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## Coordinating over time: The micro-processes of integrating creativity and control in a dramatic television production

Esther R. Maier, *The University of Western Ontario*

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A thesis submitted in partial fulfillment of the requirements for the Doctor of Philosophy degree in Business

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COORDINATING OVER TIME:  
THE MICRO-PROCESSES OF INTEGRATING CREATIVITY AND CONTROL IN A  
DRAMATIC TELEVISION PRODUCTION

(Thesis format: Monograph)

By

Esther R. Maier

Graduate Program in Business Administration

A thesis submitted in partial fulfilment  
of the requirements for the degree of  
Doctor of Philosophy

The School of Graduate and Postdoctoral Studies  
The University of Western Ontario  
London, Ontario, Canada

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## ABSTRACT

The pressures of continuous innovation in response to shorter product lifecycles and changing customer tastes or requirements create a constant challenge for firms expected to deliver predictable growth. Yet, the creativity needed for new product development projects often emerges in unpredictable and non-linear ways. Projects such as software development, new drug exploration, and filmmaking are knowledge-intensive undertakings where creativity is not confined to the conceptual stage of the project, but required for its duration. Different groups are often involved at different stages of the project and their creative contributions need to be conjunctive. Consequently, formal controls are required to coordinate their creative inputs.

My research explores how the competing tensions of creativity and control are balanced through coordinating mechanisms over time in large-scale creative collaborations (LSCCs). Given the long implicit function of the budget as a coordinating mechanism, it became the focal point of this exploration. My dissertation is focused on answering two related research questions. First, how are budgets used to accomplish coordination *over time*? Second, how are budgets used to mediate the tensions between creativity and control?

In this study, I used a qualitative approach to build new theory. My enquiry is situated in the film and television industry where creative aspirations must be continually balanced within the parameters of time and money. Using an in-depth, single case study design, I studied the coordinating practices of the crew of a dramatic television series production in ‘real time’ as they created and produced each script of the season. In the film and television industry, each product is a new creation that comes to fruition through the collaborative efforts of teams of artists, designers and specialized crafts people.

There were three main findings from this research. First, I identify the coordinating practices of four distinct groups that each practiced time differently. Second, I identify four specific micro-processes that make it possible to coordinate creativity over these largely non-overlapping groups. Finally, I reveal how the changing relationship between creativity and control through each of the four processes allows for progressively more precise coordination and seamless transitions across the different groups.

**Keywords:** *collective creativity, large-scale creative collaborations, temporal coordination, control, qualitative methods*

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Dr. Dean Neu provided me with a comprehensive overview of the ‘alternative’ accounting research that allowed me to draw on that literature in this study. I must also thank Dr. Mark Zbaracki for the countless hours of conversation and feedback that shaped my ideas for this project when it was still in its infancy. I would also like to thank my committee members, both present and past, for helping me crystalize my thoughts and develop a more interesting dissertation.

Qualitative research relies on the insights and shared experiences of the participant in the study. When ethnographic methods such as observation are used, it also requires the willingness of participants to accept the researcher as part of their day-to-day lives, at least temporarily. I owe a great debt of gratitude to Series Corp. for making this study possible and to the crew of Series X, who warmly welcomed me into their world.

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## CHAPTER 1 – INTRODUCTION

### 1.1 Managing interdependencies through coordinating mechanisms

Coordination has long been recognized as a fundamental concern in organizational theory (e.g. Lawrence & Lorsch, 1967; March & Simon, 1958; Thompson, 1967). Coordination theory explains the management of interdependencies between tasks and/or activities (Malone & Crowston, 1994; Okhuysen & Bechky, 2009) as well as the flow of knowledge (Faraj & Sproul, 2000; Faraj & Xiao, 2006). From a macro-level perspective, coordination is often strategic: it aligns goals and means, internal resources, administrative infrastructure and specific courses of action (Farjoun, 2002).

Our early theories of coordination emerged at a time when manufacturing and production activities dominated the organizational landscape of developed economies (Okhuysen & Bechky, 2009). Standardization was seen as an important coordinating mechanism in the production of physical products where processes could be easily decomposed into sequential steps and progress towards completion easily measured (e.g. Thompson, 1967). While these early theories emphasized hierarchy and rule-based systems that could be designed for optimal organizational performance, they also recognized that there is no ‘one best’ way to organize (Adler, 1995; Malone & Crowston, 1994; Thompson, 1967).

The organizational landscape in developed economies has radically shifted in the last few decades and the large manufacturing concerns that shaped our early theories of organizations no longer dominate (Davis, 2009). The greatly reduced manufacturing sectors in advanced economies are now characterized by flexible production arrangements that emphasize the need to continually adapt to changing customer requirements (cf. Simons, 1995). The focus on continuous innovation is magnified in the service- and technology-based organizations that are

now much more prevalent than manufacturing concerns (Okhuysen & Bechky, 2009). In these organizations, processes are not necessarily linear or easily decomposed and standardization is not desirable (or even possible) since the ways in which a service or technology is delivered cannot necessarily be formalized (Faraj & Xiao, 2006). At the same time, interdependencies have grown increasingly complex and thus require more focused and sustained efforts on coordinating mechanisms (Thrift, 2004). This is particularly true in large-scale collaborative projects that often span multiple constituencies or organizations and have become a pervasive form of organizing in our current economy (Cattani, Ferriani, Fredericksen & Taube, 2011).

These large-scale projects are often contained within temporary or project-based organizations that bring together a team of specialists who contribute their expertise to bring the project to fruition (Bechky, 2006). Project-based organizations offer the flexibility required to manage the complex activities associated with the generation of new ideas and the development of new products (Cattani et al., 2011). In larger organizations, projects are often viewed as a coordinating mechanism in their own right, but they also require and rely on a series of coordinating mechanisms within the project in order to achieve their objective (Nightingale & Brady, 2011).

Coordinating mechanisms – the tools, technologies and interactions that bring interdependent elements in organizations together (Okhuysen & Bechky, 2009) – have long been recognized as the “the most basic elements of structure” (Mintzberg, 1989, p.101). The role of standards, rules, schedules, and procedures in aligning and integrating interdependent tasks has been the focal point of coordination research (Jarzabkowski, Le & Feldman, 2012; Okhuysen & Bechky, 2009). In contrast with traditional views of coordinating mechanisms as reified structures, recent research reveals their emergent and dynamic nature in practice (e.g. Adler,

1995; 2005; Jarzabkowski et al., 2012; Orlikowski & Yates, 2002). In conditions of uncertainty, novelty and change, where tasks are often uncharted and uncertain, coordinating mechanisms need to allow for experimentation as people find ways to coordinate their activities (Jarzabkowski et al., 2012).

This flexibility is particularly important for large-scale projects where the path to the goal or objective cannot be specified in advance (Gersick, 1994). For instance, Adler (1995) shows how as software development projects progress through various stages over time, the nature of interdependencies change and different coordinating mechanisms are enacted by different groups. The changing nature of coordinating mechanisms over time was also highlighted by Jarzabkowski and colleagues (2012) in their study of a corporate restructuring project brought about by regulatory changes in the broader industry.

The emergent nature of coordinating mechanisms and their inherent flexibility (Okhuysen & Bechky, 2009) have yet to be assimilated within the traditional project management literature which remains “rooted in a mechanistic paradigm of control” (Nightingale & Brady, 2011, p.85). As a result, the literature tends to emphasize the importance of rigorous formal methods in practice but this has done little to mitigate the high rate of failure in many projects (e.g. lengthy delays and cost overruns) as Nightingale and Brady (2011) point out. Despite calls for a more nuanced approach to control, especially one that draws directly on the experience of project managers who face a continual stream of unpredictable problems in practice, there remains a need to more fully theorize control in project-based organizing (Nightingale & Brady, 2011). An explanation of how controls can become sufficiently flexible to not just accommodate, but actually encourage experimentation in large-scale projects is still missing. My dissertation openly embraces this challenge by incorporating recent progress in coordination theory.

## **1.2 Restoring the links between coordination and controls**

While the focus on how coordinating mechanisms arise in practice through the day-to-day actions of organizational members has reinvigorated coordination theory, it also reflects a theoretical shift away from the traditional interconnections between coordination and management control (e.g. Thompson, 1967). For instance, coordinating mechanisms such as standards, rules, schedules and procedures have also been identified as important control mechanisms in organizations (e.g. Cardinal, Sitkin & Long, 2004). The separation of coordination and control by organization theorists may be a reflection of an academic division of labour where concerns about organizational controls have largely become the province of management accounting researchers. Regardless of the cause, the consequence is that our understanding of control in organization theory also remains entrenched in classic theories of control.

Classic management control theories emerged from the same era as our early theories of coordination where production processes could be easily decomposed (cf. Okhuysen & Bechky, 2009). Accordingly, these theories emphasize specific targets within the production process that are typically categorized into input, output and behavioural controls (Cardinal et al., 2004). In the traditional view, which is rooted in theories of social constraint that emphasize the ‘heavy hand’ of managerial agency, both coordination and control are critical components of organizational design (Dougherty, 2008).

However, this rather mechanistic view of control mechanisms is problematic for large-scale collaborative projects where coordinating mechanisms are emergent and controls require flexibility. As Dougherty (2008) illustrates, large-scale collaborative projects that rely on the creativity of project members for product innovation call for different patterns of managerial



attention. In these projects, the path to the goal or objective cannot be specified in advance but emerges as the project unfolds (Gersick, 1994). Further, the complex nature of the interdependencies between individuals and groups necessitates the use of formal controls to coordinate creative inputs over time (Adler & Chen, 2011).

In these environments, controls need to be focused on charting the path forward and the interpretation of emergent objectives, which requires some degree of fluidity (Dougherty, 2008). Controls are required to constrain certain behaviours and actions while simultaneously encouraging others (e.g. experimenting and creativity). This dual-nature of controls is also central in Simons' (1990; 1995) levers of control framework where the constraining and enabling dimensions of controls combine to create productive tensions. Adler and Chen (2011) extend this framework to theoretically argue that creativity and control can and should be combined, at least in some project-based organizations.

*Large-scale creative collaborations* (LSCCs) are projects that require creativity from project members from conception to completion, not just in the design phase (Adler & Chen, 2011). Consequently, coordinating mechanisms in LSCCs must accommodate the tensions between the need for creative freedom (Amabile & Conti, 1999) and the need for clear structures and processes (Adler, 2005). In other words, in order to create and sustain necessary productive tensions, coordination in LSCCs requires both creativity and control.

Since these large-scale projects also unfold over time, and different individuals or groups are involved at different phases or stages, there is also a temporal dimension to both coordination and control. Further, the (creative) inputs emerging from different groups at different times throughout the course of the project also need to come together seamlessly in the final product (Adler & Chen, 2011). Thus, in addition to drawing on a more nuanced view of control from the

management accounting literature, I also explore coordinating mechanisms in large-scale projects through a temporal lens.

While the literature on temporary and project-based organizing considers temporality in relation to the ephemeral nature of these organizations (e.g. DeFillippi & Arthur, 1998), time is usually considered an objective phenomenon or as a resource that needs to be managed. Project success is usually defined in terms whether it is delivered on time and on budget, and not on whether its goals or objectives were achieved (Nightingale & Brady, 2012). However, a temporal lens requires an understanding of time as something more than an objective phenomenon: time is also subjectively experienced by organizational actors.

### **1.3 Conceptions of time in organizations**

The importance of time as an organizing structure dates back to the origins of organization theory. From Fredrick Taylor's scientific management practices to the assembly lines of Fordist production models, time was considered to be an objective phenomenon, existing independently of human action. When viewed objectively, time is homogenous, linear and uniform in its flow (Orlikowski & Yates, 2002). Thus, time becomes a resource that, like money, can be saved, spent, wasted, budgeted and invested. This view still predominates in much of organization theory where popular conceptions of 'clock time' as 'real' time are assumed, if not ignored altogether (Lee & Liebenau, 1999).

The dominance of objective – or chronological time – in organization theory is not surprising given the significance of the development of standard time on industrialization practices (Okhuysen & Bechky, 2009). It is linked to a mechanical view of the world where time is absolute, unitary and quantitative (Orlikowski & Yates, 2002) and activities are precisely measured by chronometer, not by purpose (Dougherty et al., 2013). Yet standard time itself was

a social construction emerging from the need to synchronize over 500 different versions of ‘true time’ calibrated to the local position of the sun into four distinct zones within the contiguous United States (Bluedorn, 2002). The widespread adoption of standard time made it possible to coordinate train schedules across the country (Okhuysen & Bechky, 2009; Shih, 2004).

While standard time has since become reified and is now considered ‘correct time’ (Bluedorn, 2002; Lee & Liebenau, 1999), its socially constructed origins pave the way for an introduction to other subjective conceptions of time. These are neither fixed nor invariant, but based on the shared perceptions of specific groups or communities (Orlikowski & Yates, 2002). For example, in agricultural communities, the passing of the seasons guides cycles of planting and harvesting. The pacing of activity is entrained to the natural rhythms of the seasons, the timing of which can only be generally, but not precisely, known (e.g. the dates of the last and first frosts change from year to year).

Subjective conceptions of time are based on how time is experienced by different individuals and groups. *Temporality* or *temporalities* is how an individual or group belonging to a specific community experiences time: past, present and future (Vesa & Franck, 2013). Within organizations, group-level temporalities arise from the temporal nature of the activities performed by different functional subgroups (Blount & Leroy, 2007). Different activities in organizations shape, and are shaped by, different orientations to, or conceptions of, time. These can range from more open-ended orientations that extend far back into the past and forward into the future, to more closed orientations that focus on the immediate present and proximal future (Bluedorn, 2002). For instance, scientists typically have a more open-ended experience of time as their work is drawn continuously forward by posing new questions that may not have a fixed end in view (Dubinskas 1988, as cited in Orlikowski & Yates, 2002). Senior managers, on the

other hand, are often more focused on the short-term expectations of profits as they are accountable to investors.

The way that people understand time (i.e. past, present and future) has an influence on the range of options they perceive and the actions that they take (Emirbayer & Mische, 1998). The way we understand time can exert a powerful influence on day-to-day activities, particularly when they become closely associated with specific social practices (Orlikowski & Yates, 2002). However, agency also emerges through temporal orientations as actors draw on schemas developed through past experience, project different hypothetical pathways to the future, and adjust their actions to the exigencies of the situation emerging in the present (Emirbayer & Mische, 1998).<sup>1</sup>

#### **1.4 Time from a practice-based perspective**

A practice-based perspective brings together both objective and subjective conceptions of time by recognizing that time is instantiated in practice (Bourdieu, 1977). Practices contain particular temporal metrics and orientations that are often crystallized in objects that allow directed action to happen (Thrift, 2004). In organizations, people experience time through the temporal structuring of their day-to-day activities and multiple conceptions of time exist simultaneously in organizational life (Dougherty et al., 2013; Orlikowski & Yates, 2002).

*Temporal structures* provide rhythm, tempo and directionality (Bourdieu, 1977) and enacting these structures provides people with a way to “make sense of, regulate, coordinate, and account for their activities” (Orlikowski & Yates, 2002, p.686). Temporal structures have both

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<sup>1</sup> The topic of workplace temporalities appear in three edited volumes that were particularly helpful in writing this chapter. These include: *Making Time: Ethnographies of High Tech Organizations* (1988); *Time in Groups: Research on Managing Groups in Teams* (2004); and *Workplace Temporalities: Research in the Sociology of Work* (2007). Barley’s (1988) article on radiologists is frequently cited as a seminal contribution to this literature.

enabling and constraining dimensions and encompass some obvious tools that make coordination over time possible (Okhuysen & Bechky, 2009). For instance, project schedules are often used to coordinate the activities of different groups and provide for choreographed transitions across phases (Brown & Eisenhardt, 1997). While project schedules may be rooted in objective time (e.g. calendar), they also impact how time is experienced by different groups (Staudenmeyer, Tyre & Perlow, 2002). Consequently, temporal coordination requires more than just measuring time (Yakura, 2002).

Although the importance of the fiscal year in structuring particular organizational activities has been highlighted in the literature on temporal coordination (e.g. Ancona & Chong, 1996; Orlikowski & Yates, 2002), the influence of the project budget on the activities of project members has received little, if any, attention from researchers. Yet Caves (2000), highlights how project budgets are inextricably linked to project schedules in the film industry, an important research context for project based organizing that I also chose for this dissertation.

Project budgets are objects that contain various temporal metrics, but they are also temporal structures that shape, and are shaped by, the internalization of these metrics by project participants. As a temporal structure, the project budget is more than something objectively given to project members; it is something they enact as they chart the path forward (cf. Orlikowski & Yates, 2002). This is particularly important in LSCCs where the path to goal emerges through the course of the project. While different groups on the project may internalize different temporal metrics based on the activities they perform on the project, the project budget provides a common vocabulary across these different groups, making coordination possible.

## **1.5 Temporal coordination in practice**

From a practice-based perspective, coordination is defined as “a temporally unfolding and contextualized process of input regulation and interaction articulation to realize a collective performance” (Faraj & Xiao, 2006, p. 1157). My dissertation draws on and extends coordination theory by (re)introducing the concept of control, but through a more nuanced lens that better reveals this temporal unfolding. The complex interdependencies that characterize LSCCs require the coordination of multiple creative inputs, arising from different individuals and groups and thus necessitate a more nuanced understanding of control (Adler & Chen, 2011).

Budgets are a prominent feature in the traditional control literature, where they have been categorized as both an output and a behavioural control (e.g. Cardinal et al., 2004). Consequently, the project budget is the focal point of my enquiry in this study. Along with schedules and plans, budgets are omnipresent and necessary in all projects, but their role in (temporal) coordination has been largely taken for granted (but see Frow, Marginson & Ogden, 2010; and Marginson & Ogden, 2005 for exceptions). Yet project budgets contain the unique assumptions that inform other coordinating mechanisms, particularly schedules and plans.

