



Sacramento Film Office 2020 – 2025 Plan

FINAL REPORT

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Introduction and Context: Why Now?

Sacramento is experiencing a pivotal moment with the film and media industry. Recent changes to the California film tax incentive program have helped boost film and television production around the state. And, updates to the CA incentive in 2020 will further prioritize local hires outside of Los Angeles. Local film and media professionals wish to see Sacramento share in this growth and take advantage of the current boom in content creation occurring all across the industry.

The original Sacramento Film Commission was housed within Visit Sacramento, the local convention and visitor's bureau. For many years, a half-time staffer, Lucy Steffens, supported the industry with permit assistance, an online gallery of locations, referrals to local crews, equipment vendors and lodging, and many other services.

In 2017, Sacramento native Greta Gerwig released the film *Ladybird*. Due in part to its success, suddenly both the local film community and municipal leadership became optimistic that Sacramento could further grow its film and media industry. According to local accounts, Ms. Gerwig hoped to film the entire production in Sacramento, but ultimately only filmed a few days of exterior locations in the area. She carried out the remainder of the production in Los Angeles area studios. Excitement surrounding *Ladybird* and disappointment that Ms. Gerwig did not film more extensively in Sacramento helped fuel advocacy efforts.

In 2018, the Capital Film Arts Alliance advocated for more film and media industry support during the Sacramento Creative Edge cultural plan process. Goal three of the plan charges the City to “build upon and expand Sacramento’s unique creative economy” and specifically recommended the following:

Promote and develop Sacramento’s film industry by expanding the Sacramento Film Commission and making strategic investments to leverage growth in the region’s film sector. Conduct an assessment of the industry and opportunities for enhancement. Develop an advisory committee to represent the voice of the community in policy and investments, and to connect the City’s economic development of its film industry with resources in the community. The Film Commission should have at least one dedicated staff member to support its operations.

The Sacramento Film Office now operates within the Convention and Cultural Services Department, a municipal agency. As of this writing, Ms. Steffens has announced her retirement and is assisting with the transition of the permitting process and Film Commission functions to its new organizational home. The new manager is slated to begin their tenure in January 2020.

In order to equip the retooled Film Office with a plan to strategically support the film and media industry in Sacramento, Metris Arts Consulting explored the following questions:

- What does a thriving film and media industry look like in Sacramento?
- How can the City play a role in the industry’s success?
- What does a successful film office look like in the City of Sacramento and what data do we need to collect to track its success?

In this document, we first discuss our methodology, move into research key findings, then provide a plan for the new Sacramento Film Office. We conclude with a plan to measure the Film Office's progress.

Methodology

In early 2019, the Convention and Cultural Services Department engaged Metris as a thought partner to answer the framing questions above. The Metris team included Julie Burros and Rachel Engh of Metris, as well as Rich Moskal. Moskal served as director of the Chicago Film Office for over 20 years and contributed extensive expertise.

Steering Committee: We worked with the Convention and Cultural Services Department to select an eight-person steering committee. Committee members represented the industry in a variety of ways, from independent producers, to City staff, to educators. The Steering Committee provided strategic guidance throughout the project, including research design, “ground truthing” key findings, and providing feedback on the recommended plan. To further tap into their experience and expertise, we conducted one-on-one interviews with each committee member. We include a list of steering committee members in Appendix A.

Creative Industries Data Analysis: To understand the trends and depth of the local industry, we analyzed relevant economic data on the film and media industry. We explored questions such as: How much revenue does the film and media industry currently generate in Sacramento? How many creative jobs are supported by this industry? How have these numbers changed over time? The findings informed our recommended plan. We share key findings in the plan and include more detailed analysis in Appendix B.

Local Film and Media Landscape Review: What assets exist in Sacramento that will help the film and media industry grow? What obstacles hinder this growth? How can the City and its partners leverage assets and overcome potential obstacles? To answer these questions and get a more qualitative understanding of the local infrastructure, we engaged a range of local film and media stakeholders in one-on-one in-person and phone interviews. The Metris team traveled to Sacramento to tour existing film and media infrastructure. During the trip, we attended a Capital Film Arts Alliance (CFAA) meeting, where we shared information about the project with nearly 50 people and heard about their experiences working in the Sacramento film and media industry. We include a list of people who we interviewed and places we toured in Appendix C.

Benchmark Data of Film Programs in Other Cities: What can we learn from other film office operations around the country to help inform the Sacramento Film Office plan? For this analysis, we compiled programmatic and operational data for both Sacramento as well as a select number of film programs around the country. With the help of the Steering Committee, we chose to explore three film offices in comparable markets (Memphis Film Office, Portland Film Office, and Santa Clarita Film Office). We also explored Film LA to learn about permitting best practices, SF Film because of its reputation for local incentives, and Austin Film Commission because of its local filmmaker programs. We then completed one-on-one phone interviews with leadership from each film office to dive deeper into their approach to supporting film and media industry activity in their city. Find a list of benchmark interviewees in Appendix C.

Local Landscape Assessment

What is the full picture of Sacramento’s film and media landscape? What are its overall strengths and areas for improvement? Below, we offer key findings from our creative industry analysis and local film and media landscape review.

Sacramento’s diversity of locations was the top asset mentioned

A diversity of locations exists in the Sacramento region and even specifically within City boundaries (e.g., variety of natural landscapes, historic homes, cobble stone roads). Because of the diversity of locations, Sacramento and vicinity can provide a variety of urban, rural, historical, and wilderness settings. It can pass for “Any Town, USA,” as one interviewee said. This asset points to the potential for the Film Office and location managers to market Sacramento as a central location to shoot in a wide variety of settings, all in close proximity. Interviewees mentioned other Sacramento selling points, including the short flight from LA, proximity to San Francisco, and an overall lower cost of living as compared to other California cities and major production markets.

Inconsistent opinions about quantity and skills of Sacramento-based crews

Many interviewees had strong opinions on the number and experience level of the available crew in Sacramento. Some people said that many creative, enthusiastic, and talented people work in the Sacramento film and media industry. Others, particularly feature film and television producers with larger production budgets, noted a severe lack of sufficient crew and talent. They cited a lack of seasoned experienced crew in almost all “below the line” departments. Most interviewees acknowledged this disparity as a problem, in actuality as well as perception. They often described it as a “chicken and egg” dilemma: local crews lack opportunities in Sacramento to gain experience; and an inexperienced crew base means out-of-town producers are more likely to bring experienced crews with them or opt to shoot elsewhere. Interviewees also pointed to talent loss due to lack of local career opportunities. One interviewee said, “people who get experience tend to leave for opportunities.”

