than filmmaking.)

Here's an example of the arduous seven-year funding journey of Almudena Carracedo's and my film, *The Silence of Others*:

THE SILENCE OF OTHERS Funding Timeline



As you can see, in the early years we only had a little development funding, and it wasn't until nearly halfway through the process, after we had achieved a really good 15-minute work sample, that our bigger partners started to come on board. But fundraising continued all the way till the end, and there was never any guarantee of how much we would be able to raise.

How can you budget in the face of such uncertainties? First, you'll probably want to break your budget into phases for development, production, editing, postproduction, etc. This helps you think about cash flow or "by when will I need to raise how much?" Here's a simple example of a budget topsheet/summary broken into phases:

EXPENSES			EXPENSES BY PRODUCTION PHASE				
ACCT	DESCRIPTION	TOTAL AMT	RESEARCH & DEVELOPMENT	PRODUCTION	EDITING	POST-PRODUCTION	FESTIVALS, PUBLICITY, PROMO
1000	Story Rights, Research, and Project Development	25,000	25,000				
2000	Directors/Producers/Writers	150,000	15,000	45,000	45,000	45,000	
3000	Talent	-					
	SUBTOTAL ABOVE-THE-LINE (ATL)	175,000	40,000	45,000	45,000	45,000	-
4000	Staff	100,000	10,000	40,000	40,000	10,000	
5000	Production Expenses	100,000	20,000	60,000	15,000	5,000	
6000	Travel	20,000	-	20,000			
7000	Postproduction	100,000	-		20,000	80,000	
8000	Insurance	12,000	500	8,000		3,500	
9000	Office and Administration	50,000	500	20,000	20,000	9,000	500
	SUBTOTAL BELOW-THE-LINE (BTL)	382,000	31,000	148,000	95,000	107,500	500
10000	Publicity, Promotion, Website, Festivals, Impact, Distribution	40,000	-	-		-	40,000
	SUBTOTAL PUBLICITY, PROMO, WEB, FESTS, IMPACT, DISTRIB	40,000	-	-	-	-	40,000
	COMBINED SUBTOTAL	597,000	71,000	193,000	140,000	152,500	40,500
	CONTINGENCY	59,700	7,100	19,300	14,000	15,250	4,050
	FISCAL SPONSOR FEE (applied	20,000	4,000	4,000	4,000	4,000	4,000

	to grants only)						
	GRAND TOTAL	676,700	82,100	216,300	158,000	171,750	48,550
		<i>100%</i>	<i>12%</i>	<i>32%</i>	<i>23%</i>	<i>25%</i>	<i>7%</i>

Beyond approaching fundraising in phases over time, you may also need to reckon with the uncertainty of how much you will actually be able to raise. While everyone hopes to raise their full “Plan A” budget, it can help to have a backup “Plan B” and even a “Plan C.” Plan A should include full professional rates and the best possible options for everything. This will be the budget that you’ll submit to potential funders. The “medium” Plan B will involve some real compromises, and the “worst case” Plan C will be the absolute minimum needed to complete the project acceptably for you, which might require calling in lots of favors and making some extremely difficult choices or sacrifices. (Keep these backup plans to yourself.)

I always draft my Plan A budget first and begin fundraising. If things go well, I’ll be able to raise the full budget for each project phase well before it is needed. But if/when necessary, I create additional columns for Plan B or C. Here’s a sample budget topsheet with two internal backup scenarios:

EXPENSES (This is "Plan A" budget)			BACKUP PLANS (Internal Use Only)	
ACCT	DESCRIPTION	AMT	MEDIUM "BACKUP " BUDGET (Plan B)	LOW "WORST CASE" BUDGET (Plan C)
1000	Story Rights, Research, and Project Development	25,000	10,000	5,000
2000	Producing Staff	150,000	100,000	60,000
3000	Talent	-	-	-
	SUBTOTAL ABOVE-THE-LINE (ATL)	175,000	110,000	65,000
4000	Staff	100,000	75,000	50,000
5000	Production Expenses	100,000	100,000	30,000
6000	Travel	20,000	10,000	10,000
7000	Postproduction	100,000	75,000	75,000
8000	Insurance	12,000	12,000	12,000
9000	Office and Administration	50,000	25,000	15,000
	SUBTOTAL BELOW-THE-LINE (BTL)	382,000	297,000	192,000
10000	Publicity, Promotion, Website, Festivals, Impact, Distribution	40,000	20,000	15,000
	SUBTOTAL PUBLICITY, PROMO, WEB, FESTS, IMPACT, DISTRIB	40,000	20,000	15,000
	COMBINED SUBTOTAL	597,000	427,000	272,000
	CONTINGENCY	59,700	42,700	27,200
	FISCAL SPONSOR FEE (applied to grants only)	20,000	15,000	12,500
	GRAND TOTAL	676,700	484,700	311,700

You could also combine the two approaches above: first create the columns for production phases and then break each phase into Plan A/B/C etc. This would mean lots of columns, but it could help you continually adjust for available funds while always pushing to raise the full Plan A budget.

This article focuses on creating the Plan A budget. From there, you can create additional scenarios by reducing and deleting appropriate items.