My theoretical perspective is informed by my prior experience as a corporate finance executive. In practice, project budgets are commonly used to establish and update (explicit and implicit) links to critical aspects such as project milestones and delivery timelines. Thus, my first research question is intended to reveal the unique, but so far, taken-for-granted role that budgets play as a coordinating mechanism. I was specifically interested in how budgets enable the temporal unfolding of practices in LSCCs (Faraj & Xiao, 2006):

***Research Question 1: How do budgets facilitate the accomplishment of coordination over time?***

My second research question follows from the recognition of the project budget as a coordinating mechanism. Coordinating in LSCCs requires a combination of creativity and control. These are often viewed as antithetical in the organizational literature on creativity, but recent research in the management accounting literature suggests that budgets may be drawn on by organizational actors to mediate the tensions between them (Jeacle & Carter, 2011). My second question guides my exploration of the specific roles budgets play in integrating creativity and control, and to specifically explain how this integration is collectively accomplished over time.

***Research Question 2: How are budgets used to integrate creativity and control over time?***

To explore these research questions, I draw on existing literature in coordination, creativity, and management control from the perspective of time and temporality. These three distinct strands of literature inform our understanding of LSCCs (e.g. software development, new drug formulations, airplane design and filmmaking) where creativity is not limited to the concept or design phase (Adler & Chen, 2011). I use an in-depth single case study of a dramatic television series production to explore in ‘real time’ how individuals integrate creativity and control as they coordinate their contributions over time. This in-depth case study design is aligned with both my research questions and the practice-based approach to research discussed more fully in the methodology section (Chapter 4).

Three main findings emerge from this research.<sup>2</sup> I first identify four distinct groups on the project that experience time differently: diegetic; synoptic; calendar; and clock. The latter two

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<sup>2</sup> Following Nag, Corley & Gioia (2007), I depart from traditional practice in qualitative research by using theoretical concepts that emerged through the course of the study. While a ‘traditional’ approach to interpretative research

are familiar conceptions of objective time in the literature, and their relevance to day-to-day coordinating practices is reinforced through this study. However, my findings reveal how calendar and clock time are subjectively experienced by different groups on the project. Diegetic and synoptic time, on the other hand, are two different conceptions of subjective time that I introduce to the literature and develop through this study.

More specifically, diegetic time emerges from the nature of the product. In film theory, diegetic time refers to the flow of time in the world of the story. It impacts the pacing of how the story unfolds in order to build tensions and engage audiences. Since film and television products are experiential goods, diegetic time is the foundation on which they are structured.

Synoptic time, on the other hand, refers to an experience of time that brings together the past, present and future for an instantaneous view of facts. Like a map or chart of the weather, this provides a snapshot of an evolving phenomenon. Consequently, this experience of time is inherently fragile and requires continuous updating throughout the course of the project.

Second, I also identify four specific micro-processes through which creativity and control are balanced: conceptualizing; visualizing; materializing; and monetizing. These micro-processes reveal a more nuanced view of control and reveal how they are an integral part of creative practice. They also highlight how discipline is an inherent aspect of the creative process (Andriopolous, 2003; Townley & Beech, 2010).

Third, I show how the dynamic tensions between creativity and control inherent in these micro-processes moves the project forward from coarser to progressively finer-grained (more precise) coordination without foregoing either creativity or control. This ongoing and collective accomplishment allows for seamless transitions across the largely non-overlapping temporalities

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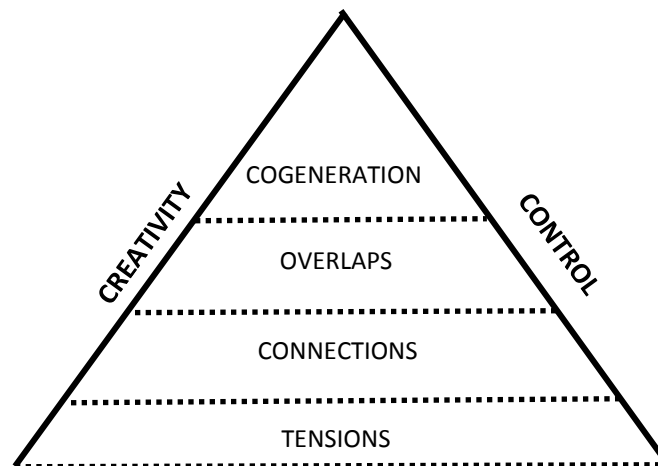
would first present the data from which these concepts emerged, I use the concepts that emerged from the data here to provide clarity for readers.



on the project. It also reveals the complementary functions of creativity and control in temporal coordination.

Figure 1.1 provides an overview of the dynamic nature of the relationship between creativity and control. At the base of the figure, creativity and control lie in tension, which is consistent with current conceptions in the literature. However, as the base of the triangle is flexed, creativity and control come closer together. Ultimately, creativity and control are cogenerated as more precise coordination is required.

**Figure 1.1: The Dynamic Relationship of Creativity and Control**



Effective product development projects require a subtle balance of freedom and control, flexibility and precision, as well as individualism and teamwork (Adler & Chen, 2011; Clark & Fujimoto, 1991). Dougherty (2008) argues that constraints are necessary because the creative work required for innovation must be orchestrated over time. By adopting a more nuanced view of control that departs from the traditional mechanistic paradigm, my research presents insights into what is commonly conceived as an antithetical relationship between creativity and control as something that is not only possible, but often necessary.

This dissertation is organized as follows. Because coordinating mechanisms are not fixed entities, but dynamic social practices (Jarzabkowski et al., 2012), I first argue that creativity is required by the people doing the coordinating (Chapter 2). I then draw on the management accounting literature for a more nuanced view of controls, particularly in relation to LSCCs. Controls are not opposed to creativity, but rather are often embedded in the coordinating mechanisms that people enact in practice (Chapter 3). In Chapter 4, I present the methodology used in my enquiry and provide an overview of the research setting in Chapter 5. The coordinating practices described in Chapter 6 reveal the different ways creativity and control are balanced *within* each temporality, while Chapter 7 highlights four micro-processes used to balance creativity and control that provide for seamless transitions *across* these largely non-overlapping groups. In Chapter 8, I discuss my contribution to temporal coordination theory and develop the implications of this research for theory and practice as well as outline possibilities for future research directions.

## CHAPTER 2 – COORDINATING THROUGH TEMPORAL STRUCTURES

### 2.1 Creativity in organizations: From the individual to the collective

Our understanding of creativity has moved a long way from the romantic myth of the lone genius toiling in isolation, endowed by the spark of divine inspiration available to only a few gifted individuals (Hargadon & Sutton, 2000). Creativity is defined as the generation of ideas that are novel and deemed useful or appropriate by a group of peers (Amabile, 1988; Ford, 1996; Oldham & Cummings, 1996) and has been conceptualized as both an outcome (e.g. Cattani & Ferriani, 2008) and a process (e.g. Lingo & O'Mahony, 2010). In this dissertation, I adopt the latter view, since creativity in LSCCs emerges through the interactions of project members (Hargadon & Bechky, 2006).

In LSCCs, creativity is often an organization-wide requirement, especially when tasks are uncertain and their execution requires problem-solving (Adler & Chen, 2011). Creativity is no longer conceived as a character trait belonging to a select few, but rather as an essential, if often implicit, set of organizational practices required to bring forward a new product, process or service (Amabile, 1988).

Over the last few decades several different theoretical models rooted in psychology have proposed distinct ways to facilitate or enhance micro-creativity within organizations by drawing attention to the factors that background, contextualize or leverage individual creativity in organizations (e.g. Amabile, 1998; Amabile & Conti, 1999; Zhou & George, 2003). For instance, in the interactionist model developed by Woodman and colleagues (1993), individual creativity is nested within, and mediated by, the group. In the systems view of creativity proposed by Csikszentimihalyi (1996), creativity emerges at the intersection of the individual, domain

(cultural or symbolic aspects) and the field. It is contingent on individual contributions fitting in or aligning with domain rules and whether or not they are accepted by those in the field.

Three conditions are key to these organizational extensions of micro-creativity: (1) intrinsic motivation (Amabile, 1998); (2) supportive leadership styles (Oldham & Cummings, 1996); and especially, (3) freedom from constraint (Amabile, 1988; 1998). Many forms of creativity that are both intrinsic to, and implicit in, daily organizational practices but not ‘animated’ by individual actors (e.g. identifying improvements for standard procedures) are ‘unsung’ and under-developed by these extensions (Unsworth, 2001).

The organization-level extensions of macro-creativity, on the other hand, focus on innovation, which is the implementation of new ideas generated through the creative process (Amabile, 1988). These extensions welcome constraints and examine the social practices and dynamics that help organizations overcome or work around these constraints (Dougherty, 2008; Dougherty & Takacs, 2004). An effective product development organization is characterized by creativity and freedom as well as a disciplined use of resources and controls over scheduling and product quality (Brown & Eisenhardt, 1997; Clark & Fujimoto, 1991). The contrast between these two bodies of work which have largely evolved independently until now centers on the place and role of controls in organization-level creativity.

While both the micro-level studies of creativity and the macro-level studies of innovation have contributed significantly to our understanding of these phenomena in organizations, a full picture of meso-level creativity in organizations has yet to emerge (Anderson, De Dreu & Nijstad, 2004). Such a meso-level theory would explore real time interactions among multiple organizational actors and pluralities across various levels of the firm (cf. Garud, Gehman &

Kumaraswamy, 2011) and problematize their ability to coordinate within organizations (e.g. Dougherty et al., 2013).

Creativity and innovation in organizations is rarely the product of a single mind, but emerges through the interactions of various individuals and groups (e.g. Adler, 2005; Brown & Eisenhardt, 1997). For instance, in their comparative study of professional service firms, Hargadon and Bechky (2006) highlight how solutions to complex problems are generated in fleeting moments when individuals with diverse experiences come together. Their multiple perspectives and their integration (coordination) are key to formulating a creative solution to issues that no individual could have solved alone.

Adler and Chen (2011) emphasize the distinct processes of collective creativity by drawing on the example of a symphony orchestra. They highlight how individual musicians cannot rely on face-to-face or mutual adjustment in the same way a small, improvisational jazz group can. Rather, the performance relies on hierarchical authority in terms of the conductor and the formal procedures provided by the score. Since the score underdetermines the performance, individual creativity is required, but never enough. An effective performance requires more than ‘just playing the notes’ in the score: the creative contributions of individual musicians are conjunctive allowing the orchestra to function as a cohesive unit (Adler & Chen, 2011).

Catmull (2008, p.66) similarly highlights how a movie is actually the product of a collective mind: each Pixar product “contains literally tens of thousands of ideas” which can come from any member of the 200- to 250-person production crew. Integrating these ideas into a cohesive product requires highly disciplined and coordinated efforts from multiple members of the crew (Adler & Chen, 2011). This is partially accomplished before the movie even starts

through industry socialization into specialized film production crafts (Mintzberg, 1979) and role functions (Bechky, 2006).

## **2.2 Large-scale creative collaborations: From a fleeting phenomenon to an ongoing process**

*Large-scale creative collaborations (LSCCs)* are common in the creative settings described above, but also essential in traditional industries such as aircraft design, new drug discoveries and software development. Any project that requires multiple individual contributors and the coordination of their creative inputs to a product or service is an LSCC (Adler & Chen, 2011).

These complex and large-scale projects stand out by their long duration, often extending over a period of years (e.g. Dougherty et al., 2013). Thus, in LSCCs, creative engagement unfolds over time. As projects progress through various stages, different interdependencies emerge among different groups that shape their interactions with a variety of coordinating mechanisms (Adler, 1995). While some of these interdependencies can be anticipated (Dougherty, 2008), others only become apparent over time (Adler, 2005).

Because the creative inputs in LSCCs are distributed over specialties, discipline is often required for synthesis (Adler & Chen, 2011), particularly since the intensity of engagement of different individuals and groups ebb and flow over time. This is common in large-scale building projects and filmmaking, for instance, where some of the creative contributions from different groups evolve sequentially as the project progresses through various stages. Other creative contributions are non-linear and cannot be precisely timed (Dougherty et al., 2013). Yet both must be accommodated in successful projects.

The sheer size, complexity and longevity of these projects necessitate a reliance on formal controls to effectively coordinate their inputs (Adler & Chen, 2011). Combining individual creativity and control presents a theoretical and practical challenge. As foreshadowed

in the opening section of this chapter, controls are seen by some creativity theorists to undermine the intrinsic motivation required for individual creativity (e.g. Amabile, 1996; Shalley, Gilson & Blum, 2000) and by others as necessary ‘evils’ that mobilize dispersed talent. Yet, these seeming antithetical or opposing forces can happily co-exist. For example, by imposing discipline on the more routine aspects of their tasks and processes, software developers revealed and thus awarded greater flexibility to the less routine parts of their projects (Adler, 2005). Controls even created occasion for synthesis, helping different functional groups involved in the project overcome ‘siloes isolation’ and figure out how to be “all playing the same piece of music” (Adler, 2005, p. 415). The effective use of controls increased cohesion and confidence among team members by providing a sense that their individual contributions were both important and consistent with the overarching goals of the project.

For Adler and Chen (2011), LSCCs use ‘control’ and ‘coordination’ interchangeably. In other words, at least some aspects of controls are embedded in coordinating mechanisms, and vice-versa. To perform creativity collectively individuals need to both simultaneously control and coordinate their individual inputs. Since LSCCs unfold over time, there is also a temporal dimension to coordinating mechanisms as different groups rely on different mechanisms at different stages in the project (e.g. Adler, 1995). Thus, the following two sections review what we know about temporal coordination in organizations. I then expand on the concept of temporal structures introduced in Chapter 1 and explain their roles as coordinating mechanisms in LSCCs.

### **2.3 Temporal coordination in organizations**

The literature on temporal coordination focuses on the rhythmic activity of different groups in organizations (e.g. Gersick, 1994; Ancona & Chong, 1996; Ancona, Okhuysen & Perlow, 2001). Many activities in organizations revolve around powerful ‘metronomes’ such as the fiscal year or

quarterly sales targets (Ancona & Chong, 1996). While these structures originate in the external (institutional) environment, they have a powerful influence on shaping action within organizations (Gersick, 1994). For example, the quarterly sales cycles distribute sales activities across four quarters. This helps sales people adjust to the seasonal buying patterns of their customers as they need to engage with different time orientations as they conduct their day-to-day activities (Orlikowski & Yates, 2002).

Temporal coordination involves mapping activities to time and multiple activity maps exists within a single organization as each department or group typically has their own map (Ancona et al., 2001). When the activity maps of different groups mesh with each other, coordination happens through entrainment since these groups share the same temporal parameters (Ancona & Chong, 1996). When the activity maps of different groups do not overlap, coordination becomes more complex as different groups may not experience time in the same way (Yakura, 2002).

Thus, temporal coordination not only unfolds over time but also across groups who may not experience time in the same way (Ancona et al., 2001; Yakura, 2002). For example, some groups may have a culture of speed and a need to focus on the present (e.g. emergency room doctors), while other groups work at a slower pace and are more oriented to the future (e.g. rehabilitation units). In these instances, transitions across groups can be accomplished through scheduling a “crossing time” where members of the two different units interact for a smooth transition (Ancona et al., 2001, p. 526). Brown and Eisenhardt (1997) similarly highlight the importance of time-based pacing to choreograph smooth transitions across project teams.

Gersick (1994) highlights the importance of temporal coordination in the presence of three conditions: (1) members have a deadline for producing a novel outcome; (2) members have



significant control over their own actions; and (3) the path to the final goal or outcome cannot be specified in advance. Thus, the need to adapt along the way is an inherent aspect of temporal coordination as it is expected that learning along the way will continue to shape the trajectory of the project (Gersick, 1994). Since the learning events cannot be precisely timed, temporal coordination also involves balancing the tensions between time- and event-based pacing (Dougherty et al., 2013).

This is perhaps nowhere more evident than in LSCCs where the time-based pacing of project schedules (Brown & Eisenhardt, 1997) often lies in tension with the emergence of unpredictable insights that cannot be timed or scheduled (Dougherty et al., 2013). Yet, Gersick (1994) shows how temporal structures can help the ‘alarm clocks’ of time-based pacing complement the ‘thermostats’ of event-based pacing. The ability of temporal structures to accommodate both objective and subjective conceptions of time is also highlighted in the theoretical contribution by Orlikowski & Yates (2002).

## **2.4 Temporal structures**

Defined as a patterned way that individuals organize time (Wu, 2010), *temporal structures* allow people to manage and coordinate their activities. The schedules, sequencing patterns and deadlines of temporal structures generate implicit rhythms and cycles of behaviour that are situated in cultural norms about time (Blount & Janicik, 2001). As with other social structures, temporal structures simultaneously constrain and enable the activities of the people who enact them by specifying the parameters of appropriate conduct (Barley, 1988; Orlikowski & Yates, 2002). Temporal structures can also have a symbolic dimension as seen in the autonomy granted to project teams when deadlines and milestones are adhered to (Grabher, 2004).

In organizations, temporal structures encompass taken-for-granted ‘things’ such as weekly or periodic meeting schedules, financial reporting periods (e.g. quarterly or annual) and academic calendars that are both the medium and the outcome of people’s practices (Giddens, 1984; Orlikowski & Yates, 2002). They can be based on objective time (calendar or clock), subjective time (event-based) or a combination of the two, such as people scheduling vacations in the summer when schools are not in session (Orlikowski & Yates, 2002). Temporal structures are central to our interpretation of events (Bourdieu, 1977).

Temporal structures can be explicit like the deadlines in project schedules, or implicit and only known when people have a deeper understanding of their workplace (Blount & Janicik, 2001). The ‘banana time,’ ‘peach time’ and ‘window time’ that Roy’s (1960) machine operators used to break up the monotony of their day highlight how an implicit temporal structure can qualitatively change the experience of time. At the other end of the spectrum, Perlow’s (1999) introduction of ‘quiet time’ to a group of engineers reveals how an implicit temporal structure can enhance collective performance.

The repeated use of temporal structures (e.g. fiscal years, quarterly financial cycles, and project schedules) imparts a taken-for-granted quality that makes them seem objectively given (Orlikowski & Yates, 2002). For instance, coordinating activities by the clock with regularly scheduled meal breaks is a deeply embedded temporal structure that would be difficult to change (Evans, Kunda & Barley, 2004; Orlikowski & Yates, 2002). Temporal structures are notoriously difficult to alter once established (Barley, 1988), as illustrated by the engineers in Perlow’s (1999) study who reverted to their former work patterns once the study period was over despite their experience of enhanced productivity.