Multiple film offices support regional industry and cause some logistical confusion

The presence of multiple film offices in the region (Placer-Lake Tahoe Film Office and El Dorado Lake Tahoe Film & Media Office) offers a good foundation for film and media industry support. The regional and disbursed nature of the assets, however, leads to inconsistent knowledge among film office staff and location scouts of what’s available outside their area of focus. Interviewees expressed generally positive opinions about all of the region’s permitting processes, but also felt confused by inconsistencies across different jurisdictions and approval agencies. The City of Rancho Cordova’s August 2019 announcement of the formation of the “California Capital Film Office” only added to the confusion about jurisdictions; its stated mission is to be a “one-stop-shop” for film permits in the entire Sacramento region, but actually has no permit authority outside of Rancho Cordova.

Limited college-level technical training opportunities contributes to “talent drain”

No clear progression of college-level programs exists for people in Sacramento to gain sequential training or mastery in the film and media industry. As one interviewee said, “there isn’t a good pipeline of education to get below-the-line staff coming up in the pipeline.” Interviewees mentioned the Elk Grove Unified School District animation curriculum as one bright spot in the film and media education ecosystem. Multiple interviewees mentioned the closure of the Art Institute of

California–Sacramento as a real loss for the community. Because of the lack of education opportunities, Sacramento residents tend to leave the area to get formal training.

Differing opinions on need for indoor production space

Many perceive a lack of available large soundstage spaces to shoot. However, others noted that the combination of existing smaller indoor spaces and the wealth of available empty buildings fill their needs. As noted above, outdoor locations are Sacramento’s main asset.

Capacity limits of the existing production infrastructure

Most interviewees acknowledged that local equipment vendors, facilities, casting agencies, and other service providers adequately serve the majority of productions that currently take place in Sacramento. However, larger, and out-of-town productions need to hire Los Angeles- or San Francisco- based vendors to supplement local resources. BCM Films’ Eden Gardens Studio is currently converting a former printing facility into a soundstage/production office facility to serve their productions, as well as the needs of both local and out-of-town producers. A significant portion of the production that currently takes place in Sacramento—indie features, documentaries, commercials, web content, and corporate media—is produced by local production companies.

Film and media industry earnings and number of jobs have grown

We used the CVSuite tool to help us understand the economic impact of Sacramento’s film and media industry. In 2017, people who work in industries that we consider part of the Sacramento metropolitan area’s film and media sector made \$876 million in earnings, a 21.8% increase from 2013. The metro area supported approximately 26,500 jobs for people working in the film and media sector in 2017, an 8.7% jump from 2013-2017. Racial disparities exist for people who hold these jobs. In 2017, 70.1% of all jobs were held by White people, whereas White people made up only 52% of the total population. The percentage of jobs held by people of color has hovered around 30% every year since 2013. Gender disparities exist, too. In 2017, men held 56.0% of all jobs, while only making up 49% of the population. Find more key findings about the region’s film and media creative economy in Appendix B.

U.S. Film Programs Benchmarks: Key Findings

We sought to understand how six film offices around the country—Austin Film Commission, Film LA, Memphis Film Office, Portland Film Office, Santa Clarita Film Office, and SF Film—helped their local film and media industry thrive. First, we complete a web search on the six film offices. We sought to understand their governance, staffing, and budget. We identified their key partners and what local film incentives, ordinances, and policies they had in place. We investigated their programming, marketing and cultivation. Then, we conducted one-on-one phone interviews with leadership from each office to dive more deeply into what services they provide. From the web search and interviews, we identified common themes.

Play to city’s strengths

All six film offices promote the diversity of their locations: they sell themselves visually, before anything else. The Austin Film Commission plays up their local cultural identity, for example, and Film SF touts its beautiful scenery. Film offices also leverage the strengths of their offices. Film LA, for example, is known for its permitting efficiency. Memphis prides itself in its customer service. Film SF advertises its local incentive program.

Endorsement from top government staff and officials is key

All six interviewees agreed that top leadership endorsement helps their film offices nimbly and effectively solve problems for filmmakers. Many acknowledged the importance of cultivating relationships between the film office and city staff. These relationships help city staff understand their role in the success of the local film and media industry and ensure smoother permitting processes.

Support your partners

Film offices cannot solely support the film and media industries in their cities. They need strategic partners, such as unions and other organizations, that provide professional development opportunities. Film offices support these efforts, for example, by providing sponsorship or free meeting space.

Understand how to support out-of-town production *and* local talent

Many interviewees pointed to the challenge of supporting local talent and attracting out-of-town production. This dynamic differs, depending on the industry market. Most interviewees noted the possibility of mutually beneficial relationships between the local and out-of-town aspects of the sector.

Recommended Plan

What is the roadmap for how a re-launched municipal film office can better support the needs of the local film and media industry and help it grow? Below, we recommend a five-year plan that outlines a series of actions and investments needed to guide the development and management of a strengthened film office. Our research informs the plan, specifically pulling from our exploration into how other film programs around the country operate and support local talent and out-of-town production. We recommend goals that we believe the film office can complete within five years. For each goal, we provide strategies to achieve the goal. And for each strategy, we detail short-, mid-, and long-term actions. The film office should aim to achieve short-term actions in Year 1, mid-term actions in Years 2 and 3, and long-term actions in Years 4 and 5. In some cases, an action helps support more than one strategy. We include actions under each strategy they help support, meaning readers will see a few actions appear multiple times in the plan below.

Summary of Goals:

1. Provide a consistent and high level of service
2. Leverage regional location assets
3. Strengthen local crews
4. Help local filmmakers thrive
5. Attract out-of-town productions

Goal 1: Provide a consistent and high level of service

Strategy: Build out Sacramento Film Office functions

An immediate need exists to build out the functions of the Film Office so that the transition is as seamless as possible and that the new manager can advance the recommended plan.

