A Time of Great Potential

Southeast Louisiana Regional Entertainment Industry

S.W.O.T. Analysis and Job Creation Action Plan

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TABLE OF CONTENTS

A Time of Great Potential

Executive Summary

Part I: S.W.O.T. Analysis

An aggressive Louisiana Motion Picture Tax Incentive Program, new technologies and chaotic changes in the filmed entertainment industry are creating an unprecedented opportunity for economic growth and job creation in the State of Louisiana, particularly in the region of New Orleans and Tangipahoa Parish.

Filmed Entertainment Industry and the Region

Filmed Entertainment includes motion pictures, video, commercials, music videos and television programming. Current efforts focus on bringing motion picture production to the state and the Region. The Region is comprised of New Orleans and Tangipahoa Parish, the center of the state's filmed entertainment industry.

S.W.O.T. Data

An analysis of the region's strengths, weaknesses, opportunities and threats (S.W.O.T.) was conducted in the first quarter of 2004. Approximately 500 individuals were invited to participate in online surveys. Interviews were conducted in person or by telephone with business, industry and community leaders. About 100 respondents participated.

Results of S.W.O.T. Data

Across the board, the three areas of concern were dominant: crew, infrastructure and finance. The principal concerns about crew were availability and qualifications (see Chapter 5). Infrastructure issues were facilities and support services (see Chapter 6). Finance concerns were the impact and future of the tax incentives and funding for production (see Chapter 7).

Crew

Every producer and executive interviewed noted "lack of qualified crew" as a threat to the growth of production in the Region. The Region is home to highly qualified, experienced workers who can excel if given the opportunity and many more who are willing to learn and work their way into the industry. However, the Resident crew base is limited in size and in need of training, professional development and experience.

Facilities

Approximately 500 categories of jobs and small businesses benefit from production. The demand for facilities, the buildings and services associated with production, will continue to grow for the foreseeable future.

Funding

The Region's progression from location to industry is dependent on a steady flow of production, production is dependent on availability of financing, and the Region is beginning to address the need through private and public sources.

Tax Incentives

The Louisiana Motion Picture Tax Incentive Program has dramatically increased the mount of production in the Region and, to date, the Program is only reaching a portion of the target market.

Conclusions

- The Region is experiencing an increase in production resulting from the Louisiana Motion Picture Tax Incentive Program that must be managed carefully for long-term growth.

- Resident workers in the filmed entertainment industry are optimistic but are concerned about being included.

- Producers and industry executives view the Region as a great location in need of a larger, more qualified work force and better production and support facilities.

- The transition from location to bona fide industry will be determined by the availability of production financing.

PART II: Job Creation Action Plan

Creating jobs is a complex process with economic, political, social and technological facets. The Region is preparing to emerge from the cocoon of "location" to spread its wings as an industry. The development of the industry requires planning and the involvement of the private sector. The Plan proposes action items for developing the entertainment in the Region.

PART I: S.W.O.T. STUDY

Chapter 1: Introduction

1.1 Background

An aggressive Louisiana Motion Picture Tax Incentive Program, new technologies and chaotic changes in the filmed entertainment industry are creating an unprecedented opportunity for economic growth and job creation in the State of Louisiana, particularly in the region of New Orleans and Tangipahoa Parish (the "Region").

The filmed entertainment industry includes motion pictures, television, video and most digital images. This study focuses on motion picture production which is the most visible segment with the greatest potential for economic impact on the Region.

Creating jobs is a complex process with economic, political, social and technological facets. Urgent need often overrides long-range vision. To address both timeframes, the New Orleans Office of Film and Video Development, the Tangipahoa Parish Tourist Commission, and the Hammond Industrial Development Board commissioned this two-pronged approach:

- An analysis of the strengths, weaknesses, opportunities and threats (S.W.O.T.) of the region's entertainment industry, based on data, analysis and findings in early 2004
- An action plan to create jobs through development of a thriving regional entertainment industry

The filmed entertainment industry is fickle. It is subject to public reaction to its products, cycles in the economy, developments in technology, and the whims of powerful personalities. A wave of change is creating a period of opportunity for the development of regional centers for creation, production and distribution of entertainment. Key factors include:

- Overwhelming response to Louisiana Motion Picture Tax Incentive Program
- Disruption of traditional industry practices by digital production and distribution technologies
- Increasing shift toward outsourcing and decentralization of services in the entertainment industry
- Globalization of the entertainment industry

1.2 Research Method

The study employed both primary and secondary research. Primary research included two online surveys and personal interviews with individuals and small groups of representatives from labor, government, educational institutions, and the private sector. Additional research sources were previously published reports and articles, as well as demographic and entertainment industry data from reliable sources. See "Appendix A: References."

An analysis of the region's strengths, weaknesses, opportunities and threats was conducted in the first quarter of 2004. Approximately 500 individuals were invited to participate. Almost 100 participated and the process included:

- review relevant secondary materials
- develop framework for regional industry analysis
- conduct primary research surveys and interviews
- collate and analyze relevant data

Personal interviews were conducted in New Orleans, Hammond and Los Angeles with constituents including:

- producers
- industry executives
- labor representatives
- economic development officials
- government officials
- financial leaders

The Job Creation Action Plan is based on a combination of generally accepted business principles and techniques employed in Canada, Ireland and Southern California for developing local entertainment industries, including materials published by the Entertainment Industry Development Corporation and others (see Appendix A: "References").

1.3 Report Structure

The study and recommendations are presented in two parts:

Part I: S.W.O.T. Study: data, analysis and findings

Part II: Job Creation Action Plan: recommendations for the development of a thriving regional entertainment industry

1.4 Chapter Summary

Louisiana Tax Motion Picture Tax Incentive Program and other factors are generating new business in Louisiana. The purpose of this study is to determine the status of the filmed entertainment industry, and determine the steps needed to create new jobs in a sustainable industry in the Region.

Chapter 2: Filmed Entertainment Industry and the Region

2.1 Introduction

The entertainment industry is global and comprised of much more than motion pictures. Annual revenues are impressive.

Global Media and Entertainment	$ 1.1 Trillion
U.S. Media and Entertainment	$ 467 Billion
Computer Games	$ 12 Billion
U.S. Box Office	$ 11.5 Billion
Video and DVDs	$ 11 Billion

This fact is acknowledged in the Incentive Program which includes commercials, music videos and television programming, excluding only sports and news. Current efforts focus on bringing motion picture production to the state.

2.2 The Filmed Entertainment Industry

Whether short or long-form, film or video, the filmed entertainment industry is comprised of many sectors,:

- development
- production
  - pre-production,
  - principle photography
  - post production
- distribution
- marketing and licensing
- dedicated technologies
- information/data management
- financial services

According to the Motion Picture Association of America, production and distribution of motion pictures employs more than a quarter million Americans, with more than half a million working in motion picture related jobs.

2002 Motion Picture Industry Employment

Production and Services	259,000
Video Rental	164,000
Theaters	142,000
	565,000

Each sector has its own potential for economic development in Louisiana. To date the primary focus in both state and local government is for use of locations in the state. Locations are required during the principal photography phase of production. The remaining phases of production and other sectors of the industry present numerous opportunities for economic development in the Region.

2.3 The Region

For purposes of this study, the Region encompasses New Orleans and Tangipahoa Parish, which includes Hammond. The area is far from isolated and the surrounding metropolitan area is subject to many of the same issues and attitudes discovered.

New Orleans is a high-profile city, a top vacation and convention destination. Events such as Mardi Gras and the Jazz & Heritage Festival add to its international status. The result is that New Orleans and Louisiana are synonymous in many minds. In fact, a common misconception held by those who have not visited the area (and a few who have) is that the state is limited to the French Quarter and swamps.

Tangipahoa Parish offers a wide variety of locations and is home to Hammond, a popular site for films set in small-town America because of its well-preserved 1950's main street and support for filming.

The significance of statewide programs is very important to the Region and is addressed as needed throughout the study.

2.4 Film Commissions

The Region is served by three film commissions:

- Governor's Office of Film & Television in the Louisiana Department of Economic Development
- Office of Film & Video Development in the Office of Arts & Entertainment of the Mayor's Office of Economic Development, City of New Orleans
- Tangipahoa Parish Convention &Visitors Bureau

Film commissions assist film, television and video production in their districts. Specific duties vary from place to place, but are based on the following:

- Business development
- Issuing permits
- Monitoring production
- Collecting and managing data

The New Orleans and Tangipahoa film offices provide free services such as script analysis and location scouting to encourage outside productions to film in the Region. They are experiencing an avalanche of requests for their free services in the wake of recent publicity about the state's Motion Picture Tax Incentive Program and the creation of LA-Squared, a purported $50 million production fund.

The Region's film commissions operate independently with some cooperation between the state and each local commission but little between the local commissions, resulting in duplication of shared duties and responsibilities.

The publicity that funding is available in the state has engendered a "gold rush" mentality and the Region's film commissions are now more likely to be approached by speculative projects than before. They are being deluged with both bona fide and prospective projects. Consequently, already under-funded and understaffed, the commissions are awash in requests for information and services.

The focus on the Region as a location, i.e. dependent on outside sources to generate production, is understandable in light of the history of the Region. However, a sustainable industry will be dependent on local production resources that supplement the work of the commissions and yield revenue for some of the services now offered for free.

2.5 Chapter Summary

- The filmed entertainment industry is comprised of many more segments than are currently being developed.

- The Region, comprised of New Orleans and Tangipahoa Parish, is a popular production location and the center of the state's filmed entertainment industry.

- Film commissions in the Region, the point of contact for the industry, are overwhelmed by requests from bona fide and speculative projects.

Chapter 3: S.W.O.T. Data

3.1 Introduction

An assessment of the strengths, weaknesses, opportunities and threats (S.W.O.T.) of the filmed entertainment industry in the southeast Louisiana region was conducted January through April, 2004. The S.W.O.T. analysis focuses on production, usually meaning principal photography or the filming phase of production, the most significant sector in Louisiana at this time.

3.2 Review of Relevant Secondary Materials

A review of pre-existing materials relating to the industry in the Region included the following:

- "Viability Study for a Film and Production Facility for the State of Louisiana," prepared for State of Louisiana Office of Film & Video by Economics Research Associates and released September 11, 1997

- "Reel Jobs: Physical Production Careers in the Entertainment Industry," prepared for The James Irvine Foundation by The Entertainment Industry Development Corporation and The PMR Group, Inc., July 2001.

- "Survey on National Cinematography," UNESCO, Culture Sector, Division of Creativity, Cultural Industries with the assistance of UNESCO Institute for Statistics and the National Commissions for UNESCO. March 2000, updated February 10, 2001

Additional materials are listed at "Appendix A: References."

Certain aspects of the study were hindered by the lack of reliable data available regarding facilities, crew, and amount of production in the Region.

3.3 Primary Research Surveys and Interviews

The study began with structured interviews and informal conversations with approximately 20 individuals in labor, government, education and production. The themes emerging from these interviews were incorporated into two questionnaires, one for members of the resident workforce and one for film producers and executives in Los Angeles and New York. See "Appendix B: Questionnaires." The questionnaires were administered online and respondents were given the option of remaining anonymous to encourage candor.

Some 500 individuals were invited by email to participate. The resident workforce is relatively mobile, but the vast majority live in the Region. To avoid bias, residents were asked about "your local entertainment industry." See Appendix B-1: "Resident Entertainment Workers Survey." Producers and production executives were questioned about “the regional entertainment industry in the United States” concluding with specific questions about Louisiana. See Appendix B-2: “Regional Entertainment Survey for Producers and Industry Executives.” Additional personal interviews were conducted with approximately 40 individuals in person or by telephone.

3.4 Collation and Analysis of Relevant Data

Overall, there were approximately 100 respondents. Personal interviews were notated and pertinent statements were extracted and organized. Questionnaire responses were collated and tabulated for statistical analysis. The findings provide insight into the current attitudes and expectations of resident workers and the industry executives whose decisions impact the Region. The results are significant and represent prevailing attitudes. The data also provides a baseline for measuring changes in perceptions about the industry in the future.

3.5 Manner of Inquiry

Respondents were asked to answer four general questions with regard to their local entertainment industry in addition to more specific questions to determine attitudes and demographics. The four general questions asked of producers and executives were:

- The best thing about filming in Louisiana is:
- The biggest problem with filming in Louisiana is:
- The biggest threat to the entertainment industry in Louisiana is:
- The most important opportunity for the entertainment industry in Louisiana is:

To encourage candor and prevent biased answers, resident respondents were asked the same general questions in a slightly different way:

- The best thing about the entertainment industry in my local area is:
- The biggest problem with the entertainment industry in my local area is:
- The biggest threat to the entertainment industry in my local area is:
- The most important opportunity for the entertainment industry in my local area is:

3.6 Responses

Respondents appeared to be forthcoming and candid. Language was sometimes colorful and very expressive. A summary of responses is presented here for reference. The number in parentheses after each topic represents the percentage of respondents who mentioned that factor. Respondents often referenced more than one topic and percentages do not necessarily equal 100% for each question.

