Ethics for Television Researchers and Associate Producers

By

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To the Deepest Truths of the Universe

Table of Contents

Lexicon of Terminology

Act: A major division or segment in a documentary that propels the story.

Appearance One Sheet: A document given to an on-camera contributor shortly before the filming date giving times, locations, and instructions for the interview.

Archivist: The person responsible for obtaining and cataloguing edit assets and factual material for the production.

Assets: Audio and visual material to be used in a documentary, from photographs, videos, pictures, and recordings.

Associate Producer (AP): While the duties vary widely depending on the program and the production company, the AP helps with operations, coordinates meetings, writes notes, manages and supervises researchers, often writes pitches, and research packs (RPs), and even takes on episode files independently.

B-roll: Supplemental video footage, such as filming landmarks which define a city that is the subject of the documentary.

Bible: The format of a documentary or docuseries.

Beat Sheet: A complete map of the documentary script by beats.

Booking: Setting up a time and day for an on-camera source to be filmed.

Box Script: A script used by the director and series producer to know how the episode is to be filmed.

Call Sheet: A one or two-page document given to the filming crew and production during the filming of an episode with the

researcher's name and contact information as well as dates, times, and locations of filming, and information about b-roll locations and on-camera contributors.

Chair: An on-camera source to be interviewed for the documentary. First chair is the central figure, followed by other speakers.

Closer: A researcher who secures on-air contributors for a documentary.

Contributor Release: The legal agreement that an on-camera source must sign prior to the interview, giving permission to be filmed for the purposes of the documentary, and often, to be featured in other media as well, such as promos and trailers.

Documentary: A nonfiction film on a single topic that is researched and contains original footage, edit assets, and on-camera interviews.

Docuseries: A factual-based program with a single theme and genre which focuses on a specific case of that theme per episode.

Edit Assets: See Assets.

Executive Producer: The individual in charge of the program or documentary who has the final say over the production.

Fee: A nominal financial agreement for a contributor to appear on camera.

First Chair: The most important on-camera contributor whose participation is essential for the episode or documentary.

Five-Act Structure: The format of storytelling for a documentary. The first act begins the story, the next three acts progress it, and the final act resolves or brings closure to the story.

Freedom of Information (FOI): The right to public access to information held by public authorities, such as police files. Also known as FOIL, ATIP, ATIA, and RTK.

Get: An exclusive and high-profile on-camera contributor who has agreed to participate.

Handover: This is a document and/or meeting where the next person in charge of a file is given an account of what has been done and what still needs to be done.

Honorarium: See Fee.

Hook: A simple, but intriguing element of a story which will interest audiences enough to watch and stay for the duration of the episode or documentary.

Lead: A potential episode, podcast, or documentary with a viable story and on-camera first chair.

Lead Generation: Finding potential subjects for a documentary by scouring for subject matter which conforms to the program's format and has a potential first chair to interview.

Notification Letter: This is a correspondence sent to families of the subject of a true crime documentary, looking for approval for featuring the case on film.

One Sheet: An introductory document about the program which explains the mandate, and format, and briefly mentions the benefits of participation. It is given to potential on-camera sources, publicists, and public information officers. There is usually text with graphics of previous episodes as well information about the production company's credentials.

Production Coordinator: The person who oversees many administrative tasks, such as contributor booking, work permits,

and distributing a variety of materials to the crew, and is involved in the pre-production process.

Production Manager: The individual who decides when filming will take place, who will be filming when a contributor requires a fee, and when your contract comes up for renewal.

Pitch: A document which outlines a potential story and its contributors that requires approval from the EP.

POV: Abbreviation for Point of View, it refers to how a story is framed and whose perspective the story is told.

Pre-Pitch: A first draft of a pitch sent to an AP to be vetted, revised, and expanded before the pitch.

Prepping: A meeting with an on-camera contributor to discuss the logistics of filming, the format and subject of the episode, and expectations of the session in terms of wardrobe, speaking format, and content of the discussion.