Short-term actions

- Complete transition of former film commission functions to the new Sacramento Film Office
- Host a welcome party to introduce the new manager to the entire film and media community and formally announce the new Office. The party will help cultivate support from and build relationships with partners.
- Design and build initial web presence for the Film Office
- Create systems for collecting data and tracking Film Office progress. This could include CVSuite data, number of queries received by the office, number of permits issued and how many are to local productions vs. out-of-town productions, etc. (See section on metrics later in this report.)
- Leverage existing convention and cultural services staff to increase capacity of the Film Office.
- Meet with and get to know local stakeholders. Through our research, thanks especially to the Steering Committee, we compiled a list of local industry stakeholders. We engaged some through this research; the Film Office has an opportunity to connect with even more.

Mid-term actions

- Expand function and features of film office web presence: add a welcome-message video, FAQs, more locations, and links to partners and events
- Continue to leverage convention and cultural services staff and consider if additional staff is needed to further increase film office capacity

Long-term actions

- Film office manager should plan regular site visits prior to, and during, filming. This is particularly important when complex logistics (street closures, special effects, etc.) are required, to troubleshoot potential impacts with producers and city officials.

Strategy: Refine Sacramento Film Office governance and policies

Once the film office manager stabilizes day to day operations, they will need to shift their attention to more broad issues of governance, policy, and systems change. These factors can yield improvements in service delivery to the film and media community.

Short-term actions

- Establish if Film Office will have/need an advisory committee, separate from the newly formed Arts, Culture, and Creative Economy Commission
- Address any immediate fixes needed to existing film ordinance and permit process

Mid-term actions

- Create a formal policy document that helps guide city agencies when regulations for film permissions are unclear or in conflict with each other
- Refine and add to policy as the film office manager continues to trouble shoot permit approval sticking points

- Form ad-hoc committees of local film and industry representatives, as needed. Such committees can help guide the direction of the Film Office regarding issues such as workforce development, crew training, and union representation.

Long-term actions

- Move to a true, online film permit that integrates with other City permit approval processes and workflows
- Continue to decrease turnaround time for permits, aiming for a 48-hour turnaround from application to issuance for routine requests

Strategy: Develop incentive programs

Even a small financial incentive is a good marketing tool. It demonstrates a city’s commitment to attracting and servicing the industry. As one interviewee noted, “[you] have to be realistic about what a local incentive can do; it’s maybe more of a marketing tool rather than nuts and bolts bottom line type game-changer.” These include offering a number of free cops per day; setting aside funds to cover permit fees; allowing free use of government-owned buildings; and offering a local sales tax exemption. If the film office can show the impact of its work and of the film and media industry, it will be able to make a stronger case for incentives.

Mid-term actions

- Pilot an incentive program for productions that meet a minimum local spending threshold. Before piloting any incentive program, we advise the Film Office to build relationships with strategic city staff and officials and collect data to show economic impact. The Film Office should think carefully about potential incentives that capitalize on local assets and meet the needs of producers.

Promising practices:

- ⇒ The City of Santa Clarita refunds the basic film permit fee(s) to production that pulls four or more City film permits within a specified time period
- ⇒ The City of Austin Economic Development Department offers up to a .75% cash rebate for productions spending more than \$250,000: <https://austintexas.gov/department/film-incentives>

Strategy: Nurture inter-governmental partnerships

The Film Office must be an advocate for the industry, finding a way to “yes,” in often extremely bureaucratic city systems. As we heard in our interviews and through our benchmark research, partnerships are key to a successful film office. To make a shoot possible, film offices must collaborate with a wide range of city offices, including permitting, fire, police, transportation, and the attorney’s office. Benchmark research surfaced the importance of helping city staff understand their roles in achieving film and media efforts. As one benchmark interviewee said, “you have to get the political players involved so they take ownership and celebrate the industry.” Another benchmark interviewee credits the city’s film office success to a “supportive city council that understands the value of the industry to the local economy and are committed to being ‘film friendly.’”

Short-term actions

- Develop relationship with California film commission director and staff
- Regularly invite the mayor, city manager, city council members, and other municipal leaders to film locations and industry events
- Film office manager should meet with key department officials to discuss filming operations and potential impacts. In addition, request inclusion in regular intergovernmental coordination meetings related to large-scale events or capital projects to help avoid conflicts.
- Film office manager should meet with key education and workforce development agency officials to discuss resources and potential for collaboration

Mid-term actions

- Regularly share impact of the film and media industry, as well as the Film Office, with elected officials and the appropriate appointed Commission

Promising practice:

- ⇒ Film SF sponsors quarterly mixers at locations throughout the city interested in attracting industry business (e.g., hotels, locations for shooting). Besides inviting film and media industry folks, Film SF also invites city staff from permitting, public works, transportation, and police. This way, industry people meet city staff, leading to both understanding each other better.

Strategy: Optimize regional film office and film commission coordination and collaboration

The regulatory jurisdiction of the new Sacramento Film Office is to issue permits within the city limits. In addition, the Film Office will need to facilitate permits on behalf of producers throughout Sacramento County. Many productions film in multiple locations across different jurisdictions. This can be confusing and frustrating for location managers, so all the film office staff in the region must cooperate and collaborate, in order to deliver a high level of service. All of the regional film offices will have a role in promoting each other's assets, in an effort to keep more work in the region. When neighboring film offices bundle the region's assets, producers can get more of what they need in region. As one interviewee put it, "it's crucially important for us to work together across the region with honesty and integrity."

Short-term actions

- Meet regularly with other regional film office staff to foster communication and collaboration, and to minimize duplication of efforts
- Create an excellent, online resource featuring a robust catalogue of regional locations

Mid-term actions

- Collaborate with the other film offices to advocate for stronger regional guild and union representation and service to the below-the-line crew trades
- Plan joint training sessions for location scouts and managers, so that they are more familiar with the different jurisdictions and respective permit processes

Goal 2: Leverage regional location assets

Strategy: Create high quality, searchable, online location database

Sacramento’s diversity of locations is its biggest asset. The searchable database of regional film locations should include high-quality photography, contact information, and jurisdiction and related approvals. With an improved database, location scouts and producers can more efficiently understand Sacramento’s breadth of locations, as well as key logistical parameters.