“In-Kind” and “Deferments”

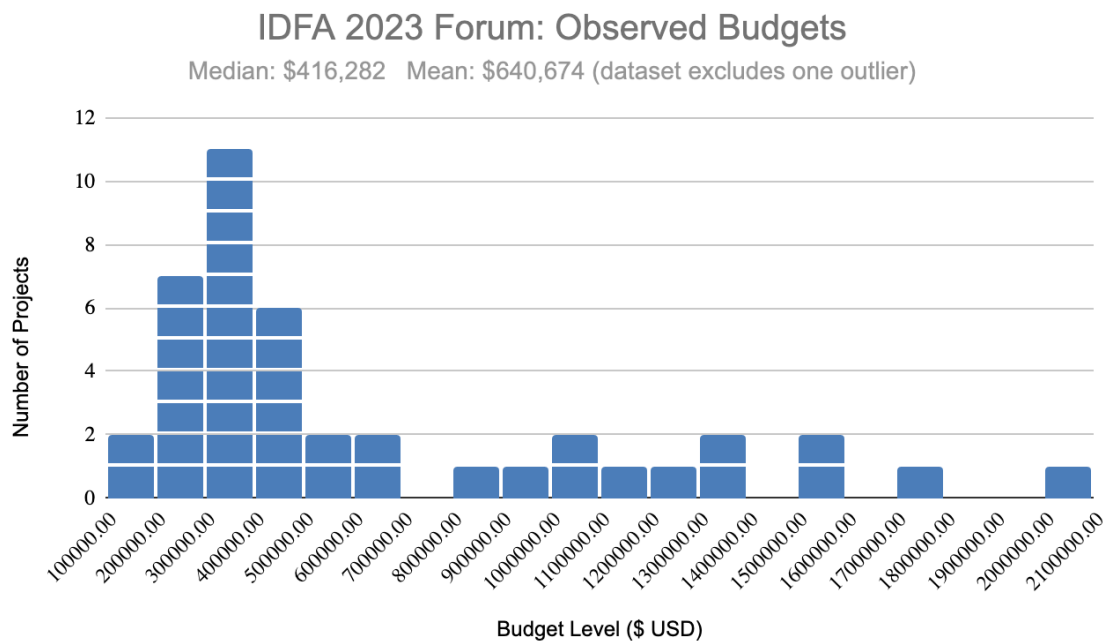
Lower budget films often use in-kind contributions or deferments to help offset budget costs. In-kind contributions are goods or services that are donated to the production. Many filmmakers like to add a budget column to show what was contributed in-kind, and then include the same amount in their finance plan as “in-kind support.” This helps communicate that the value invested in a project is much greater than the cash that has hit the bank. But partly because it can be difficult to establish the value of in-kind contributions, many funders will only want to work with the “cash” budget, which can be backed up with invoices and receipts. (It can also be risky to build future in-kind contributions into the budget. What if schedules change or someone gets sick and those goods or services can’t be donated after all?)

Deferments are fees, or portions of fees, that team members agree to “defer” till later, typically once the film is complete and begins to make profits, if any. Deferments are not counted as income but must be factored into agreements relating to the distribution of net profits. Crew members who accept deferments effectively assume some of the production’s risk and know that the film may never make enough profits to collect the deferment. This gets tricky, but very clear written agreements can help prevent misunderstandings.

For a truly excellent exploration of income flows from a documentary, including more on in-kind contributions, deferments, and recoupment of producer cash, check out the [Documentary Producers Alliance’s Guidelines for the Documentary Waterfall](#).

PART V. Documentary Budget Levels at Pitch Forums and Beyond

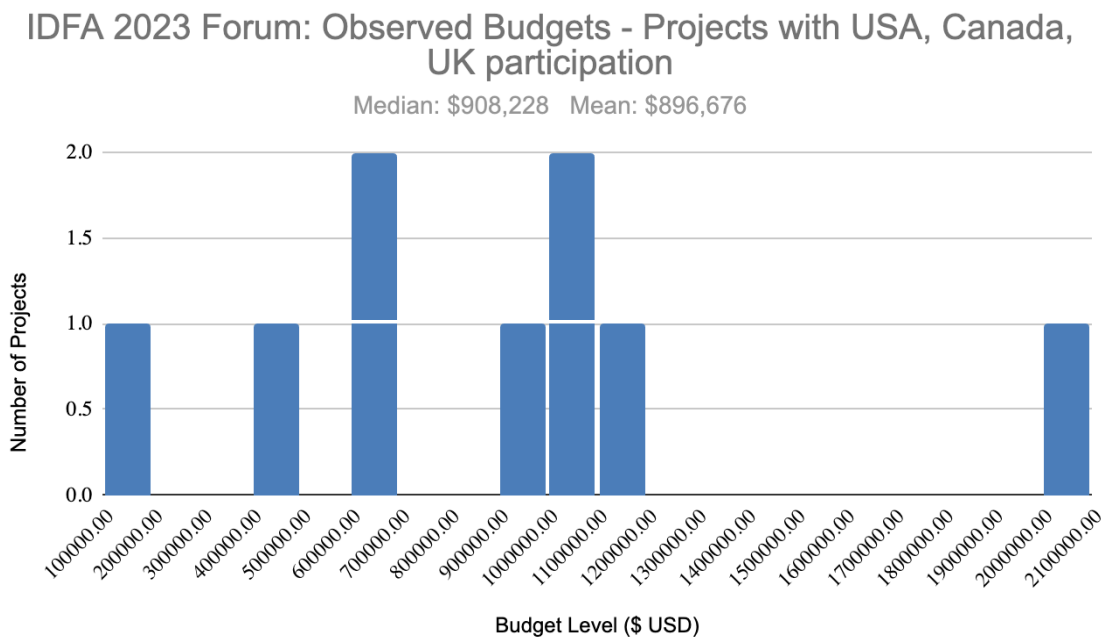
Before starting to budget, it helps to have some context about documentary budget levels. Of course, “it all depends,” but let’s look at the budget levels for projects pitched at the 2023 IDFA Forum, one of the top places in the world to pitch a documentary. Keep in mind that these are projects’ Plan A budgets, and we don’t know how much they ultimately raised. (Aggregated/anonymized IDFA budget data used with permission.)