Recrea: These are scenes within a documentary or docudrama that has actors recreate scenes from a real-life event.

Research Pack (RP): A document that serves as the backbone of the episode. The RP contains all the information required to film the documentary, including names of players, and events, as well as on-camera contributors' information and essential filming locations. The script is based on the RP.

Series Producer: This individual is responsible for managing, hiring, directing, and producing a television series with creative control over the series.

Showrunner: See Series Producer.

Slate: The number of on-camera contributors (known as "chairs") interviewed for a documentary. When all chairs have been filled, it is referred to as a full slate.

Slug: One- or two-word internal description of a story, such as a person's name. This title will usually not be used for the finished product.

Story Researcher: The individual responsible for finding information, facts, and contributors for a documentary.

Three-Act Structure: For shorter documentaries, the progression comes in three distinct segments: a beginning middle and end.

Preface

An overlooked and underappreciated position in television documentaries is the story researcher: those people who find information and sources to make episodes come to life. It is a difficult job, and one where there is a high degree of burnout and stress without the glamour or high-profile perks of a director or executive producer, yet without researchers, there would be no content for a program, whether it be a historical documentary series, theatrical wildlife release or a true crime program. Every expert, psychologist, historian, professor, author, detective, eyewitness, and attorney speaking on camera is there because a story researcher made contact and convinced those people to agree to tell the world their experience and expertise.

Yet many times these on-camera contributors have bad experiences with the process, having felt that they were deceived or misled in the bargain. Often, a scrupulous story researcher will hear about the bitter aftermath of those who had dealings with unscrupulous ones, meaning much information and insights get lost because of a single ethical lapse. Even if a program is in the realm of infotainment, there is no reason why ethics needs to be sacrificed for a riveting story. It is important to ensure that integrity isn't lost in the process. Murder victims should not be demeaned; history need not be turned into a farce, and reputations should not be denigrated because it amuses a few in production.

While many books and trade and journal articles delve into the topic of documentary film ethics, almost none are geared toward the story researcher whose mandate is not about the creative or subjective: these are the hunter-gatherers who must bring data and sources as the material that others shape into the final product. While ethics in film-making usually veers into the legal realm, it is only a fraction of the

big picture. For researchers and associate producers (generally referred to as APs), they are in a world between traditional and rigid journalism and the more nebulous and artistic realm of the cinematic. What they require isn't journalism and it isn't film-making, yet the guide for such considerations has been traditionally lacking.

This book is your guide to becoming a savvier and more principled story researcher or associate producer, as many productions have APs doing much of the same work. This guide will show you how to conduct yourself ethically from the first step to the last, regardless of time constraints and job demands. From securing interviews to writing research packs, you will learn how to negotiate and leverage situations in such a way that you do not compromise your work or cut corners and distort information for the sake of a story. When you have a clear map of the landscape, you will be able to spot potential pitfalls and avoid them.

While a story researcher's job is intensive and fast-paced, with only a few weeks to construct a viable and fascinating documentary, it is also one which can allow for honesty and integrity. It is a job that has contact with many sources, and many who may have conflicting and clashing interests. When you have a clear vision of your mandate, you will be able to balance various elements and players to provide precise fodder for the program. While each production will be different, given the budget, genre, ratings, and style, as well as the demands of the executive producer, there will be common elements and problems which can be overcome without compromise.

This book is more than a guide to becoming an effective and efficient story researcher or AP: it is a manual to doing the job ethically as you interact with both those who are seeking information and those who are working with you in the making of documentary programming.

Alexandra Kitty

Chapter One

Introduction to Researching for Documentary Programs

Documentary programs are a long-time popular staple in broadcasting, cinema, streaming, and even podcasting: factual information has its devoted followers who are seeking information on the topics which interest them, from true crime to ancient history, there is no shortage of genres where information is presented through a narrative lens. Even here, there are categories of factual programming: some are straightforward factual-based shows, while some programs are deemed *infotainment*, but there still must be a factual backbone to it. In the last few years, public interest in the format has increased, with more platforms devoted to presenting nonfiction cinematic fare to the public. The more serious the subject matter, the more it is important to be mindful of both factual and ethical considerations, whether it be a current events program or a documentary outlining a historical travesty. Many rely on these programs to learn about people, places, and events in a linear and simplified way. While there is always nuance and a plurality of perspectives, the documentary is more aligned with using storytelling features from a single or dual perspective for the sake of clarity and understanding. There must be some engagement to "hook" and maintain audience interest without trivialising or sensationalising people or events.