Ancona and colleagues (2001) draw on two well-known studies to highlight how temporal structures can be understood from different perspectives. For Zerubavel (1979), ‘hospital time’ is a type of time that provides round-the-clock coverage of doctors, nurses and residents. In contrast, Brown and Eisenhardt (1997) focus on the temporal perceptions of project members in new product development firms who used fixed project calendars to predict how the future would unfold in order to plan and coordinate their work. Both of these perspectives are important for understanding the role of temporal structures as coordinating mechanisms.

## **2.5 Temporal structures as coordinating mechanisms in LSCCs**

Gersick (1994) identified how time-based and event-based temporal structures coexist in new product development projects with the mid-point of the former often providing a powerful heuristic for the latter. Project deadlines and milestones may be oriented in objective time, but they also impact the subjective experience of time for project members (Staudenmayer, Tyre & Perlow, 2002). For instance, Brown and Eisenhardt (1997) argue that the rhythm of predictable time intervals put forward in project schedules gives people a sense of confidence as they pace their work and synchronize their energies (if not their activities) with one another. Ultimately, this creates a sense of ‘flow’ for organizational or project members where their focused attention enhances collective performance.

In LSCCs, work is typically structured around project schedules and project members work toward completion of project goals without specific instructions on *how* to accomplish these goals (Shih, 2004). The temporal structure of project deadlines makes coordination between different groups possible and helps project members regulate their progress (Gersick, 1994). Project deadlines are typically augmented by regularly scheduled project meetings, another temporal structure, that keep project members informed of everyone’s activities and

provide the opportunity to integrate insights and knowledge (Brown & Eisenhardt, 1997; Orlikowski & Yates, 2002).

In addition, temporal structures can bridge different groups with different perspectives on time. For instance, Dougherty and colleagues (2013, p.242) show how scientists involved in long-term drug discovery projects view milestones as learning events that deepen knowledge of how a drug will behave in the body (a learning event), while senior managers view these moments as finding discrete answers to the question of whether or not it is a “good drug target.” Despite their different understandings, the milestones provided a common referent point and initiated a different set of activities for each group.

## **2.6 The role of control in temporal coordination**

While the importance of temporal coordination is not new to organization theory (e.g. Thompson, 1967), the role of controls has been overlooked by researchers focused on coordinating mechanisms. This neglect by organization theorists may emerge from the close association of controls with theories of social constraint that emphasize managerial agency and the use of a heavy hand to constrain the activities of others (Dougherty, 2008). Social constraint theories posit that coordination is difficult, costly and dependent on the internal congruence of the administrative infrastructure (Thompson, 1967).

In contrast, theories of social action see coordination as a natural activity that can be easily accomplished (Doherty, 2008). Organizations can be temporary and coordination can be emergent because people come together with a vision of the work that needs to be done (Bechky, 2006; Jarzabkowski et al., 2012). People take responsibility for the practices that form their day-to-day activities and contribute their own expertise as they effectively carry out their work, without being repeatedly told what to do (Brown & Duguid, 1998; Giddens, 1979).

A third view brings together theories of social constraint and social action by viewing them as two sides of the same functional whole with a combination of both necessary in successful LSCCs (Dougherty, 2008). For instance, Brown and Eisenhardt (1997) show how limited structures (controls) provide the basis for people to effectively coordinate their work over time and across projects. Controls are necessary because work must be orchestrated in a way that makes it easy for people (who may have never met) to work together effectively, but they must also have sufficient flexibility to allow people to respond in the moment to the unpredictable issues that inevitably surface as projects evolve (Dougherty, 2008).

In LSCCs, controls need to map out possible flows and pathways to the future as well as surface problems in the present in order to address them proactively (Dougherty, 2008). Thus, the primary aim of controls is not to eliminate variation or to coercively punish those who have gone astray (Jelinek & Schoonhoven, 1990), but to focus on how objectives can be achieved. Since the objectives in LSCCs emerge and evolve over time, coordination comes from a common ground and coherent vision of the work to be accomplished (Dougherty, 2008; Okhuysen & Bechky, 2009). Too little control makes coordination difficult, while too much makes it impossible to adapt developing projects to changing circumstances (Brown & Eisenhardt, 1997).

In Chapter 3, I review an emerging stream of studies from the management accounting literature that explores the enabling and constraining dimensions of controls, including those tied to budgets, in organizations. While the enabling dimensions of budgets may be viewed as something of a paradox by organizational theorists, the management accounting literature recognizes that budgets can be used to grant autonomy to organizational members. My review of

this literature gradually reveals the different ways in which budgets can be used to foster both creativity and control over time.

## CHAPTER 3 – MANAGEMENT CONTROL

### 3.1 Levers of control framework

Every organization has a management control system. Management control systems are structures designed to support decision making and enhance organizational effectiveness. In this view, the purpose of management control is to reduce, if not eliminate altogether, variation in order to foster productivity and efficiency (Davila, Foster & Oyon, 2009; Revellino & Mouritsen, 2009).

Control has traditionally been conceived as a constraint, often seen as antithetical to creativity. Simons' (1990; 1995) levers of control framework introduces the concept of the dual-nature of controls, arguing that controls have both enabling and constraining functions in organizations. The former promotes creativity and the latter emphasizes predictability (see Appendix A for further elaboration). While management controls aim to provide predictability and control with respect to organizational goals, they can also encourage creativity and innovation in order to identify opportunities or solve problems as they arise (Henri, 2006; Mundy, 2010; Simons 1994). These competing roles create the dynamic tensions required for effective control (Simons 1995; Tessier & Otley, 2012). Thus, control is about balancing tensions between freedom and constraint, experimentation and efficiency and top-down direction with bottom-up creativity (Bisbe & Otley, 2004; Davila, Foster & Oyon, 2009; Simons, 1995).

Simons' model is seen by some as a paradigm shift. For others, it is the target of criticism and the subject of confusion within the management accounting literature. I acknowledge the limitations of the framework discussed elsewhere, especially the ambiguity in some of the concepts (Tessier & Otley, 2012) and its missing process dimension (Canonic & Soderlund,

2010). I use Simons' framework not as a typology, but as an invitation to conceptualize a more nuanced view of management control that makes room for (rather than rules out) creativity. I build on Simons' distinction between the dual role of controls (i.e. constraining and enabling) and Adler and Chen's (2011) notion of the quality of controls (e.g. coercive equals *bad* controls while enabling equals *good* controls)<sup>3</sup> as these are sometimes conflated in the literature (Tessier & Otley, 2012). For me, controls come in various forms and are not inherently good or bad because they promote certain actions and discourage others. Rather, the quality of a control depends on when and how it is used and any control can be a 'bad' control if used at the inappropriate time or in an inappropriate way.

### **3.2 The enabling dimension of management control**

Our traditional theories of management control emerge from the same era as many of our theories of coordination when control could be easily achieved through standardization, which is not desirable – or even possible – for firms focused on continuous innovation. However, Simon's framework has engendered a reconceptualization of management controls as something more than constraint. For instance, in their study of a new product development process that unfolded over several years, Revellino & Mouritsen (2009) show how the vision (belief system) proposed a possible future that guided action in the present. Although the initial concept of the project comprised a set of loosely formulated visions for the final product, these coalesced into a coherent narrative as the project progressed. As the project transitioned through more advanced phases, additional control mechanisms were established that were more focused on managing the alignments with external partners in order to 'make the innovation productive.'

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<sup>3</sup> For further clarification, see Adler & Chen (2011) who position enabling and coercive bureaucracies within diagnostic systems. In other words, diagnostic systems are not inherently 'bad' controls, but they can be if used in a coercive rather than constructive way.



The importance of a common vision was also evident in Ditillo's (2004) comparative study of three software development teams. In the project teams studied, Ditillo found coordinating mechanisms centered on creating a common vision were far more effective controls than any efforts to codify tacit knowledge. Further, the plans, schedules and forecasts used to coordinate the activities of development teams served as both control mechanisms and knowledge integration mechanisms. While boundary systems played a vital role in each of these projects (e.g. through the specification of development parameters), the regularity of face-to-face meetings (i.e. interactive use of controls) was also a common feature.

Jorgensen and Messner's (2010) study of new product development practices in an organization that designs technology products for quality control in the agriculture, pharmaceutical and chemical industries also shows that management control practices varied at different stages of the project. Projects were separated into three distinct phases: conceptualizing new product design ideas; physically realizing the components of new design ideas (i.e. materializing); and integrating the components into a fully functioning product. In the conceptualizing phase, management control practices were centered on maintaining open dialogue through meetings and discussions in order to shape the direction of the emerging product. As the projects progressed through later stages of development, control practices became more focused on coordinating mechanisms.

Ahrens and Chapman (2007), illuminate another aspect of the enabling dimension of controls in their study of menu design as a control practice. Although they did not deploy Simons' framework in their analysis, they refer to an enabling use of controls (cf. Adler & Borys, 1996). Their description of the scheduled weekly meetings between individual restaurant and area managers illustrate an interactive use of management control. Discussions in these

meetings were focused on restaurant operations and covered a variety of perspectives, including food margins, operating income, human resources and pricing. The review of past performance was focused on constructing plans for future action which were developed collaboratively with individual restaurant managers.

In addition to highlighting how controls are not merely devices of constraint, these studies begin to reveal the fluid and adaptive nature of management controls in contexts characterized by uncertainty and the need for innovation (Adler & Chen, 2011; Jeacle & Carter, 2012), especially over time (different phases). I adopt the dual-natured role of controls and the practice-based perspective common across these studies (Ahrens & Chapman, 2007; Jorgensen & Messner, 2010; Revellino & Mouritsen, 2009) to conceptualize management control as a practical activity that is distributed across people and throughout the organization (Ahrens & Chapman, 2007). These controls shape, and are shaped by, the day-to-day activities of people in the organization as they formulate plans, write reports and discuss project or customer needs (Faure & Rouleau, 2011). In this view, management controls are a key part of, but insufficient for, broader organizing processes including those connected to strategic concerns (Jorgensen & Messner, 2010).

### **3.3 Budgets in organizations**

Budgets are often considered to be ‘the pivotal’ organizational control mechanism (Marginson & Ogden, 2005) and they are certainly one of the most widely researched topics in the management accounting literature. They are most commonly conceived as a diagnostic control as they can, and do, signal the need for corrective action when results diverge from standards or plans. However, budgets (like many control mechanisms) can also be used interactively to explore alternative possibilities for future action (Simons, 1995). Indeed, many firms use budgets and

other financial forecasts as a way for people to project themselves into the future making it possible to identify potential issues and opportunities (Davila, Foster & Li, 2009). Whether used interactively or diagnostically, budgets often incorporate the boundary and belief systems of an organization. Boundary systems may be reflected in the budget through resource allocations in terms of project funding (e.g. Canonico & Soderlund, 2010; Mundy, 2010) or capital asset acquisitions (Simons 1995). Belief systems, on the other hand, are linked to the budget through the strategic planning process as objectives are translated into operating goals and performance measures that may then be monitored (Mundy, 2010).

Although a full review of the vast literature on budgets is beyond the scope of this chapter, it is important to point out that much recent attention in the management control literature has focused on the negative aspects of budgets.<sup>4</sup> In response to these criticisms, other researchers have emphasized the multiple purposes that budgets are used for in organizations. In the empirical work that led to the development of the levers of control framework, Simons (1990) observed that budgets were not used strictly as financial documents, but provided an agenda for discussion of a wide range of topics from new marketing ideas to product development plans. As a communication device, budgets provide a common vocabulary in the familiar form of numbers for disparate organizational groups (Czarniawska-Jorges & Jacobsson, 1989), even though the interpretation of these numbers may mean different things to different groups.

Budgets also play an integral role in communicating and coordinating strategic priorities by translating them into financial terms (Abernethy & Brownell, 1999). For example, in their study of a technology service company, Frow and colleagues (2010) show how strategic

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<sup>4</sup> See for example Hope & Fraser (2003) on 'Beyond Budgeting' and Jensen (2003) on issues arising from linking performance bonuses to budget targets.

priorities were cascaded down into the high level financial targets that individual managers used to develop their budgets. Given the inherent unpredictability of new product development processes, these targets were not seen as sacrosanct, but were reassessed and adjusted in light of changing circumstances. Resources were reallocated to projects closest to launch in order to preserve the 'business case' (e.g. unit sales and revenue forecasts) when design changes or other issues posed the potential to delay completion.

In a study of a multinational communications firm focused on new technology development, Marginson and Ogden (2005) found that budget targets provided a beacon of clarity in a world of shifting priorities. In this organization, rewards were in no way tied to the attainment of budget targets, yet the visibility of these targets was sufficient for commitment. In a fluid and changing environment, meeting the budget was a way for managers to signal competence and their attempts to achieve budget targets provided a sense of security and self-worth. While this organization promoted empowerment as a core value, this was accompanied with role ambiguity for mid-level managers given the pressures of constant innovation. By committing to budget targets, managers were able to carve out a sense of purpose and direction to help navigate the fog of uncertainty.

Jeacle and Carter's (2012) study of a high fashion retailer provides an in-depth view of how budgets impact the day-to-day activities of mid-level managers. Their study traces how the budget (e.g. cost and sales forecasts) was implicated in garment design decisions as the designer and buyer worked together to create the most cost effective product without sacrificing either quality or design. The buyer worked with the merchandiser to allocate the budget across the range of different garments for the season and to forecast the quantities to be purchased to maintain inventory given the budgeted level of sales. While past performance of certain garments

were considered, they were only one data point in the calculus for purchasing decisions in an industry where past performance was no guarantee of future success.

The lack of direct involvement by accountants or accounting actors is notable in these last two studies. At the same time, these studies begin to get inside the ‘lived experience’ of the people ‘doing’ the budget (cf. Jarzabkowski, 2005; Samra-Fredricks, 2003). The mid-level managers that were the focal point of these studies do not inhabit finance or accounting departments but are responsible for a particular set of organizational activities. As they draw on budgets to shape these activities, which in turn shape the budget, the representational faithfulness of the numbers is less important than their ability to provide possibilities for future action (Ahrens & Chapman, 2007; Bower, 1970).

The preceding paragraphs also show how budgets are implicated in a number of organizational practices that collectively function as management controls. While budgets instill a financial discipline in the decisions and actions of organizational members, they do not operate in isolation. Rather, they are often integrated into coordinating mechanisms, such as plans and schedules, which also function as controls. They provide managers with the autonomy and flexibility to respond to changing circumstances (Frow et al., 2010). Further, these studies also reveal how budgets are deeply ingrained in the fabric of organizational life (Scapens & Roberts, 1993) and cannot be as easily dismissed as their critics sometimes suggest (Otley, 1999). At the same time, the links between coordination and control tend to be implicit in this literature and one of the central aims of this project is to make those links explicit.

### **3.4 Decomposing budgets through inscriptions**

The concept of inscriptions, used extensively in the management accounting literature, can help explicate the links between coordination and control. Inscriptions are defined as the material

textual translations of a particular setting and include things such as graphs, diagrams, text, numbers and lists (Latour, 1987; Robson, 1992). The concept of inscriptions requires a shift from the conception of numbers as information, to numbers as both targets and objects of action (Vollmer, 2007). Inscriptions are used to construct and represent order in the world and in doing so they also structure and support the interactions of people (Roth & McGinn, 1998). As with other forms of inscriptions, numbers have the qualities of stability (i.e. they are recognizable) and mobility (i.e. they travel easily between the setting and individual actors).

Numerical inscriptions also have the quality of combinability, which makes them particularly salient in organizational settings. This quality allows numerical inscriptions to be aggregated, disaggregated and recombined in myriad ways according to the needs of the users (Qu & Cooper, 2011). The combinability of inscriptions is highlighted by Faure and Rouleau (2011) in their study of a large-scale real estate development project in France. The first task of the project management team was to re-orient the structure of the budget from a financial estimate to a format more conducive to coordinating the activities of the various contractors, crews and suppliers. This format also made it easier for the project managers to monitor progress of the building site against the established timelines and served as the focal point for the monthly reviews where the initial forecast was compared with the latest estimate of financial outcomes.

From a practice-based perspective, inscriptions are subject to ongoing debate and continually reworked through an iterative process of negotiation (Ahrens & Chapman, 2007; Faure & Rouleau, 2011; Jorgensen & Messner, 2010). While high level financial targets take on the Latourian quality of ‘immutable mobiles’ (i.e. unchanging as they circulate through time and space), they also engender a degree of agency among project or organizational members. For these individuals, the numbers that will ultimately comprise the attainment of that target (i.e.

actuals) are always in the making. The making and remaking of inscriptions is disbursed through a variety of organizational activities and actors as they circulate through objects such as plans, schedules, and even restaurant menus (e.g. Ahrens & Chapman, 2007).

For example, Jeacle and Carter (2012) show how inscriptions from the budget circulated through to garment cost cards and weekly forecasting tools that guided the activities of the trio of the designer, merchandiser and buyer as they planned inventory acquisition. In illuminating how ‘non-accounting’ actors relied on the numerical inscriptions contained in these objects, the authors show how budgets are used to grant autonomy to a variety of organizational actors. In the world of high fashion retailing, the budget was also drawn on to shape day-to-day activities and mediate tensions between creativity and control (Jeacle & Carter, 2012).

Delegating responsibility for the budget to individual managers increases their autonomy, but it also increases their accountability for results (Faure & Rouleau, 2011). In this way, accountability is embedded in the inscriptions that circulate through the budget (Robson, 1992) and other objects that are connected to it. Thus, autonomy is predicated on the existence and acceptance of wider forms of numeracy and related discourse in the broader social sphere that encourages self-discipline in the activities of organizational members (Neu, 2006; Vollmer, 2007).