In the first chart, which includes projects from all over the world, budgets average between \$416K and \$640K. There is a large cluster of projects in the \$200K–\$500K

range, and two other important clusters in the \$500K–\$700K and \$800K–\$1.4 million ranges. There are also projects at \$1.5 million, \$1.7 million, and \$2 million.

If, however, we look only at projects with USA, Canada, or UK participation, the budgets being pitched shift higher, averaging around \$900K:



This gives us helpful context. But pitch forums don't represent the entire gamut of documentary filmmaking. On the lower end, I deeply respect the fact that documentary budgets start at almost nothing. Some projects raise only enough to cover basic hard costs, and others are only ever partially funded, relying instead on volunteer labor and in-kind contributions of goods and services.

On the higher end, there is a world of documentary budgets far above what we see at pitch forums, ranging from \$1.5 million to \$3 million and up, typically for high-profile or

complex projects supported by studios, networks, global streaming platforms, or equity investors.

Above all, there is no right answer to what a documentary should cost, though undoubtedly, no matter how long the schedule or how big the budget, there will never be “enough” time or money.

PART VI. Accessibility

One of the most exciting additions to the updated budget template is the inclusion of numerous budget line items relating to accessibility for d/Deaf, hard-of-hearing (HOH), blind, low vision, chronically ill, neurodivergent, or disabled film crew, film participants, and audiences.

As the documentary community strives toward greater diversity, equity, inclusion, and accessibility, there is an increasing recognition that accessibility must be included in plans for all documentaries, not just projects relating to disability. This removes barriers so that wide, diverse audiences can access and enjoy all films, and so that disabled filmmakers, crew, and participants can fully participate in documentary filmmaking.

Audiences

To help make films accessible to wide and diverse audiences, the budget template includes several new line items:

1. **Transcripts** covering all audible and visual elements are essential to support work around closed captions and audio descriptions, and for film team access including during production and offline editing. Transcripts may also be offered directly to audience members in certain contexts, such as educational distribution.

2. **Closed captions (CC)**, sometimes also known as “Subtitles for the d/Deaf and hard of hearing” (SDH), are similar to subtitles, but generally in the same language as the film. They include spoken dialogue, changes of speaker, descriptions of music, and key sound effects (e.g., “knock at door”) to make the film accessible without sound. Closed captions are also used widely by non-native speakers, in situations such as at airports, doctors’ offices, bars, or public transportation where a TV, phone, or tablet must be muted, and in environments with background noise, such as airplanes.

3. **Audio descriptions (AD)** are audio tracks for blind and low-vision audiences that include the full soundtrack but add verbal commentary on what is happening visually on-screen, both to set the scene/location and describe action and other details.

These three elements—transcripts, closed captions, and audio descriptions—are increasingly standard deliverables to reach wide audiences and are now required by many film festivals, awards bodies, television networks, and streaming platforms. Keep in mind that these also need to be budgeted for trailers, marketing assets, festival and awards screeners, and social media. (Social elements should also include image descriptions/alt text.)

To fully integrate captions and audio descriptions into your workflow, try to think of them not as last-minute postproduction tasks but as creative elements that need care and collaboration from the filmmaking team to fully communicate the film’s intentions and be culturally sensitive to its content. In addition, as accessibility is integrated into the filmmaking process from the very beginning, deeper questions that affect schedule/budget may emerge, such as planning visuals to leave room on-screen for captions or adjusting the editing rhythm to leave space for subtitles, captions, or audio descriptions.

Some filmmakers are also exploring creating versions of their films with on-screen (burnt-in) sign language interpretation, although it is much less common than transcripts, captions, and audio descriptions. It has thus been included in the budget template as an option in the postproduction deliverables, but it is by no means a requirement for accessible deliverables, while transcripts, captions, and audio descriptions are.

Other important considerations for audience accessibility include the creation of DCPs with open caption (burnt-in) versions, so that public screenings can be accessible and avoid the risk of technical malfunctions from auxiliary systems. And, once accessible screening materials have been created, it's important that they actually be used. For example, many filmmakers are now advocating that there be at least one accessible screening of their film at every festival or in every city where it plays, and that the accessibility information is mentioned in PR, advertising, or event invitations.

Finally, consider budgeting/planning for accessibility for in-person or online events related to the film, such as Q&A's and panels.

Filmmakers, Film Crews, and Film Participants

Removing barriers so that disabled filmmakers, film crews, and film participants can fully participate in documentary filmmaking requires determining the specific requirements of each person and of the project itself. (Greater accessibility can also benefit nondisabled team members, for example, people with caring responsibilities who need flexible working hours, or people who live at a distance from locations or the production office and could benefit from an adjusted work start time.)

The only “general” recommendation is that, just like for audiences, film teams and industry colleagues can benefit from transcripts, closed captions, and audio descriptions so that sample teasers, rough cuts, and working materials are accessible. These may

initially be created as temp tracks in the edit room rather than with an outside vendor, which saves money and helps build accessibility into the edit process.

Beyond that, accessibility becomes more bespoke, and some productions ask for voluntary “access riders” from each crew person to learn about specific accessibility requirements as soon as possible. (This can help identify non-disability-related needs like childcare and elder care as well.) The Arts Council England offers one model for access riders at <https://www.accessdocsforartists.com> that might provide inspiration.

Once access requirements have been identified, they can be budgeted in two ways. On one hand, some requirements will go along with the team member—for example, an executive producer who will require an ASL interpreter for every aspect of their communication during the project. Other requirements might include a note-taker, assistance from a personal assistant, more time or rest time during shoots, rest space, quiet space, interpreter rest space, service animal rest space, mobility equipment, screen readers, or accessible toilets. For this reason, each budget crew section, such as “Directors, Producers, Writers,” “Production Staff,” and “Editing Staff,” now has an additional line for “Accessibility” where individuals’ project-wide needs can be budgeted for.