The documentary can be a powerful medium, and its impact is real. Documentaries are not traditional journalism products as there is a distinct story and opinion. As Pryluck noted in 1976:

> In such situations the film gear serves to intimidate the wary. Even government officials can be intimidated by something so simple as portable video equipment.

Yet documentaries require proof and evidence. These productions are not mere entertainment: these become a "historical document" as Rabinowitz observed in 1993:

> Documentary films provide a stability to an ever-changing reality, freezing the images within their frames for later instructional use.

There are many players who create a documentary or docuseries: executive producer, production manager, series producer, scriptwriter and director. But there is another group who ignite the process by finding information in the first place: the story researcher and the Associate Producer (AP). While these are not the personnel who have the final say on the documentary, their imprint on the product is the first and determines the course of the program.

The importance of researchers and APs in documentary programs cannot be overstated: without the front-line workers who find and then verify information, there would be no content for the documentary. Researchers find on-camera sources, and fodder to make an episode come to life. They find the raw data and then production and post-production finesse and refine the raw materials into a documentary for audiences. The backbone of any documentary is the quality and quantity of research, and the better quality and original information you can find, the more riveting and memorable the final product. Researchers and APs are an essential part of the documentary equations and that is the primary reason why ethics is the driving force behind their worth, even in the race for audiences. An ethical breach can end a program and taint the information stream.

However, researching for documentaries is an intensive job which requires a balance of focus and multi-tasking, and it is tempting to cut corners and bend rules for the sake of avoiding confrontation, yet such tactics can have deleterious consequences, from job termination to lawsuits. Therefore, integrity is paramount and there are numerous strategies to manage ethics in a work-heavy job such as researcher and associate producer. You will be working on multiple episodes as you be pitching new ones, and generating leads in a short period of time. Depending on the resources and length of the series, you may be tasked with many subjects or one; however, the quality of your work must maintain consistency, and often, you are expected to be proficient in the job without a mentor guiding you, even when novel problems crop up in the course of your work.

Researchers are documentary television's front-line workers, and arguably, the most important link in the chain. Story researchers find leads, sources, assets, and information that not only shapes an episode but without them, there would be no content to produce. Who is interviewed, what information will be presented, and in what order will fall on the story researcher, and many times, the Associate Producer (AP). While everyone on the production and post-production teams has a vital role to play in the construction of a documentary or docuseries, the match is lit only when the researcher ignites the story with willing sources and information, and often, scores a coup with prime interview subjects, or "gets." While other members of the production team are concerned with the aesthetics of the final product, the story researcher deals with the mundane reality of finding facts and people that will help tell the story. However, as Blumenberg noted in 1977, aesthetics cannot trump ethics:

> It is, in fact, this ethical dimension that separates the documentary film—including cinéma vérité—from other types of pictures. "Truth" is an ethical concern—not an aesthetic or epistemological concern-—and this is

> why the problem of truth is so important in films that purport to deal with actualities.

It is the story researcher who ensures ethics are a vital element of the documentary from the first steps. Without facts gathered with integrity, the final product will fail. Ergo, there is real pressure on researchers to fill a slate with on-camera sources and exclusive details, and while researchers do not have the same cache as an executive producer, they are no less important to the making of a documentary. Yet, as the entertainment trade magazine *Variety* noted in a March 8, 2023 article, with documentaries, "Everything is negotiable. There are only traditions, no rules." However, story researchers have ethical considerations when gathering information, but often little direction and cannot rely on other comparable industries that have other advantages that the story researcher does not.