Short-term actions

- Transition existing assets from Visit Sacramento location catalogue to new film office web page
- Plan and implement improved database with enhanced functionality, such as searchable features and data on each location

Mid-term actions

- Commission high-quality, professional photography of desirable locations that aren’t well represented within existing catalogue(s)
- Add short video clips of high-priority locations
- Continue to add locations annually

Promising practice:

⇒ Users of Santa Clarita Film Office’s Location Library can browse thousands of locations and sort by category (e.g., parks, residential, retail) and easily find addresses and pertinent contact info for each site: <http://filmlib.santa-clarita.com/index.aspx?page=10>

Strategy: Cultivate greater knowledge of Sacramento’s location assets among West Coast producers, professional location scouts, and location managers

An interviewee mentioned that “producers often come seeking one location but find that the region can provide additional locations that also fit their project.” If more location scouts know about the wealth of Sacramento’s locations, they could better promote the region to out-of-town producers.

Short-term actions

- Create an excellent, online resource featuring a robust catalogue of regional locations
- Attend industry events produced by the Location Managers Guild of America to ensure regional representation
- Continue membership and participation in relevant industry organizations such as FLICS (Film Liaisons in California Statewide)

Mid-term actions

- Collaborate with partners to create a “sizzle-reel” that showcases location assets
- Support and carry out ongoing, location-manager training opportunities. The Film Office could support Capital Film Arts Alliance (CFAA), or another partner, such as the community college, local access TV station, or a guild or union to provide this training and introduce this work as a career pathway for those interested in film or photography.

- Cultivate relationships with studio executives in charge of production, major independent producers, and commercial producers. It is especially important to cultivate relationships with individuals in Los Angeles and San Francisco.
- Host familiarization trips (FAM Trips) for Los Angeles- and San Francisco-based location managers, production managers, and line producers

Long-term actions

- Develop and incentivize paid location manager and/or scout internship opportunities on local productions to help develop skills and deepen the pool of available location scouts and managers

Promising practice:

⇒ Film LA sponsors a series of location manager training workshops run by Teamster Local 399: <https://www.ht399.org/our-members/locations/>

Goal 3: Strengthen local crews

Strategy: Leverage partners and platforms to foster greater network connectivity

The Film Office needs to know the local film and media community well enough to connect filmmakers and producers to the local crew, vendors, and facilities that they need. Much of the business functions on relationships and word of mouth. Interviewees mentioned that they primarily look to their network for gigs or tap into their networks when they need to staff up. However, producers coming from out of town can realize significant savings, if they can staff up locally rather than importing all their crew and talent from elsewhere. Our research indicates that many Sacramento-based film and media industry workers don't use the Reel Directory. Some have the perception that the directory is San Francisco-focused and hard to find Sacramento-based workers. Since it already exists, and some do use it, if more local crews were listed, it could become a more robust resource to the local community.

Short-term actions

- Work with partners to grow opportunities for people in the industry to meet each other and connect, such as the CFAA events
- Advocate that local crews and talent list themselves in the Reel Directory or identify another viable local directory option
- Promote the Reel Directory on the Film Office website and verbally to out-of-town film productions

Strategy: Craft and support programs, partnerships, and incentives to help local crews gain experience/skills

Both local and out-of-town productions will benefit from a stronger pool of experienced crews and talent. Opportunities for formal education and training are few; they must also be supplemented with opportunities to gain on the job experience. In addition, our research showed that in 2017, women only held 43% of all below-the-line technical jobs in the Sacramento metropolitan area. People of color only held 30% of these jobs. Compared to their share of the overall metropolitan area population, women and people of color are underrepresented.

Short-term actions

- Foster internship opportunities by assembling a list of organizations and schools that can provide qualified interns to film and media productions
- Lobby productions to regularly hire interns and pay them a living wage

Mid-term actions

- Assemble an ad-hoc committee of industry professionals to help the City strengthen both formal and informal training programs and partnerships
- Lobby for recipients of California film tax incentive who produce in Sacramento to hire local interns, pay them a living wage, and encourage racial and gender diversity in the hiring process

Long-term action

- Partner with a workforce development entity to offer a film and media industry-specific training program for women and people of color

Promising Practice:

⇒ The Chicago Film Office piloted “Chicago Track” with Free Spirit Media, a training program for young adults. Free Spirit Media still runs the program as Industry Pathways, which specifically strives to support young people marginalized by various identities, such as race, gender, and class: <https://freespiritmedia.org/inpathways>

Goal 4: Help local filmmakers thrive

Strategy: Craft programs that support local filmmakers

Sacramento’s local film industry wants support from the Film Office. Our research surfaced examples of Film Offices that support local filmmakers through decreased fees and grant programs. Even modest grants can validate local filmmakers. As one benchmark interviewee said, “it’s made them aware that we’re looking at them. It’s not going to be the water that lifts all boats or anything to that effect, but it is a little bit of a pebble in the ocean towards winning support in their direction.”

Short-term actions

- Consider a fee waiver or sliding scale of permit fees for small, local productions. By law, cities often can’t “waive fees.” Instead, the City can set aside money to essentially pay themselves or reimburse the producer for the fees they pay.
- Help identify a solution for low-cost production insurance
- Support film festivals that showcase locally produced content

Mid-term actions

- Collaborate with partners to create a “sizzle-reel” that showcases the work of local filmmakers
- Ensure that all film and media related creative activities are eligible for Sacramento Metropolitan Arts Commission grants

Long-term action

- Explore development of an incentive program that support local filmmakers

Promising practices

- ⇒ The City of Santa Clarita covers permit fees for student films
- ⇒ Film LA ran a pilot program that offered discounted fees to low-budget, independent producers
- ⇒ Memphis Film Commission’s Production Incentive Pilot Program reimburses select Memphis directors for 30% of their in-city spending on projects with total budgets of \$150,000 or less: <https://www.filmmemphis.org/local-production-incentive>
- ⇒ Since 2018, the Portland Film Office has partnered with Oregon Made Creative Foundation on the Portland Post-Production Film Grant Program. The program supports small, local filmmakers by providing funds for activities including sound design, scoring, editing, color correction, closed captioning, VFX, and music clearances using local post-production houses. In 2019, the program awarded four \$5000 grants: <http://www.oregonmade.org/portland-post-production-grant-2019.html>

Goal 5: Attract out-of-town productions

Strategy: Invest in marketing and outreach to attract out-of-town producers

For the Sacramento film and media industry to grow and for local crew to gain experience, the Film Office needs to market to out-of-town producers primary based in Los Angeles and San Francisco. The Film Office can leverage the efforts of the California Film Commission and Film Locations in California. It can buy ads in the “Locations California” and the AFCE’s “Locations International” publications. It can participate in the annual “California On Location Awards” (COLA) awards. With its move to the City, the Film Office has an excuse to reestablish relationships with these entities that support the Film Office’s marketing and outreach efforts.