The ubiquity of numerical inscriptions in organizations means that they are implicated in a rather impressive set of problems that extend far beyond the confines of the accounting or finance departments (Vollmer, 2007). Like other forms of inscriptions, numerical inscriptions are proxies for some other kind of reality. As proxies, they can only ever be a partial representation of that reality; however, this is sufficient to generate a basis for action (Ahrens & Chapman, 2007). Consequently, inscriptions help stabilize temporary understandings about the work that

needs to be done even when the details of what will ultimately be delivered are not yet fully specified (Qu & Cooper, 2011). These temporary understandings highlight the sometimes fragile nature of inscriptions and when combined with the continuous nature of inscription building, suggest a temporal unfolding of the meanings attributed to them that has yet to be fully explored within this literature.

### **3.5 Budgets as temporal structures**

In their work on entrainment, a concept borrowed from the natural sciences, Ancona and Chong (1996) highlight the parallels between the circadian rhythms (i.e. day/night) within individuals and the fiscal year within organizations. In organizations, many activities (especially those specifically related to budgets) are structured around 12-month cycles that may or may not coincide with the calendar year. While the organization selects the date for its fiscal year end, once it is set, the organization must entrain activities to meet the demands it creates on an annual basis (Ancona & Chong, 1996). In this way, ‘year-end’ becomes an event even though it is entrained to a reified chronological rhythm (Orlikowski & Yates, 2002).

The fiscal year provides a ‘uniform pacer’ for a variety of organizational activities ranging from closing sales and revenue account to performance reviews and bonus calculations (Ancona & Chong, 1996). In some industries, planning for the fiscal year also incorporates seasonal adjustments such as the buying patterns of consumers (e.g. Jeacle & Carter, 2012) that are incorporated into calendarized (i.e. monthly) budgets. This calendarization allows for a monthly or quarterly review of results that set in motion another chain of activities entrained to the fiscal calendar (e.g. preparation for monthly or quarterly management meetings).

To meet the demands of the overarching temporal rhythms of the fiscal year and quarterly reporting cycles, organization members frequently enact *micro temporal structures* to guide the



rhythm of their daily activities (Orlikowski & Yates, 2002). The studies reviewed earlier in this chapter provide some insight into the nature of these structures and how they are enacted. For instance, weekly sales forecasts were the focal point of meetings scheduled with the same frequency in a restaurant chain (Ahrens & Chapman (2007) and a high fashion retailer (Jeacle & Carter, 2012). In these high velocity environments, the frequency of purchasing decisions triggers a range of weekly activities for restaurant and retail managers.

In organizations where projects provide the basis for structuring activities, the uniform pacer of the fiscal year becomes far more complex. Project budgets may still be structured around a linear view of time; however, the milestones that mark progression towards completion often take on the subjective dimension of event time. Further, since projects often cross multiple fiscal years, the activities contained within these milestones are not necessarily entrained to the uniform pacer of the fiscal year. For example, Faure and Rouleau (2010) highlight how project managers on a large-scale building project scrambled to transform ‘raw data’ (e.g. orders, invoices, and receipts) to construct a synoptic view of the project for the monthly budgetary control meetings.

The activities in new product development projects are often structured around both clock time and event time (Orlikowski & Yates, 2002). Product launch dates take on the qualities of event time as they cannot be precisely planned. At the same time, the business case for a new product is often built on the sales estimates based on a certain release date (e.g. Frow et al., 2010). To this end, Frow and colleagues (2010) show how project members referred to a delayed launch date as ‘missing the window of opportunity’ (i.e. a kairos moment) to maximize unit sales. Reallocating resources from other projects and potentially incurring adverse variances was seen as the more preferable action than losing revenues due to a missed launch date.

While issues of time and temporality were not foregrounded in any of these studies, the “lens of temporal structuring provides a richer understanding of how, when and why members of a community or organization structure their activities over time and with what consequences” (Orlikowski & Yates, 2002, p.692). Entraining organizational activities to the uniform pacer of the fiscal year can give rise to dysfunctional behaviours, such as smoothing forecast costs to complete a project (e.g. Faure & Rouleau, 2011), or managers deferring costs at year-end to make their performance look better (Ancona & Chong, 1996). However, these behaviours can be mitigated (or reinforced) to some extent through the (in)appropriate use of boundary and belief systems (Simons, 1995). As highlighted earlier in the chapter, aspects of both boundary and belief systems are reflected in the budget.

In its exploration of how the budget is drawn on by organizational actors as they coordinate their activities and balance the tensions between creativity and control, this study focuses on the budget as a temporal structure. However, as outlined in Chapter 2, multiple temporal structures typically coexist in organizations. In addition, as highlighted earlier in this chapter, budgets are seldom enacted in isolation from other organizational practices. Rather, time and money (e.g. schedules and budgets) are the two key organizing dimensions in LSCCs in general and, in my research setting (the film and television industry), more specifically. In this setting time and money are actively balanced with creative aspirations over the course of the project (Chapter 7).

## CHAPTER 4 – METHODOLOGY

### 4.1 Case study strategy

The aim of this study was to build new theory inductively (Eisenhardt, 1989). I chose a case study research strategy to reveal the dynamic interplay between creativity and control over time in large-scale creative collaborations (LSCCs). Because the creative tasks involved in these types of activities are complex and interdependent, individuals are required to embrace formal controls and demonstrate creativity at the same time (Adler & Chen, 2011). In the organizational literature, insights into collective creativity are only starting to emerge (e.g. Catmull, 2008; Hargadon & Bechky, 2006) and we have little insight into how formal management controls may be used to enhance this process. As Yin (1994) points out, even single case studies can allow for multiple levels of analysis. Such flexibility is necessary since LSCCs are characterized by interdependent inputs that originate from a variety of individuals and teams as well as complexity and constant change over time.

My intention is to provide an in-depth exploration of an LSCC through an examination of day-to-day activities (Dougherty, 2002). A case study approach offers the opportunity to proceed with the research using an emergent or adaptive design (Gioia, Corley & Hamilton, 2013), which allows the researcher to alter the interview questions as the research progresses based on the data emerging from the field. In this way, interview questions become more focused as the study progresses, allowing the researcher to delve deeper into activity sequences as they unfold (Maitlis, 2005). A single case study approach begins with a well-defined phenomenon of interest and research question(s) to guide the data collection process.

Case study research typically begins “as closely as possible to the idea of no theory under consideration and no hypotheses to test” (Eisenhardt, 1989, p.536). This departure from more traditional approaches to research is aimed at reducing the potential bias from existing theoretical perspectives that may limit the findings (Gioia et al., 2013; Eisenhardt, 1989).<sup>5</sup>

My research project has a discovery-oriented nature and my own epistemological stance is interpretative. The design for this study reflects the logic of what is often referred to as ‘Gioia Method’ (Langley & Abdallah, 2011). This approach draws on grounded theory (Glaser & Strauss, 1967; Strauss & Corbin, 1990) as its methodological foundation and aims to develop new concepts for the purpose of theory building (Gioia et al., 2013).

One of the key assumptions underpinning this approach is that both the researched and researcher are seen as knowledgeable agents. It is the combination of both these voices that provides depth and dimension to single case studies: in the early stages of data collection voice is given to the participants while in later stages the researcher identifies patterns in the data to surface theoretical concepts and the relationships between them (Langley & Abdallah, 2011). This process creates the opportunity for the discovery of new concepts that are ground in the realities of organizational life.

## **4.2 Single case study**

This study employs a single case design. Single case analyses have very different objectives from multiple case designs (Langley & Abdallah, 2011). While multi-case designs use cross-case comparison to generate theory, a single case offers revelatory potential given the richness of the

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<sup>5</sup> The case study methodology can be used by researchers with epistemological views consistent with the positivist or post-positivist tradition to develop testable hypotheses (e.g Eisenhardt, 1989). It is also an approach followed by researchers who approach their work from an interpretive perspective that aim to capture and model the meanings of participants in the field (e.g. Corley & Gioia, 2004; Rerup & Feldman, 2011).

data.<sup>6</sup> Inductive theorizing with single case studies is ground in the perspective of the participants (Gioia et al., 2013) and researchers following this approach aim to understand how people construct meaning from their intersubjective experience (Suddaby, 2006).

Given their focus on prolonged engagement within one organization, single case studies provide the opportunity for closer engagement with the field than multi-case studies. This paves the way for rich descriptions of organizational practice that allow the researcher to see new theoretical relationships (Ahrens & Dent, 1998). However, because this style of research requires an in-depth understanding of the specific context, it requires a “get in there and get your hands dirty” approach to research (Gioia et al., 2013, p.5). Since cases are selected for their revelatory potential, the ability to secure broad access to the organization is necessary in order to ensure depth and richness of the data (Langley & Abdallah, 2011). Observation typically plays a crucial role in this process as it allows for triangulation of interview data with real-time insights. Taken together, these aspects combine to the development of more complex theory comprising many underlying relationships.

Case studies are best suited to the exploration of “how” and “why” questions (Yin, 1994). My overarching research question was focused on the exploration of how budgets facilitate the accomplishment of coordination over time. This broad question helped focus my attention throughout the data collection process as did the protocol for the semi-structured interviews. As is common practice in case study research, I began this study without a specific theoretical framework or hypotheses in mind (Eisenhardt, 1989). Rather, data collection was guided by the

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<sup>6</sup> Although single case designs have received some criticisms because of their inability to generate material for replication and comparison (Langley, 1999), according to Yin (1994), a single case study can be the basis for significant explanations and generalizations.

selection of a suitable case organization in which to explore the phenomenon of interest (Yin, 1994).

At the same time, I did have a general understanding of the three areas of literature that Adler & Chen (2011) draw on to inform the concept of large scale collaborative creativity: creativity, coordination and management control. Indeed, an overview of these literatures was incorporated into the proposal for this research project. However, I found it necessary to avoid making any theoretical connections with these literatures as I delved deeper in the field as they seemed to constrain my ability to fully appreciate the meanings ascribed by participants to various practices and processes in the field. In the following sections, I outline the steps I followed in the selection of the case organization, data collection, data analysis and theory development. While data collection, data analysis and theory development tend to be iterative and overlapping processes in case study research, each is presented in a separate section for clarity.

### **4.3 Case selection**

When selecting sites for holistic case studies, Yin (2009) suggests that three different logics may be used: 1) 'critical' cases when the objective of the study is to 'test' theory; 2) 'extreme' cases when the goal is to understand something exceptional that is occurring; and 3) 'revelatory' cases when the desire is to develop new insight into an understudied phenomenon. The case organization selected must be suitable to the phenomenon of interest (Yin, 1994), which in this instance, meant a firm engaged in large scale creative activities as their core business. The case organization was selected for this study on the basis of the third logic. Its revelatory potential was enhanced by the level of access I was able to negotiate with the case organization and my prior industry experience.

Access to the organization was negotiated through a combination of personal and professional contacts built up through my prior career in the film and television sector. These contacts spanned a combination of key creative individuals associated with the project, as well as financial executives within the case organization. While this combination of contacts in the industry is somewhat unique, it proved to be essential to obtaining the broad access required to conduct this investigation (Gioia et al., 2013). Negotiations for access to the case organization evolved through these multiple points of contact and culminated in a meeting with the senior executive. During this meeting, assurances of anonymity were provided given general industry sensitivities surrounding individual project budgets.

Series Corp is a medium-sized, privately-held Canadian independent producer with annual production volumes in the range of C\$50 – C\$60 million. Series X, the focal point of this study, is one of several dramatic television series owned and produced by Series Corp. In many ways, Series X is a typical example of a genre known in the industry as ‘high-budget scripted drama.’ This genre is generally aimed at adult audiences and airs during ‘prime-time,’ the peak hours for television viewers. As is standard in the industry, Series X is produced by a temporary organization with a freelance crew (Bechky, 2006). High budget projects in the industry are usually produced by unionized crews, and Series X is no exception. Unionized crews are generally more experienced than their non-union counterparts as membership in any of the film and television unions is predicated on experience and sponsorship by existing union members.

#### ***4.3.1 Purposeful sampling***

Following Lincoln and Guba’s (1985) guidelines for purposeful sampling, participants for this study were initially selected on the basis of their involvement in issues relating to the project budget, including those involved in raising the financing required to produce the project. Prior

experience in the industry suggested that sampling should begin with production executives at the corporate level and the two senior management positions within the temporary organization: the Line Producer and the Showrunner (see Appendix B for a detailed description of the key roles on a film or television crew).

While this guided the selection of participants during the pilot study, as I became immersed in the fieldwork, sampling was extended to include each of the department heads who were responsible for budget-related activities in their own areas. This sample evolved further as interview data revealed that many department heads delegate at least some of this activity to their ‘number one’ (i.e. assistant managers). Finally, as the budget is translated into a number of commonly held heuristics for individuals in coordinative functions – and often incorporated into their titles – key individuals in this capacity were also added as participants.

#### ***4.3.2 Data collection***

Consistent with the approach followed for single case research outlined above, several data collection methods were used in conducting this research. The interviews carried out in multiple rounds and at multiple levels were augmented and informed by observational data (Corley & Gioia, 2004; Langley & Abdallah, 2011). Triangulation of different data sources is an essential component of case study research as it mitigates the inherent bias in using data from a single source (Eisenhardt, 1989). In addition to semi-structured interviews, data sources for this included: observation of formal and informal meetings; internal documents and artifacts gathered in the field; annual reports from funding agency websites; and news articles from the industry trades and the popular press.

The data collection for this study proceeded in three phases. In the first phase, from April 2011 to April 2012, data were collected from a variety of primary and secondary sources. This



included preliminary interviews with managers at the case organization as well as broadcasters, tax credit officers and sales agents. These interviews provided an understanding of the broader contextual factors and industry dynamics, which provided insight into some of the current challenges encountered by Series Corp. These insights were augmented through participant observation conducted through my attendance at industry sessions during the Banff World Media Festival (Banff) and the Toronto International Film Festival (TIFF).

During the second phase of the study, from May 2012 to August 2012, intensive field work was carried out throughout the 82-day period of principal photography for the sixth season of the series. In addition to the observation of planning meetings, in-depth interviews were conducted with key members of the freelance production crew. While these interviews were the primary method of data collection during this phase, real time observation of both formal and informal planning sessions helped mitigate the retrospective bias or impression management that can be a concern with interview data (Eisenhardt & Graebner, 2007).

The third and final phase of this study transpired between August 2012 and November 2012. During this phase, additional interviews based on a revised protocol were conducted with key participants to delve deeper into themes emerging during the second phase of the study. As a final step, I presented key participants with a chronological case story incorporating the emerging concepts in order to solicit their feedback.

Approval was received from The Ivey School of Business Ethics Review Board for Non-medical Research Involving Human Subjects (NMREB) at each of the three stages outlined above. A full submission was made to the Ethics Review Board for the first two stages, while a revised interview protocol was submitted as an amendment for the third phase. The approvals for

each stage are included in Appendix C and the interview protocols for each of the three stages appear in Appendix D.

#### ***4.3.3 Archival data and secondary sources***

In the first phase of the study, I accessed extensive archival data available through the corporate and industry websites. Since the film and television industry in Canada is considered part of the cultural sector, it benefits from certain protective measures established in cultural policy documents. Thus, regulatory guidelines clearly establish what qualifies as bona fide Canadian Content (Cancon). Projects that qualify as Cancon are also eligible for numerous funding incentives offered through government-sponsored programs and private funds, as well as public-private partnerships. Although these aspects of the setting will be discussed in greater detail in Chapter 5, Research Context, it is introduced here to indicate the wide range of secondary data that is publicly available.

Publicly available data included the standardized development and production budgets available through Telefilm Canada which are used throughout the industry. In addition, current eligibility guidelines for financing available for Cancon projects were accessed from sources such as the Canadian Media Fund (CMF), a public-private partnership, and the Shaw Fund, a privately-held organization with cable and broadcast operations. The current federal tax credit guidelines and accompanying forms were accessed through Heritage Canada, while the provincial tax credit guidelines were accessed through the Ontario Media Development Corporation (OMDC). These documents provided an in-depth understanding of the current funding available to independent producers of Cancon qualified projects and the requirements to access this funding. For instance, current funding guidelines for the CMF stipulate a mandatory digital media component must be produced alongside a traditional media program.

This background knowledge proved vital since Series Corp follows a strategy of maximizing access to these funds in order to finance its projects. Indeed, a common industry refrain is ‘never invest your own money’ in a film or television project and Series Corp adheres closely to this philosophy, even with a number of successful series in its portfolio. Additional background information on Series Corp was accessed through the corporate website and industry trade magazines – particularly *Playback*, the Canadian trade – as well as independent media coverage. Finally, in the interest of full disclosure, this exploration of archival and secondary data was guided by my own knowledge of the industry structures and processes based on my 15-year career in this sector. At the same time, it was necessary to ensure that my knowledge was current and this was achieved through the exploration of archival data and secondary sources.

#### ***4.3.4 Observation and semi-structured interviews***

As indicated in the preceding paragraphs, the first phase of this study incorporated observation at key industry conferences. At Banff, I participated as a conference volunteer, which gave me access to panel discussions and industry awards presentations, which provided an overview of current industry trends in film, television and digital media. My attendance at TIFF was in the capacity of an industry delegate. This allowed me full access to industry panel discussions and presentations by the key funding agencies that operate both provincially and nationally. Attendance at these sessions both confirmed and elaborated my understanding of the current funding requirements acquired during my archival research.

In the second phase of this study, observation data was collected in the production offices, sets and locations of *Series X*. My presence in production meetings was both noted and announced, with the cast and crew fully aware of my position as a researcher. As an observer, I was able to move freely from department to department and from planning meetings to the

‘floor’ (i.e. production set). Since the practice of shadowing specific individuals as they work is common practice among aspiring industry entrants, my presence – and continual scribbling in my notebook – was not seen as an anomaly. On the contrary, once the crew became comfortable with me, I was on the receiving end of jokes and quips just like everybody else.

Through this phase, I directly observed a total of 32 hours of planning meetings with the writers and department heads on the production crew. In addition, I spent time on set – both on location and in studio – to observe the filming resulting from these planning meetings. Extensive field notes were taken during these meetings and supplemented with pre- and post-meeting observations. As recommended by Yin (1994), detailed field notes were written up within a 24-hour period. These meetings provided a deeper understanding of each of their roles on the production crew which provided invaluable insights to draw upon during the semi-structured interviews that followed. Equally important, these observations provided a new perspective through which to analyze the data collected during the first phase of the study.