It can be tempting to rely on gambits, false promises, deceptions, and other manipulations in order to *get the get;* however, there are ways to connect and find information through principled methods as well. Lateral and divergent thinking can do more than shady gambits and should be used instead. While a researcher works with facts, emotional and primal literacy can be used to find elusive sources and gain trust and alliances. By using more social techniques and devising strategies, sources may come to you or offer you prime information you can use without resorting to trickery, manipulation, or aggression.

The researcher's job requires emotional literacy to connect and understand sources, and it is this core literacy which is the driving force of the job: having a feel for individuals and connecting to gain trust and goodwill. However, a researcher must also use analytical literacy to find and verify information, meaning that it is essential to preserve accuracy, credibility, empirical objectivity, and integrity, no matter the time frame or circumstances. While it is easy to make

excuses and explain away lapses as being morally superior to other methods in an attempt to deflect criticism, this after-the-fact reasoning is framed in self-serving sophistry in a drive to downplay the importance of objectivity. Tides turn, and while the zeitgeist changes over time, the final product stays static. Your work will always be under scrutiny not just from different groups, but from those groups from future eras as well. By being principled and sensitive, you are ensuring your work stands the test of time and public fickleness. Those not in the documentary business do not understand the process but will have strong opinions, nonetheless. The trick is to have work which can stand up to scrutiny.

A researcher's job has many elements to it, from lead generation to writing research packs, but these processes are not complicated. There are many steps, but they are simple to memorize. The challenge is to leverage these simple steps quickly to gain as much information and insight to make an informative and compelling documentary product.

Every step of a researcher's or AP's job requires attention to detail, focus, diligence, and discipline. Your work should be your own and not only reflect the events and people under investigation, but also its subtext. While it is true that documentaries and docuseries will rely on narrative and framing to build suspense and enhance some elements over others for the sake of effective storytelling, the final product should still be an accurate and truthful representation of the subject of an episode or documentary. You may look at people and events from a specific perspective, such as a detective or player in an event, but at no time should false or misleading information be used, nor should a researcher deceive sources or keep them ill-informed of the purpose of the documentary. Your word should be your bond.

However, in order to ensure your work can withstand scrutiny, it is important to first understand the basic elements of the job.

Chapter Two

Basics of the Job

The trajectory of a researcher's job is important to understand as it makes clear the potential areas for ethical lapses and to recognise why and how they can occur, from tight deadlines to last-minute cancellations. By having a deep comprehension of the research process beforehand, it is easier to formulate plans and counter plans proactively should a problem arise, and in the unpredictable world of a researcher, problems will be a near-daily occurrence, even if you have done your job flawlessly. To create accurate pitches and research packs, you need to have access to first-hand information from a variety of sources, and then present them to the higher levels of the program's production team in a way that it will be accepted as such, and then as the episode is constructed, maintain its core of accuracy in such a way that participants do not feel misled or exploited. As the researcher is the first to gather information, it is the first link of the chain which determines the core and content of the documentary.

However, story researchers, while functioning in a similar role of journalists, do not hold the same place in the public mind. Journalists are out in the open; whereas the researcher is near invisible in the documentary process, and cannot use the same markers or tactics to perform essentially the same task. The journalist can construct a public persona and narrative and gain personal attention, while the researcher may perform the same function, but without the pretence to gain trust from potential sources. As Wuergler and Dubied noted in 2023:

> [P]rint journalists perform an investigative identity throughout their texts. This includes playing a watchdog role, demonstrating an "investigative mindset," claiming

> specialized skills, and/or high- lighting their thorough verification procedure. By employing these strategies, investigative journalists seek recognition based on their social role, their individual traits, their specialized skills, and/or their incontrovertible knowledge claims. We analyze these four identity markers as strategic devices for claiming special authority within the journalistic profession.

These journalistic gambits to gain authority will have little to do with the creation of a news article, but is used as a strategy to gain an audience and cooperation from sources. The researcher has the same task, but cannot rely on the same theatre. That means that the story researcher has a harder undertaking with more obstacles, and cannot rely on persona to foster cooperation from potential sources, and must employ other methods to turn a potential lead into a completed documentary.