On the other hand, some access requirements will go along with the activity or location. For example, during travel a flight upgrade for more accessible seating, mobility equipment, car service instead of public transport, a wheelchair van/lift, or assistance from a personal assistant might be needed. During shooting, access requirements could include specially rigged monitors or cameras for a wheelchair, bespoke audio receivers, additional lighting, floor markings, ramps, bell/light or traffic light system for “All quiet on set,” accessible toilets, and the rest spaces/quiet spaces mentioned above. And during editing, access requirements could include a fully wheelchair-accessible edit location, modified desks and/or chairs, screen readers, accessible toilets, etc.

In the budget template, accessibility line items appear in many categories, and these generally have budget account codes that end with “80” (for example, 2080, 4180, etc.). Note that some of these line items are filled in with actual costs, whereas others will be quite specific to the unique requirements of your crew/participants and list several options for you to explore and budget accordingly. Of course, even these budget line items are just examples, and the idea is to listen, ask questions, and eliminate barriers to accessibility.

As described in the “STORY CONCEPT & BUDGET ASSUMPTIONS” tab of the budget template, for the purpose of the budget template we have assumed that the production manager is a wheelchair user and have budgeted appropriately for her access requirements.

Production Accessibility Coordinator

As the industry works to incorporate accessibility into its practices, a new position known as a production access coordinator or production accessibility coordinator is emerging to help evaluate and plan for accessibility. In the sample budget template, this person is involved for a few days at each stage of the process to ensure accessibility is a reality.

It is also worth noting that some productions, especially if they include characters or story elements related to disability, are bringing on an access producer to oversee access and to advocate for authentic representation on-screen directly from a producer level.

Setting Money Aside for Access in the Budget

While it’s simple to add transcripts, captions, and audio descriptions to every budget, how do you set money aside for team members’ bespoke accessibility requirements before crew is hired and specific requirements have been identified? In the sample budget, I’ve left \$5,000 in each of the four main crew sections’

accessibility lines (“Directors, Producers, Writers,” “Production Staff,” “Production Crew,” “Editing Staff”) for a total of \$20K. This reserves about 2% of the budget for accessibility, which can then be redistributed to specific accessibility line items. Depending on specific requirements, this could either be sufficient or only just a start. But at least it is a helpful minimum percentage to set aside, and then to protect through the course of the project, as new team members with accessibility requirements could come on board even late in postproduction.

Learning More

For extensive links and resources regarding accessibility and documentary film, visit the [FWD-Doc resources page](#) and the [IDA Nonfiction Access Initiative resources page](#).

Acknowledgments

Special thanks to [FWD-Doc](#) for having consulted on the accessibility-related aspects of this article and budget template, and without whose guidance this would not have been possible. Special thanks to [Concordia Studio](#) and the [Concordia Fellowship](#) for generously supporting this consultation and helping to inspire it. Special thanks to [D-PAN](#) for feedback regarding accessibility, captions, audio descriptions, and ASL interpretation and to the [Inevitable Foundation](#), whose existing resources were valuable to consult. Finally, special thanks to [IDA](#) for helping inspire and manage this consultation process.

PART VII. The Schedule

So you need a schedule! There are many acceptable formats, and, in the new template, I offer a weekly schedule template, with one row per week, and with columns showing which fundraising, research, archival, shoot, edit, music, post, or distribution/impact activities take place that week. Additional columns show which staff members work each week. Here are some scheduling considerations:

Research. How much time do you need to research your subject, identify and secure access to possible participants, or survey archival materials or other possible elements? When will you be ready to prepare a proposal/treatment, pitch deck, budget, and schedule, and how long will each one take? What about a work sample?

Production. How much shooting will be needed, and will you do it all at once or spread it across months or years? Are there any constraints outside of your control, like an annual event or limited participant availability? How much time will be needed to review and prepare material for the edit? Beyond shooting, how much time will be dedicated to gathering archival footage or other materials? And what other processes, such as animation, are important for your film and need to be scheduled?

Scheduling cinema vérité and long-term investigations poses special challenges because you don't know how or when things will unfold. It can thus help to first estimate the rhythm of shooting—in other words, how many days per week or month do you plan to shoot? Then consider the possible duration. Six months? A year? Multiple years? If the uncertainties are not too great, you may be able to plan for them by estimating carefully and then including a generous schedule buffer. For greater uncertainties, you may want to draft distinct schedules for multiple scenarios.

Editing. Editing is perhaps the most fundamental process to documentary filmmaking, and giving the right editor(s) sufficient time to do their best work can make or break a film. While edit schedules vary widely around the world, the U.S.-based Alliance of Documentary Editors' [Guide for Documentary Edit Schedules](#) recommends roughly one month of editing for every 10 minutes of screen time for the completed film. So a 90-minute film would need nine months of editing. Of course, some films will need more time due to the complexity of the story or the volume of material, while others may be limited by budget, scope, or delivery dates. (I can't resist sharing one line from the Alliance's guide: "Editors are rarely invited to participate in the scheduling of a

documentary, but the results of an unrealistic schedule are felt most keenly in the edit room.”)

Postproduction. Processes such as color grading, visual effects, graphics, sound design/editing/mixing, and original music composition are best scheduled in collaboration with the artists or post houses that will provide these services. Post schedules often need to be planned far in advance to ensure availability at busy post houses and can require intricate coordination, as the post processes are interdependent. The schedule in the template shows 12 weeks for post and 4 additional weeks for deliverables. If needed, post could go faster to make a premiere or festival screening date. But it could also go slower, depending on artist/vendor availabilities and the amount of time desired for each process.

Festivals/Impact/Distribution. Finally, if your budget includes the bigger life of the film, such as festivals, impact, or distribution (see “Setting the Finish Line” above), then your schedule should too.