While the semi-structured interviews served as my main source of primary data, field notes were also used extensively. My regular presence in the production office provided the opportunity to ask individuals brief, clarifying questions. On more than one occasion, I was able to observe informal problem solving sessions in situ by virtue of being in the right place at the right time. Department heads (i.e. managers) from different functional areas were interviewed to elucidate the different perspectives from each of these areas. Some of these department heads are directly responsible for their own budgets (e.g. art department, costumes and set-decoration), while others (e.g. camera, electrics and grips) work through the Line Producer and/or the Production Manager on issues regarding costs.

Interviews were conducted with a total of 38 participants (see Table 4.1 for a description of interviewees). Repeated interviews were also conducted with six key participants across different phases of this project. This progressive focusing of interviews as the study progressed was based on patterns that were beginning to emerge across the participants and enhanced the collection of targeted data (Corley & Gioia, 2004). In order to avoid bias, the repeated interviews were spaced out and questions were phrased in the same terms used by the study participants. Following Corley & Gioia (2004), I led off these interviews by identifying issues raised by other participants or witnessed during meetings as an added measure to reduce bias.

**Table 4-1: Description of Interviewees**

	Phase 1	Phase 2	Phase 3	Total
<b>Production Crew</b>				
Line Producer		2	1	3
Creative Producer	1		1	2
Directors			2	2
Production Manager		1	1	2
Writers/Story Editors	2	1	2	5
Department Heads		3	6	9
1 <sup>st</sup> Assistants		3	2	5
Coordinators		3		3
<b>Corporate Office</b>				
Production Executives		1	2	3
Finance Executives	2	2		4
<b>Other</b>				
Broadcast Executives	3			3
Tax Credit Officer	1			1
Sales Executives	1			1
Line Producers	3			3
<b>Total</b>	<b>13</b>	<b>16</b>	<b>17</b>	<b>46</b>

#### ***4.3.4 Member checks***

In the second stage of data analysis, member checks were conducted in both informal conversations with the crew and through verifying interpretations in semi-structured interviews of data gathered earlier. Near the end of the data collection period, a rich chronological case story of the production of the series was written and presented to the key participants of the

production crew to validate the accuracy of the account and enhance the trustworthiness of the data (Langley, 1999; Lincoln & Guba, 1985). This provided the opportunity to get feedback from the study participants on the concepts and interpretations emerging from the data. Member checks also ensure that the emerging theoretical framework makes sense to those living in the phenomenon of interest (Nag, Corley & Gioia, 2007; Rerup & Feldman, 2011).

#### **4.4 Data analysis and theory development**

The data was analyzed following an iterative process that proceeded in stages in which the core themes were developed by cycling through interview transcripts and field notes. Following Gioia and colleagues (2013), this process began with the open coding of the interview transcripts. The purpose of in-vivo coding is to allow the first-order categories to emerge while retaining the language of the participants wherever possible (Glaser & Strauss, 1967). This process adheres closely to the guidelines of both naturalistic inquiry (Lincoln & Guba, 1985) and the constant comparative technique or method of grounded theory (Glaser & Straus, 1976; Straus & Corbin, 1990).

The in-vivo or open coding was followed by axial coding, a process of looking at one theme at a time across the data (Dougherty, 2002). First order themes were also analyzed for similarities and differences across the categories, as well as the relationships between them. Although this is an iterative – not linear – process, axial coding leads to the emergence of 2<sup>nd</sup> order theoretical themes (Gioia et al., 2013). These second-order themes were used to develop the data structures presented in Chapter 6 and Chapter 7.

Finally, the methods section would not be complete without some discussion of rigour. In naturalistic or interpretive research, rigour is typically discussed in terms of trustworthiness. I followed the steps outlined by Lincoln & Guba (1985) to ensure trustworthiness of the data. All

data was meticulously managed using NVIVO, a computer based qualitative data management program. This included interview transcripts, field notes and documents gathered during the data collection process. It also included peer debriefing in which the emerging themes and patterns in the data were presented in the form of early-stage working papers at two academic conferences and a job-talk presentation. This provided the opportunity to solicit feedback and gain an outsiders perspective on the data as the analysis unfolded (Corley & Gioia, 2004).

In the following chapter, I provide an overview of the research context. I begin Chapter 5 with a review of prior studies conducted in the film and television industry before moving into a detailed description of the specific research site for this study. I also highlight the similarities and differences between film projects and scripted television projects.

## CHAPTER 5 – RESEARCH CONTEXT

### 5.1 The film and television industry: creativity and control

In many ways, projects in the film and television industry are ideal cases of LSCCs. Innovation in both design and execution of the ideas is a priority for film and television crews as they strive to create a product that is different from anything previously produced (Gil & Spiller, 2007; DeFillippi, Jones & Grabher, 2007). Film and television projects are complex undertakings in which each product is custom-made by a team of designers, technicians and other professionals located in semi-autonomous units (Faulkner & Anderson, 1987). Each of these semi-autonomous units produces a set of creative inputs that are required at specific points in the process, yet come together as a cohesive whole. Given that non-routine combination of inputs extends through all phases of the project, creativity is not confined to a particular stage but is required through the entire process (Jones, 2002; Townley et al., 2009).

While these creative inputs originate in the semi-autonomous units, they must come together as a cohesive whole (Cattani & Ferriani, 2008). Yet rather than relying on rigid rules or standard procedures, projects are designed using discretion formulas; however, controls must still be high in order to effectively coordinate these inputs (Faulkner & Anderson, 1987). Indeed, on film projects, the importance of the control function is seen in the continuous revisions to production planning and production cost forecasting as the crew encounters schedule delays, no matter what their cause (DeFillippi & Arthur, 1998). On television series projects, production planning and production cost forecasting are continuous as the production cycle is repeated for each script.

Further, as Faulkner & Anderson (1987) suggest, a “small army” is involved in the production of film and television projects. During production, film crews can easily expand to



over 200 people as sets and costumes are designed and built. However, staffing levels ebb and flow over the course of the project as different groups play a very specific role in the different phases of process. Each individual is hired only for the length of time their contributions are required. By post (production), only a small creative core remains to assemble the finished product.

Since the American film industry (i.e. Hollywood) has been used as a research setting by a number of organizational scholars, a brief discussion of the distinction between the Canadian industry and its Hollywood counterpart is provided in Appendix E. While there are many similarities between the two (including the use of temporary organizations), this discussion is intended to provide readers with additional details regarding the distinguishing features of the industry in Canada.

## **5.2 Coordination in the film and television industry**

The production teams that produce these projects are a collection of freelancers contracted by the temporary organizations formed for this specific purpose. This form of organizing emerged after the collapse of the Hollywood studio system in the late 1940s, when the industry shifted from a vertically integrated model of production to a network-based one (Caves, 2000). With the shift away from traditional hierarchical structures, it became critical for the major studios to develop core capabilities in identifying and assembling the key creative resources that they no longer controlled (Lampel & Shamsie, 2003). While the studios remained engaged in the financing of projects, managing the complexities of coordinating the cast and production crews became the concern of the temporary organization (DeFillippi & Arthur, 1998).

Given the single-purpose nature of their existence, these temporary organizations are characterized by the continuous process of formation and dissolution (Baker & Faulkner, 1991).

However, project crews do not need to continually reinvent the rules for creative collaboration as they come together on each project with an understanding of the routines (Jones, 1996) and roles (Bechky, 2006) that are part of the industry culture (Jones & Lichtenstein, 2008). The routines and roles are fixed enough to provide predictability in terms of who is responsible for what, but flexible enough to accommodate the continuous change that is inherent in the production process.

For instance, the system of departments clearly delineates the group responsible for certain types of tasks (e.g. the Costume Department alone is responsible for dressing the cast and the Art Department, in collaboration with the Production Designer, is responsible for building the sets). Although Producers, Directors and Stars are most familiar to the public, the department heads in charge of the semi-autonomous units constitute the core of the temporary organization and it is through this group that projects are made (DeFillippi & Arthur, 1998). At the same time, the positions and relationships among the crew are never given, but must be actively constructed on each and every project (Baker & Faulkner, 1991). Even though the role systems endure, their nuances are negotiated in situ on every project (Bechky, 2006).

The shooting schedule is another important element that has an established place in the industry culture. This schedule guides the department heads in planning the creative tasks and activities of their individual teams. It provides an overview of what is required from each department for each scene and specifies the sequence (i.e. which day) that each scene will be shot. As the definitive project plan, the shooting schedule is also inextricably linked to the budget (Caves, 2000).

Although most of the budget is spent during production, the decisions on how to spend it are made in the planning phase (Lampel & Shamsie, 2003). The budget dictates how long the

overall shooting schedule will be and also shapes how the story will be told. While each scene of the script is analyzed to create the budget for feature film projects (Young, Gong & Van der Stede, 2009), there are any number of ways a particular scene can be approached. Some of these approaches are inherently more expensive than others, but it is during this phase where the producer's wishes must be balanced by estimates of what they can afford (Faulkner & Anderson, 1987).

While the producer and the director are held most accountable for the budget on a film project, the department heads – acting as their lieutenants – share their concerns (DeFillippi & Arthur, 1998). The creative ambitions of each department head are held accountable to, and calibrated against, the original budget estimates for the film. Any department head that cannot work within these parameters on a particular project may find it difficult to secure employment on a future project. This is particularly true for television projects which have much tighter time and budget constraints than many film projects.

### **5.3 From film to television**

In many ways, television series are an ideal research setting when there is a desire for longer-term engagement with the field. The product is still 'custom made' by a freelance crew in a temporary organization (Bechky, 2006; Faulkner & Anderson, 1987). Each episode of a single series is a new creation although it must fall within the conceptual vision of the project and remain true to the nature of the key characters. Perhaps most importantly from a research perspective, the production schedule extends over a period of months, not weeks as it does with feature films. These factors contributed to the selection of a dramatic television series production as the research setting for this project.

Within the industry, film is normally considered a Director's medium, while television is considered a writer's and producer's medium. The Showrunner, typically a producer that came up through the ranks of the writers, is responsible for the creative vision of the project, not the Director. In fact, there are many directors in series production, usually one for each shooting block of the season. The Showrunner shares accountability for the budget with the Line Producer, who is primarily responsible for the logistical aspects of the project.

Unlike feature films, where there is only a single script, a television series consists of multiple scripts: one for each episode of the season. While the distinct phases (e.g. story development, planning and production) identified in prior studies (e.g. Baker & Faulkner, 1991; Elsbach & Kramer, 2003; Jones, 1996) are also evident in series production, they are coexisting rather than sequential. While each script moves through this cycle, the phases become functions of different groups. The function or phases focused on in this project include: scriptwriting (i.e. story development; planning; prep (i.e. pre-production); and production. The literature has also identified post-production has a distinct stage in film and television projects. Since this stage transpires in post-production facilities and not within the temporary organization, it is beyond the scope of this study.

Since not all the scripts are written in advance of production in television series, it is not possible to design the budget using a scene-by-scene breakdown of the script (cf. Young et al., 2009). Each script of a television series will require a different set of creative inputs to transform the text on the page to a finished product. Thus, the project budget and production plan must be developed based on a series of assumptions. These include the size of the crew, department structure, total shooting days, the number of shooting days per episode, and location days vs.

studio days, amongst other things. These assumptions form the basis of the budget against which the creative decisions for each episode will be calibrated throughout the course of production.

#### **5.4 The Research Setting: Series X**

Series X is a highly successful dramatic series conceived and produced by Series Corp for two ‘lead’ broadcasters: one domestic and one international as a qualifying domestic production (Cancon). The series has been produced for a number of seasons, albeit with much uncertainty as Series X has always been ‘renewed’ for only a single season at a time, which is typical in television production. Despite this uncertainty, there has been remarkable stability with the crew of Series X as many of the key core group (i.e. Department Heads) and other individuals have been with the series since its inception. Many of the crew members of Series X arrange their schedules to ensure that they are available when production for the next season begins.

The crew’s high level of commitment to Series X persists despite the challenges presented by the relatively modest budget for a project of such stature. There is an unmistakable pride of place among the crew of Series X and unusually cordial relations between the cast and crew. These contribute to the high level of production values (i.e. the quality of the image, sound, and storytelling) that Series X delivers on its relatively modest budget. The Line Producer spoke about his role navigating the creative aspirations of the series given its financial parameters:

*My role is really finding the balance between the two and ensuring that either one doesn't suffer because if one suffers, it's not a success. If you go over budget too much, it's not a success because [...] the company that is executive producing and creating the show, is going to lose money. [...] And if you don't produce something where the creative needs are met, for the sake of staying on budget, the reality is you're probably going to*

*incur additional expenses anyhow, because there is generally going to be negative feedback which will create a situation where you have to shoot additional stuff (Line Producer).*

Season 6 of Series X (the research period) consisted of an 82-day shooting schedule with a 2-week hiatus planned for the middle of the shoot. Over the course of this 6 to 7 month period, the cast and crew collaborated to transform 13 individual scripts into 13 different finished products. The 82-day shooting schedule for Series X was segregated into eight different shooting blocks, each comprising one or two scripts. Wherever possible on Series X, scripts are grouped into pairs within a longer shooting block to give the crew 13 days to prep and 13 days to shoot both scripts. While the prep crew is going through the planning process for one shooting block, the shooting crew is filming another. Table 5.1 provides an overview of the concurrent functions of each group over the course of the series calendar.

The tight timelines on Series X combined with the modest budget creates the need for an experienced crew, and individuals are selected based on their reputations for delivering a compelling product within the parameters of the budget. Consequently, Series X is a union shoot in order to attract crew members with the level of experience required. Most of the department heads on Series X have at least 20 years of experience in the industry, giving them expert status in their area of specialization.

An incredible level of planning is required to bring the disparate array of elements together that comprise the inputs required to transform each script to reality within the limited time available. However, most of the detailed planning cannot be done in advance of the 82-day shooting schedule because the scripts are not yet written so the elements required to transform them to reality cannot be identified. Consequently, detailed planning is a continuous process that

takes place throughout the 82-day shooting schedule as each script is released to production. This includes cost estimates from the department heads for each shooting block, as well as weekly meetings to review the progression of the project in relation to the budget.

Detailed planning also includes developing the shooting schedule for each block. Series X is shot in studio as well as on location. In the studio, the standing sets include many of the familiar places – offices, homes and meeting places – that form the world of the series. Different locations are also found for a number of scenes in every script. Shooting on location is more challenging to coordinate given the need to transport all of the crew and equipment to the particular destination selected for different scenes in different episodes. This makes Series X an attractive research setting as there are more variables involved than for a series that is shot entirely on standing sets.

The crew of Series X faces an additional coordination hurdle with respect to locations since part of the project financing includes enhanced tax credits available to productions using locations outside the Greater Toronto Area (GTA). It is impossible to miss the maps that adorn the walls of the Locations Department on Series X. The red boundaries that outline the perimeter of the city represent the boundaries of the location search: suitable locations must be found outside these markers to ensure the show qualifies for the enhanced tax credits. At the same time, the ideal locations should not be too far outside these boundaries in order to minimize travel time for the crew.

**Table 5-1: Series X Production Calendar**

<b>Series X Production Schedule Overview (Functions/Phases)</b>																															
Stage	January - April				May					June				July				August				September				October - December					
	1	2	3	4	1	2	3	4	5	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3			
Scriptwriting	Principal Photography - 82 Days																														
Planning																															
Prep (Block)			A															B	B										C		
Shoot (Block)																		B	B												
																			</												



Taken together, the preceding paragraphs suggest that time and money both play key roles in coordinating the creative inputs required for production on Series X. While the literature on the film industry certainly suggests the importance of project budgets and their links to planning, there has yet to be an in-depth exploration how this varies across different stages and groups. I combine time (Chapter 1), coordination (Chapter 2) and control from the management accounting literature (Chapter 3) to induce how creativity and control are (re)balanced within and across the four different groups on the project.

## CHAPTER 6 – TEMPORALITIES ON SERIES X

In this chapter, I induce four different temporalities that co-exist within the crew of Series X and show how different groups engage in distinct coordinating practices. In Chapter 1, I set out the definition of temporality as the way in which time – the past, present and future – is experienced. As Vesa and Franck (2013) point out, time is always a social achievement and order is created in organizations by aligning multiple (individual) temporalities into group- and organization- level temporalities.

Prior studies set in the film industry have identified the different phases of film projects as they progress from conception to completion (e.g. Baker & Faulkner, 1991; Jones, 1996). However, in dramatic television series production, the phases of story/script development, planning, pre-production (prep) and production (shoot), co-exist throughout the project and are orchestrated simultaneously by different groups. Because each group is engaged in distinct ongoing activities that are largely parallel, albeit with some points of overlap, the unfolding of the project appears seamless. However, my analysis shows how coordinating across the different groups on Series X is an on-going and effortful accomplishment.

The overarching purpose of this thesis was to explore how creativity and control are simultaneously balanced by diverse groups and individuals as they coordinate their work in LSCCs over time (Adler & Chen, 2011). My starting premise was that temporal structures direct the timing of different organizational activities and allow people to coordinate their work (Orlikowski & Yates, 2002). I was particularly interested in budgets given their connection to the timing of different organizational activities and the fact that they are so deeply ingrained in organizational life that they are often taken for granted (Ancona & Chong, 1996; Orlikowski & Yates, 2002).

At the outset of any film or television project, the budget establishes how many days will be allocated to principal photography (i.e. the overall shooting schedule) and the amount of financial resources allocated to each department (Caves, 2000). On Series X, each department head is responsible (and accountable) for their own section of the budget. The budget also sets out the size of the crew as it is designed based on the estimated number of people in each department:

*I mean every department has their own individual budget. The budget also dictates what we all get paid. It dictates how long our days are and the overall schedule (1<sup>st</sup> AD).*

While the initial research questions singled out the budget as a pivotal coordinating mechanism, my analysis revealed that it is enacted simultaneously with three other temporal structures as the crew coordinates their activities: (1) the script(s); (2) the scheduled planning meetings; (3) the detailed shooting schedule(s). Collectively, these four distinct temporal structures provide the backbone for organizing activities over time (see Table 6.1 for a description of each). Each of these structures not only plays a unique role in structuring the activities of the crew of Series X, but they are also intertwined in multiple ways.