To ensure your assigned episodes have the best chance of forming and making it to air, you will need to know the basic steps of your job. While different productions and genres deviate, the general process for a story researcher comes down to performing a series of time-consuming steps. To be unfamiliarised with the process can become overwhelming, and many researchers will leave after the first cycle of a contract has concluded. If you understand the mechanics from your first contract cycle, it will be easier to your composure and create strategies to ensure an ethical and accurate core to your work. A researcher does not do just one job, but multiple ones, and in many cases, these will be the same processes in higher-level positions such as producer for a newscast. We shall now look at each step in turn:

Primary Research: The first step is to find new stories by reading articles, books, or watching news reports or other documentaries;

however, it is also advisable to look to other places for information. For instance, if you are working on an arts-based program featuring the history of artists, it is a good idea to look at unlikely sources, such as reading reports and organisations where art forgery or art theft is investigated as there may be interesting or important facets or factors which may align with the program's format that is not readily available elsewhere. If you are researching about ancient treasures and their historical importance, you may wish to look at databases, such as INTERPOL to find out about missing artefacts and if there are potential leads to pursue. You are looking for potential stories, expert sources, and the overall patterns and scope of the subject in question, looking for *new* information that would fit the format – or find twists to subjects that have been covered elsewhere.

Sometimes there are hundreds or thousands of cases to explore; other times, there may be only a handful of potential stories to pursue. Some producers seek new stories, while others prefer ones that have been done elsewhere. In either case, you are scouting for something new to add to the discourse, by the degree depends on your supervisor's preferences. What you need to avoid is plagiarism. Even if your topic has been covered a dozen times, you should still provide new information and angles that deviate from previous tellings.

Lead Generation: You will need to find specific cases for each episode, meaning you will need to find real-life cases which fit to the formula of the program. For instance, if you are working on a true crime program which focuses on unsolved missing persons cases, you will need to find the cases which fit the theme and format of the program. You are trying to find cases that you can pursue with a higher chance of getting an on-camera source.

It is imperative not to try to distort information to make it "fit": the goal is to find fodder for potential episodes. Do not try to bluff a supervisor by distorting a lead: try to find as many potential stories

as you can. An AP will usually be able to determine what leads hold promise, and which ones are not likely to be approved. News articles and other documentaries will be your starting point.

First Chair Connect: You will need one major source to agree to an on-camera interview in order to write a pitch: the pitch will be accepted or rejected by the executive producer, but you cannot make a pitch unless you have an agreement for on-camera participation. This agreement does not guarantee that the pitch will be accepted, and if it is, does it guarantee that you will find enough individuals to fill the slate. However, the first chair is the one who makes a potential documentary or episode possible.

Here, you must not deceive or misrepresent the nature of the program or fool or coerce a source into participating.

Pitch: This is the researcher's or AP's first official document in an episode's construction. It is the crude roadmap of the subject of an episode, the key figures and story progression, the first chair's identity and role in the episode, and the other chairs the researcher is pursuing. The pitch is usually constructed in five acts (three acts with shorter documentaries), and a research pack will build from the pitch. This document requires approval before the next steps. The pitch may be outright rejected, sent back for revisions, or accepted. You must have facts in your pitch as well as your story from beginning to end. Some pitches may be short, while others long, but it is the functioning template for the episode.

Secondary Research: Once a pitch is approved, you will need to dig deeper to find more information to fill the episode or full documentary. You will need background reports on key figures, inmates, police or court reports in some cases, or other harder-to-find information not easily obtained through a search engine. You are looking for raw data and primary sources at this stage.

Pre-Interviews: As you fill your slate, you will need to interview sources prior to their on-camera interviews, and there should be no surprises by the time they are to be filmed. Any source who will give an on-camera interview needs to be vetted for a number of factors, such as knowledge, ease of speaking to a stranger, and to be prepped to know what to expect on the day of the interview. Do not deceive your sources or hide important information from them. In many cases, you may need to work with a spokesperson, publicity agent, or public information officer (PIO) who will vet you and ensure the source will not be deceived by the program.