Accessibility. Before completing a draft schedule, think about accessibility once again. Is the schedule realistic and sustainable for all team members, considering each of their accessibility requirements and each person’s pace of work? Is there sufficient rest time to empower each crew member to contribute their very best to the project? Has time been allowed to make accessible edit materials and deliverables, and to test them?

PART VIII. The Budget: Line by Line

After much preparation, we are now ready to start working on the budget itself!

Budgeting Software

Google Sheets or Microsoft Excel work well for budgeting, and the sample budget works in both. If you need help learning either one, there are numerous tutorials on YouTube and other sites.

Specialized software like Movie Magic Budgeting is also available, and while I'll use it on some bigger projects, I love the flexibility of a Google Sheets/Excel spreadsheet, where I can add columns for phases/scenarios and really customize it.

Budgeting Is Research

Budgeting is *research*. There is simply no substitute for the hours of calls with potential crew or vendors about the project, or meetings with post facilities to suss out workflow and seek initial bids. Essential research might also include working with an archival producer to assess existing archival material and costs, doing tests with potential collaborators, or seeking advice from colleagues who have made similar films or shot in the same locale and can provide recent, firsthand experience.

For all these reasons, while you can use the numbers in the template as a vague guide for USA rates in New York or California, don't use them as your final numbers. Every project is unique, and your research will help you customize every line item to your project and location.

The Sample Budget Template

Let's start to explore the [actual budget template](#). (You may want to open it now so you can refer to it alongside the rest of this article.)

The sample budget is for a \$1.3 million documentary. I chose to present a high budget to show full professional rates for everything, an extensive set of line items, and the full breadth of what is possible. Presenting full rates also helps to remind filmmakers and funders just how much everything really costs, which is crucial for conversations around sustainability. As you use the template, you can focus on the line items that you need and reduce or remove as needed.

The template includes separate tabs for schedule, budget topsheet, budget detail, finance plan, budget globals, and more. It's best to start with the "READ THIS FIRST!" tab, which explains how to use the template.

The Budget Topsheet

The budget topsheet offers a one-page budget summary and includes the main budget assumptions at the very top. You will also see that it is divided between "Above-the-Line" and "Below-the-Line" costs. "Above-the-Line" typically includes directors, producers, writers, any actors, and development costs. "Below-the-Line" covers the crew, equipment and expenses. This structure comes from Hollywood budgets, where "Above-the-Line" talent costs can vary widely depending on the market value of well-known directors, writers, or actors, whereas "Below-the-Line" costs are more predictable. While in documentaries these divisions are less relevant, the traditional structure is often maintained.

That said, there are many ways to organize budgets. For example, in the budget template, all of the staff is grouped together in three sections: "Production Staff," "Production Crew," and "Editorial Staff." Keeping all of the "labor" together is generally preferred by grantors and nonfilm funders, and is fine for film funders too. In other budget formats, especially for fiction, staff may be listed within each department (camera crew listed under Camera department, etc.).

The Budget Detail

The Budget Detail is where the budget actually gets built. It is divided into **categories** like “Camera” and “Production Travel,” each of which contains **line items**. Let’s take a closer look:

ACCT	DESCRIPTION	#	UNIT	X	RATE	TOTAL \$ COST
5900	LOCATION TRANSPORTATION					5,600
5910	Cargo van - w/high roof+shelving	4	weeks	1	1,100	4,400
5930	Gas & Oil	4	weeks	1	300	1,200
6000	PRODUCTION TRAVEL					3,820
6010	Airfare/Railfare	3	R/T	1	340	1,020
6020	Add'l baggage fees for equipment	2	fees	1	50	100
6030	Hotel/Lodging (3 nights x 3 people)	3	hotel-nights	3	300	2,700

Starting on the left, every category and line item has an **account number**. This numbering system, or **chart of accounts**, will later be used in the accounting process to track actual expenses against the budget. If you are starting from scratch, it doesn’t really matter which chart of accounts you use, as long as you are consistent. If a studio or network comes on board your film, though, they will likely ask you to switch to their chart of accounts to integrate with their accounting system.

There are then columns for **description**, **quantity (#)**, **unit**, an **extra multiplier (X)**, **rate**, and **total \$ cost**. The math is simple. On line 5910, 4 weeks * \$1,100/week = \$4,400. On lines like 6030, we need an extra multiplier (X) because the hotel is needed for 3 nights and for 3 people per night: 3 nights * 3 rooms/night * \$300/room/night = \$2,700.

Unit. In this column, you'll often see units like hours, days, weeks, or "R/T" (roundtrip ticket). An **allow** means an estimate. You could allow \$1,000 for office expenses for your entire production. It is best to avoid allows whenever possible because they are vague and open to debate. Instead, it's better to budget Office Supplies for 10 months @ \$100/month. The result (\$1,000) is the same, but it is now much clearer and easier to defend.

Flat means a contractual amount that cannot change, at least within agreed-upon parameters. If you contract with a composer to compose, arrange, record, produce and deliver your score for \$30,000, that quantity is fixed and will not change. (Unless of course, you change the parameters stipulated in the contract—like switching from a string quartet to a full orchestra!)

Empty Lines. You'll notice that the sample budget includes some lines where no money is being spent. Generally, these would be hidden (i.e., if you don't need to rent a dolly you can eliminate that line), but they are included in the template to make it as useful as possible in brainstorming all of your needs.

Let's examine each category:

Story Rights, Research & Project Development

1000 Story & Other Rights. Any intellectual property or other rights that you need to option or purchase, for example, if your film is based on a book, article, song, or other copyrighted material.

1100 Research. Books, videos, meetings, and other research expenses.

1200 Research Travel. In categories like travel, I detail each trip and who is traveling where to head off questions. Travel costs are often—and wisely—scrutinized by funders.