3.6.1 Summary of Strengths

Resident Respondents

- Growth and potential (40%)
- Workforce (20%)
- Political support (10%)
- Tax incentives (10%)
- Unique culture (10%)
- Locations (10%)
- Not sure or nothing (10%)
- Personal advantage (7%)
- Training available (7%)

Producers/Executives

- Locations (34%)
- Culture (34%)
- Tax incentives (17%)

3.6.2 Summary of Weaknesses

Resident Respondents

- Lack of opportunity to work (37%)
- Lack of communication (17%)
- Lack of facilities (14%)
- Fragmented, disorganized industry (14%)
- Lack of experienced workforce (14%)
- Lack of funding (10%)
- Tax incentive issues (10%)
- Lack of promotion (7%)

Producers/Executives

- Lack of qualified crew (100%)
- Lack of facilities (70%)
- Lack of sound stages (70%)
- Local unions (34%)
- Locations too expensive (17%)
- Locations too specific (17%)

3.6.3 Summary of Threats

Resident Respondents

- Nepotism / cronyism (37%)
- Public attitude (20%)
- Ethical issues (17%)
- Political greed (14%)
- Lack of regular business (14%)
- Unstable workforce (10%)
- Competition (7%)
- Lack of funding (7%)

Producers/Executives

- Tax incentive issues (50%)
- Lack of qualified crew (17%)
- Lack of facilities / sound stages (17%)
- Lack of industry understanding (17%)

3.6.4 Summary of Opportunities

Resident Respondents

- More jobs (27%)
- More job training / education (17%)
- New businesses (14%)
- Better economy (10%)
- New permanent industry (7%)

Producers/Executives

- Improve crew base (50%)
- Improve tax incentives (34%)
- Improve facilities (34%)
- Provide tax rebates (17%)
- Make it fun (7%)

3.7 Chapter Summary

Online, in-person and telephone interviews were notated and relevant quotes extracted. Individual survey responses have been summarized and ranked for comparative purposes.

Chapter 4: Analysis of S.W.O.T. Data

4.1 Introduction

Analyzing the data presented a challenge because it was drawn from two viewpoints: resident workers and out-of-state producers and executives. Comparisons and contrasts are pointed out wherever appropriate. Each group had strong feelings about certain issues.

4.2 “Great Potential”

Many respondents were extremely enthusiastic about the future of the industry in the Region. The Region is enjoying a “honeymoon” phase with Hollywood. The attention is resulting in zeal for production in the Region.

4.2.1 Optimistic Residents

Overall, optimism and hope for the future are strong. 40% of respondents referenced "potential" as the greatest strength of the local industry. Resident respondents expressed an optimistic outlook:

- "Great potential."
- "Being the new kid on the block it has the potential to create great job opportunities for people interested in entertainment."
- "It seems to be growing, so hopefully there will be more job opportunities for local crew."
- "There seems to be a real desire to do it right and build an industry."
- "A vast number of people willing to make it work."
- "We have a great product here."
- "It's raw and just starting to take off."

4.2.2 Positive Producers

Producers and executives cite locations and culture as equally strong points with 34% each and tax incentives a distant third at 17%.

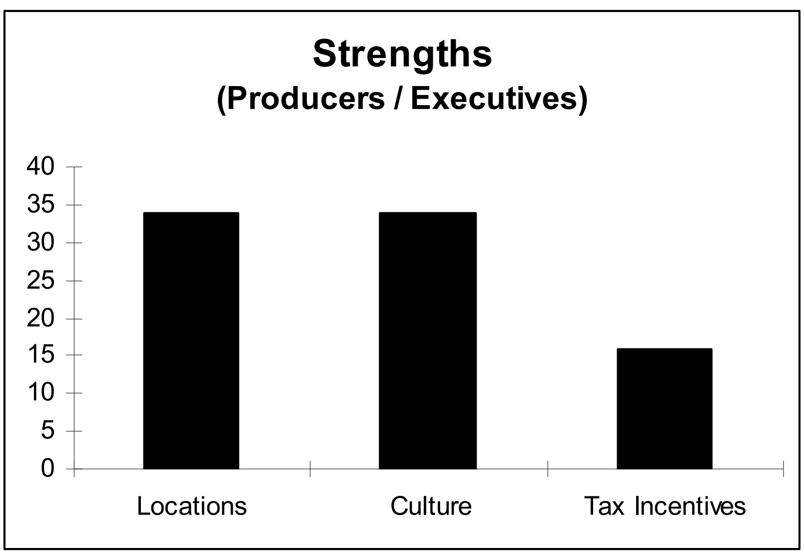


Figure 1

Their comments also referenced as significant strengths of the Region's entertainment industry:

- "Amazing locations"
- "The food",
- "Southern hospitality"
- "New Orleans"
- "Drive-thru daiquiri's!"

The regional industry is also seen as a favorable place to work by respondents who stated, "Working within a small community fosters better work relationships" and "It's like a small family."

4.3 "We Have Problems"

Across the board, the three areas of concern were dominant: crew, infrastructure and finance. The principal concerns about crew were availability and qualifications (see Chapter 5). Infrastructure issues were facilities and support services (see Chapter 6). Finance concerns were the impact and future of the tax incentives and funding for production (see Chapter 7).

4.4 "We Are Trying"

Residents who work in the entertainment industry are very enthusiastic about the future of development in the region. As one respondent said, "There seems to be a real desire to do it right and build an industry. Sure we have problems but we are trying."

As 77% of residents respondents said, "It takes everyone - public, commercial and individual efforts."

4.5 Chapter Summary

Respondents were positive about efforts to cultivate the filmed entertainment industry in the Region. Many were enthusiastic. They cited three primary issues that need to be addressed: crew (see Chapter 5), infrastructure (see Chapter 6) and finance (see Chapter 7).

Chapter 5: Crew

5.1 Introduction

Every producer and executive interviewed (100%) noted "lack of qualified crew" as a threat to the growth of production in the Region.

5.2 Size of Crew Base

The size of the crew base was an omnipresent issue. Comments included "no crew," "not enough qualified crew" and "lack of qualified union crews in all areas." One producer suggested, "Encourage trained technicians to return to or move to Louisiana" to help alleviate the shortage.

It is difficult to assess the degree of the shortage. One resident respondent indicated the need "To identify all qualified production personnel." Another stated, "[There's] not enough local crew to handle multiple productions at same time." On the other hand, resident respondents found advantages in the situation, "It's like a small family" and "Working within a small community fosters better work relationships."

The Motion Picture Studio Mechanics Local 478 is taking steps to increase its membership but has yet to reach its target. At one point in 2003, approximately 90% of local union members were engaged on one production. This is in stark contract to Austin, Texas which is rated at 4.5, meaning that the local there is rated capable of handling 4 major productions and several smaller ones at one time. The Region's union leaders face the dilemma of loyalty to resident members and meeting the growing demand for a greater number of more experienced workers.

5.3 Quality of Crew

When asked to rate the quality of entertainment industry workers, perceptions differ significantly inside the state and among outsiders.

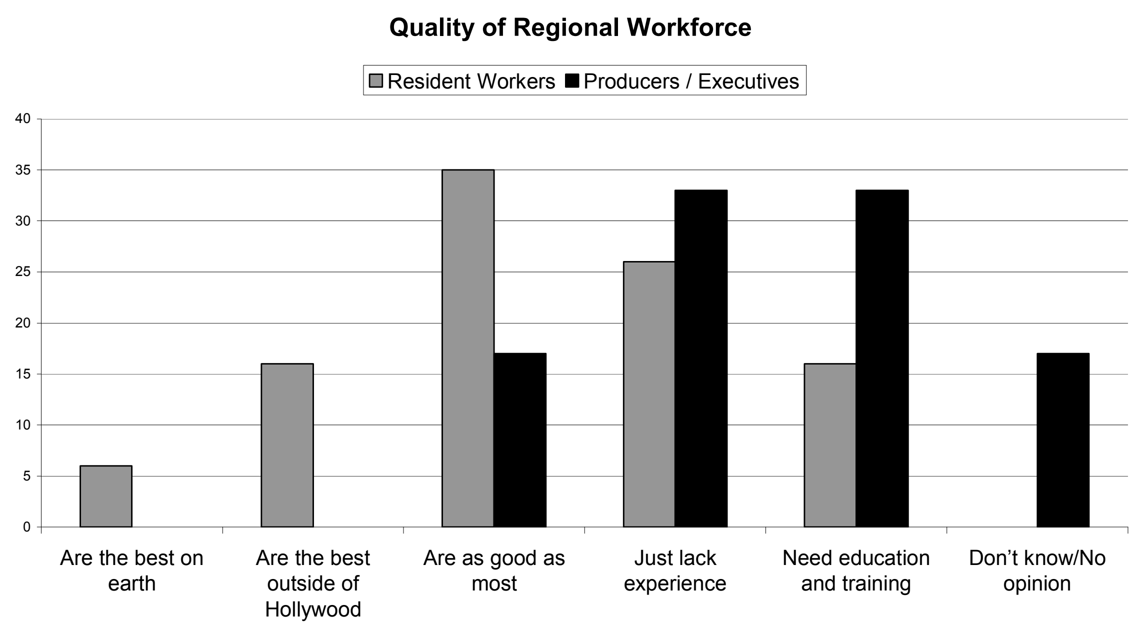


Figure 2

A majority (57%) of in-state respondents rated their colleagues as good or better compared to 17% of out-of state producers and executives. Only 16% of locals rated the workforce as needing education and training compared to 33% of those who might hire them. Both groups rated "just lack experience" as significant (26% and 33%, respectively), a condition which will hopefully be resolved over time.

Most of the responding producers have experience with resident crews and it is not clear whether working with local crews has improved opinions. A follow-up survey to compare data with the baseline provided here would shed light on this question.

5.4 Education and Training

There are a number of programs providing education and training such as University of New Orleans and the Nims Center Studios, and nearby Baton Rouge Community College. The Motion Picture Studio Mechanics Local 478 presents introductory classes for potential workers, especially those transferring from related occupations, on an intermittent basis. One respondent voiced his concern about providing training for jobs that do not yet exist and disappointing workers if the jobs do not materialize. While valid, the concern is heavily outweighed by the need for education and training voiced by those responsible for hiring.

Universities and trade schools offer education and professional instruction. A respondent pointed out a common theme, "It is a training ground for more advanced placements in larger and more sophisticated markets." A training program for production assistants is in place, although it should be noted that production assistants are traditionally trained on the job and such a training program is somewhat alien to industry professionals. A coordinated effort by community colleges across the state is developing training programs to meet specific employer needs as they arise.

5.5 Work Opportunities

When asked about work opportunities, more than half (55%) stated "there's not enough work for me.

Amount of Work
(Residents)

	%
I have more work (business) than I can handle	6
I work as much as I want	26
There's not enough work (business) for me	55
It's my second job and I don't depend on it	13
	100

This attitude is also reflected in the following statements: "It's cliquish, and the big jobs and roles are hired in Los Angeles" and "I have no line of contact to make my services available."

The industry is inherently cliquish. In nearly all creative endeavors, directors, designers and artists prefer to work with people they know and with whom they share a successful work history. This preference is demonstrated by the large number of department heads and crew leaders currently being imported to the state. However, as local workers gain experience, foster positive working relationships, and develop better reputations, the situation should improve.

The amount of work will increase in proportion to the level of production, but if workers are not aware of work opportunities, the growth process may be thwarted. When asked about their awareness of work opportunities, 35% said "it's sheer chance if I find out about anything" or "I'm out of the loop".

Awareness of
Work Opportunities
(Residents)

	%
I'm always informed because I'm plugged in	26
I know what I need to know when I need to know it	16
I find out when I really try	23
It's sheer chance if I hear about anything	29
I'm out of the loop	6
	100

A smaller applicant pool heightens the perception of a limited, under-qualified workforce. Therefore, it is important that workers be made aware of jobs when they are available.

When asked how they learned about opportunities, the overwhelming majority (71%) indicated "gossip on the grapevine".

Current Method to Learn
of Work Opportunities
(Residents)

	%
Gossip on the grapevine	71
Telephone hotline	3
On the internet	26
	100

When asked how they would *prefer* to learn about production and job opportunities, a majority of respondents (77%) indicated on the internet (42%) or by telephone hotline (35%).

Preferred Method to Learn
of Work Opportunities
(Residents)

	%
On the internet	42
On a telephone hotline	35
Other	23
	100

5.6 Crew Base Attitude

The resident workforce is cautiously optimistic about the future of the industry, as one respondent stated, “There seems to be a real desire to do it right and build an industry. Sure we have problems but we are trying.” Another said, “Being the new kid on the block, it has the potential to create great job opportunities for people interested in entertainment” and another, “a vast number of people [are] willing to make it work.”

Local workers expressed concern that job creation is threatened by “apathy by the government and local citizens who don't understand the industry and what it can do for our area” and the “inability for companies and producers to weed out the professionals from those that want to exploit them.” One producer noted a “lack of knowledge and experience about industry procedures and practices” in the state among workers and vendors.

Amid the optimism and excitement, a sense of disenfranchisement emerged as a strong undercurrent. A significant number (37%) of resident respondents voiced concerns about “cronyism and nepotism” hindering development of jobs. One respondent stated, “What work there is goes to the chosen few.” Another remarked that “[there’s] too much control in the hands of too few.” While it is tempting to attribute these concerns to sour grapes, an anonymous respondent wrote, “I create the jobs . . . I rule”, giving some validity to the charge.

Another frequent matter of concern was ethical conduct. When asked what they considered the greatest threat to Region’s entertainment industry, one respondent stated, “[a] lack of unity and honesty” and the presence of “an ‘I want my cut’ attitude that sends production companies looking elsewhere.” According to another respondent, “Too often, politicians and companies want to get their hands on too much money from production companies, so the companies go elsewhere.”

Producers and executives also gave notice that “lazy union workers” and “[problems with] union crews” were a threat to local production. Problems included:

- Demands for a rate of compensation comparable to Los Angeles (which they viewed as defeating gains made by tax incentives)

- Excessive travel charges (the 30-mile limit making it almost as economical to bring crew from Los Angeles due to costs of housing)

- Unrealistic appraisal of qualifications (compared to Los Angeles crew), and

- Padding of work hours.

This pattern of behavior is hopefully a passing phase since it was also found in the Canadian film industry in the 1980's during its infancy. Hopefully, inappropriate behavior and excessive demands will moderate as the industry matures and these unfavorable perceptions will fade quickly.