For instance, the scripts are the focal point of the schedule as each script is broken down into scenes which are then rearranged to build the schedule. Both the script and the schedule are used by department heads to estimate the costs of the creative elements required for each shooting block. The budget not only shapes the overall shooting schedule, but the detailed shooting schedules (one for each shooting block or a total of eight over the course of the season) also shape the enactment of the budget.

**Table 6-1: Key Temporal Structures on Series X**

Temporal Structure	What	Created by:	Enacted by:
Script	The ‘blueprint’ for the product to be created: 13 scripts (blueprints) for the season	Writers	All
Shooting schedule	The plan for which scenes will be shot on each day of the 82-day schedule: disaggregated into 8 shooting blocks with 1 or 2 scripts	1 <sup>st</sup> ADs*	Prep Crew Shooting Crew
Planning Meetings	Cycle of meetings for each of the 8 shooting blocks: establish creative vision for each script; surface ‘logistical’ issues (what needs to happen and how); and review cost estimates from each department	1 <sup>st</sup> ADs*	All
Project Budget	Financial plan for the project: allocated to each department and disaggregated into 8 shooting blocks. Reviewed by Production on a weekly basis.	Line Producer	Production Prep Crew Shooting Crew

\*Included with ‘Producers’ (one of the four temporalities)

The first insight that emerged early in the fieldwork<sup>7</sup> was that the production crew was not a homogenous unit, but comprised a series of ‘small villages’ that coalesced into three distinct groups: (1) the writers and directors; (2) the prep crew; and (3) the shooting crew. As shown in Table 6.2, a fourth group, consisting of the Showrunner, Line Producer, Production Designer, Production Manager and the 1<sup>st</sup> ADs are analogous to the senior management team for the project. This group is referred to as ‘Production’ throughout the balance of this dissertation. The distinguishing characteristics of these four groups arise in part from the activities they are responsible for and how their time is negotiated and ordered as they carry out their day-to-day activities.

Each of these groups is focused on a different set of activities. For instance, the writers create the scripts that become the blueprint for the product that will be created (i.e. *blueprinting*). Creating the world of Series X is a labour intensive process and the writers start working months before the rest of the crew in order to ensure sufficient scripts (usually 6 or 7 out of the 13) are

<sup>7</sup> These groups were identified during the pilot study and the inquiry was organized by these different groups.

ready for production. They also need to maintain a certain pace in their progress if they are to avoid the potential collision when the linear tracks of (real) time take priority over diegetic time as the train of production leaves the station.

Production, on the other hand, needs to understand the world of the story from a very different perspective. As the group responsible for *detailed planning* (e.g. scheduling and balancing to budget), they need to fuel the creative aspirations of each script, but they also need to ensure that the quality of the series (i.e. production value) is maintained. In order to maintain this balance, they meet weekly to review the costs of what has been done creatively so they know where they can go in the future scripts of the season.

**Table 6-2: Group-level Temporalities on Series X**

<b>Temporality</b>	<b>Definition</b>	<b>Who</b>	<b>Illustrative Quote</b>
Diegetic	Internal world of the story that the characters experience and encounter based on a fictional past, present and future. To create this world, the writers start months before the rest of the crew.	Writers Directors	<i>I refer to it as the train of production and you start off well ahead of the train, but you're moving at different speeds. And the train is coming behind you, so you are moving at this speed [...] and your job is to try to make to the end of the season before the train hits you (Writer-1).</i>
Synoptic	Brings together the past, present and future for an instantaneous view of facts that only exist in succession. Enables one to understand in a single glance meanings that are produced one-by-one and step-by-step.	Production:  Line Producer Showrunner Production Designer Production Manager 1 <sup>st</sup> ADs	<i>It's like the opposite of the matrix: it is reality. It's everything that's been spent so far, plus it's what we've got left to spend. Everything is there - - what we've done and what we have left to work with. It's a snapshot of the whole thing. (Production Manager).</i>
Calendar	'Real-time' deadlines based on a specific day in the shooting schedule. Allows people to predict how the future will unfold so they can plan and coordinate their work.	Prep Crew:  Art Department Costume Department Props Department Sets Department	<i>I don't think anybody in Set [Decoration] would want to be on the shooting crew. It's just a different sort of pressure. Like our pressure is deadlines. We're done before they get there, and that's the different deadline than "We have to shoot this before 8:00 because we get kicked out." It's a different sort of ticking (Set Decorator).</i>
Clock	'Real-time' deadlines specified in the 24-hour 'military' clock. A 'standard day' is 11 hours and then it's 'premium' time.	Shooting Crew:  Camera Electrics Grips Locations	<i>When you have all that equipment and the crew standing by, you have to figure out a way to keep things moving. It's a huge expense so you want to keep things moving, even if it means changing the order that was originally planned for that day (2<sup>nd</sup> AD).</i>

Even though they both experience time differently, the activities of the prep crew and the shooting crew are firmly anchored in ‘real’ time. The prep crew is focused on calendar time as their work needs to be accomplished for each day in the schedule. They need to prepare the sets, props and costumes in advance of each day of shooting (i.e. *preparing the floor*). In contrast, the shooting crew is focused on the clock as they film all of the elements created by the prep crew. Their goal is to get through all of the scenes in the detailed shooting schedule (i.e. *executing the plan*) on a given day without incurring overtime. Thus, delays need to be minimized and every moment counts when they are forced to respond to the unexpected.

The balance of this chapter focuses on the coordinating practices of each of the four group-level temporalities that constitute the crew of Series X. The data is organized by the primary function that each group performs as outlined in the preceding paragraphs: blueprinting, detailed planning, preparing the floor, and executing the schedule. Each section begins with a definition of the primary function of each group, as well as a brief elaboration of their temporal orientation. I then introduce the distinct coordinating practices of each of these groups.

## 6.1 Blueprinting

*I am endlessly impressed by the ability of the whole creative structure to take in a script, break it down, figure out what needs to happen in it, make all the plans and decisions and then pull it all off on the floor in a timely manner (Writer-1).*

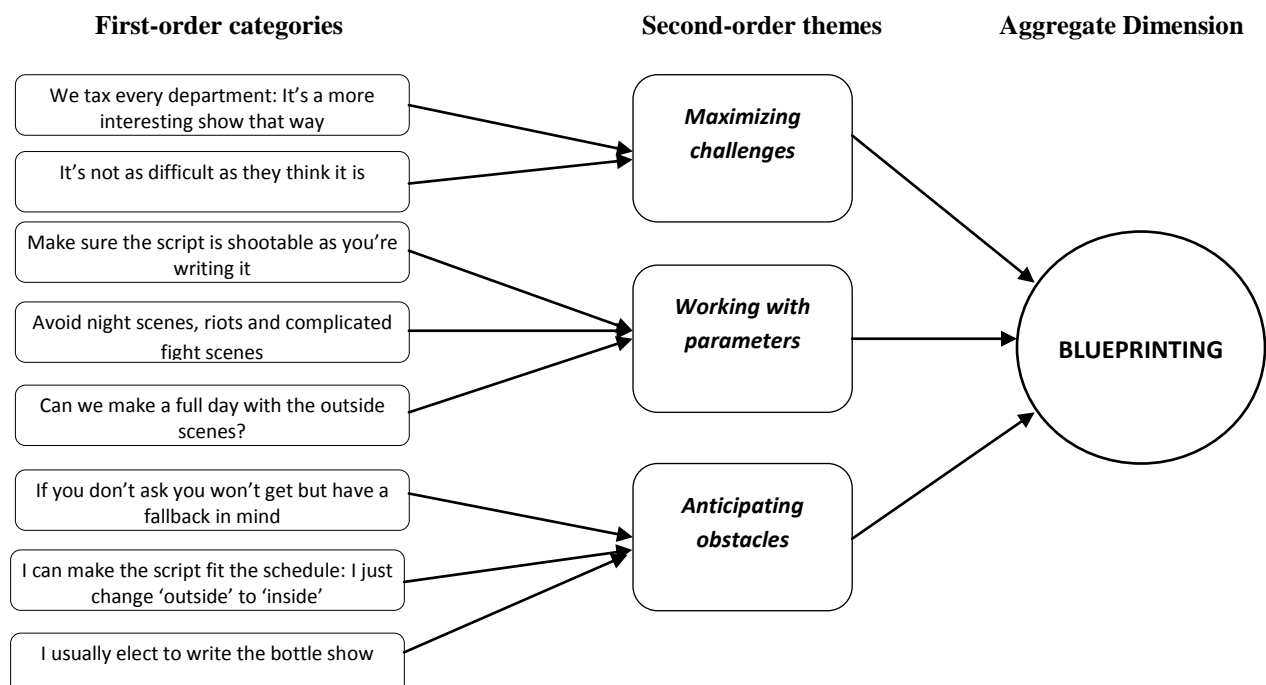
A blueprint is something intended as a guide for something else that is often depicted graphically (e.g. an architectural or mechanical drawing). However, as a detailed outline or plan of action, blueprints can come in many forms. The verb blueprinting refers to laying out a plan regardless of what form that plan takes (i.e. image or textual). On Series X, the scripts are the blueprints for production. The text on the page provides the basis for the final product that will be created

through the carefully orchestrated efforts of the cast and crew. The high quality of scripts on Series X is a significant factor to the success of the show.

For the writers of Series X, blueprinting involves creating the fictitious world known in film theory as the ‘diegesis’ or world of the story. Time flows differently in the world of the story (i.e. diegetic time) as the stories in each script unfold over a number of days and that audiences experience in an hour of viewing. Story tensions are built through the transitions between day and night as they unfold before the audience. The writers effectively inhabit two different worlds in their day-to-day activities: the world of the story and the world of crew.

As shown in Figure 6.1, three main subthemes emerged from the analysis of the writers activities in blueprinting: (1) maximizing challenges (creating solvable problems); (2) working within parameters (writing within the bounds of time and money); and (3) anticipating obstacles (creating less costly options and stories). The raw data supporting the second order themes is provided in Table 6.3.

**Figure 6.1: Data Structure - Blueprinting**



**Table 6-3: Representative Quotes Underlying Second Order Themes (Blueprinting)**

1 <sup>ST</sup> Order Categories	Second-Order Themes
<b><i>Maximizing challenges</i></b>	
It's a more interesting show if departments are challenged.	And of course, we tax every department, so we create problems for them because it's a more interesting show if they're taxed. It actually turns out that way. It's actually kind of cool: we are the department of problem creation (Writer-1).
It's not as difficult as they think.	I kind of know what it's going to look like as I'm writing it. I don't get that many nasty surprises and I know when I'm going to push people into a difficult schedule, because it's not as difficult as they think it is (Showrunner).
<b><i>Working within parameters</i></b>	
Make sure the script is shootable as you're writing it.	Now, I get having to work within your parameters and having to stay inside as much as you can and having to make sure that everything is really actually shootable when you're writing it (Writer-3).  You can't go [to] your first production meeting without being immediately aware of the parameters of what you can actually shoot (Writer-1).
Avoid night scenes, riots, and complicated fight scenes.	You suddenly realize, "Well. Hmm. No. [A] riot scene and we can only afford four guys. It really doesn't work." We are probably better off coming in after the riot scene, when everyone is brought into jail (Writer-1).  Night is a killer so it's like "Exterior: Night," is something that's a no, no (Writer-4).
Can we make a full day with the outside scenes?	On this show, I've taken to trying to second guess the AD's. When I'm writing I'll go, "Okay, we have so many outside scenes. Can we make a full day of it?" We'll actually think of that when we're writing it (Writer-1).
<b><i>Anticipating obstacles</i></b>	
If you don't ask you won't get, but have a fallback in mind.	I am being more conscious, but at the same time, sometimes I just do it: I put in the more expensive whatever, knowing that I have a fallback because if you don't ask, you're not going to get it (Writer-2).  They lost a few things [in the script] I was hoping for (Writer-3).
I can make the script fit the schedule: I just change 'outside' to 'inside'.	I know how to quickly make adjustments to the script to make it fit the schedule. I know that there's usually 8 to 10 scenes in a script that I can change without thinking. I just write "inside" instead of "outside." (Showrunner).
I usually elect to write the bottle show.	I will actually usually elect to write the bottle show which is difficult because you have to do it with a very constrained budget and it usually means you are working with a fairly high concept, because you don't have the opportunity to go outside and go to different locations, it all has to play out on one or two sets (Writer-1).

**Maximizing challenges.** Defined as setting the creative target for the cast and crew to inspire their performance, this subtheme refers to how each script establishes the activities required from the rest of the crew. These activities are not specified in detail in the script, but emerge through the interpretations of the story being told. Not only do scripts need problems in



order to make the story interesting for audiences, they also need to create challenges for the rest of the crew:

*I mean obviously you can't have a script – you can't have a story without problems that have to be solved – so you create those problems and then you realize the script is a bit dull. It doesn't have enough problems so you have to put more problems in. [...]*  
*Obviously there has to be a solution; within the story and outside. It all has to be solvable (Writer-1).*

Like the problems in the story itself which must be resolved within each episode, the challenges created for the crew need to be solvable. Some scripts will require more cast and costumes, while others may call for imaginative props or a number of new sets. Scripts with more than the average scene counts require that many more set ups from the shooting crew. Resolving these issues requires creativity and problem solving from the rest of the crew; however, they must be accommodated since they are important to the story (i.e. the final product).

Without sufficient challenges, the concern is that the crew will fall into routine and that the quality of the final product will be compromised as a result:

*There is still a tendency to situationally take the easy way out. Like, "We can make this easy if we just do this, this and this." I'll be like, "Yeah, I know we can but at the end of the day ... that's not what people want to watch. I know it's a bitch that we've got to go out and do this, but it's not incredibly hard to do" (Showrunner).*

Thus, scripts present a set of problems for both the audience and the crew. The story tensions keep the audience engaged, while the tensions that arise in the transformation from text

to the screen keeps the crew engaged. These tensions create more focused attention and efforts on the part of the crew and translate into the creation of a more interesting product for audiences.

**Working within parameters.** Defined as a high-level understanding of what the crew can accomplish within the bounds of time and money, this subtheme refers to how the writers use their understanding of the show's parameters as a guide when crafting their scripts. While the writers are granted considerable freedom in generating their scripts, they are also aware that the crew has certain limitations in making them material. For the writers, these constraints impact how the story is told, but not the story itself. For instance, there are certain kinds of scenes that they avoid or keep to a minimum:

*I know if I wrote a scene with a big mob and a hundred extras, I know that's going to be an issue. We'll only end up with 20 extras and it will look like shit. So, we try not to do that unless it's absolutely necessary. We try not to do big fight scenes because they look like shit because you just don't have the time to shoot them properly (Writer-3).*

Instead of showing the fight or the riot, the story will start with the aftermath (e.g. when all the rioters are in jail). Although the writers do not know with any certainty what the rest of the crew will need to transform the text on the page, they do recognize that certain things have a high cost attached, create logistical issues, or both. For instance, not only do the extras in crowd scenes need to be paid, they also need to go through costumes and make-up. Complex fight scenes require choreography, stunts and rehearsals. They also benefit from multiple camera angles which require much more time to shoot. In addition to scheduling the crew to work evenings, night scenes also require complex and costly lighting set-ups.

The writers sidestep some of the obvious problems as they write their scripts, but their understanding is based on impressions and perceptions of what others need to do. The same is

true of the shooting schedule that they contemplate as they write. Scenes they envisioned in one location or set can often end up being scheduled for somewhere else:

*We've really tried – it's kind of funny – to keep as much as possible for the back lot and then they'll end up going and taking it out somewhere. And you're like, "But I wrote that for the back lot!" Then you get all these complaints, "Oh, you keep writing for all these locations!" And you're like, "No, I wrote it for the back lot!" (Writer-3).*

Despite their awareness that they are working with incomplete information, the writers' understanding of the show's parameters guides their own internal coordinating practices. Each script is a collective product of the story department. New story ideas are 'broken' (i.e. generated) as a group and each member of the department provides notes (i.e. feedback) on the scripts written by their colleagues. Their understanding of the show's parameters informs each of these practices as their ultimate aim is to create scripts that can actually be produced.

**Anticipating obstacles.** Defined as preparing 'plug and play' options to accommodate the budget and the schedule, this subtheme refers to how the writers develop alternative possibilities as they write. Their best wishes may be included in the first draft of every script, but they often have a fallback option ready in case the limits of the budget have been reached:

*I think the budget always plays a role, to some degree because that creates how you're going to handle things creatively. [...] The director will always want everything and the writer will want everything too, but the writer knows that, at least; we're not going to have everything (Writer-4).*

The 'fallback' options prepared by the writers offer a ready-made path to follow in the event that compromises need to be made. Sometimes these options can be executed by simply changing the location of a scene (e.g. from a location to the studio). Because the extent of the

changes that may be required cannot be predicted by the writers, they work to the ideal knowing that at least some aspects will likely change. At the same time, they can often be pleasantly surprised by what they are able to retain:

*There are about 3 times as many cast as there normally are with all those [extras]; they have to be cast. [...] We're going to [two different] locations and one at night even! The whole crew hates me, but I was like, "You can suck it up! I never get a night scene!"*  
(Writer-3).

Since each season contains a number of 'big' scripts that are expensive to produce, at least one script in every season needs to be designated a 'bottle show' (i.e. a high-concept story contained to existing sets) in order to keep the budget in line. These scripts can be quite challenging to write and have been known to end up costing more than an 'average' script when attempted by an inexperienced hand. Consequently, the task of writing the bottle show usually falls to more experienced writers who have a better sense of how to approach a bottle show. They know how to keep scenes 'small' but interesting by writing engaging dialogue between a few characters at a time.

All scripts go through numerous changes as the planning for each unfolds. There are numerous colour-coded versions of every script as the writers incorporate the required changes emerging through detailed planning. The writers continue to adjust their scripts (i.e. fine-tune their blueprints) until they transition to the 'floor' (i.e. shooting crew). At that point, they pass the creative baton to the Director who is tasked with the responsibility of visually telling their stories.