1300 Written Proposal, Budget/Schedule, Other Fundraising Costs. Grant writing, pitch deck, drafting budget/schedule and cashflow, creating promotional materials, etc.; costs will vary based on how much research and revision is required, and how much the film team can do in-house.

1400 Production of “Test Shoots” or “Special Shoots” for Sample Teaser. Only use this category if you are doing test shoots as a “proof-of-concept” or special shoots just for the fundraising sample teaser. If the material for the sample teaser will come from your early footage and not from special shoots, budget for that in the main production section.

1500 Editing & Postproduction for Sample Teaser. The sample shows a week of editing for the fundraising sample. Depending on the project, this could be much more complex, or different versions could be needed as filming evolves.

1600 Fundraising Travel. Travel to markets, funder meetings, etc.

Producing Staff

2000 Directors, Producers, Writers. Director/producer fees are traditionally budgeted as flat project fees, in part because they (1) are considered to be management and responsible for budget/schedule, (2) may have ownership or revenue participation in the

project, and (3) are being engaged long-term in what will be a mix of full-time and part-time work. (Directors, producers, and major actors are budgeted the same way on fiction films.)

Director and producer fees frequently range from 5% to 10% of the budget each, though the percentage is often higher for lower budgets and capped for higher budgets. The exact fees will depend on each person's experience level, time devoted to the project, any other roles they play on the project, production locale, and overall budget level.

In addition, if their fees are divided into months or years, they should result in reasonable, appropriate salaries for the given location. For this reason, I normally note the monthly or yearly breakdown in the "description" field on these lines, to show that what might at first appear to be large fees are actually quite reasonable.

Flat Fees Need Clear Parameters

After years of fieldwide conversations about the challenges of sustainability, concerns have come up that these flat fees need clearer parameters. What if a flat fee has been negotiated based on a two-year schedule that has now stretched six months, a year, or two years longer? At what point should the fee be augmented? And does a producer's fee really cover a rush request for new international deliverables four years after a project has been completed? Or should that require an additional fee?

Another important parameter is the director or producer's supporting team. Does the director have a story researcher and a field producer, or are they handling it all themselves? Is a producer supported by a grant writer, line producer, production manager, coordinator, and postproduction supervisor? Or are they a one-person production department? Just like schedule parameters, if flat fees have been negotiated assuming a certain level of support staff, and that changes, producer/director responsibilities will also change and fees should be revisited.

Of course, these questions presuppose that directors/producers have actually been paid their fees at all, while the tragic reality of independent documentary making is that they are often the first to sacrifice or defer portions of their fees to try to get the project made.

For all these reasons, many would now argue that “flat fees” can only be considered equitable if they are based on contracts with clear parameters, such as exactly how much time they are meant to cover, what activities they cover, how much support staff will be available, and what will happen if there are major schedule shifts, etc. And if the fees are actually paid!

Working “For Hire”

For directors or producers who are working “for hire” and don’t have any ownership or future participation, the situation is a bit different. There is often a stronger argument for a time-based (weekly or monthly) fee structure.

For a deep dive around all of these issues, check out the Documentary Producers Alliance guidelines: [Negotiating Contracts for Independent Documentary Producers](#).

Director vs. Producer Fee Levels

Director and producer fees may or may not be comparable, depending on each’s time commitment and professional experience level, as well as all the other factors mentioned above. In the budget template, you’ll see that the Director /Writer/DOP/Co-Producer and the Producer/Writer/Sound will be largely making this film together and happen to have equal fees. This is because it is assumed that their time commitment will be roughly equal. They are both working full time through production and post; in addition, the director researched the film for a long time before it got off the ground, while the producer will handle the deliverables, marketing, and business side long after it has wrapped.

Talent

3000 Talent. If you are planning to do reenactments or hire a narrator, you'll need to list talent here. Rates vary considerably and may be subject to union or guild agreements.

Staff

4000 Production Staff. The staff who will work on the production for weeks or months at a time, handling production, research, archives, etc., will vary considerably based on your needs and resources, and it is often the budget that reveals to your funders exactly who will be doing what. Keep in mind that while crew rates are somewhat negotiable, it's best to maintain parity among similar positions. In the U.S., the [Pay Transparency Project](#) is a great resource for crew rates on documentary films and series.

4100 Production Crew. The crew is mainly present on shoot days, as well as some prep days or camera tests. Most work on daily rates, with a 10-hour day in mind. Rates vary widely from city to city and even more around the world. A local line producer, production manager, or fixer can be a huge help in budgeting crew properly, as well as recommending the best talent.

4200 Editorial Staff. Documentaries truly are made in the edit room, and the editor might just be the single most important line item in the budget. Bigger films may have multiple editors and assistants working simultaneously, whereas on low-budget projects, the director may know the material best and perform some assistant functions.

4300 Consultants. This includes subject-area experts or consultants, boards of advisers, etc. It's also where you could budget for mental health and wellness support for film team or participants.

2099, 4099, 4199, and 4299 Personnel Taxes. These are the costs that an employer must pay in addition to an employee's salary, such as (in the U.S.) Social Security, Medicare, unemployment insurance, Workers' Compensation, and payroll service fees. A payroll service can provide you with current rates for your locations and can also process these payments. For international shoots, it is often best to work with a production services company that can handle local compliance for you.

Beware: Some producers try to avoid personnel taxes by incorrectly classifying staff or crew as independent contractors. The IRS, however, and many other countries' tax authorities, have strict rules about who is an employee and who is a contractor. Misclassifying employees can lead to huge penalties or legal action. Consult your attorney or accountant.