Short-term action

- Commit to an annual marketing and outreach budget. This budget would include attendance at industry conferences, advertising, and branding, and the creation of “swag.”

Mid-term actions

- Cultivate relationships with industry decision makers at Los Angeles studios, networks, and companies; specifically target people working in feature film and television productions
- Cultivate relationships with advertising agencies and production companies in Los Angeles and San Francisco; specifically target commercial productions
- Host FAM trips for Los Angeles- and San Francisco-based location managers, production managers and line producers

Long-term action

- Assess efficacy of marketing efforts with analytics and feedback to either course-correct or consider additional investments

GOAL AND STRATEGY MATRIX

Goal I: Provide a consistent and high level of service

Strategy: Build out Sacramento Film Office functions

Actions	Short	Mid	Long
Complete transition of former film commission functions to the new Sacramento Film Office	x		
Host a welcome party for the new manager	x		
Design and build initial web presence for Film Office	x		
Create systems for collecting data and tracking film office progress	x		
Leverage existing convention and cultural services staff to increase capacity of the Film Office	x		
Meet with and get to know local stakeholders	x		
Expand function and features of web presence for Film Office		x	
Consider if additional staff is needed to further increase capacity of the Film Office		x	
Plan regular site visits prior to, and during, filming			x

Strategy: Refine Sacramento Film Office governance and policies

Actions	Short	Mid	Long
Establish if Film Office will have/need an advisory committee	x		
Address any immediate fixes needed to existing film ordinance and permit process	x		
Create a formal policy document that helps guide city agencies		x	
Refine and add to policy as the film office manager continues to trouble shoot permit approval sticking points		x	
Form ad-hoc committees of local film and industry representatives, as needed		x	
Move to a true, online film permit			x
Continue to decrease turnaround time for permits			x

Strategy: Develop incentive program

Actions	Short	Mid	Long
Pilot an incentive program for productions that meet a minimum local spending threshold		x	

Strategy: Nurture inter-governmental partnerships

Actions	Short	Mid	Long
Develop relationship with California film commission director and staff	x		
Regularly invite the mayor, city manager, city council members, and other municipal leaders to film locations and industry events	x		
Film office manager meets with department officials to discuss filming operations and potential impacts	x		
Film office manager meets with education and workforce development agencies officials to discuss resources and collaboration	x		
Regularly share impact of the film and media industry, as well as the Film Office		x	

Strategy: Optimize regional film office and film commission coordination and collaboration

Actions	Short	Mid	Long
Meet regularly with other regional film office staff to foster communication and collaboration	x		
Create an excellent, online resource featuring a robust catalogue of regional locations	x		
Collaborate with the other film offices to advocate for stronger regional guild and union representation and service to the below-the-line crew trades		x	
Plan joint training sessions for location scouts and managers		x	

Goal 2: Leverage regional location assets

Strategy: Create high quality, searchable, online location database

Actions	Short	Mid	Long
Transition existing assets from Visit Sacramento location catalogue to new film office web page	x		
Plan and implement improved database with enhanced functionality	x		
Commission high-quality professional photography of desirable locations		x	
Add short video clips of high-priority locations		x	
Continue to add locations annually		x	

Strategy: Cultivate greater knowledge of Sacramento’s location assets among West Coast producers, professional location scouts, and location managers

Actions	Short	Mid	Long
Create an excellent, online resource featuring a robust catalogue of regional locations	x		
Attend industry events produced by the Location Managers Guild of America	x		
Continue membership and participation in relevant industry organizations such as FLICS (Film Liaisons in California Statewide)	x		
Collaborate with partners to create a “sizzle-reel” that showcases location assets		x	
Support and carry out ongoing location-manager training opportunities		x	
Cultivate relationships with studio executives in charge of production, major independent producers, and commercial producers		x	
Host familiarization “fam” trips for location managers, production managers and line producers		x	
Develop and incentivize paid location manager and/or scout internship opportunities on local productions			x

Goal 3: Strengthen local crews

Strategy: Leverage partners and platforms to foster greater network connectivity

Actions	Short	Mid	Long
Work with partners to grow opportunities for people in the industry to meet each other and connect	x		
Advocate that local crews and talent list themselves in the Reel Directory	x		
Promote the Reel Directory on the Film Office website and verbally to out-of-town film productions	x		

Strategy: Craft and support programs, partnerships, and incentives to help local crews gain experience/skills

Actions	Short	Mid	Long
Foster internship opportunities	x		
Lobby productions to regularly hire interns and pay them a living wage	x		
Assemble an ad-hoc committee of industry professionals to help strengthen training programs and partnerships		x	
Lobby for recipients of California film tax incentive who produce in Sacramento to hire local interns		x	
Partner with a workforce development entity to offer training program for women and people of color			x

Goal 4: Help local filmmakers thrive

Strategy: Craft programs that support local filmmakers

Actions	Short	Mid	Long
Consider a fee waiver or sliding scale of permit fees for small, local productions	x		
Help identify a solution for low-cost production insurance	x		
Support film festivals that showcase locally produced content	x		
Collaborate with partners to create a “sizzle-reel”		x	
Ensure that all film and media related creative activities are eligible for Sacramento Metropolitan Arts Commission grants		x	
Explore development of an incentive program that support local filmmakers			x

Goal 5: Attract out-of-town productions

Strategy: Invest in marketing and outreach to attract out-of-town producers

Actions	Short	Mid	Long
Commit to an annual marketing and outreach budget	x		
Cultivate relationships with industry decision makers at Los Angeles studios, networks, and companies		x	
Cultivate relationships with advertising agencies and production companies in Los Angeles and San Francisco		x	
Host FAM trips for Los Angeles- and San Francisco-based location managers, production managers and line producers		x	
Assess efficacy of marketing efforts with analytics and feedback to either course-correct or consider additional investments			x

MEASUREMENT

As the Film Office embarks on this new plan, it must understand the results of its efforts. The data the Film Office collects will help it track progress over time, course correct internal practices, and advocate for increased support. Tracking and communicating this data will help to enhance transparency and accountability. As one benchmark interviewee said, “we have a very supportive city government that realizes the value of film to the city, because it provides local jobs, a good amount of local spending, and that it then also increases tourism when people see our city around the world.” In other words, showing impact matters.