Exacerbating the situation, a local producer reports that he has no difficulty finding competent union workers for commercial shoots because "crew prefer the short jobs to long term jobs like feature films."

5.7 Chapter Summary

In summary, the Region is home to highly qualified, experienced workers who could excel if given the opportunity and many more who are willing to learn and work their way into the industry. On the other hand, the Resident crew base is limited in size and is perceived as being in need of experienced and training by producers and executives.

Chapter 6: Facilities

6.1 Introduction

In reality, the term "facilities" encompasses much more than sound stages. Sound stages are spacious open buildings with high ceilings and grids for hanging lights and scenery such as those found at the Nims Center and Independent Studios in New Orleans. Physical production facilities also consist of production offices, set construction and shop areas, edit bays, sound recording studios and screening rooms, to name a few.

The term facilities also refers to many of the services associated with production such as film laboratories, equipment rental, craft services and catering, large camera houses, raw stock distributors, motor home rental, and so forth. For a more complete list of these services, see "Appendix C: Associated Jobs and Small Businesses."

When asked to rate facilities in the Region, producers and executives were presented with several choices:

- Excellent - exactly what I need
- Better than I usually find on location
- As good can be expected
- Substandard
- Woefully lacking
- Don't know

One-third (33%) of responding producers and executives said “as good as can be expected” and the remainder (67%) said “substandard.”

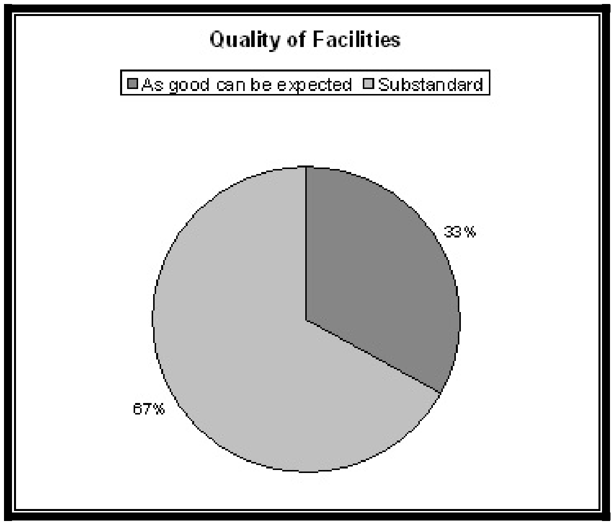


Figure 3

6.2 Sound Stages

Despite the fact that the New Orleans area has about 35,000 square feet of shooting space, one respondent observed that the Region is “losing productions because of lack of real soundstage space.” As illustrated in data gathered by the Entertainment Industry Development Corporation[1], other regions have much more space available.

[1] http://www.eidc.com/Location_Information/Soundstages/soundstages.html

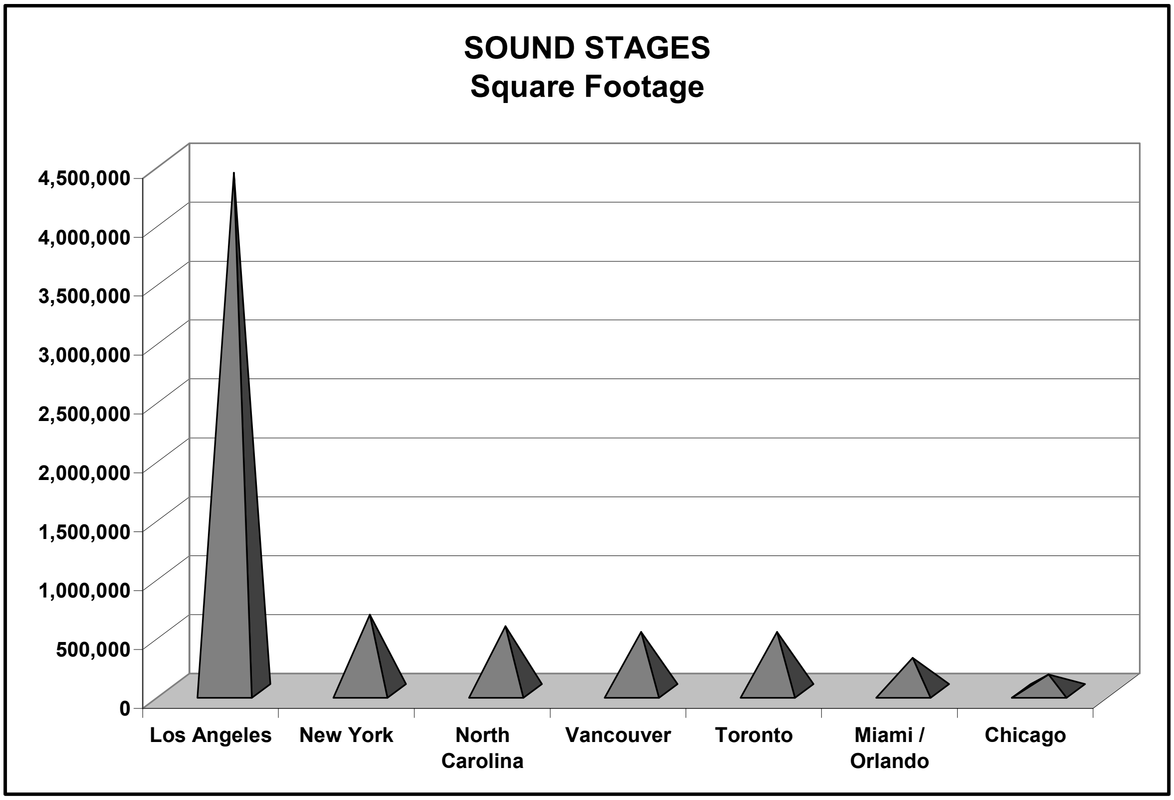


Figure 4

With the exception of North Carolina, there appears to be a correlation between the available square footage of sound stages and revenue generated by production.[2]

Comparison of Soundstage
Area and Production Revenue

City	Soundstage Square Footage	Revenue
Los Angeles	4,400,000	$27.1 billion
New York	650,000	$2.7 billion
North Carolina	550,000	$329 million
Vancouver	502,000	$634 million
Toronto	500,000	$592 million
Miami / Orlando	282,000	$214 million
Chicago	140,000	$104 million

Sound stages or structures used as sound stages in the region include the Nims Center Studios (almost 25,000 square feet in two rooms, unfortunately broken up by columns), Independent Studios (nearly 10,000 square feet). In addition,

[2] Ibid.

warehouses such as the Jim Carey Building in Hammond (30,000 square feet) and unoccupied buildings are habitually used for shooting. Some of the sound stages are adequately, if not well, equipped. One respondent recommended, "[add] a bona fide soundstage or two – 18,000 or 24,000 square feet." Additional space is not the only answer; however, publicizing the available sound stages and alternative spaces to the industry would also be helpful.

6.3 Support Facilities

Approximately 500 categories of jobs and small businesses benefit from production. From the obvious such as hotels and restaurants to the surprising such as arborists and laundromats, film production adds to the economy. Appendix C: "Associated Jobs and Small Businesses" lists many of the beneficiaries.

As for other types of facilities, there is a great deal of interest in building additional post-production and sound studios. One respondent said, "no camera houses, raw stock distributors, limited motor homes sums up vendor issues." Another remarked simply, "build up facilities!" They are divided into three groups which sometimes have common members:

6.3.1 Sector Specific Jobs and Small Businesses

The sector specific category includes the artists and crafts people involved in production plus agents, managers, product placement, film & tape storage, and nearly 200 other businesses. For more examples, see Appendix C-1: "Sector Specific Jobs and Small Businesses."

6.3.2 Adaptive Jobs and Small Businesses

Adaptive jobs and small business offer specialized versions of regular services. Examples are production accountants, studio teachers/welfare workers, and underwater technicians. For more examples, see Appendix C-2: "Adaptive Jobs and Small Businesses."

6.3.3 General Jobs and Small Businesses

This group benefits from increased demand for products and services created by production and include drycleaners, copy centers and vending services. For more examples, see Appendix C-3: "General Jobs and Small Businesses."

It should be noted that some support facilities are in place but that they are not easy to find. A reliable database of support facilities would be very helpful. To date, exactly what new facilities will materialize is not clear.

6.4 Chapter Summary

Major strides have been made in developing facilities. However, reliable data regarding facilities in the Region is not readily available. The Region would benefit from additional sound stages and nurturing the jobs and small businesses that benefit from the entertainment industry.

Chapter 7: Funding

7.1 Introduction

A key to development of any industry is funding. Filmed entertainment is a venture capital industry and each project begins afresh. Film financing has the characteristics of an art (imaginative combination of elements) and a science (the application of a set of logical and practical methods). Behind the glitz and glamour of movies is the sometimes tumultuous, sometimes mundane, always creative world of film finance. To quote Stephen Sondheim, “The art of the art is putting it together.” Films are rarely financed by a single individual or company. The deal may include multiple studios, production companies, and distributors with contributions from bank loans, product placement, licensing, merchandizing, tax credits or territory pre-sales.

A key factor in development of the industry is a steady flow of projects. There are two sources: studio and independent films. Each offers advantages and disadvantages and both are necessary for a thriving industry. Studio films are budgeted from $25 million to $200 million and often bring in what they need and take it away when they wrap. Independent films are budgeted up to $40 million dollars and often spend a greater percentage of their budget in the Region.

The industry is cyclical and focus shifts periodically from studio to independent productions. Ultimately, the growth of the filmed entertainment industry in the Region is dependent on the availability of financing for production.

7.2 Studio and Independent Films

Globally, the number of full-length feature films released annually is estimated at 4,500 to 5,000. In the United States, the number is estimated at 500, with about 200 produced by major studios and another 200 acquired for release by the majors from their makers. The remaining films are released by independent distributors. These numbers are based on theatrical release and do not include movies that are made for television networks and cable or that go directly to video or dvd.

7.2.1 Hollywood Studio Films

Although the Hollywood Creative Directory lists more than 1,600 motion picture production companies, the major studios (or “majors” as they are commonly known) are the flagships of the industry.

- The Walt Disney Company
- Sony Pictures Entertainment
- Metro-Goldwyn-Mayer
- Paramount Pictures
- Twentieth Century Fox
- Universal Studios
- Warner Bros.

The majors function as marketing systems. They market entertainment products that range from film and television to bobble-head dolls. The average production budget for a studio film is more than $100 million, which could explain why each studio makes fewer than 20 films a year. It is rare for a production budget of less than $25 million to reach the lofty heights of studio production. No studio wants to risk $100 million on a film, so the norm is co-production with another company that provides cash or services, such as special effects, to the production.

The majors are profit-driven, publicly-held corporations with demanding stockholders to satisfy. Their massive marketing machine needs to be fed to keep hundreds of accountants, managers and clerks occupied, so the majors also acquire films for distribution from foreign countries, smaller production companies and independent producers. These acquisitions sometimes account for the greatest return on investment for a studio. It’s difficult to discern actual returns because studio accounting is regarded as a black box where money goes in but rarely comes out.

7.2.2 Independent Financing

Independent films draw financing from equity, bank loan, distribution pre-sales and product placement. The specific combination is determined by current market conditions and the project package including script, cast and director. Well-financed studios minimize risk by hiring big name stars, writers and directors. The average studio film in 2004 costs $102 million. Independent producers seek out high-quality scripts and actors with recognizable names and faces. Creativity is a luxury for studios and a requirement for independent film.

Under almost any circumstances, the possibility of a 100% loss is very real and yet the potential return is literally astronomical. In its first two months of release, Mel Gibson’s independent film “The Passion of the Christ” earned almost $600 million worldwide with a production budget of $30 million and an estimated marketing budget of $25 million. The return has generated almost as much comment as the film itself. Other widely-reported successes include “My Big Fat

Greek Wedding" which earned roughly $396 million on a production budget of $5 million and an estimated marketing budget of $19 million and "Blair Witch Project" which has earned $248 million on an estimated marketing budget of $25 million, dwarfing its almost minuscule production cost of $60,000.

While these independent films were financial homeruns, even box office bombs can made breakeven or better through cable, video or foreign sales.

7.3 Film Distribution

The complexity of film financing lies in the distribution system that reaches into the consumer's pocket. Some films are dependent on box office receipts and others are only released in theaters for a week or two, just to promote the soon-to-be-released video or dvd. The products based on a single film can number into the hundreds or even thousands. Technology presents numerous avenues for distributing and packaging products based on the film.[3]

A film draws streams of revenue from territories (by continent or country) for specified windows (allotted time periods) in different media (theatrical, pay-per-view, cable tv, network tv, airplanes, videotape, dvds). Sequels, live action or cartoon series for television, books, theme-park rides and other ancillary entertainment products may also be based on a film.

Financing is based on the potential revenue a film is estimated to earn, although it is generally accepted that projections are in fact "guesstimates." Traditionally, pre-sales (advances against a distributor's anticipated earnings) provided half or more of a film's production budget. Today, distribution agreements are less likely to provide such funding and are more apt to contain a "first look" provision for a distributor to view the finished film to see if it is suitable for distribution. This change makes Louisiana's Motion Picture Tax Incentive Program very attractive to filmmakers who are anxious to reduce their bottom line.

7.4 Financial Resources

Sources of financing are developing in the Region. One fund, LA-Squared, is based in New Orleans and Regional banks are entering the area. Private investors are starting to look at the opportunities created by the tax credit program.

[3] "Buffy, the Vampire Slayer" earned less than $5 million at the box office but generated two television series ("Buffy" and "Angel"), dozens of books and other publications, and more than 10,000 products.