Production Expenses

5000–5600 Production Expenses. These sections detail the camera, sound, lighting, grip and other equipment, facilities, and services required to shoot the documentary. A good way to budget these categories is to talk with the person leading each category—the director of photography, sound recordist, or makeup artist, and assess the project's needs together.

For documentaries with long schedules, equipment rentals can pose a special issue as rental costs may exceed the cost of purchasing equipment. In these cases, the production may choose: (1) to rent the gear from a rental house (or owner/operator) anyway and accept the excess cost because it includes service, support, etc.; (2) for the production company itself to buy the gear and then rent it to the production subject to a cap, such as 75% of the purchase price (funder policies and percentages vary), which controls funder costs and helps the production company earn rental income and build their own infrastructure; or (3) to buy the equipment and resell it at the end of production, which is often budgeted as a net cost of 50% of the purchase price, but carries the burden of

maintaining the equipment and the risk that it won't sell at all, and will need to be delivered to the financier at wrap. (Keep in mind that most funders are cautious about equipment purchases and will often set a limit such as \$500 above which any purchases require approval and become trackable production assets.)

Finally, note that some crew members, such as directors of photography or sound recordists, may have made big investments in their own equipment packages. They will likely prefer to work with their own gear as an "owner/operator," both for the rental income and because they know their equipment intimately, which will likely enable them to do their best work.

5700 Production Film & Lab. This covers hard drives for your camera's original footage and multiple backups. It would also include film stock and processing, if applicable. Keep in mind the 3:2:1 rule: digital assets are only reliably backed up if there are at least three digital copies (ideally made with checksum verification) on two different kinds of media (such as hard drive and LTO tape) with at least one copy kept at a separate location.

5800 Location Expenses. Take special note of line 5830, "Crew Meals." Nothing tells a crew that you respect their work and talent more than providing proper meals. I once line-produced a low-budget feature where we served a hot breakfast in addition to lunch. The crew arrived early every day for breakfast and started the day happy! A little money can go a long way.

5900 Location Transportation. As you budget for rental vehicles, gas and oil, etc., keep in mind both your shooting schedule and the time that will be needed to pick up and return equipment.

Travel

6000 Travel Expenses. Travel expenses add up quickly and are often scrutinized by funders. Try to keep travel to a minimum, and consider when you can hire local crew. When you must travel, always seek out advice from people who have shot before in the same location. As mentioned earlier, I add notes in the budget to explain the purpose of every trip so there is no doubt who is traveling where and why.

Postproduction

7000 Editorial Equipment, Facility & Supplies. This includes editing systems, edit rooms, and editing supplies. The sample budget shows two editing systems, one for the editor and another for the assistant. Simpler productions might have just one system, with assistant editing happening off-hours or at night. More complex projects may require multiple systems and edit servers, such as the AVID Nexis or Jellyfish, so that multiple editors, assistants, archival researchers, or producers can access edit materials. Remote editing, using local edit stations that can be accessed by remote editors using solutions like Teradici or Jump Desktop, is also increasingly common.

7100-7600 Postproduction. As problems arise during production, someone will suggest that you “fix it in post.” But that can get expensive, fast. It’s better to think of post as the second half of a marathon: you can’t afford to carry too much baggage from the first half. You’ll be best prepared by doing plenty of research and by selecting your graphics, visual effects, online facility, colorist, and sound designer before you shoot. Talk through the intricacies of your workflow and delivery requirements. Do end-to-end workflow tests. Get detailed written bids. These steps will not only help you budget for postproduction but may also uncover savings for production.

It can be hard to estimate post needs early in a project, and it sometimes helps to think of things in categories. For example, “For graphics, we’ll need identifiers for people and locations, 10 title cards, opening/end credits, and 10 social media graphics.” Or “We

think we'll need three one-minute animated sequences to explain certain concepts, and we like XX film as an example of animation." This will help your partners brainstorm and propose budgets.

Note that the cost of some aspects of post depends on how much money you have. Should you spend 24 hours or 50 hours doing color correction? Three days or ten days of final mix? It depends on how slowly and carefully you want to go but also on what you can afford.

7600 Output & Deliverables. This is where setting "the finish line" becomes so important. If you are budgeting solely to deliver to a broadcaster or platform, just budget for the contractually required deliverables. But if you are starting with a festival release and waiting to see what happens, it's best to budget for festival DCPs and also deliveries to a domestic distributor and international sales agent. (You should only produce the essential elements needed at each stage, though. For example, start with your festival DCP, and then wait to see what happens. It's likely that things will evolve and any deliverables that you made "preemptively" will end up needing to be redone by the time a specific sale or opportunity comes up.)

7700 Archival Footage & Stills. This includes the costs of researching and licensing archival material, with the exception of the archival researcher who is listed under "Staff." Here, the devil is in the details. For example, many archives charge a 30-second minimum no matter the length of the clip that you use; you thus may need to budget for many more seconds than you use on-screen. On the positive side, though, you may find similar material in multiple archives and be able to concentrate your needs around a few archives to satisfy minimums and increase your negotiating power.

Films with heavy archival needs often hire an archival producer during the budgeting process to assess material availabilities and costs, and then build what they find out into the budget.

7800 Music/Composer. Original scores for documentaries are frequently done as a “package,” in which composers compose, arrange, record, produce, and deliver a completed score prior to the sound mix. The “flat” contractual fee negotiated with the composer thus needs to include several parameters, including how much music is expected, how much collaboration/revision will take place, and the number of instruments/performers that will be recorded.

Projects that license existing music may require a music supervisor, as licensing songs can quickly become very complex and expensive.

7900 Subtitles, Closed Captions, Accessibility, Add'l Required Items. These line items are discussed extensively in “PART VI. Accessibility.”

Insurance

8000 Insurance. Film production is tough. Cars and property get damaged. People get hurt. Releases that weren't signed or rights that were misunderstood create risk. You need insurance.