Below, we offer indicators and regular data collection methods to measure the efficacy of the Film Office and its impact. We recommend that the Film Office think strategically about audiences for this data and regularly share analysis. In approximately one year, we will use data collected by the Film Office to produce a baseline assessment. The baseline assessment will help the Office going forward to reflect on its plan implementation progress and make any needed course corrections. Some of the indicators the Film Office can collect immediately, such as the number of locations listed on its website. Others will require the Film Office to establish mechanisms to track data. We suggest that the Film Office measure some indicators immediately so that we can assess progress in approximately one year; we identify these indicators below with an *.

Goal: Provide a consistent and high level of service

- Maintain a log of queries made to the Film Office with categories to indicate query content. Tracking this information could help the Film Office make the case for increased resources and influences communication strategies.
- Average number of hours from permit submission to issuance; aim for a standard of service of 48 hours
- Number of training sessions for location scouts and managers (either hosted or supported)

Goal: Leverage regional location assets

- Number of locations listed on website*
- Number of visits to locations webpage
- Number of queries the Film Office receives about location types

Goal: Strengthen local crews

- Number of Sacramento-based crew and talent listed in Reel Directory*
- Number of Sacramento-based folks in International Alliance of Theatrical Stage Employees 50 (IASTE) and other film industry unions or guilds such as (Screen Actors Guild (SAG) and Directors Guild of America (DGA))*
- Number of networking events (and attendees) that Film Office supports and attends
- Number of below-the-line technical jobs (use CVSuite to analyze)
- Percentages of below-the-line technical jobs held by women and people of color (use CVSuite to analyze)

Goal: Help filmmakers thrive

- Number of permits issued to local filmmakers

- Number of “film days” from local productions
- Amount of funds generated by permit fees paid by local filmmakers
- Number of internships programs supported and number of interns in these programs

Goal: Attract out-of-town productions

- Number of permits issued to out-of-town productions
- Amount of funds generated by permit fees paid by out-of-town productions
- Number of “film days” from out-of-town productions
- Amount of local spending and local hires from out-of-town productions
- Number of queries received by Film Office from various marketing platforms or campaigns
- Number of film days generated from marketing investment(s)
- Number of people who ask about, and then attend, FAM trips in Sacramento

Appendix A: Steering Committee Members

- Sean Arnold, Film Office, Convention & Cultural Services (staff liaison)
- Roxanne Avent Taylor, Hidden Empire Film Group
- Matthew Gilliam, Sacramento Metropolitan Arts Commission and local filmmaker
- Al Gonzalez, soc; Quad Air Communications
- Amy Lemish, California Film Commission (former)
- Laurie Pederson, Capital Film Arts Alliance
- Melissa Romero, Special Events, City of Sacramento
- Lucy Steffens, Film Commission, Visit Sacramento
- Shawn Sullivan, Elk Grove Unified School District
- Jody Ulich, Director, Convention and Cultural Services Department (staff liaison)

Appendix B: Creative Industry Key Findings

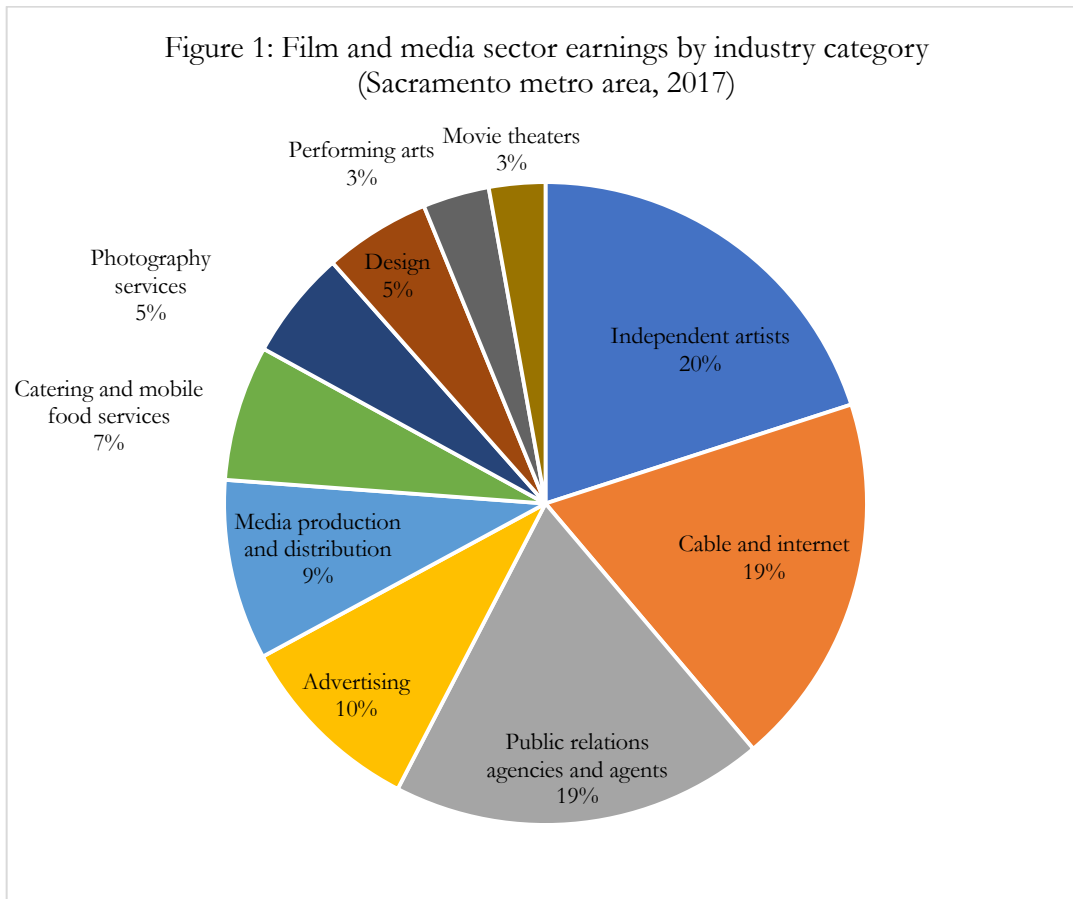
We analyzed film and media industry economic data for the Sacramento--Roseville--Arden-Arcade metropolitan area. Below, we include key findings from our analysis.