7.4.1 LA-Squared

Currently, there is one high-profile fund in Louisiana, LA-Squared independent film fund. The fund was established last July by Element (then known as Samy Boy Entertainment and HSI Productions) in partnership with the Louisiana Institute of Film Technology (LIFT) and the state-owned Louisiana Economic Development Corporation (LEDC). The fund's target capitalization of $50 million has been widely publicized. The actual amount raised to date is estimated at about one-fifth of that figure.

The fund hopes to go into production on its first film in the Fall, 2004. It is anticipated that up to 90% of the 70-person crew will be hired locally. On a positive note, LA-Squared has generated a great deal of interest in filming in the Region and promises to generate jobs. On the other hand, the requirements for utilizing the fund are on a par with the most stringent Hollywood studio deal. Fund managers have stated that producers must hand over creative control; use facilities owned by fund managers; employ crew designated by fund managers; and relinquish all distribution rights. Many producers consider these terms unacceptable. Though limiting, the policy guarantees control to the fund managers and presents an opportunity for production of low budget scripts, a traditional training ground for the industry.

7.4.2 Bank Financing

Despite efforts by state agencies to guarantee at least partial bank financing and by Louisiana banks to provide such financing, resident respondents expressed concern about "no funding" and "lack of local financial resources". Bank financing terms are on a par with the most stringent in Hollywood and offer limited incentive to producers to choose the Region over other financing options.

However, the very fact that bank financing for production is available in the Region is a major step toward moving from location status to being the home of an industry.

7.5.3 Financial Models

The availability of funding is a major incentive for filming in the Region. UNESCO's Survey on National Cinematography[4] reported that an increasing number of countries and locales are offering some level of film funding in an effort to attract production. One respondent compared the Louisiana program unfavorably "to New Mexico, where I can get true production dollars, not just tax credits." Canada has long offered funding as an incentive. Ireland offers funding to encourage local film production in particular. Even the United Nations encourages diversity in filmmaking through grants from the Better World

[4] Ibid.

Campaign of the United Nations, funded by a portion of Ted Turner's historic $100 million donation.

7.6 Chapter Summary

The Region's progression from location to industry is dependent on a steady flow of production, production is dependent on availability of financing, and the Region has started to address the need.

Chapter 8: Tax Incentives

8.1 Introduction

The surge in production can be attributed directly to the Louisiana Motion Picture Incentive Program ("Program") which was passed by the legislature and went into effect in July, 2002. Then Film Commissioner Mark Smith and city, parish and state officials, the legal and financial community, and industry leaders were instrumental in creating the Program. The tax incentives are threefold:

- Sales and Use Tax Exclusion
- Employment Tax Credit
- Investor Tax Credit

The Program also provides for certain production bank loan guarantees for productions.

Respondents' experiences and attitudes with regard to the Program were explored because of their explicit impact on development of the entertainment industry in the Region.

A comparison of state incentive programs by Axium International in May 2004, found that Louisiana offers the strongest incentive program in the United States. The Louisiana program was a recurrent topic of discussion at a gathering of about 200 producers and industry executives at a Digital Coast Roundtable event at Locations Expo in Los Angeles in April 2004.

8.2 Objectives of Incentives

The objectives of the Louisiana Motion Picture Incentive Program are threefold:

- To encourage film and video production in Louisiana
- To advocate the hiring of Louisiana technical crew and talent
- To support and encourage the use of Louisiana equipment and services related to film and video production

Amendments in 2003 made the motion picture investor tax credits explicitly transferable. In March, 2004, the investor tax credit was amended by legislation that "removes the sunset date; limits the credit so that it will not exceed Louisiana expenditures of the production; authorizes a carry forward of tax credits; and provides for administrative procedures and fees for the tax credits by the Governor's Office of Film and Television and the Department of Revenue."

8.3 Impact of Incentives

The Louisiana Motion Picture Incentive Program, used effectively, can reduce the production costs of a film up from 12% to 15%, although rumors expand this figure to 48%. The potential savings have attracted the attention of a large number of studios and producers. As a group, producers and executives cited script requirements as the primary reason for selecting a location, "it feels like the setting of the film" and ". . . appropriate to supporting the storytelling called for by the script." When asked about non-script factors, one-third selected tax incentives as the most important reason for choosing a shooting location, second only to qualified crew.

Everything Else Being Equal,
Most Important Reason for Selecting a Location
(Producers / Executives)

	%
Qualified crew	67
Tax incentives	33
Production facilities	-
Community support	-
Government services	-
Cash rebates	-
Great place to visit	-
	100

It should be noted that the pool of respondents was somewhat biased since it consisted in large part of producers who had experience with production in Louisiana and the incentive program.

Awareness of Louisiana Tax Incentives
(Producers / Executives)

	%
I'm already using it	33
I intend to take advantage of it	50
I've heard of it but it doesn't interest me	-
I don't know what you're talking about	-
It's not relevant to me	-
Don't know	17
	100

It is evident that the Louisiana Motion Picture Tax Incentive Program is attracting producers and executives who place a high value on tax incentives (33%). It is significant that the same group places an even higher value on qualified crew (67%). One respondent summarized the biggest threat to growth of the industry in Louisiana as "tax incentive programs in other states that have a crew base."

When asked to rate the Program, a number equal to those familiar (83%) gave it a rating of good (50%) or great (33%).

Rating of Louisiana Tax Incentives
(Producers / Executives)

	%
A great program that worked for my project	33
A good idea but has a few kinks	50
Too complicated to be effective	-
Okay for bigger players but doesn't work for my project	-
Don't know	17
	100

8.4 Difficulties with Incentives

In contrast, other respondents expressed doubt. One asked, "Are these tax incentives valuable?" In an interview, a respondent who felt he had investigated the Program thoroughly stated, "There are no guarantees. It's all speculative until the production is done. It's not like Canada where I keep the money in my pocket." Another suggested "better yet, tax rebates."

The requirement to spend the full budget before garnering tax credits is of special concern to independent producers and production companies who must raise or borrow production funding. These producers are responsible for the majority of film production in the United States. Annually, studios produce approximately 200 films and acquire about 250 from outside sources for distribution under their banner. It is estimated that more than 500 non-studio films are made in the United States each year, and the number is increasing rapidly thanks to digital technology. An additional 4,500 films are produced worldwide in more than 100 countries.[5] A significant number of these films are candidates for production in the Region.

Independent producers who do not have full-time attorneys and accountants on staff find the Program cumbersome and confusing. One said, “the cost of having an attorney negotiate with the state is more than the credits are worth.” They cite complicated qualifying conditions for projects, uncertainty about value in dollars, and delay in capturing rewards, especially in comparison to other incentive programs.

8.5 Secondary Consequence of Incentives

The Program has also given rise to new financial services that broker state tax credits for out-of-state investors with Louisiana taxpayers. The derivative market for tax credits enhances the financial stability of the industry. Some producers feel the brokers “drain money from the production to put in their own pockets.” Demand for these and related services will rise as the number of productions increases. As Louisiana taxpayers and the industry become more aware of the Program, additional derivatives will probably develop that take advantage of opportunities offered.

The publicity that funding is available in the state has engendered a “gold rush” mentality and local film and tourist commissions are being deluged with both bona fide and prospective projects. Consequently, the Region’s film commissions are now more likely to be approached by speculative projects than before. Already under-funded and understaffed, the commissions are awash in requests for information and services.

8.6 Chapter Summary

- The Louisiana Motion Picture Tax Incentive Program has dramatically increased the mount of production in the Region. Data is not available to show how much.

- The success of the Program has placed an increased demand on film commissions at all levels.

- The Program is only reaching a portion of the target market.

[5] Survey on National Cinematography, UNESCO, Culture Sector, Division of Creativity, Cultural Industries with the assistance of UNESCO Institute for Statistics and the National Commissions for UNESCO. March 2000, updated February 10, 2001.

Chapter 9: Conclusions

- The Region is experiencing an increase in production resulting from the Louisiana Motion Picture Tax Incentive Program that must be managed carefully for long-term growth.

- Resident workers in the filmed entertainment industry are optimistic but are concerned about being included.

- Producers and industry executives view the Region as a great location in need of a larger, more qualified work force and better production and support facilities.

- The transition from location to bona fide industry will be determined by the availability of production financing.

PART II: JOB CREATION ACTION PLAN

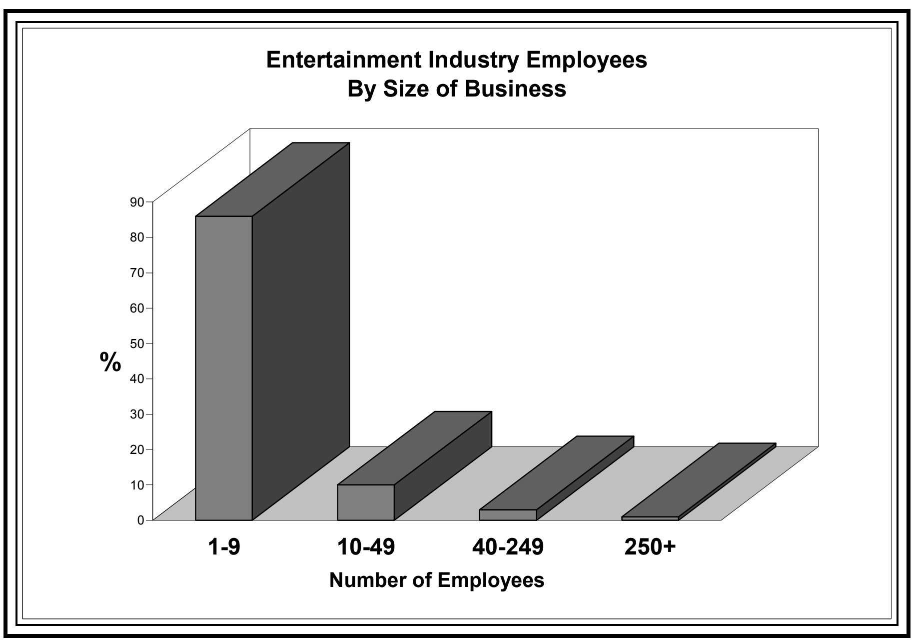
Section 1: Introduction

Creating jobs is a complex process with economic, political, social and technological facets. Adding to the complexity is the fact that the Region is giving birth to a new and improved version of an established industry in an era of rapid change and economic uncertainty.

Section 2: Importance of Small Business

The natural tendency is to emulate historical patterns of success in the entertainment industry: massive capital expenditures to capture extensive market share with narrow profit margins. This scale of risk and investment is unreasonable and unnecessary today.

Small businesses are the principle source of jobs in the entertainment industry. In Los Angeles County, the acknowledged center of the industry. 96% of film and television jobs are in businesses with less than 50 employees. More specifically, 86% of jobs are in businesses with less than 10 employees and another 10% are in businesses with less than 50 employees. With 3% of the businesses employing between 50 and 250, that leaves only 1% of the film and television workforce is employed by the studios and other large companies with more than 250 employees.



Los Angeles County, U.S. Bureau of the Census,
County Business Patterns, 1997

Figure 5

Section 3: Industry Growth Cycle

3.1 Introduction

An overview of the entertainment industry's growth and development in general will help put the region's opportunity in perspective. The entertainment industry is mature. It has existed for more than 100 years and gone through the maturation cycle a number of times. The widely-accepted life cycle of a business ecosystem has four stages:[6]

- Pioneering Stage
- Expansion Stage
- Authority Stage
- Renewal Stage

3.2 Pioneering Stage

The pioneering stage begins when a disruption of some kind forces a change in an existing ecosystem. In the filmed entertainment industry, macro forces of technology and globalization are challenging the traditional way of doing business for entertainment conglomerates and their constituent suppliers and customers.

With its advantages in production costs and lifestyle, the Region can take advantage of this disruption to become a strong regional entertainment industry. The Region has some legacy businesses that can lead the way and expand to meet initial demands. Businesses located in Southern California are starting to investigate re-location to the Region. As demand increases, small businesses are developing to serve the industry.

3.3 Expansion Stage

During the expansion stage, numerous businesses start up, spin-off, merge and disappear. Competitors will eventually merge or buy each other out. As they grow, some will spin-off specialized services. This process is required to produce strong enterprises with sustainable revenue models, experienced management and a diverse marketplace for the next stage.

3.4 Authority Stage

Leaders consolidate their positions, industry standards emerge, and growth is diminished. Competition for market share overtakes new product innovation.

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[6] The Death of Competition - Leadership and Strategy in the Age of Business Ecosystems by James F. Moore, HarperBusiness, New York, 1996

3.5 Renewal

A mature industry must adapt or perish. For instance, the major studios are faced with average production budgets topping $100 million and are increasingly reliant on independent producers for product to sustain their marketing machines. The full impact of digital technology has yet to be seen, but dramatic changes are already underway.

3.6 Impact of Growth Cycle on the Region

The 100-year-old filmed entertainment industry is mature and in the renewal stage and the Region is in the pioneering stage. The very factors that threaten the traditional means and methods of the mature entertainment industry offer unprecedented opportunities for growth and expansion.

Several observations are relevant:

- Small businesses generate more jobs than big businesses in the entertainment industry.

Identifying the jobs and small businesses that serve and benefit the Region's entertainment industry is a key step in job creation. Services that were once imported are starting to find a permanent foothold in the Region's economy. See "Appendix C: Associated Jobs and Small Business" for a list of jobs and small businesses that are candidates.

- Information and service jobs are supplanting manufacturing jobs.

The entertainment industry is rife with information and service jobs to replace the manufacturing jobs the Region is currently losing. Filmed entertainment is a "clean industry." It generates little waste and leaves a negligible footprint on the environment. These jobs can help retain the educated young people now leaving to pursue career opportunities beyond the Region's borders.