Filling the Slate: You need to know where to find people for the episode who can speak knowledgeably and comfortably in front of a camera, and each person is a chair to fill. The first two chairs are your key sources, and most times, the episode cannot be aired without the first chair. Your job is to fill the slate by finding enough people to agree to go on camera, and the same ethical considerations must be taken with each one.

Research Pack (RP): You are giving a detailed timeline and roadmap for the scriptwriter, director, and showrunner to construct an episode based on your research. From sources to be interviewed to the construction of the episode, the RP is one of the most important documents a researcher or AP will create. You will also require images of key players and places to help production recognized sources and key landmarks.

Freedom of Information/Asset-Gathering: You will need to begin the process of finding audio and visual materials for the episode, and in many cases, you will need to fill out a freedom of information request. Be complete and detailed in your request, and try to establish contact with the individual in order to ensure you will receive assets in a timely manner.

Directorial Handover: You will need to keep a director up to speed on the content of the episode and the people to be interviewed, as well as answer any questions the director may have about the episode. You are handing over your notes to the next person in the production line.

Research Handover: Sometimes you will leave your position or will be asked to take on a different file, but your current files are incomplete. You will need to keep the next researcher up-to-date with what has been done, and what still needs to be completed. Your notes should be orderly and easy to follow.

Depending on the program and the genre, there may be more steps or fewer; however, these are the essentials to consider when you are building a documentary. There will be hurdles to clear and each step builds on the previous ones. Filling a slate cannot be completed until a pitch is approved, and a pitch cannot be approved unless the first chair is filled. Documentary programming is not entirely linear: steps are partially completed before the next step can be finished – and then when the next step is partially completed, the researcher circles back to finish a previous step. It can be an overwhelming and confusing process, but it can be made simpler by focusing on organizing your work at each level of research.

Determining production resources

One often overlooked aspect is that many beginners do not ask about the resources a production company has for story research. Most companies do not have onboarding tutorials, and it is easy to miss any database or resource that those who are familiar with the production take for granted. When you begin, you must ask your AP or production coordinator what databases are available to make your work more effective.

For example, there may be newspaper and legal databases, such as Lexis-Nexis and Pacer, as well as background resources, such as the White Pages and Intellius. While some APs will tell researchers on their first day, others may not. You should also inquire where One Sheets and Contributor Releases are kept, and then keep copies for your convenience. You may also request a letterhead for correspondence as well. The more resources you have from the start, the smoother your research will become.

Organizing your research

A muddled researcher is one prone to ethical lapses, but also to reputational-damaging carelessness as well. Your work should be meticulously organised so that others can easily find materials. You should prepare your folders before you begin your case work, clearly labelling every folder and subfolder for easy reference. Upload your work immediately; otherwise, your actions seem furtive, dishonest, and passive-aggressive. A functional television production shares information. A dysfunctional one hides and hoards.

One of the biggest problems many companies face is *data siloes:* information is bottlenecked in one department, and information is withheld from others. Do not create a data silo. When you are asked to give information or reports, you can copy the link to the folder and forward it in an email or chat. Ideally, all information should be available on a detailed spreadsheet so that others can find the information in question, but in the fast-paced and unpredictable discipline of documentary production, it can be difficult to find information and then place it in various spreadsheets, wasting time in the bargain. On the other hand, you should not have to be asked for documents you have completed because you did not upload them when you were done. Paper-chasing slows down production and increases the likelihood of errors, miscommunications, and

frustration. It is not a power play to withhold information; it is a sign of an unethical worker who has little regard for the job or colleagues.

On the other hand, when you are prompt and organised, you build both credibility and goodwill. The key is to have detailed and consistent folders. You will often be asked to take over another researcher's work, and it is then that an organised file is appreciated.