Film and media industry earnings

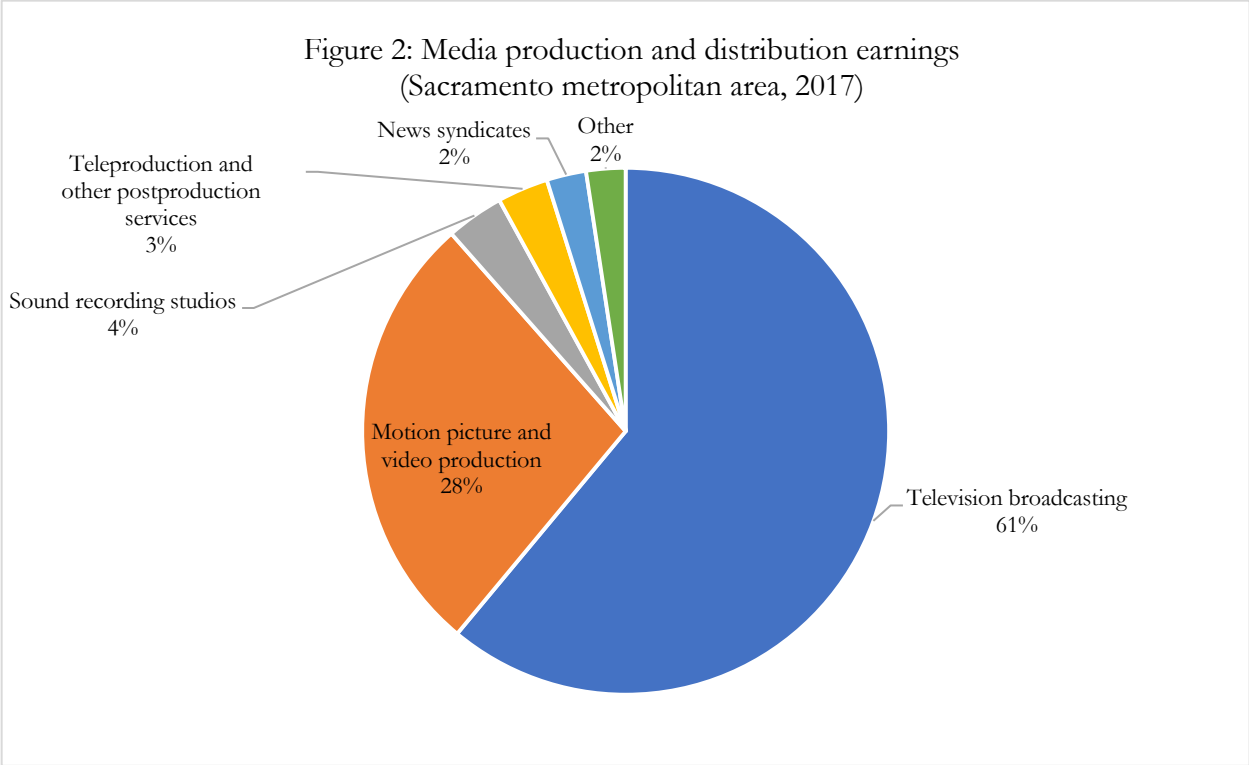
In 2017, people who work in the film and media sector made \$876 million in earnings. These earnings have increased 21.8% from 2013-2017. Much of this change is thanks to growth in high-earning industries, like public relations agencies (+30.7%, \$156M earnings in 2017) and cable and other subscription programming (+38.6%, \$105M earnings in 2017 earnings). We included the following industries in our analysis of earnings:

- Advertising agencies
- Agents and managers for artists, athletes, entertainers, and other public figures
- Cable and other subscription programming
- Caterers
- Commercial photography
- Dance companies
- Drive-in motion picture theaters
- Fine arts schools (private)
- Graphic design services
- Independent artists, writers, and performers
- Internet publishing and broadcasting and web search portals
- Libraries and archives
- Mobile food services
- Motion picture and video distribution
- Motion picture and video production
- Motion picture theaters (except drive-Ins)
- Music publishers
- Musical groups and artists
- News syndicates
- Other motion picture and video industries
- Other performing arts companies
- Other services related to advertising
- Other sound recording industries
- Other specialized design services
- Photofinishing laboratories (except one-hour)
- Photography studios, portrait
- Public relations agencies
- Sound recording studios
- Teleproduction and other postproduction services
- Television broadcasting
- Theater companies and dinner theaters

In terms of specific industries within the film and media sector, these earned the most in 2017: independent artists, writers, and performers: \$172 million; public relations agencies: \$156 million; cable and other subscription programming: \$105 million; advertising agencies: \$68 million; and internet publishing and broadcasting and web search portals: \$57 million. We can group specific industries into larger categories to more easily see trends. In 2017, independent artists accounted for 20% of all earnings, followed closely by cable and internet (19%), and public relations agencies and agents (19%) (Figure 1).



If we just look at the media production and distribution category, which generated \$79M in earnings in 2017, 61.0% of earnings in this category went to people working in television broadcasting; 27.4% went to people working in motion picture and video production (Figure 2).



Occupations

The Sacramento metropolitan area supported approximately 26,500 jobs (instances of employment) in the film and media sector in 2017. Jobs grew 8.7% from 2013-2017. In terms of specific occupations in the film and media sector, occupations with the highest number of jobs in 2017 included: photographers: 7,049; writers and authors: 3,212; musicians and singers: 2,923; graphic designers: 2,492; and fine artists, including painters, sculptors, and illustrators: 1,445. Some notable occupations have experienced pretty steady growth over time from 2013-2017; art directors (+56.2%, 1,033 jobs in 2017); actors (+33.4%, 787 jobs in 2017); and producers and directors (+27.9%, 904 jobs in 2017).

The median hourly earnings for someone working in the film and media sector is \$21. People working in four occupations make at least a median wage of \$30/hour: broadcast new analysts: \$37; media and communication equipment workers, all other: \$33; technical writers: \$32; and fashion designers: \$31.