- It is not possible to predict which types of business will succeed or fail in this era of disruptive technology and economic challenge.

The Region is not encumbered with an existing infrastructure of entertainment industry dinosaurs. As opportunities expand, new businesses are emerging in a "gold rush" powered by opportunity and innovation. They are challenging the status quo of importing goods and services from beyond the Region by presenting alternatives to the existing paradigm. Improvements in communication and transportation make it possible for production and related activities, once limited to studio lots, to now take place in the Region.

- Globalization is creating new challenges and opportunities for markets that are no longer limited geographically.

The Region's history of international trade and its location at the gateway to Central and South America is an open invitation to international ventures and co-production treaties. Technology virtually ignores geographical and political boundaries. As distribution of entertainment continues to shift from physical media to satellite and cable, the Region's location will increase in importance. New prospects for entertainment related technologies will materialize, as well.

Section 4: Transition from Location to Industry

The Region is preparing to emerge from the cocoon of "location" to spread its wings as an industry. The contrasts are marked:

Location	Industry
▪ Temporary workforce	▪ Permanent workforce
▪ Part-time jobs	▪ Full-time and part-time jobs
▪ Highly competitive market	▪ Relatively stable market
▪ Vulnerable to trends	▪ Trend-setter
▪ Volatile cycles	▪ Market cycles
▪ Culture clash	▪ Culture of excellence
▪ Dependent on external funding	▪ Self-generated funding

Section 5: Enhancing Quality and Size of Crew Base

According to "Reel Jobs: Physical Production Careers in the Entertainment Industry"[7]:

> "Getting experience and getting to be known are the keys to getting jobs. Having gotten a job, doing a good job and enhancing a reputation for performance is very important in getting the next job."

At the present time, three approaches are needed to improve the quality and size of the workforce:

- Education and training
- Professional development
- Recruit experienced workers

[7] "Reel Jobs: Physical Production Careers in the Entertainment Industry," prepared for The James Irvine Foundation by The Entertainment Industry Development Corporation and The PMR Group, Inc., July 2001.

5.1 Education and Training

Education and training programs are a sure sign of growth in an industry. It is important to support academic courses in media and the arts as well as specialized programs for technical training such as the following examples.

- The Robert E. Nims Center for Entertainment Arts and Multi-Media Technology, a division of the University of New Orleans Foundation and the University of New Orleans, offers undergraduate and graduate degrees in film, video production, theatre arts and communication through the Department of Drama and Communications at the University of New Orleans.

- Louisiana Technical College in Metairie is a member of a consortium of community and technical colleges that is developing a statewide system of training with each member offering a different focus. See Appendix D: "Louisiana Community and Technical College System Film, Television and Entertainment Consortium."

- Louisiana Institute for Film Technology (L.I.F.T.) offers a 4-week Total Immersion Course in film and video production with "hands-on" training on industry standard cameras, cranes and editing suites.

Support can take many forms, among them are:

- Recognition
- Promotion
- Financial aid
- Assistance in developing curriculum
- Special programs
- Presentations by professionals in the industry at high school career days
- Tours of the existing facilities for students
- Intern programs would acquaint young people with the myriad of jobs behind the screen.

5.2 Professional Development

Professional development may be achieved through continuing education courses, seminars and workshops, mentoring. Organizations that represent workers in the industry are a resource for information and assistance in professional development. Several offer education programs such as:

- Academy of Motion Picture Arts and Sciences "Visiting Artists Program"

- Academy of Televisions Arts and Sciences “Visiting Professionals Program.”

(See “Appendix E: Academy Programs”) Others offer job training and support for developing jobs through grants or resource sharing. See Appendix G: “Entertainment Industry Professional Organizations, Guilds and Unions.”

5.3 Recruiting Natives and Retirees

Two groups are prime targets for recruitment:

- Natives
- Retirees

The author of this report is one of many natives of the Region who have returned after gaining professional experience in the entertainment industry in California and New York. Reasons for returning vary and include:

- Desire to raise their children in the Region
- Demands of aging parents
- Craving for crawfish.

Some are also retirees and many are looking for second careers or a chance to pass on their knowledge through mentoring and teaching. They can be reached as follows:

- The Louisiana Department of Culture, Recreation & Tourism is currently developing a program for retirees

- Guild and union newsletters for entertainment industry workers

- AARP-type magazines extolling the virtues of opportunities in the Region.

5.4 Union Workers

The Union leaders are taking measures to meet the demand for workers.

- Offer a training program through vocational schools such as the Louisiana Technical College at the Hammond or Metairie campus.

- Provide Union instructors who would be compensated through a fee-sharing arrangement with the sponsoring institution.

- Supply tuition through Veteran’s assistance, TANF or Temporary Assistance for Needy Families, Pell Grants, and vocational aid programs.

Section 6: Developing Facilities

The development of facilities requires planning and involvement of the private sector.

6.1 Survey Existing Facilities

First, a census of existing facilities is essential for two reasons:

- To be able to inform the industry about what's available
- To determine what is needed

6.2 Master Plan

An important consideration in building new facilities is that they meet the demands of the market at the time of completion which may be quite different from demands at conception of the project. A Master Plan that identifies specific types of facilities would encourage the real estate industry and financial interests to get involved.

6.2 Private Sector

A challenge to the private sector to find solutions will start the ball rolling. See Appendix H: "Invitation for Expressions of Interest" for an example issued by the Irish film community in 2002. Similar to a request for proposal, the Invitation asks the private sector for aid in meeting a common need.

If the industry is to expand and grow authentically, it is essential that the private sector assume the responsibility for building the infrastructure. Otherwise, growth will dwindle as public funding expires.

6.3 Sound Stages

The imbalance between demand and availability of sound stages is unavoidable during the pioneering stage of the industry in the Region. The need for sound stages presents three options:

- Expand and improve existing sound stages (which is beginning to happen)

- Renovate suitable buildings such warehouses into sound stages (which should be encouraged by informing owners and managers of the opportunity)

- Build new state of the art sound stages (which will require significant capital investment and know-how)

6.4 Support Facilities

Support facilities include the services listed in Appendix C:

- Appendix C-1: "Sector Specific Jobs and Small Businesses"
- Appendix C-2: 'Adaptive Jobs and Small Businesses"

To encourage the development of these busineses:

- Create a guide to starting such a business that lists all of the available assistance, tax advantages, support from economic development agencies and other advantages

- Invite experts to speak at meetings of the Chamber of Commerce, Rotary and other civic and business groups about the need and opportunity for adaptive businesses

Section 7: Funding

A studio film can provide huge influx of revenue to the Region. However, the bread and butter of a thriving filmed entertainment industry is commercials, music videos, documentaries and independent film. They keep the business flowing. Entrepreneurs and investors need data on all phases of production in the Region to justify their efforts and investment. If the industry is going to attract the kind of investment required to move forward, it is essential that the data be:

- collected
- collated
- distributed

If proper management of data is too great a burden for already overtaxed film commissions:

- Contract with a university graduate program, business development center or private contractor to collect and distribute data.

7.1 Independent Production

Independent producers number in the thousands and their productions in the hundreds.

- Create film funds, private sector or private/public sector with realistic expectations for investment and return will serve the purpose. Each dollar committed can result in generous returns to the Region's economy if managed properly.

- Provide communal facilities similar to business incubators would be attractive to the cost-conscious.

- Although it's beyond the purview of this report, simplify the steps required for taking advantage of the Motion Picture Tax Incentive Program would have a very favorable impact on independent production in the Region.

7.2 Native Production

Native production is an essential part of the transformation from "location" to industry. Programs such as those offered by the Film Arts Foundation of San Francisco encourage development and production by the local filmmaker with small grants that have big returns. See Appendix F: "Film Arts Foundation."

- Create a similar fund from a combination of public and private sources

- Seek out funding for ethnic projects about the Region's unique culture through a grant to encourage diversity in filmmaking from the Better World Campaign of the United Nations

Section 8: Film Commissions

As stated throughout this report, the Region's film commissions are overwhelmed by new productions, both bona fide and speculative. Because they are the conduit through which the industry is entering the Region, it is vital that they be staffed and funded adequately. Producers and industry executives are notoriously demanding, requiring immediate response and a great deal of personal attention.

- Office in Los Angeles

Quite a few regional film commissions have offices in Los Angeles for marketing and customer relations purposes. The Los Angeles Center Studios offers special terms for space in their film commission suite. Sharing expenses with the state or other local film commissions could make this a viable option for the Region.

- Staff

For comparative purposes, it is interesting to note that the Entertainment Industry Development Corporation (EIDC) is the film commission for the City of Los Angeles and Los Angeles County. It is responsible for all non-studio or "street" production and employs about 35 people, with 12 runners for the sole purpose of delivering permits. The California Film Commission functions with a staff of five.

- Services

The fundamental services for film commissions and tourist commissions functioning as film commissions include:

- Development
  - Marketing
  - Locations
  - Local resources
- Permitting
  - Processing applications
  - Delivering applications
- Accounting
- Monitoring production

- Develop Private Sector Services

As the industry develops, some of the duties that now fall to the Region's film offices will be assumed by private enterprises. This trend should be encouraged to reduce demands of labor and expense for public funding.

Section 9: Data Fuels Growth

Data is the essence of the information age in which we live and the data hierarchy is the blueprint:

- Data
- Information
- Knowledge
- Wisdom

The accuracy and timeliness of data determines its value. The industry requires data on production, planned production, expenses, revenue, ancillary costs, labor, facilities, personnel and services.

Information is organized data that provides useful information and knowledge is the interpreted data. Wisdom, while highly desirable, is beyond the scope of this report.

- Publish a comprehensive list of the types of locations available in the Region. See Appendix I: "Types of Locations". Links to photos and contact information.

- Create a page similar to Appendix J: "North Carolina Film Hotsheet" which shows the basic production information required by production companies and workers.

The lack of accurate, timely data is undeniably hindering the growth of the filmed entertainment industry in the Region.

Section 10: Strategic Planning

The Region's filmed entertainment industry is growing. Whether it will continue to grow is dependent on factors that are external and internal, expected or surprising, manageable or uncontrollable.

Strategic planning is a powerful tool that could help to alleviate growing pains and provide a roadmap for the diverse sectors of the Region involved.

- Develop a strategic plan for the Region
- Support development of a strategic plan for the state

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Appendix B: Questionnaires

Appendix B-1: Resident Entertainment Workers Survey

Tell us what you think . . .

Your opinion counts! Your opinion is important to the future of the entertainment industry in your area. All responses are confidential, so please answer candidly.

1) As far as the entertainment industry is concerned:
    a) I have more work (business) than I can handle
    b) I work as much as I want
    c) It's my second job and I don't depend on it
    d) There's not enough work (business) for me
    e) I just do it for fun

2) Workers in the local entertainment industry:
    a) Are the best on earth
    b) Are the best outside of Hollywood
    c) Are as good as most
    d) Just lack experience
    e) Need education and training

3) When it comes to more jobs in the local entertainment industry:
    a) It takes everyone – public, commercial and individual efforts
    b) The governor and other state officials have to do it
    c) Local tourist and film commissions are responsible
    d) It's an overwhelming task and a mystery to me
    e) It's up to the movers and shakers in Hollywood

4) As far as information about production and job opportunities is concerned:
    a) I'm always informed because I'm plugged in
    b) I know what I need to know when I need to know it
    c) I find out when I really try
    d) It's sheer chance if I hear about anything
    e) I'm out of the loop

5) Today, the best way to learn about production and work is:
    a) Gossip on the grapevine
    b) Telephone hotline
    c) My union tells me
    d) On the internet

6) I would prefer learning about production and job opportunities:
   a) On a telephone hotline
   b) On the internet
   c) Other

7) The best thing about the entertainment industry in my local area is: (fill in blank)

8) The biggest problem with the entertainment industry in my local area is: (fill in blank)

9) The biggest threat to the entertainment industry in my local area is: (fill in blank)

10) The most important opportunity for the entertainment industry in my local area is: (fill in blank)

11) What do you do? (check all that apply to you or your business):

12) a
   a) Work in film or television production
   b) Work in a non-production segment of the entertainment industry
   c) Provide services to the entertainment industry
   d) Sell equipment or other goods to the entertainment industry
   e) None of the above.

13) My local area is:
   a) California
   b) Louisiana
   c) South Carolina
   d) Another state in the U.S.
   e) Mexico
   f) Canada
   g) Outside North America

14) Optional (your confidentiality will be maintained):
   a) Your name:
   b) Email address:

15) Notify me when the survey results are posted. (Requires your email)
   a) yes
   b) no

Appendix B-2: Regional Entertainment Survey for Producers and Industry Executives

Tell us what you think . . .

Your opinion counts! Your opinion is important to the future of the regional entertainment industry in the United States. All responses are confidential, so please answer candidly.

A few questions about locations in general . . .

1) When it comes to selecting a location, the most important thing to me is: (fill in blank)

2) My favorite filming location is: (fill in blank)

3) Other things being equal, the most important reason for selecting a filming location is:

   a) Production facilities
   b) Qualified crew
   c) Tax incentives
   d) Local support
   e) Government services
   f) Cash rebates
   g) Great place to visit

4) If I could, I would live and work in:
   a) Los Angeles
   b) New York
   c) Louisiana
   d) New Orleans
   e) The French Quarter
   f) Other

Now, let's get more specific . . .