## 6.2 Detailed planning

*There's lots [of costs] that are affected by the weather, which is the production. That's the way I look at a production: it's like the weather. It changes so you have to be prepared. You have to have an umbrella; you have to have a rain suit. You have to have shorts for the hot weather and a warm jacket for the winter. That's how you plan, right? (Line Producer).*

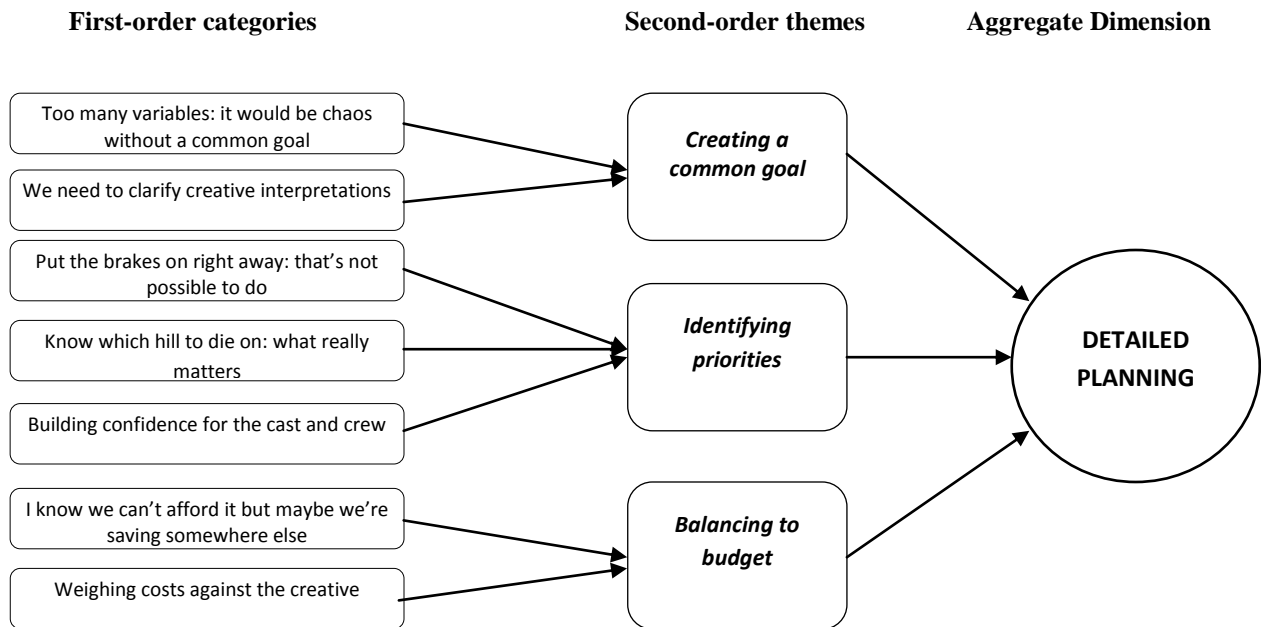
While planning is generally understood as a detailed proposal for doing or achieving something, the depth of planning in series production extends to the finest level of detail. Scheduling plays a vital role on Series X and a detailed shooting schedule is built from the ground up for each of the eight shooting blocks of the season. Yet, paradoxically, these incredibly detailed plans remain remarkably flexible since everyone knows that the weather will change. Because the weather can change so quickly, costs are reviewed on a weekly basis and the expected future costs are (re)forecast at the same time.

This kind of planning requires a more comprehensive or overall view of the project. Production has visibility into the entire project budget whereas each department head only sees their individual section. Since production also gets scripts earlier than the rest of the crew, they are able to set aside savings from past shooting blocks to accommodate the creative aspirations of scripts in future shooting blocks. These plans are centered on realizing the production values established for the series which requires them to balance both the creative and financial imperatives. By holding the overall vision of how the individual pieces come together, production provides each group the ability to focus on their specific part.

As shown in Figure 6.2, three key subthemes emerged in detailed planning: (1) creating a common goal (aligning creative and logistical requirements); (2) identifying priorities

(establishing key creative objectives); and (3) balancing to budget (calibrating creative priorities within financial parameters). The raw data for each of these subthemes is presented in Table 6.4.

**Figure 6.2: Data Structure - Detailed Planning**



**Table 6-4: Representative Quotes Underlying Second-Order Themes (Detailed Planning)**

1 <sup>ST</sup> Order Categories	Second-Order Themes
<b><i>Creating a common goal</i></b>	
Too many variables: it would be chaos without a common goal.	You have to plan so everybody has a common goal. If you don't have a common goal, there's too many variables involved and it will be chaos (Line Producer).  The scripts all have different requirements. (Production Manager).
We need to clarify creative interpretations.	So there is that management issue of someone interpreting it differently, that's why we have concept meetings: for clarification (Line Producer).  [The Concept Meeting] triggers those needs of individual department meetings, or a couple of reduced department meetings so that everything is working towards the ultimate goal of making the best show possible within the time and money that you have to do it (Line Producer).
<b><i>Identifying priorities</i></b>	
Put the brakes on right away: that's not possible to do.	You're also listening to each department and what it is that they need to do [...] and sometimes you might have to put the brakes on something right there. But really, the Concept meeting is where you get an idea of what the actual requirements are (Production Manager).  We'll look at [the script] and go, "Well, there is this exterior farm house scene that's half a page, or a page, and then everything else is an urban setting." You know you're not going to be able to do that. [...] You know that's going to change. That's not possible to do (Line Producer).
Know which hill to die on: what really matters.	The corny expression is that you've got to know what hill to die on. In my position I have to know that. So if I blow stuff off, "oh, that doesn't matter" there will also be a moment in time where it will be "No, actually this has to happen like that." (Showrunner).  It's such a tight schedule that if you don't identify [the priority] early you're going to walk in and end up doing overtime on those big days (1 <sup>st</sup> AD-1).
Building confidence for the cast and crew.	The other thing I try to do is plan for a "good" first day. A good day, but not a difficult day, gives the Director a chance to get a good day under his belt. It helps to build confidence: the confidence of the Director but also of the cast and crew (1st AD-2).
<b><i>Balancing to budget</i></b>	
I know we can't afford it, but maybe we're saving somewhere else.	I know as a general rule of thumb – from being in tune with the budget but also through experience – there's certain things that we can or can't afford, right off the bat. So, but I don't try to say no to things right away because there maybe something that we are saving on (Line Producer).
Weighing costs against the creative.	[I'm concerned about] costs, but weighed against the creative (Production Manager).  I have to make the decision that if something is - - through my experience or questioning or challenging the person that is saying, "It's going to cost us this much and it's beyond our cost" I have to get into a conversation with them, "Well, what about this? What about that?" before I go to the story (Line Producer).

**Creating a common goal.** Defined as aligning the creative and logistical requirements

for each script, this subtheme refers to how a detailed plan needs to be developed for each script

in every shooting block. Each script has a very different set of requirements or elements that need to be made material in order to visually tell the story. Because the variables in each script are so radically different, the common goal cannot be defined in advance:

*You just don't know because we're going to be making the same product every week, but the variables that go into the creation of - - to make each product an individual unit could be anywhere from we need 50 horses and a skyscraper in this episode, and the next episode we just need a boat, and the next episode we just need a jail cell and two guys (Showrunner).*

The common goal for each script evolves through the scheduled planning meetings that happen for each of the eight shooting blocks of the season. In the words of the Line Producer:

*That common goal is the plan of how are we going to take this script and how are we going to get it on film [...] in the time frame that we're supposed to do it in (Line Producer).*

Thus, the common goal is reflected in the detailed shooting schedule prepared by the 1<sup>st</sup> AD during prep. The detailed shooting schedule is the master plan that choreographs the flow of activities for both the prep and the shooting crews. Creating this schedule requires temporally mapping how the different elements can best come together given actor availability, location constraints (e.g. if they are only available on a certain day) and the time the prep crew needs to get the sets ready:

*If [the ADs] are good at their job, they know everything that's required from each of the departments. That's a big job. It's not that easy. The money in a way depends on them a lot too, because they need to make it all happen in time and as smoothly and as efficiently as possible (Asst. Costume Designer).*



These efforts are guided by the overarching goal of making the best show possible given the available resources (i.e. time and money). For instance, creative interpretations of the script must be aligned to ensure that all the individual pieces come together cohesively within the time available. Additional planning meetings are scheduled to work out the unique interdependencies emerging from a particular scene in the script. All of these practices are focused on establishing a common goal in order to maximize creativity from the perspective of what is best for the story.

**Identifying priorities.** Defined as establishing the key creative objectives in each script and each shooting block, this subtheme refers to the practice of separating out what is logistically possible from what is not. In other words, identifying priorities refers to the physical elements required in terms of ‘how’ they are going to make it happen within the bounds of the schedule and the budget.

Identifying priorities is one of the many functions of the scheduled planning meetings as this is where production hears what each department needs to transform the script. Some ideas may need to be quashed right away (e.g. because they are too costly or stray from what is best for the story). On other occasions, it may become obvious that a certain scene cannot be accommodated on location, which means that changes will be necessary. For the most part, however, issues are not readily apparent as the important areas of each script are revealed through the progression of planning meetings and the physical limitations are surfaced.

There are scenes in every script that can be given less attention and scenes that demand more. Because of the tight timelines in series production, these scenes need to be identified early to ensure that they are allocated sufficient time in the schedule. Since the Showrunner is responsible for the creative aspects of the project, this falls within his purview in consultation

and collaboration with the Director for each shooting block. The 1<sup>st</sup> AD incorporates these priorities into the detailed shooting schedule:

*Number one: going in and understanding the top priority of the day and making sure that the rest of the day doesn't necessarily cater to it but doesn't impede it, either. So, that comes in the scheduling beforehand, and you hope that you made the right decision about which scene is going to take the longest, and what time of day you schedule it (1<sup>st</sup> AD-1).*

Scheduling goes beyond temporally mapping all of the different activities in order to develop a coherent schedule. Since the shooting crew must adjust to the styles of different directors for each shooting block, the 1<sup>st</sup> AD is also concerned about developing rapport between Director and the cast and crew. This happens by building confidence through a “good” first day on each shooting block in order to establish a positive working relationship with each Director and a positive environment on set.

**Balancing to budget.** Defined as calibrating the creative priorities with the financial parameters of the project, this subtheme refers to the continuous and sustained efforts of production throughout the duration of the project. The ultimate goal is to maintain a balance between the creative aspirations and the financial reality, rather than let the show tip in favour of one over the other. For instance, ideas are not immediately dismissed even when the Line Producer knows they may not be able to afford to execute them. If the idea has creative merit, it must be considered in relation to its cost.

Savings in one area are often used to offset higher costs in another. This practice requires an understanding of the overall project and the overarching creative goals of each script. An individual department head may be tempted to ask for changes to the script in response to the

budget pressures they are experiencing; however, they do not have visibility into the plans for bringing the whole together:

*Ultimately they are not in the position to go to the person who is writing the script [...] or the Showrunner and say, "Can we do this or that because it's going to cost us too much?" Those conversations happen, but [...] ultimately, it's got to be the people who are responsible in the end, for the bottom line because it's balancing; you are just balancing to budget (Line Producer).*

The people balancing to the bottom line not only have the ability to see how each piece needs to come together in the present, they also have full visibility into the past. However, this picture is inherently fragile as it is always in motion. Consequently, it is continually updated through the weekly cost report meetings:

*You have to look forward. You have to look and see what you have done so you know where you can go. What's there and what's coming and how. It's like, "Okay, well there is less visual effects here, so we should take some money and put it into block seven in visual effects" because we know that's coming up. Do it now so that it's already there so by the time we get there, it's already done. (Production Manager).*

Much like a synoptic chart of the weather, this snapshot of the prevailing patterns of the show is inherently partial and the forecasts of future costs need to be continually reworked. While there is some sense of the certain requirements of future scripts, their specific needs cannot be known until each department head has had the opportunity to analyze and interpret them. However, the Showrunner does have the ability to shape the creative aspirations of the scripts yet to be written:

*I have to be somewhat aware of what the big picture is and I also know what's coming down the pike, or I can change what's coming down the pike to make this work. "Oh, we're going to go \$40,000 over on this episode?" It's like, "Yeah, we are! So, I'm going to make one where we won't, but we have to do this one" (Line Producer).*

The Showrunner also shares responsibility for the budget with the Line Producer and knows he has to find a way to keep costs in line by writing a 'smaller' (i.e. less ambitious) script. While the scripts in series production follow a common pattern of "3 or 4 big ones, 5 medium and 2 or 3 that are easier to produce," (Line Producer), nothing is taken-for-granted. Maintaining the synoptic view requires the sustained efforts and attention of each individual within production over the course of the entire season.

### **6.3 Preparing the floor**

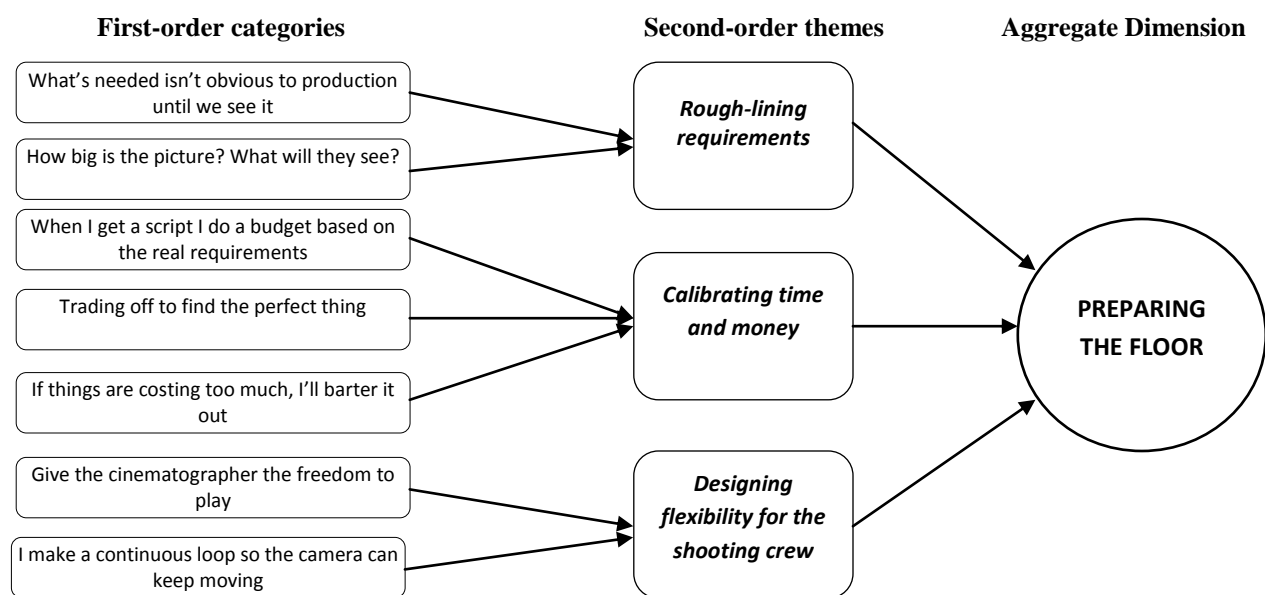
*The key is to create a marriage of elements: construction, scenic, set decoration, props. And then [...] you bring in all the various players that participate in creating that final illusion (Art Director).*

Preparing the floor is defined as getting all the sets and costumes ready for the shooting crew and the performers. In television production, 'the floor' is where all of the action takes place. On Series X, the floor comprises the (permanent) standing sets, the (multi-purpose) swing sets, the back lot and all the different locations required over the course of the season. The prep crew gets each of these sets ready (often building some from scratch) for each scene in every episode. They also dress all of the performers that will appear in each of them. In film theory, these elements are collectively known as the *mise-en-scene* which refers to everything that appears in the frame of the scene, apart from the actual dialogue.

The activities of the prep crew are governed by the schedule as each day of the shoot requires a different set of elements to be delivered to the floor. Each set and every costume (and sometimes multiples of the same costume) needs to be ready before the shooting crew arrives on the following day. They typically only have 2 or 3 days to get the sets ready regardless of whether they are in studio or on location. Sets in the former need to be ‘turned over’ and sets on the latter often need to be made functional for the shooting crew. For instance, when they are shooting in a private residence on location, the owner’s furniture is often moved out into storage and replaced with pieces more suitable for the series. Given these tight timelines, the prep crew is under constant pressure to get these elements ready.

As shown in Figure 6.3, three key second-order themes emerged in preparing the floor: (1) rough-lining requirements (outlining physical elements needed to transform the script); (2) calibrating ‘time and money’ (juggling creative aspirations based on when it is needed and how much it will cost); and (3) designing flexibility for the shooting crew (creative options within the built sets). The raw data from which the second-order themes emerged is shown in Table 6.5.

**Figure 6.3: Data Structure – Preparing the Floor**



**Table 6-5: Representative Quotes Underlying Second-Order Themes (Preparing the Floor)**

<b>1<sup>ST</sup> Order Categories</b>	<b>Second-Order Themes</b>
<b><i>Rough-lining requirements</i></b>	
What's needed isn't obvious to Production until we see it.	I think that really isn't that obvious to the producers until the head of each department sees it and goes, "We're going to need this to make it happen. We're going to need this to make this happen." (Costume Designer).  The concept meeting is where you get an idea of what the actual requirements are (Production Manager).
How big is the picture? What will they see?	[The concept meeting] puts a frame around how big a picture is going to be. [...] We'll discuss let's say, "Okay the courier goes over the rapids and tumbles and this and that," and it's written that way. Then the Director says, "You know what? I'm only going to see the end of the canoe. [...] Then I'm going to pick it up from down the fall [...] and then I'm going to see the actor swim to shore. So right away, you can focus on that perfect little ledge; the perfect little drop (Art Director).
<b><i>Calibrating time and money</i></b>	
When I get a script I do a budget based on the real requirements.	We start out with an overall budget for that stock and then I do an episodic budget of what the actual script requirements are for that block. So I hand them in as we go along, as I get the scripts and see what the real requirements are for that episode once it's scripted (Costume Designer).
Trading off to find the perfect thing.	It's like we found the perfect thing, but it's \$500 more that we have in the budget. So, I can steal it from here and I'll put something less nice in that one there (Set Decorator).
If things are costing too much, I'll barter it out.	I only step in if there's a problem: if things are costing too much. Then, I usually go to the [Line Producer] and I'll barter it out. And barter is exactly what it is: I'll give you - - I won't build that if I build that. It's a trade. It's constantly sort of this horse trading (Production Designer).
<b><i>Designing flexibility for the shooting crew</i></b>	
Give the cinematographer freedom to play.	It makes all the difference to giving the cinematographer the freedom. [...] If the design is of a style that it allows freedom for all areas then everybody has got freedom to play. We all take it into account but [the Production Designer] and I really pay a lot of attention to that - is that it has to be accessible (Art Director).
I make a continuous loop so the camera can keep moving.	That's the other thing that I do, I make a continuous loop so that the camera can keep moving [...] It doesn't take a half an hour [to re-set] because they just go around the loop and they're back at the starting point. (Production Designer).