During production, common insurance coverages include general liability, auto liability, umbrella or excess liability, Workers Compensation, and a “production package,” which generally includes negative/videotape/faulty stock (to cover reshoots in case footage is damaged or lost), extra expense (to cover unexpected expenses due to certain kinds of disruption or cancellation of shooting), third-party property damage, and equipment insurance. Note that during postproduction, coverages related to shooting can sometimes

be reduced. The best way to assess your needs is to consult an experienced insurance broker who specializes in media or entertainment about the risks related to your project.

To distribute a film, errors & omissions (E&O) insurance is usually required to protect against claims (and defense costs) for copyright infringement, invasion of privacy, defamation, plagiarism, violation of publicity rights, and other “errors” and “omissions.” The premium cost can vary depending on the film’s budget, how it will be distributed, the producer’s track record, policy limits, policy term, and a careful risk assessment of the film itself.

Note that applying for E&O insurance can take weeks and often requires an opinion letter from an experienced entertainment clearance attorney addressing any “fair use” materials or other special considerations. Also, while E&O is often timed to a film’s release, depending on the project’s risk profile, it may be prudent to secure it before the film is publicly announced, which could mean prior to principal photography or earlier. This may increase costs due to a longer policy term, but it can lower risk.

Again, talk carefully with an experienced entertainment lawyer and entertainment industry insurance broker as early as possible.

Office & Administration

9000 Office/Admin. It’s often best to budget these expenses by the month, which makes them fairly self-explanatory. Some productions are finding cost savings with remote work or virtual offices, while others feel the synergy of working together in person makes up for any additional costs.

9100 Professional Services. Talk with your attorney at the outset to estimate legal costs, which can add up quickly. Some attorneys will work on an hourly basis or for a flat “project fee” (with parameters), whereas others may seek a fee based on a budget

percentage, such as 1% to 1.5% or more. Above all, it's important to work with an experienced media or entertainment attorney who has worked extensively with documentary production, clearance, and distribution.

Fact-checking, accounting, tax preparation, and other professional services are also budgeted here.

Publicity, Promotion, Website, Festivals, Impact, Distribution

These sections cover the early festival and distribution life of the film. Each section could easily be expanded into a full budget if desired, and some sections, like Impact, Outreach, and Education, are clearly limited to just the R&D needed to develop a separate impact campaign proposal and budget. (As mentioned, Doc Society's [Impact Field Guide & Toolkit](#) is a great resource for planning and budgeting impact campaigns.) Keep in mind that some funders, especially broadcasters, won't allow these items as part of the production budget.

Final Items

Contingency. Film production is unpredictable, and a contingency—typically 6% to 10%—protects you from big surprises, like an entire storyline not working out, or losing an editor and having to bring in someone new who needs extra months to review material. I normally start out budgeting a 10% contingency and reduce reluctantly when the overall budget is too high.

That said, although a contingency is a commonly accepted line item, some funders unfortunately do not allow it. If you are not allowed to budget for a separate contingency, you may need to adjust line items throughout the budget to protect you from the inevitable surprise.

Fiscal Sponsor Fees. This is the administrative fee paid to a U.S. nonprofit organization that receives grants and charitable donations on your behalf. Note that this fee is budgeted as a percentage of the charitable funding you receive, but is not applied to funds that can be paid directly to the production.

Production Services Fee. For films that are fully commissioned, and where the producer will not receive future distribution revenue, it is common to include an approximately 10% “production services fee” or “production company fee” in lieu of future profits. (If multiple production companies are involved, this fee would be split.)

For films where the producer will receive future distribution revenues, which includes most “independent” documentaries, those revenues are generally assumed to be the producer’s profit, and there is no added fee.

There are some hybrid scenarios, though, and sometimes this may be negotiable.

Now You’re Done Budgeting, Right?

Not quite. It’s time to look back at the topsheet and consider the big picture again. If you must meet a target budget, this is the moment to explore compromises to reduce the budget but still maintain the project’s vision. What kinds of deals can you get? Can you shoot for fewer days? Use a smaller crew? Decrease travel? Change workflow?

If you’re working independently and you’ve carefully budgeted your film the way you’d like to shoot it, then you have made your Plan A budget. Now it’s time to map it into the production phases discussed earlier, and focus on raising the funds for the first stage. Get started, and make that fundraising sample teaser. Many great films have been made phase by phase just like this.

PART IX. Finance Plan

The new budget/schedule template also includes a template finance plan. There are separate sections for funds raised and funds pending, and columns that show if funders have acquired distribution rights or if they will participate in profit sharing. Any “producer cash” that was spent should also be listed under funding, and hopefully funding agreements will be structured so that it can be recouped in first position.

The finance plan can be included on the budget topsheet or submitted as a separate document.

We’ve reached the end of this journey and I hope it has been valuable! As we have seen, budgeting and scheduling are as much an art as a science, and they reflect and can support the dynamic, complicated, frustrating, beautiful process of documentary filmmaking. Happy Budgeting and Scheduling!

Robert Bahar is a Peabody, Goya, and three-time Emmy-winning documentary filmmaker. He produced and directed, with Almudena Carracedo, You Are Not Alone, which has been seen by millions, spent two weeks in Netflix’s Global Top 10 for non-English films, and is currently nominated for a Goya (Spain’s Academy Award) and a duPont-Columbia Award.. Their film The Silence of Others won the Berlinale Panorama Audience Award, the Goya, a Peabody, two Emmys, and was shortlisted for an Oscar. They previously won an Emmy for their documentary Made in L.A. He is a Creative Capital Fellow, Sundance Documentary Fellow, and a member of both the Academy of Motion Picture Arts & Sciences and Spain’s Academy of Cinema.

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