5) If I had to rate production facilities in Louisiana, I'd say they are:
   a) Excellent – exactly what I need
   b) Better than I usually find on location
   c) As good as can be expected
   d) Substandard
   e) Woefully lacking
   f) Don't know

6) If I had to rate production crew in Louisiana, I'd say they are:
   a) Are as good as anywhere on earth
   b) Are better than any outside of Hollywood
   c) Are as good as most
   d) Just lack experience
   e) Need education and training

7) About the Louisiana Tax Incentive Program for film and television production:
   a) I'm already using it
   b) I intend to take advantage of it
   c) I've heard of it but it doesn't interest me
   d) I don't know what you're talking about
   e) It's not relevant to me
   f) Don't know

8) In my mind, the Louisiana Tax Incentive Program for film and television production is:
   a) A great program that worked for my project
   b) A good idea but it has a few kinks
   c) Too complicated to be effective
   d) Okay for bigger players but it doesn't work form my project
   e) Don't know

9) The best thing about filming in Louisiana is: (fill in blank)

10) The biggest problem with filming in Louisiana is: (fill in blank)

11) The biggest threat to the entertainment industry in Louisiana is: (fill in blank)

12) The most important opportunity for the entertainment industry in Louisiana is: (fill in blank)

Tell us about you . . .

13) My home base is:
   a) Los Angeles
   b) New York
   c) Georgia
   d) Louisiana
   e) Los Angeles
   f) New Mexico
   g) South Carolina
   h) Canada
   i) Another state in the U.S.

14) What do you do? (check all that apply to you or your business):
a) Producer
b) Director
c) Production Executive
d) Location Manager/Scout
e) Location Service
f) None of the above

15) When it comes to deciding where to film:
a) I make the final decision
b) I participate in making the decision
c) I provide input and guidance
d) I have some say
e) Nobody listens to me

16) How many films have you worked on in the last 3 years?
a) 1-2
b) 3-5
c) 6-10
d) More than 10
e) None

17) Optional (your confidentiality will be maintained):
a) Your name:
b) Email address:

18) Notify me when the survey results are posted. (Requires your email)
a) yes
b) no

Appendix C: Associated Jobs and Small Business

Appendix C-1: Sector Specific Jobs and Small Businesses

Highly specialized services that are utilized primarily by the entertainment industry include:

- Advertising Freelance Producers
- Aerial - Fixed Wing & Helicopter Pilots
- Agents and Representatives
- Airline Motion Picture Employees
- Animators
- Animatronics, Puppets & Makeup FX
- Art Department
- Art Directors
- Art Fabrication, Licensing & Rentals
- Assistant Director(s)
- Atmospheric/Lighting FX & Pyrotechnics
- Attorneys - Entertainment
- Audio Post Facilities
- Backings & Scenic Artists
- Booms, Cranes & Camera Support
- Camera Assistants
- Camera Cars & Tracking Vehicles
- Camera Operators
- Camera Rentals - Motion Picture
- Camera Rentals - Still Photography
- Car Prep, Rigging & Prototypes
- Cast (non principals)
- Casting Directors
- Casting Facilities
- Casting Support Services
- Choreographers
- Cinematographers
- Color Correction
- Commercial Directors
- Commercial Editorial Houses
- Commercial Production Companies
- Composers & Sound Designers
- Computer Graphics, Animation & Visual FX
- Continuity Coordinators
- Continuity Supplies
- Corporate & Video Production Companies

Sector Specific Jobs and Small Businesses

- Costume Makers & Rentals
- Director
- Directors of Photography
- Editing Equipment Rentals & Sales
- Editing Supplies
- Editors
- Expendables
- Extras
- Extras Casting Agencies
- Film & Tape Storage
- Film Commissions
- Film Commissions/Permit Offices
- Film Exchange Staff
- Film Financing
- Film Laboratories - Still Photos
- First Assistant Directors
- Foreign Unit Technicians
- Gaffers & Lighting Directors
- Grip Equipment
- Hair & Makeup Artists
- Hand & Leg Models
- High Definition Video Equipment Rental
- Infomercial Production Companies
- International Film Liaisons
- Key Grips
- Laboratory Film/Video Technicians
- Licensing & Merchandising
- Lighting/ Spotting Labor
- Location Libraries
- Location Management & Scouts
- Location Permit Services
- Mechanical FX & Prop Fabrication
- Medical & Scientific Props
- Miscellaneous Expenses
- Miscellaneous Studio Staff
- Motion Picture Costumers
- Motion Picture Editors Guild
- Motion Picture Laboratory Technicians
- Motion Picture Projectionists, Operators and Video Technicians
- Motion Picture Set Painters

- Motion Picture Sign Writers
- Motion Picture Studio Teachers
- Motion Picture Videotape Technicians
- Motion Picture Welfare Workers
- Motorhomes & Portable Dressing Rooms
- Music Libraries & Publishing
- Music Playback Services
- Music Production & Sound Design
- Music Video Directors
- Music Video Production Companies
- Musicians
- Payroll & Production Accountants
- Photo, Video & Electronic Props
- Post Houses
- Post Production Supervisors
- Principal Cast
- Producer(s)
- Producers
- Product Placement
- Production Accounting
- Production Assistants
- Production Consultants
- Production Coordinators
- Production Designers
- Production Equipment & Accessories
- Production Managers
- Production Office Coordinators
- Production Offices
- Production Services
- Production Sound Technicians
- Promo Production Companies
- Promoters
- Prompting Equipment
- Prop Masters
- Prop Rental
- Prosthetics
- Raw Stock
- Scenic Artists
- Screening Rooms
- Script Supervisors

- Second Assistant Directors
- Set Decorators
- Set Design, Construction & Rentals
- Set Designers
- Set Dressing Labor
- Set Sketchers
- Singers
- Sound Effects Technicians
- Sound Production Mixers
- Special Effects
- Stages
- Standing Sets
- Stock Footage & Photos
- Storyboard Artists
- Streaming Audio & Video
- Striking Crew
- Studio Electrical Lighting Technicians
- Studio Mechanics
- Studio Prop Rentals
- Studio Services
- Studio Teachers/Welfare Workers
- Stunt Coordinators - Aerial & Specialty
- Stunt Coordinators & Performance Drivers
- Stunt Equipment
- Talent & Modeling Agencies
- Technical Advisors
- Television Broadcasting Remote Staff
- Television Broadcasting Studio Staff
- Television Engineers
- Theatrical Managers
- Theatrical Press Agents
- Theatrical Wardrobe
- Title and Graphic Artists
- Titling & Broadcast Design
- Trade Associations/Unions
- Trade Publications
- Trailer Production Houses
- Transportation Captains
- Video Assist Services
- Video Assist Technicians
- Video Cameras & Equipment

Sector Specific Jobs and Small Businesses

- Video Technicians
- Videos - Various Types
- Videotape Recorder Operators
- Visual FX Supervisors & Technicians
- Wardrobe Stylists/Costume Designers
- Wardrobe/ Costumes/ Wigs

Appendix C-2: Adaptive Jobs and Small Businesses

These businesses provide specialized services that are adapted from more mainstream concerns:

- Accountants
- Advertising
- Advertising Agencies
- Aerial Equipment
- Job Referral Services
- Air Charter
- Airlines
- Airport Shuttles
- Airports
- Animals & Trainers
- Apartment Locators
- Arbitrators
- Arborists
- Arts & Crafts Supplies
- Attorneys - Labor
- Attorneys - Litigation
- Bed & Breakfast
- Bidders
- Boats & Nautical Props
- Books & Authors
- Building Operations Labor
- Building Supplies
- Building/Surface Materials & Hardware
- Business Services
- Cabinet Shop
- Car Rentals
- Caterers
- Communications Equipment
- Computer & Office Equipment Rentals
- Computer Consultants & Software
- Computer Service Technicians
- Computer Software
- Construction - Specialized
- Construction Labor
- Craft Service
- Developer (Land)
- Digital Imaging Technicians
- Directories & Trade Publications

- Drafting
- Drivers
- Electronic Sound Technicians
- Employment Agency
- Engineers / Engineering
- Entertainment Attorneys
- Ethnic, Religious & Seasonal Props
- Financial Management
- Food Stylists & Home Economists
- Furniture Rentals & Accessories
- Hair Stylists
- Hair, Makeup & Wardrobe Supplies
- Heavy Equipment Operators
- Hoisting Equipment
- Home Based Businesses
- Import / Export
- Independent Sales Reps
- Industrial & Specialty Props
- Insurance Brokers & Guarantors
- Interior Designers
- Internet Access Providers
- Investments
- Janitorial & Strike Services
- Labor Relations
- Laboratories
- Landscaping / Greenery
- Legal Services / Lawyers
- Libraries, Research & Clearance
- Lighting Equipment & Generators
- Make-up Artists
- Make-up/ Hairdressing
- Marketing
- Medical Services
- Mobile Home Dealers
- Model Makers
- Music
- Nurses & Medics
- Opticals
- Painters
- Payroll Services
- Photographer & Photography Service

- Photography Equipment Sales
- Picture Vehicles
- Process Photography
- Projectionists
- Propmakers
- Public Relations
- Publicity
- Publishers & Publications
- Ranches
- Restaurant & Kitchen Equipment
- Secretarial & Transcription Services
- Secretarial/Word Processing
- Sign Painter
- Software
- Sound Equipment Rentals & Sales
- Sound Maintenance Technicians
- Sound Recording Supplies
- Speakers - Public Keynote
- Stage Employees
- Stages - Portable
- Stills Camera
- Tailoring/Alterations/Sewing
- Technical Advisors
- Theaters & Stadiums
- Therapy
- Training / Education
- Translation Services
- Transporting Freight & Baggage
- Treasurers & Ticket Sellers
- Underwater Technicians
- Upholsterers
- Welding
- Writers

Appendix C-3: General Jobs and Small Businesses

Many general businesses enjoy additional demand from the entertainment and its employees. For example:

- Accommodations/Hotels
- Air Freight & Courier Services
- Animal Care Services
- Antique Shop
- Appliance Repair
- Appliance Sales
- Appraisers
- Architects
- Art Galleries/Studios
- Attorneys - General
- Auctioneers
- Auto Dealers
- Auto Parts Retail
- Auto Rentals
- Auto, Truck and Motorcycle Repairs
- Bakeries
- Barbershops
- Bars
- Beauty Salons
- Bicycle Shops
- Bookkeeping & Tax Service
- Bookstore/Newstand
- Bookstores
- Bus Charters
- Business Machines
- Car Wash
- Carpet and Floor Coverings
- Carpet Cleaning
- Casino Hotel Employees
- Catering Halls
- Cellular Services
- Chiropractic Care
- Cleaners
- Cleaning Services - Misc.
- Climate Control Systems
- Clothing Sales
- Coffee Services
- Coffee Shops

- Commercial Real Estate
- Communications Services
- Computer Sales
- Computer Services
- Construction & Yard Equipment Rentals
- Consulates General
- Cosmetologists
- Counseling
- Crating & Packing
- Custom Brokers & Carnets
- Dance Lessons
- Delicatessen
- Delivery Services
- Dentists or Orthodontist
- Department Store
- Draperies & Window Treatments
- Dream Interpretation
- Dry Cleaners
- Duplication
- DVD Authoring & Replication
- Educational Products
- Electrical Repair
- Electrical Sales
- Estate Planning
- Eyewear & Jewelry
- Fabric Store
- Fabrics
- Fax Service
- Finance Company
- Financial Services
- Fishing Guides & Charters
- Flags, Graphics & Signage
- Floral Design
- Florist
- Foam
- Food Services
- Freight Services
- Furniture Refinishing/Repair
- Furniture Retailers
- Games, Toys & Amusements
- Gasoline and Fuel

- Gates
- General Aviation
- Gift Services & Florists
- Gifts
- Glass
- Graphic Art & Design
- Grocery Stores
- Gymnasiums & Health Spas
- Health & Fitness
- Health Care Providers
- Hotels, Rooming Houses
- House Cleaning
- Ice
- Ice Cream Parlors
- Industrial Fasteners
- Insurance Adjustors
- Interior Decorations/Design
- Investment Brokers
- Janitorial/Maintenance
- Jewelers
- Laundromat
- Leather & Shoe Repair
- Limousines
- Locksmiths
- Lost & Stolen Credit Cards
- Lumber
- Maid Services
- Mail Order
- Mailing Services
- Manicurist
- Marine Repairs (Yacht/Boat Services Etc.)
- Massage Therapists
- Medical Accessory Supplies
- Messenger Services
- Mobile Food Vendor
- Mobile Home Services
- Mobile Motels (Trailer Parks)
- Mortgage Company
- Mortgage Loans
- Motels
- Movie Theatres

- Moving Companies- Local
- Moving, Storage & Transportation
- Music Stores
- Musical Instrument Rentals
- Neon
- Newspaper
- Notaries
- Novelty Items
- Nursery (Plants/Garden Supplies)Retail
- Nursery Schools
- Office Supplies
- Optical Sales
- Optometrists, Ophthalmologists
- Paint Stores
- Party Planners
- Party Supplies & Equipment
- Pest Control
- Pet Shops
- Pharmacies
- Physicians/Medical Professionals
- Pizza Parlors
- Plants & Greens
- Plastics, Plexiglass & Fiberglass
- Plumbing Service
- Pool Service
- Private Airports
- Private Jets
- Printers
- Private Investigator
- Professional Services
- Promotional Products
- Property Management
- Real Estate
- Recreation & Entertainment
- Rental Service
- Repair & Handyman
- Residential Day Care
- Restaurants
- Retail - Miscellaneous
- Rooming Houses
- Schools (Private)

- Security & Access Control Products
- Security & Bodyguards
- Security Service
- Semiconductor Products
- Service Station
- Shoe Store
- Spas
- Spas & Salons
- Specialty Papers
- Sport Vehicle Rentals
- Sporting Goods
- Sports
- Stationery Supplies
- Stills Photographers
- Surge Protectors
- Surveyors
- Swimming Pools
- Taxi Cab & Limousine
- Tour Businesses
- Travel - Group Events/Special Needs
- Travel & Transport Suppliers
- Travel Agencies
- Tree Services
- Trucks & Vans
- TV/Audio/Video Retail
- Uniforms & Surplus
- Vending Machines
- Vending Services
- Veterinarians
- Video Conferencing & Transmission Services
- Vintage Clothing & Accessories
- Water Trucks
- Weather Services
- Web Page Design
- Wholesalers
- Wood Products
- Wrap Party Locations