Racial disparities exist for people who hold jobs in the film and media sector. In 2017, 70.1% of all jobs were held by White people; 14% were held by Hispanics or Latinos; 8% by Asian Americans; 5% by Black or African American; and 3% of people of two or more races. The percentage of jobs held by people of color has hovered around 30% every year since 2013. Gender disparities exist, too. In 2017, men held 56.0% of all jobs, women held 44.0%.

Above-the-line jobs numbered 5,687 in 2017. Above-the-line jobs include actors, producers and directors, writers and authors, and entertainment performers, sports, and related workers. Above-the-line jobs increased 17.7% from 2013 to 2017. In 2017, people of color only held 23.2% of

above-the-line jobs. One occupation, in particular, drew this value down: people of color held 15.9% of jobs in the writers and authors occupation. In 2017, women held 49.5% of above-the-line jobs. This number is skewed by writers and authors: 54.8% of all these jobs were held by women.

Below-the-line jobs numbered 18,779 in 2017 and increased 6.6% from 2013 to 2017. Photography jobs make up a sizable chunk of these jobs (7,049). In 2017, people of color held 31.2% of all below-the-line jobs, which aligns with the percentage of all film/media sector jobs. In 2017, men held 57.4% of below-the-line jobs. This is a slightly higher percentage than the percentage for all film/media jobs. Below-the-line jobs include:

- Art directors
- Artists and related workers, all other
- Audio and video equipment technicians
- Camera operators, television, video, and motion picture
- Choreographers
- Costume attendants
- Craft artists
- Dancers
- Designers, all other
- Entertainment attendants and related workers, all other
- Fashion designers
- Film and video editors
- Fine artists, including painters, sculptors, and illustrators
- Graphic designers
- Makeup artists, theatrical and performance
- Media and communication equipment workers, all other
- Multimedia artists and animators
- Music directors and composers
- Musicians and singers
- Photographers
- Set and exhibit designers
- Sound engineering technicians

If we just look at below-the-line *technical* jobs, these numbered 9,025 in 2017 and increased 11.0% from 2013 to 2017. People of color held 30.1% of all below-the-line technical jobs in 2017. Women held 42.8% of below-the-line tech jobs. Technical jobs include:

- Audio and video equipment technicians
- Camera operators, television, video, and motion picture
- Costume attendants
- Entertainment attendants and related workers, all other
- Film and video editors
- Makeup artists, theatrical and performance
- Media and communication equipment workers, all other
- Multimedia artists and animators
- Photographers

- Set and exhibit designers
- Sound engineering technicians

Notes on economic analysis methodology

We worked with the Steering Committee to identify which industries and occupations to include in this analysis. Not all the industries and occupations data we counted above will be in the film and media sector, as our data source does not allow us to understand certain nuance of these industries and jobs. For example, we don't know how many acting jobs were for TV and film and which were for live theater. And we don't know what percent of the earnings of catering and mobile food services was generated by film sets and what percent was generated at a local food truck festival. However, regardless of whether the acting jobs are in TV, film, or live theater, for example, the data gives us an overarching picture of what types of jobs and industries the Sacramento region supports.

One important issue with looking at creative sector data is recognizing the difference between “workers” and “jobs” when talking about occupations. Most occupation data reflect filled jobs, whether full or part-time, temporary or permanent, by place of work. Extended proprietor jobs (these can be thought of as secondary jobs) data are based on tax returns. It's important to count extended proprietor jobs for the creative economy because of the prevalence of creative people having multiple sources of secondary income through side jobs and gigs.

It is incorrect to say that the Sacramento metro supports approximately 26,500 workers in the film and media sector. Instead, it's accurate to say that the area supports nearly 26,500 creative jobs in this sector, or nearly 26,500 instances of employment. Jobs are considered instances of employment, not workers, since an individual may have multiple jobs. We can think of the number of instances of employment or jobs as reflective of the demand for certain kinds of work.

For example, say I work full-time as a high school teacher and do animation gigs on the side. In 2017, I got paid for four animation jobs, one in every quarter (winter, spring, etc.). The number of my instances of employment or jobs reflected in the data will depend on when I report the money I received from these jobs. If I report money I received from each of my four animation jobs in the quarters I completed them, my work in 2017 as an animator will count as four instances of employment or four jobs. If I report the money I receive from all four jobs in Quarter 4, my work as an animator will count as one instant of employment, or one job. Unfortunately, we don't know if people are reporting those four jobs every quarter or all at once in one quarter.

Another important nuance to understand with creative occupation data is that we include all classes of workers in our analysis: salaried, self-employed, and extended proprietors. Many creative workers freelance, so including all classes of workers allows us to get an accurate snapshot of the region. Self-employed and extended proprietors may represent jobs outside of the Sacramento region. Even if jobs completed by those workers are outside the region, earnings would likely go back into the Sacramento region.

Appendix C: Interviewees

Sacramento Landscape Review

- Sean Arnold, Film Office, Convention & Cultural Services
- Roxanne Avent Taylor, Hidden Empire Film Group
- Dave Bunge, Bunge Grip & Electric
- John Christensen, Sacramento Media Center
- Kathleen Dodge, El Dorado Lake Tahoe Film Office
- Sally Forcier, Forcier Casting
- Matthew Gilliam, Sacramento Metropolitan Arts Commission and local filmmaker
- Al Gonzalez, soc; Quad Air Communications
- Amy Lemish, California Film Commission
- Bryan Martin & Matt Stevens, BCM Films
- Gary Martin, Access Sacramento
- Melissa Patack, Motion Picture Association of America
- Laurie Pederson, Capital Film Arts Alliance
- Melissa Romero, Special Events, City of Sacramento
- Lauren Schwartz, Kaboom Productions
- Lucy Steffens, Film Office, Convention & Cultural Services
- Shawn Sullivan, Elk Grove Unified School District

Benchmark Film Offices

- Brian Gannon, Director, Austin Film Commission
- Susan Greason Robbins, Executive Director, SF Film
- Brian Lord, Director, Portland Film Office
- Linn Sitler, Director, Memphis Film Office
- Evan Thomason, Director, Santa Clarita Film Office
- Donna Washington, Vice President of Permit Operations, Film LA