Suppose you are working in the true crime genre: organizing your folders would entail beginning with each case you are tasked to research. Your folders may be organized in this manner:

Jane Smith, New York, NY
Mo Singh, Chicago, IL
Bebe Rivera, Jonesville, TX

Each folder represents the episode you are working on with the name of the victim and the location of the homicide. Inside each folder should be subfolders with specific kinds of information:

Articles
Police Files
Court Files
Photographs
Pre-Interview Transcripts
Inmate Records
Obituaries
Family Notification Letter
Signed Release Forms
Background Reports
Maps
Location Reports
Research Pack and Pitch
Information Requests

Here, police files are kept separate from news reports, and obituaries (which often give leads to family members) are kept in another file. Inmate, police, and court files are separated as are background reports on the victim, killer, and various other suspects and key players. Keeping sub-holders on the killer and other suspects may not be necessary, but if you feel having dossiers on individuals helps in your work, then do so. The point is to be accurate and keep copies of your research as well as any signed forms and requests you receive or send, respectively.

If you require to get copyright permission, there should be a separate folder from your freedom of information requests. The more organised you are, the easier it is to find information when a showrunner, director, editor, or scriptwriter asks for detailed material, and in television production, you will be asked about the minutiae of events and will require to answer quickly. When you are dealing with thousands of documents for a single episode, a deep-level organization will make finding what you need a straightforward process.

Organizing your progress

In an era where so much can be done on a laptop, tablet, or mobile phone, we often forget that having hard copies of our progress will help us visualize our movement in a different way. To ensure that all of your files get equal focus and attention, it is advisable to use various kinds of workflow charts where you can look at your progress and know what is missing or needs correcting. Having a whiteboard or colour-coded paper on a wall that follows your progress allows you to see patterns in your work, any common troubles you are having, and any weaknesses in your work. Each of your files should be represented by a different coloured pen (on a whiteboard) or paper. This is your crudest reference which can then be translated electronically, such as a spreadsheet.

While having your own spreadsheets track your progress is extremely helpful, having a printed version on your wall as well allows you to compare your files, write in ideas or make corrections, as well as have you keep track of missing information. Do you have all your documents? Did you fill your slate? What will be your pre-interview questions? Have you gotten all contributor release forms signed? By adding and removing blocks of data as you work, you can better organize your day, and accommodate new requests. You will know when you can take new requests and when you will need to focus on finishing a research pack.

By understanding the basic chain of events, it will be easier to manage multiple stories at once, even a dozen at various stages at once. However, the first step in this chain is the one which determines whether you will use your time efficiently, or will waste it pursuing stories that will come to dead ends or rejections by an executive producer or showrunner, or even a production manager who can foresee budgetary problems pursuing a story that you will have to abandon. The next chapter takes us to the first stage of the research process: finding potential stories to pursue.

Chapter Three

Lead Generation

Many times, stories and leads will be assigned to you directly from scratch, or you will inherit leads from a departing researcher who could not get a potential story incubated in time. A lead is a potentially viable subject of a docuseries or documentary, meaning it is not merely an instance of a person or event that fits a pattern. The subject conforms to the format of a documentary in key ways and has viable on-camera sources who can be approached for participation. It must make for a compelling story. For example, in a true crime series, there are many victims of homicides, but if the program focuses on solved homicides of victims who are seen as pillars of their community and requires a living lead detective to be on-camera with all appeals exhausted, the unsolved murder of an abusive victim from a century ago is not a viable lead: all three conditions must be met for the cycle to begin. A program's "bible" will dictate the specific parameters necessary for acceptance. As a researcher, you may be asked to generate leads, but the task is often in the hands of an AP.

Finding potential subjects necessarily means you will need far more leads than episodes. Promising stories are scuttled when access to visual assets is denied, essential sources decline to be interviewed, families of homicide victims object to the episode, or any other obstacle prevents pursuing the story. While it is not essential for a family to agree to participate in an episode, it is an industry practice to respect their wishes, especially as many detectives will pull out if the family doesn't sanction the production. It is essential to understand that every documentary is a fragile work in progress built on tenuous threads, and a single broken thread can derail the

entire process. It can be tempting to salvage threads by any means necessary; however, this may only temporarily save a production, only for it to unravel at a later stage. The best way to create a more solid structure is by finding the most promising leads from the beginning.