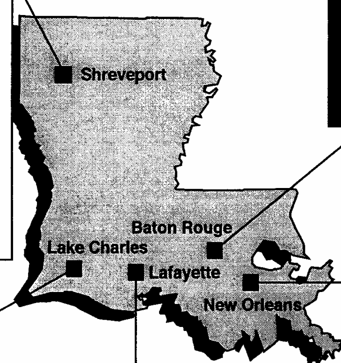
Appendix D: Louisiana Community and Technical College System Film, Television and Entertainment Consortium

Louisiana Community and Technical College System Film, Television, and Entertainment Consortium

Contact: Dr. Myrtle E.B. Dorsey, Chancellor
Baton Rouge Community College
5310 Florida Blvd., Baton Rouge, Louisiana
(225) 216-8402 - dorseym@mybr.cc

BATON ROUGE COMMUNITY COLLEGE
- Video Editing
  - Avid - 23 Production Suites
  - Final Cut Pro
- Grips & Lighting
- Hair & Makeup
- Wardrobe
- Casting
- Coming Attractions
  - Visual Effects
  - Set Design & Construction

BOSSIER PARISH COMMUNITY COLLEGE
- Broadcasting - Announcing For Radio and Television, Television Directing
- Computer Animation - (Lightwave II & Abobe Photoshop)
- Film - Scriptwriting, Film Production and Design
- Media for Ministry - Audio Production in Media, Media Ethics
- Photography - Portrait Photography & Wedding Photography
- Radio - Voice & Diction, Radio Practicum
- Television - Video Editing, Electronic Field Production



LOUISIANA TECHNICAL COLLEGE - DISTRICT 1
- Gaffer Grip
- Camera
- Hair/Makeup & Wardrobe
- Lighting
- Sound
- Graphics (Additional Development Needed)

SOWELA TECHNICAL COMMUNITY COLLEGE
- Camera Techniques
- Lighting
- Sound
- Video Editing (Avid & After Effects)
- Photography (includes B & W, Color & Digital)
- Computer Animation (Lightwave)
- Computer Graphics (Adobe Photoshop & Adobe Illustrator)
- Creative Copy Writing

SOUTH LOUISIANA COMMUNITY COLLEGE
- Film/Video Production
- Final Cut Pro Editing
- HD Cinematography/Shake Compositing
- Live Sound Engineering
- HD Audio Production

Appendix E: Academy Programs

Appendix E-1: Academy of Motion Picture Arts and Sciences Visiting Artists Program

THE PROGRAM

Since 1970, the Visiting Artists Program has been an ongoing activity of the Academy of Motion Picture Arts and Sciences and the Academy Foundation. The program assists colleges and media arts centers, as well as festivals, conferences and other film-related events, in sponsoring visits to their sites by leading film professionals.

The program was designed by the Academy to allow students and faculty the opportunity to have direct contact with working film professionals, thereby establishing an important link between the academic study of film and filmmaking and the men and women who make movies.

The Academy assists institutions applying to the program by contacting its members to determine their availability and interest in serving as Visiting Artists. The program also provides funding for transportation. Proposals focused on a particular individual or two are the most difficult to accommodate; those with greater flexibility are more likely to be successful.

For more information on how your school or organization can become involved, please contact the Academy's Educational Programs and Special Projects Department.

HOW TO APPLY

You must submit a written proposal to the Academy to be eligible to participate in the Visiting Artists program. The proposal must include the following information:

- The history and scope of the applying institution's film department or program.
- A breakdown of how the artist's time would be utilized, including any classes, workshops and screenings in which the artist might participate.
- What impact such a visit would have on the audience involved, and to what extent that audience is knowledgeable about film and filmmaking.
- Which branch of the Academy the artist should represent to best meet specific needs. The Branches of the Academy are:

- Actors
- Art Directors
- Cinematographers
- Directors
- Documentary
- Executives
- Film Editors
- Music
- Producers
- Public Relations
- Short Films
- Feature Animation
- Sound
- Visual Effects
- Writers

- The proposed dates for the artist's visit.

The Academy carefully considers all written proposals and evaluates them on the basis of merit and need. You will be contacted after your proposal has been received and reviewed. For additional information, go to http://www.oscars.org/foundation/visitingartists.html.

Please address all correspondence to:

Visiting Artists Program
Attention Randy Haberkamp
Educational Programs and Special Projects
8949 Wilshire Boulevard, 5th Floor
Beverly Hills, California 90211
E-mail: rhaberkamp@oscars.org

Appendix E-2: Academy of Televisions Arts and Sciences Visiting Professionals Program

The Visiting Professionals Program is designed to furnish colleges and universities with television professionals from the Academy for lectures, workshops, seminars or full course study on campuses across the country. The need for involvement in the classroom by working professionals is frequently articulated by professors as well as students. The Academy's Educational Programs & Services (EPS) Department is uniquely qualified and equipped to provide this service.

The TV Academy membership of 10,000 strong is divided into 26 peer groups which represent every aspect of the television industry. Each peer group contains experienced, skilled, talented people who feel that sharing their expertise and love of the business with the next generation is a part of what our Academy is all about. The peer groups include:

- Animation
- Art Directors
- Casting Executives
- Children's Programming
- Cinematographers
- Commercials
- Costume Designers & Supervisors
- Daytime Programming
- Directors & Choreographers
- Electronic Production
- Informational Programming
- Interactive Media
- Makeup Artists & Hair Stylists
- Music
- Non-Fiction Programming
- Performers
- Producers (National credits)
- Production Executives
- Professional Representatives
- Public Relations
- Sound
- Sound Editors
- Telecommunication Executives
- TV & Motion Picture Editors
- Title Design / Special Visual Effects
- Writers

To apply for a Visiting Professional (VP), college professors first register with the EPS department by sending a written proposal which should include the following:

- a brief description of the background and scope of the university's TV/Film department or program
- a breakdown of how the VP's time would be utilized and scheduled, including information about any classes (lectures), workshops, screenings or seminars in which the VP might participate
- what impact a visit would have on the audience involved
- the extent to which the audience is knowledgeable about television and television production
- which branch of the Academy the artist would represent in order to best meet specific needs (see list of peer groups)
- the proposed dates for the artist's visit
- stipend (if offered)

After discussing the specific classroom needs with the professor, the EPS department then selects a suitable Academy member from among those who have formally expressed interest in being a VP. The TV Academy facilitates contact between the college and the VP and they then work out the VP's travel and teaching schedule. The host institution is responsible for all transportation, housing and a modest per diem to cover food and incidentals. Stipends are optional.

This is not designed to be just a "Guest Star" program, although the Performers peer group is certainly peopled with well-known names and faces. This program offers students the opportunity to spend time with working members of all the arts and crafts of our industry. Where else can universities draw upon a professional talent pool like this to come and discuss the everyday realities of the work they do in the television industry?

To find out more about the Visiting Professionals Program, please go to http://www.emmys.com/foundation/visitingprofessionals.php or contact:

Nancy Robinson
Programs Coordinator
Academy of Television Arts & Sciences
5220 Lankershim Boulevard
North Hollywood, CA 91601-3109
(818)754-2832
Email: visitingprofessionals@emmys.org

Appendix F: Film Arts Foundation

Film Arts Foundation (Film Arts), located in San Francisco, California, is a non-profit leader in the media arts field, providing comprehensive training, equipment, information, consultations, and exhibition opportunities to independent filmmakers. Now in its twenty-eight year, Film Arts has more than 3,400 members working in film, video, and multimedia, and is the largest regional organization of independent producers in the country.

Film Arts services take the filmmaker from the first step (education) to the final one (distribution) and cover everything they will need to know in between. Services include:

- education and training
- low-cost equipment access
- exhibition opportunities
- fiscal sponsorship
- project funding
- consultation and
- information resources

Film Arts Foundation's programs have become models for other organizations around the country.

Film Arts Foundation's achievements have garnered the admiration and respect of a national audience: the Museum of Modern Art in New York presented a month-long tribute to Film Arts, the MacArthur Foundation has recognized Film Arts as one of seven media arts centers in the country of "national significance," the New York-based Association of Independent Video and Filmmakers has given Film Arts the "Indie Award" for outstanding media arts center, festivals throughout the world praise the organization, and Film Arts Foundation has even been thanked in an Academy Award acceptance speech. Film Arts members have either won or been nominated for over thirty Academy Awards over the past two decades.

Contact: Film Art Foundation, 145 9th St, #101, San Francisco, CA 94103, info@filmarts.org

Film Arts Foundation Grants

But more important than awards or honors, Film Arts forms the emotional, physical, and technological center of the Bay Area's independent filmmaking community.

Created in 1984, the goal of the Film Arts Foundation Grants Program is to encourage new and diverse works by film and video artists who have little likelihood of being supported through traditional funding sources. These awards are targeted for film and videomakers in categories that are among the most difficult areas in which to raise money for media projects.

Cash Award: Personal Works
Awarded for new, short personal works in film or video. These grants are for artist-made films or videos that can be completed with the grant amount; additional in-kind contributions beyond the cash budget are allowable. Priority is given to artistic concepts that challenge and expand the film/video art form.

Cash Award: Development
Awarded for projects in the development and fundraising stages. Priority will is given to production of fundraising clips, research, and proposal/concept development. Development grantees are required to submit periodic reports on the funding status of their projects.

Cash Award: Completion/Distribution
Awarded to artists who demonstrate a need for this amount (and this amount only) to complete fully and/or distribute a film or video.

Robin Eickman Screenwriting Award
created to honor the longtime executive director of the San Francisco Film and Video Arts Commission, provides professional consultation with a screenwriting consultant, screenwriting software, and a cash prize of $4,000 for feature-length (75-125 pages) screenplays.

Robin Eickman Feature Film Award (Biannually)
Cash award and goods and services for a feature-length narrative film budgeted under $200,000. Projects must have a completed screenplay and be at least 72 minutes in length. Priority is given to projects with financing for the balance of production funds in place. Well-developed strategies for completion sources will be considered.

STAND 2000 (Support, Training and Access for New Directors)
Given to emerging film and videomakers from under-represented communities. The awards support the creation of a first film or video. Projects may not exceed six minutes. The awards consist of: orientations, training and access to production and post production equipment available at Film Arts Foundation; four to six weeks of production primer and basic production class, and screenwriting workshop; 25 hours of project mentoring by an established director; a one year Film Art Foundation membership, and exhibition of completed works.

Appendix G: Entertainment Industry Professional Organizations, Guilds and Unions

Professional Organizations

- Academy of Motion Picture Arts and Sciences
- Academy of Television Arts and Sciences
- American Film Institute
- Interactive Television Alliance
- International Animated Film Society
- National Association of Television Programming Executives
- Recording Industry Association of America
- Women In Film

Guilds

- Directors Guild of America
- Producers Guild of America
- Screen Actors Guild
- Writers Guild of America

AFL-CIO Affiliates

- Amusement Area Employees (AAE)
- Art Directors Guild & Scenic, Title and Graphic Artists (ADG&STGA)
- Arena Employees (AE)
- Arena Facility Employees (AFE)
- Animation Guild and Affiliated Optical Electronic and Graphic Arts (AG&AOE&GA)
- Airline Motion Picture Employees (AMPE)
- Admissions, Mutual Ticket Sellers (AMTS)
- Affiliated Property Craftspersons (APC)
- Association of Theatrical Press Agents and Managers (ATPAM)
- Back Room, Film Exchange Employees (B)
- Ball Park Ticket Sellers (BPTS)
- Camerapersons (C)
- Costume Designers Guild (CDG)
- Casino Hotel Employees (CHE)
- Electronic, Sound & Computer Service Technicians (E,S&CST)
- Exhibition Employees (EE)
- Exhibition Employees/Bill Posters, Billers and Distributors (EE/BPBD)
- Front Office, Film Exchange Employees (F)
- First Aid Employees (FAE)
- International Cinematographers Guild (ICG)
- Laboratory Film/Video Technicians (LF/VT)
- Lab. Film/Film/Video Technicians/Cinetechnicians (LF/VT/C)
- Mixed (M)

- Make-Up Artists & Hair Stylists (MAHS)
- Make-Up Artists & Hair Stylists Guild (MAHSG)
- Motion Picture Costumers (MPC)
- Motion Picture Editors Guild (inclusive of Script Editors and Story Analysts) (MPEG)
- Motion Picture Projectionists, Operators and Video Technicians (MPP,O&VT)
- Motion Picture Projectionists, Operators, Video Technicians & Allied Crafts (MPP,O,VT&AC)
- Motion Picture Studio Arts Craftspersons (MPSAC)
- Motion Picture Studio Electrical Lighting Technicians (MPSELT)
- Motion Picture Studio Grips/Crafts Service (MPSG/CS)
- Motion Picture Set Painters & Sign Writers (MPSP&S-W)
- Motion Picture Studio Production Technicians (MPSPT)
- Motion Picture Studio Teachers and Welfare Workers (MPST)
- Motion Picture Videotape/Laboratory Technicians/Allied Crafts and Government Employees (MPVT/LT/AC&GE)
- Mail Telephone Order Clerks (MT)
- Operators
- PC Production Coordinators
- Production Sound Technicians, Television Engineers and Video Assist Technicians (PST,TE&VAT)
- Radio & Television Sound Effects & Broadcast Studio Employees (RTSE&BSE)
- Stage Employees (S)
- Sound & Figure Maintenance Technicians (S&FMT)
- Scenic Artists (SA)
- Scenic Artists and Propmakers (SA&P)
- Set Designers & Model Makers (SDMM)
- Studio Mechanics (SM)
- Script Supervisors & Continuity Coordinators (SS&CC)
- Script Supervisors, Continuity and Allied Production Specialists Guild (SS,C&APSG)
- Script Supervisors, Production Office Coordinators & Continuity Coordinators (SSPOC&CC)
- Theatre Employees - Special Departments (T)
- Treasurers & Ticket Sellers (T&T)
- Television Broadcasting Remote & Studio Employees (TBR&SE)
- Television Broadcasting Studio Employees (TBSE)
- Ticket Sales Agents (TSA)
- Theatrical Wardrobe, Make-up Artists and Hair Stylists (TW,MAHS)
- Theatrical Wardrobe Union (TWU)
- United Scenic Artists (USA)

Appendix H: Invitation for Expressions of Interest

Cinema Provision
Stage I: Call for Expressions of Interest
June 2002

The Arts Council / An Chomhairle Ealaíon
The Arts Council of Northern Ireland
Bord Scannán na hÉireann/The Irish Film Board
Northern Irish Film and Television Commission

Background
The arts in Ireland have experienced ten years of unprecedented growth, and their reach into all parts of culture and society has been transformed, thanks to the growing recognition of the part they play in people's quality of life. In recent years government policy for cultural capital investment has been implemented through CDIS and ACCESS schemes run by the Department of Arts, Heritage, Gaeltacht and the Islands (now the Department of Arts, Sport and Tourism) with the involvement of Local Authorities, many of whom now have adopted arts development plans for their areas.

The Arts Council/An Comhairle Ealaíon along with the Arts Council of Northern Ireland (ACNI), the Northern Irish Film and Television Commission (NIFTC) and Bord Scannán na hÉireann/The Irish Film Board has formed a Consortium to enhance access to art house cinema on the island of Ireland and in particular to foster an attractive and viable environment for exhibiting art house film.

The Arts Council is determined to promote a vibrant art house cinema exhibition sector in order to improve audience enjoyment and participation.

ACNI is the main distributor of public support for the arts in Northern Ireland and has a strong commitment to improving access to the arts, particularly through improved facilities for disability access.

NIFTC plays a key strategic role in developing the film industry in Northern Ireland and film exhibition and media education are two of its core priorities.

The Irish Film Board is involved in the Consortium as part of its determination to increase the range of Irish films available to Irish audiences.

The Consortium commissioned and published **Developing Cultural Cinema in Ireland** by Neil Connolly and Maretta Dillon (2001) and its key findings were:

- Commercial cinema exhibition has been going through a period of extraordinary growth fuelled by high levels of investment in new multiplex development.

- Recent data shows that the rate of cinema going increased by 20% in 2000 to 4.1 visits per person per year in Ireland.

- Opportunities to engage with art house film are not available to audiences round the Island. Only four cinemas operate on a full-time basis as art house cinemas: Belfast's Queen's Film Theatre (QFT), the Kino in Cork and the Irish Film Centre (IFC) and the Screen Cinema in Dublin.

- High per capita cinema attendance often occurs in smaller centres which have a high concentration of students and affluent socio-economic groupings especially in Galway, Cork, Limerick and Waterford.

The Consortium's exhibition policy is intended to broaden access to Cultural Cinema on the island of Ireland and to ensure audiences have a quality cultural experience with regard to world cinema, indigenous film-making and classic films often in specialised venues driven by an educational or cultural remit. (*A more detailed definition is attached in schedule 1*)

Introduction

The Cultural Cinema Consortium now invites expressions of interest for capital development in art house cinemas (two /three screen dedicated cinema facilities) in urban centres particularly outside Dublin city centre, and by the refurbishment of buildings including disability access and also upgrading technical facilities. The Consortium is specifically interested in proposals which will increase the quality and range of exhibition, based on a strong programming and audience development policy. The Consortium intends that it will be a catalyst rather than the main funder of such developments, and is interested in securing added value in private/public or commercial/municipal developments. In the Consortium's view, the success and viability of any initiative in this area will depend on the active involvement of the local authorities.

PROPOSALS FOR CAPITAL INVESTMENT IN ART HOUSE CINEMA SHOULD INVOLVE SOME COMBINATION OF EXHIBITORS, DEVELOPERS, LOCAL AUTHORITIES and ARTS ORGANISATIONS.

There will be three programmes for development of facilities:

1. Capital investment in two /three screen dedicated cinema facilities in urban centres to commence building by end 2004

2. Capital investment in building refurbishment such as improving disability access, improving health and safety, upgrading cinema auditoria and cinema foyers

3. Capital investment in equipment such as stereo and Dolby sound systems, screens, projectors, audio loop, seating and soundproofing

The Consortium envisages that investment in the order of €8m will be required from all sources and proposes to part-fund costs in each of these programmes as follows:

1) The creation of multi-screen art house cinemas (in the Republic only) will be supported though public/ private partnerships which involve grant-aid from the Arts Council, investment by Local Authorities and equity finance through private investment. State-aid from participating agencies will be in the order of €5m over five years with the pre-requisite that Local Authorities are involved in developments from the outset.

2) Building refurbishment will be supported with an emphasis on improvements which enhance physical access and improve audience facilities. State-aid from participating agencies will be in the order of €1.5m over five years

3) Capital applications for improved technical facilities will be supported with a particular emphasis on improving disability access and audience facilities. State-aid from participating agencies will be in the order of €1.5m over five years

Criteria For Art House Multi-Screen Proposals
The Consortium will use the following broad criteria when assessing and responding to expressions of interest received as a result of this call.

1) Knowledge and expertise in art house programming, or evidence of established relationships with Irish or UK exhibitors of art house cinema, are essential.

2) Evidence of business capacity to achieve long-term financial sustainability is essential.

3) A funding model with a convincing combination of private and public investment is required.

4) Involvement of, or indication of interest by, a Local Authority is required.

Schedule for submission of expressions of interest

Phase 1: Expression of interest (see below) by 5pm on July 19th 2002

Phase 2: Selected Invitations to tender will be issued by September 31st 2002 with tenders to be received by 5pm on Friday 20th December 2002.

Phase 3: Appraisal of tenders completed by January 31st 2003

Note: In exceptional cases the Consortium may consider contributing to the costs for feasibility plans at tender stage (phase 2).

Expressions of Interest should include:

§ An operational plan and time scale for developing, financing and delivering a development project in one of the three strands of funding outlined above

§ A topsheet budget that indicates the project's sustainability

§ Proposed marketing strategy

§ Audience development plan

§ A description of the expert resources that will be assigned to this project, including the project team, architects, programming advisers etc.

§ An address to changing technology specifically digital projection

Proposals should be no longer than six pages and should be sent for the attention of: The Director, The Arts Council, 70 Merrion Square, Dublin 2.

Further queries should be sent to: Siobhan Bourke, Film Adviser, The Arts Council, 70 Merrion Square, Dublin 2 email address: siobhan@artscouncil.ie

Note: the Arts Council is subject to the Freedom of Information Act (1997).

Schedule 1: Definition of Specialist Cinema

The Consortium adopts the following definition of Specialist Cinema which is based on a definition set out in REFERENCE DETAILS.

Specialist Cinema exists to satisfy the desire of audiences to see a diverse range of films, at a variety of cinemas or other locations. Specialised venues are often driven by a broad educational remit and may offer discrete education activities. Typically they exhibit a majority of specialised films.

Specialised film may be either feature-length or shorts, fact or fiction. They normally fall into one or more of the following categories:

· Films which engage with current aesthetic, political, social and cultural issues, and which seek to encourage their audiences to become similarly engaged.

· English or Irish language films that, because of the creative originality of their form or content, challenge audience expectations, emotionally, aesthetically or intellectually.

· Foreign language films particularly those that, because of the creative originally of their form or content, challenge audience expectations, emotionally, aesthetically or intellectually.

· Films where ethnicity, sexual orientation or disability are important factors for makers and/or audiences.

· Classic films that reappear in cinema repertoires over the years.

· Archive films, because of their place in history of cinema, or because of their relevance to a particular community or geographical community.

· Films that appeal to children or other under-served audiences, including those that, because of the creative originally of their form or content, challenge audience expectations, emotionally, aesthetically or intellectually.

(KPMG/Olsberg report for Film Council, 2002)

Appendix I: Types of Locations

Agricultural Areas
Fish Farms & Hatcheries
Ranches & Farms
Vineyards & Orchards

Cities, Towns & Public Spaces
Cities
Fountains & Statues
Neighborhoods
Small Towns
Town Squares & Plazas
Western, Mining & Ghost Towns

Commercial & Retail
Art Galleries
Auto Care & Maintenance
Auto Dealerships
Ballrooms & Banquet Halls
Banks
Bars & Nightclubs
Beauty & Barber Shops
Cemeteries
Convention Centers
Funeral Homes
Health Care Facilities
Hotels, Resorts & Spas
Office Buildings
Parking Lots & Structures
Restaurants
Stores & Retail Districts

Entertainment & Leisure
Amusement Parks
Attractions
Billiard & Pool Halls
Boardwalks
Bowling Alleys
Carnivals
Casinos & Card Clubs

Entertainment & Leisure
Fairgrounds & Exhibition Halls
Health Clubs & Gyms
Theaters & Stages
Zoos & Aquariums

Governmental
Civic Centers
Courthouses
Fire Stations
Government Buildings
Military Bases
Morgues
Police Facilities
Prisons & Jails
Public Utilities

Industrial
Boiler Rooms & Service Tunnels
Factories
Junkyards & Dumps
Manufacturing Districts
Oil Fields
Quarries & Mines
Warehouses

Institutional
Churches & Temples
Colleges & Trade Schools
Day Care & Pre-Schools
Elementary & High Schools
Libraries
Missions
Museums
Observatories
Seminaries & Convents
Shelters
Social & Fraternal Halls

Miscellaneous
Board & Conference Rooms
Hangars
Kitchens & Bathrooms
Labs & Technical Facilities
Lofts & Studios
Murals & Graffiti
Vacant Lots, Abandoned Bldgs
Vernacular Architecture

Natural Terrain
Caves & Caverns
Deserts & Barren Land
Dry Lake Beds
Forests & Woodlands
Mountains & Rocks
Open Terrain
Sand Dunes
Vistas & Geological Oddities

Parks, Gardens & Camps
Campgrounds
Gardens
Jungles
Parks

Residential
Apartments & Condos
Cabins
Castles
Houses
Mansions & Estates
Mobile Homes & Trailer Parks

Sports Facilities
Arenas & Stadiums
Cycling
Equestrian
Golf
Gymnasiums

Sports Facilities
Motor Raceways
Racquet Sports
Ranges
Skating Rinks
Swimming Pools

Studio Facilities
Backlots & Standing Sets
Photo Studios & Labs
Recording & Broadcast

Transportation
Aircraft
Airports & Airfields
Alleys
Boats & Ships
Bridges
Buses & Trolleys
Rail Transportation
Roads & Highways
Tunnels
Walk & Bike Paths

Water Resources
Beaches & Coastline
Commercial Piers & Dockage
Harbors & Marinas
Lakes, Dams & Reservoirs
Lighthouses
Rivers, Deltas & Waterfalls
Springs & Geysers
Swamps & Marshes
Water Storage

Appendix J: North Carolina Film Hotsheet

http://www.ncfilm.com/hotsheet/

Wolfsbane"	
Filming Area(s):	Western NC Mountains
Start Date:	early August
Additional Information:	Non-union feature film by Stormcatcher Films of Richmond,VA.,will hold auditions for male,female actors,18-45,June 5, at Springhill Suites,3055 Inerstate 85 Service Rd.,Charlotte.Crew should apply at P.O.Box 72757,Richmond,VA.23235.
"The Christmas Siren"	
Filming Area(s):	Charlotte and Reno,Nevada
Start Date:	September-October
Additional Information:	FilmWorks LSD LLC of Charlotte is seeking union and non-union cast and crew at SAG Indie rates.Auditions to be announced in June. For info, contact www.Sibotmotion.com
Untitled Drama	
Filming Area(s):	Carrboro, Chapel Hill
Start Date:	Mid-July through Mid-August
Production Office Fax:	919-929-8551
Additional Information:	This is a feature-length no-budget DV movie produced by Banzai!Entertainment. Seeking cast and crew, non-union and non-paying. Contact Donald Whittier at production@thebanzai.com
"June Bug"	
Filming Area(s):	The Triad
Start Date:	June 14 through July 10
Production Office Fax:	336-922-3146
Additional Information:	This feature, by June Bug,LLC.of N.Y., is entertaining resumes for crew positions. If interested, contact them at the FAX indicated.

"The Trouble With Frank"	
Filming Area(s):	The Triad
Start Date:	May 5
Additional Information:	This feature, starring Jon Bon Jovi and directed by Arthur Hiller, is being produced by Symphony Productions. It is fully cast and crewed.
"Dinner, No Movie"	
Filming Area(s):	Wilmington NC
Start Date:	Mid-May
Additional Information:	Short 12-13 page comedy. Casting for GLORIA, female, mid-20's, fit, attractive. WAITER, male, comedic type. MAITRE D', male. Please e-mail charlesm@cfifn.org to schedule audition.
Energy Wise Healthy Home	
Filming Area(s):	Charlotte
Start Date:	ongoing through July.
Additional Information:	This home-improvement show is filming its first season of episodes in Charlotte, will air on national PBS, beginning in June.
Surprise By Design	
Filming Area(s):	Charlotte
Start Date:	ongoing through May
Additional Information:	Rocket Pictures is doing 24 episodes of this show for the Discovery Channel. It is fully cast and crewed.