How to ethically find new leads for episodes requires a keen sense of the program's format, as well as its deeper subtext. Understanding the kinds of stories that a program produces is paramount to lead generation. It is sometimes easier to focus on *rejecting* potential leads than focus on the ones that show promise. The process of gatekeeping increases the chances of finding promising material to pursue.

You should keep diversity and inclusion in mind without distortion or revision when you begin your task; meaning you will need to find many different sources to find story leads. You may also need to cultivate human sources and find advocates who can suggest story ideas from their experience. While it is important to find information and inspiration, you will have to do this all while avoiding plagiarism.

The confines of the program (or its *bible*) will dictate what sorts of leads are viable to pursue. For instance, if you are working for a true crime documentary program that focuses on detectives solving cases where the killer is a co-worker, then you will need to find cases which match this criterion. There may be some leeway (a former co-worker, supervisor, underling, or intern), meaning you can widen a net; otherwise, you are tethered by the stringent parameters. If you are working on an arts program where the focus is on emerging painters and sculptors, there will be specific cut-off dates and clear definitions of what constitutes an emerging artist; however, there may be some leeway if the artist in question passed away before a significant breakthrough. It is important to know how much you can

bend and play within the limits to give you an idea of where you can look for leads. It is always important to ask and read production documentation; otherwise, you may approach a source only to have to dash hopes and renege because of carelessness. The closer the lead aligns with the format, the greater the chance for approval.

It is a good idea to have several leads incubated at once before seeking feedback. Batch approval increases the likelihood of a supervisor spending time focussing on your leads; otherwise, your single lead may get lost in an email pile. The order you present them may be alphabetised; however, it is better to put your strongest leads at the top of your file. Clearly mark your message and do not add any other information to your requests. Colour code your message, highlighting names so that information does not get misremembered or inadvertently skipped or conflated. The goal is one of simplification. Once you receive approval for your leads, you will most likely need to migrate these potential stories on a spreadsheet, colour-coding each according to whether you have secured a first chair, were outright rejected, or are waiting for a response. Once you have secured an on-camera interview with the first chair, you will open a folder and begin to construct the episode through research and pre-interviewing.

Lead generation is a complex process where there will be more misses than hits, and success may depend on many factors, from a supervisor's temperament to the number of cases or stories which match the format. Do not misrepresent a lead in order to push through a story through especially if several other leads you proposed were rejected. Look at feedback to see what element you are missing, and then revise your strategy.

Often, you will be required to watch other documentary programs to find leads for higher profile stories, but here, you cannot take the same angle or presentation in your leads: it must deviate in an

accurate, but different way. The perspective must differ and you will need to find new information. While you may ask the same first chair for on-camera participation, your other chairs should be other sources who can provide different insights, information, and perspectives. You will not merely rehash the previous episode (a process in the industry known as "scraping"), but it will be a starting point. Many programs prefer tested source material as it means a first chair is willing to speak on camera and can be constructed into a viable episode; however, some other documentary programs veer from the "same, but different" model and seek original fodder. Make certain you know what is expected from you on the first day of your tenure. In either case, it is often helpful to look to similar programs as a starting point.

In fact, other programs should be a guide of what not do to – not in the sense that other productions are of questionable or inferior quality, but there should be something new that your work as a researcher can contribute to the discourse. When you watch other productions, were there questions which you had that were not answered? If so, you have your line of inquiry. Watching other programming should never be an attempt at plagiarism, but part of your preliminary research.

Understanding how to look for leads

While story researchers need to find facts, it is important to remember that audiences think in terms of *story.* The facts they remember will be the ones closely aligned with the story itself. As Glaser et al noted in 2012:

> [R]ecipients tend to process hybrid television documentaries predominantly in a narrative mode of reception. This reception mode is indicated by the finding that in both studies, viewers reported the