**Rough-lining requirements.** Defined as discovering what is physically needed to transform each script to reality, this subtheme refers to the discovery of what each department requires to make that happen. No single individual on the crew can make the determination of what is required for each script, and the expertise of each department head is critical to establishing what is required to realize the text on the page. These discussions start in the Concept Meeting where the group assembled walks through every scene in each script with the

Showrunner and the Director. As the department heads listen to the plans for each scene, they share ideas of what they need to do. This practice also helps identify which department will be responsible for specific elements in the script, particularly since that is not always clear:

*[The meetings] absolutely do help, because then you sort of get a sense of what other departments are doing and what things might fall on you. There is sort of that weird in-between grey area, where you don't quite know whether it is a prop or costumes; or whether it's a set thing. It's where you try to sort all that out (Costume Designer).*

The Director's vision for each scene is a crucial input into determining the specific elements required from each department. For example, the script may conjure images of Niagara Falls, but the Director may only be planning a tight shot of a rocky ledge. This directs the search for locations and it also contains the efforts required by the prep crew since they only need to be concerned with creating a small set. However, things can also go in the other direction. Sometimes, the length of a scene in the script belies the extensive efforts that will be required from the prep crew:

*Sometimes in the writing you know, we just described the courier and the blah-blah-blah and it can go on. And it's only an eighth of a page, but it could be the world! You often hear, "It's an eighth of a page..." I think you've heard that in our Concept Meetings even, "Well, yes. But this is two days of work!" (Art Director).*

Each of the department heads must plan and schedule the activities of their respective teams to get that work done. Planning of the detailed activities of their teams requires close attention to the shooting schedule, but these activities also play a role in shaping that schedule:

*There's a lot of scheduling; a lot of immediacy. [...] There is a lot you have to organize. You have to organize things beyond and beyond. But that can be a lot of fun, too [...] once you get into it, if you have a system (Asst. Costume Designer).*

The department heads work with the 1<sup>st</sup> AD as he is designing the schedule to keep him apprised of how much time they need to get the elements ready for each scene. By planning the activities of their own teams, they are able to provide the 1<sup>st</sup> AD with a realistic timeline so he can fine-tune the detailed shooting schedule. The amount of time the prep departments have to get things ready also plays a role in establishing what they set out to do.

**Calibrating time and money.** Defined as juggling creative aspirations based on how much it costs and when it is needed, the subtheme refers to the practices the prep crew engages in to establish what their department can reasonably deliver for each script. The department heads often go through a micro 'make-or-buy' calculation based on how many days they have to get each element ready. For instance, making a piece of furniture is usually the less costly option, but there may not be enough time to build it:

*[The schedule] really sets everything else because [...] everybody can do their budgets after they have the department meetings, but they can't finalize it until they see a schedule because the schedule effects how they do it - - when they have to have it (Line Producer).*

The prep crew has more time to get the elements ready for scenes scheduled on Day 12 of a shooting block than for those scheduled on Day 1. Less time to prepare usually means a 'buy' decision even if something built internally would work better and cost less. In this way, time influences the estimates that they prepare for each shooting block. Since the unique attributes of each script are also inputs into these estimates (referred to as 'budgets' by the crew), they are



prepared separately for each shooting block. Further, each department head tracks their own costs over the course of the season and monitors their progress against the initial estimates established at the start of the season.

Calibrating time and money can also involve making tradeoffs over time (i.e. from scripts in one shooting block to those in another). For instance, if the ‘perfect thing’ for a current script is beyond the bounds of the budget for the shooting block, there will be a negotiation to curtail creative aspirations on a future script in order to keep the budget in line:

*We go over budget. Sometimes, we go under budget. But there is a big, big number and we try to stay within that because some episodes will be more expensive. Some could be twice as much as one episode and then you have to do two at like half of what you want to do, just to kind of bring it back in line (Set Decorator).*

These movements across time are negotiated through the Line Producer or the Production Manager with the Showrunner occasionally stepping into the mix (e.g. to signal the importance of a particular element). Tradeoffs are made to support the priorities of the current script in order to make certain scenes (i.e. the priorities) really shine. These back and forth movements across time allow each department to satisfy the creative aspirations of each script while remaining within the ‘big number’ over the course of the season.

**Designing for flexibility.** Defined as creating options for the shooting crew, this subtheme refers to how the needs of the shooting crew are incorporated into the design of the sets. The sets not only need to appear authentic to audiences, they also need to accommodate the lighting, equipment, and cameras of the shooting crew in order to become a fully functioning set:

*When we are initially designing a set, it’s very important that we take those other departments into consideration, specifically lighting. Without great lighting then you are*

*compromising atmosphere. If you look around here, what we've given them in these sets to be able to create mood by them having to pick: and not just like I've got one light source like this. It's like, "I can put a shutter here; I can close that blind. I can tweak that thing" (Art Director).*

The shooting crew usually shoots each scene from multiple camera angles. These built-in options provide multiple ways to position the lights in order to accommodate a variety of different positions for the camera. This flexibility is particularly important on the standing sets, many of which date back to the first season of the series. Changing the camera angles and the lighting can dramatically change the appearance of a room and brings a fresh perspective to sets that have been used over and over again.

In the current season of Series X, the back lot was extended by building additional sets (e.g. office exteriors and storefronts). These sets allow for more exterior scenes than what the crew can accomplish on the limited location days allocated to each shooting block. Again, these sets were designed to create as many options as possible for the shooting crew:

*It's those kind of things that I've brought to it: the ability to in the street to keep - - instead of they could point the camera one way and then point the camera the other way, and that was pretty well it. But now, with that loop... (Production Designer)*

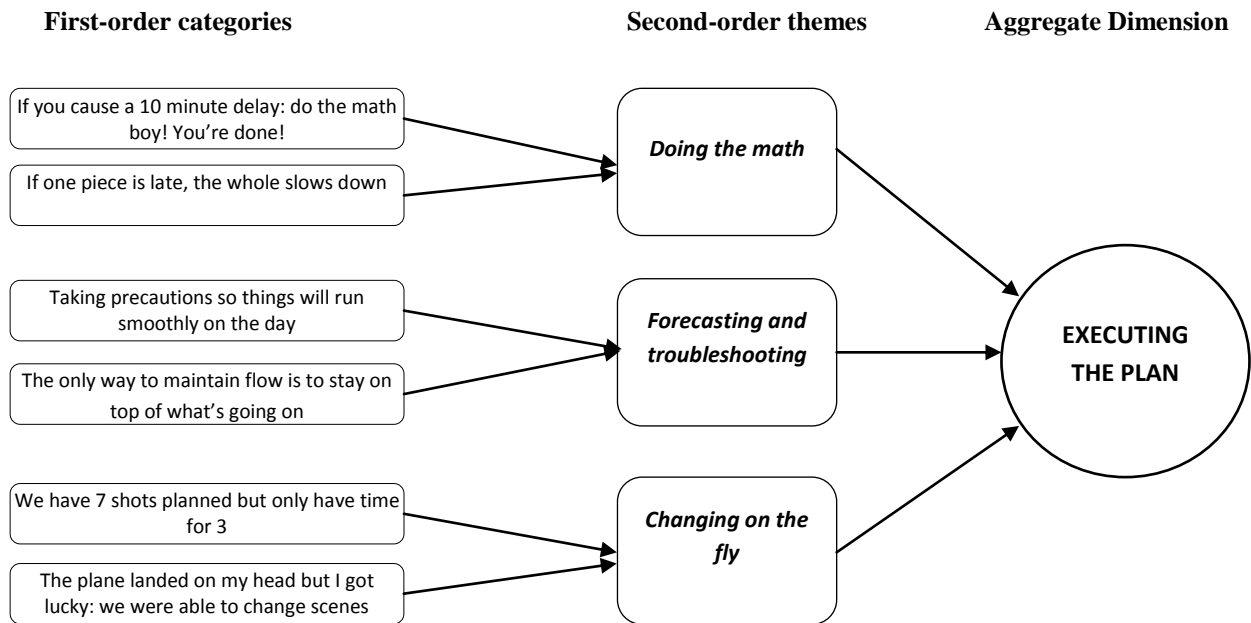
They were also designed with efficiencies in mind. For instance, the loop means that the shooting crew does not need to stop and re-set the scene each time a new take is required. Rather, the camera can keep rolling as the actors are moving through the street. This level of flexibility is invaluable for the shooting crew as it increases their ability to adapt to changing circumstances as they execute the schedule.

## 6.4 Executing the schedule

Defined as enacting the daily shooting schedule, this subtheme refers to the practices used by the shooting crew to coordinate their activities on the floor. On Series X, the standard shooting day is 11 hours and there are typically around ten script pages scheduled on a given day; however, this number varies depending on how much time is allocated to each scene. While the shooting crew spends most of their days in the standing sets or on the back lot, approximately one-third of each shooting block (i.e. 4-5 days) takes place on location.

While the shooting crew works the same hours as the prep crew, their days are characterized by a very different pattern of activity. For instance, their start times are predicated on the shooting schedule and can range from the early morning to the late afternoon (when shooting nights). The shooting crew is tethered to the clock and not just any clock: the 24-hour “*military clock*”, as the 2<sup>nd</sup> AD refers to it. They are connected together through the headsets they wear that allow them to remain in constant communication. This allows them to respond in concert when they need to adapt their plans in the moment.

Figure 6.4 illustrates the three subthemes in executing the schedule: (1) doing the math (every second counts as money); (2) forecasting and troubleshooting (taking precautions for the shoot); and (3) changing on the fly (adapting plans in the moment). Table 6.6 contains the raw data underlying each one of these subthemes.

**Figure 6.4: Executing the Plan**

**Table 6-6: Representative Quotes Underlying Second-Order Themes (Executing the Plan)**

1 <sup>ST</sup> Order Categories	Second-Order Themes
<b><i>Doing the math</i></b>	
If you cause a 10-minute delay: do the math boy! You're done!	When you figure that production runs anywhere from on the cheapest, cheapest piece of shit show, \$5 – 7 grand an hour, and on the big ones, closer to \$60 or 70 grand an hour, if you cause a 10 minute delay: do the math boy! You're done! (1 <sup>st</sup> AD-1).  When you have all that equipment and the crew standing by [...] it's a huge expense so you want to keep things moving (2nd AD).
If one piece is late, the whole slows down.	The bottom line is – if you're late – if one piece of it is late, then the whole slows down. There's that whole cost thing: it's not about teaching you, it's just about ensuring that you're there (Locations Manager).
<b><i>Forecasting and Troubleshooting</i></b>	
Taking precautions so things will run smoothly on the day.	A large part of this is the ability to forecast and trouble shoot. The more complex the shoot is, the more expensive the shoot is. At least, that's how I view it, so you want to take all the precautions you can to make sure that things will run as smoothly as possible on the day (2 <sup>nd</sup> AD).
The only way to maintaining the flow is to stay on top of what's going on.	The flow is everything and the only way to maintain flow is to be right on top of what's going on. [...] I'm really, really on top of every little delay. It's not that I'm holding people responsible for it; it's that I'm trying to manage around it (1 <sup>st</sup> AD-1).  If we're consistently making lighting adjustments between rehearsals and takes: that kills flow (1 <sup>st</sup> AD-1).
<b><i>Changing on the fly</i></b>	
We have 7 shots planned, but only have time for 3.	I'll talk to the DP and say, "I know he's got 7 shots planned but we can only do 3, how do we get it down to 3?" And he'll say, "Well, we can do this, this and this," or I'll say, "We've got to get it down to 3 shots, so do this." And [the DP] will suggest to the Director, "Hey, we can do it like this!" And he'll go, "Great idea!" (Showrunner).
The plane landed on my head, but I got lucky: we were able to change scenes.	The plane landing on my head: the sub-text for the whole show! [...] When something like that happens you need to be able to adapt, so I took a look at the scenes we had planned. You need to come up with what you can shoot and I got lucky. We had an actor in early for another scene so we were able to switch to a different scene (1 <sup>st</sup> AD-1).

**Doing the math.** Defined as understanding how every second counts (as money), this subtheme effectively captures the underpinning of the coordinating practices for the shooting crew. Their activities are so interconnected that a mistimed or missed beat by one individual or group is inevitability experienced by the whole:

*Especially with the structure of how we do things. It's a house of cards, if one department completely falls over, we all go out! There's nothing we can do about it (1<sup>st</sup> AD-1).*

The shooting crew is segregated into a number of different departments. The camera department operates the cameras while the grips are responsible for providing the equipment to move the cameras (e.g. cranes and dolly tracks). The gaffers provide the necessary electrics as well as the lighting used to shoot each scene. However, there is considerable overlap between these units as they share the same equipment and need to work as a cohesive team on the floor.

The Locations Department also plays a vital role when the shooting crew travels beyond the studio and the back lot. The Locations Department needs to ensure that every obstacle is removed from the path of the shooting crew so they can focus their full attention on filming each scene in the schedule:

*There's no room for error in a situation like that: you've got all this extra labour that's being paid on an hourly basis and we've got 5 or 6 times the normal amount of dailies up there. So, I also have to be sure that the timeline is maintained (Asst. Location Manager).*

No single individual or group wants to be the cause of any delay. This is particularly true on location where scenes are often far more complex than in the studio and require additional equipment as well as labour. For the shooting crew, the cost component is particularly salient since every minute beyond the standard day incurs the additional expense of overtime.

**Forecasting and trouble-shooting.** Defined as taking precautions to ensure that each day of the schedule will proceed as smoothly as possible, this subtheme refers to how the shooting crew aims to minimize potential issues that may arise on the floor. This is particularly true for location days since there are many more things that can go wrong than in the relatively controlled environments of the studio and the back lot. Consequently, the department heads on the shooting crew are “*always looking to see if scenes can be shifted around to make the work flow better*” (Gaffer).

Concerns about the work flow are shared throughout the crew. For instance, when preparing the Daily Call Sheet (i.e. the detailed schedule for the next day), the 2<sup>nd</sup> AD does not merely transfer the information from the 1<sup>st</sup> AD's schedule. He analyzes the call times for each and every crew member and moves scenes around where possible to avoid the possibility of overtime. He often sets call times earlier than necessary if no time penalties will be incurred in order to have people standing by in case issues are encountered. This has the benefit of providing additional flexibility if scenes need to be shifted around due to unforeseen contingencies that often arise on location.

As soon as the cameras start rolling on the first day of each shooting block, the 1<sup>st</sup> AD carefully observes the flow of activity and keeps detailed notes of what he sees:

*On the back of my sides at the end of every day, it's entirely covered – like both panels because I fold it in half – in shorthand. From top – it's complete gibberish to anyone else, but it's 100% coverage of the entire day. I'm talking right down to [...] minute-to-minute of the entire day. Like, I notice patterns with certain shows and you have to accept the patterns or manage around them (1<sup>st</sup> AD).*

Inevitably, there are some issues that the 1<sup>st</sup> AD must accept (e.g. the number of set-ups the shooting crew needs to execute) but there are also areas where the 1<sup>st</sup> AD can intervene to make improvements. However, before making that determination, the 1<sup>st</sup> AD digs deeper to identify the source of the problem:

*If the pattern is that we are rehearsing at 3:05 for a shot and we don't roll on that shot for an average of 8-12 minutes after the rehearsal, to me that is a, "[Whiskey Tango Foxtrot] happened there?" And then I want to know what that is (1<sup>st</sup> AD).*

For instance, if delays are caused by lighting adjustments, the 1<sup>st</sup> AD can intervene to minimize or even eliminate them by adding an extra rehearsal to ensure there is sufficient time to make the necessary adjustments. Maintaining a smooth flow of activity is the primary objective of the 1<sup>st</sup> AD. While the ‘flow’ is in many ways a signal of efficiency, it is also critical for establishing an atmosphere on set that is conducive to creativity. While the creativity of the shooting crew manifests in many forms, it is particularly essential when they need to adapt their plans in the moment.

**Changing on the fly.** Defined as adapting plans in the moment to get through all of the scheduled scenes in a given day, this subtheme refers to the inherent flexibility of the shooting crew. Despite all the careful attention and planning that goes into designing the detailed shooting schedule, it is never seen as rigid or unbending, even though the clock is unforgiving. On the contrary, the schedule serves as the starting point for the inevitable adjustments that need to be made to get through all of the scenes scheduled on a given day:

*You’re compromising all the time because we sort of give them more work than can reasonably be done in a day. [...] If you do the math, we generally have 11 scenes to do in a day. That means you have an hour a scene and it takes 15 minutes to do a shot, so you’re never going to make the math work. So, somewhere around hour 8, you’re giving up something because nothing ever goes completely according to plan (Showrunner).*

“Giving something up” usually means changing the original plans for certain scenes. For instance, the Director may have planned for seven shots of a particular scene, but the pressures of the clock mean there is only time for three. This is where the expertise of the Director of Photography (DP) is critical as he has an arsenal of tricks up his sleeve that can be deployed to capture the desired impact of a scene in far less time:



*I know we can't do all the eye lines. So [the DP] said, "Let's do a French reverse." I thought, "Great. Never heard of it." [...] We cheat it so that for her coverage [...] you get that she's looking in two different places. [...] [The DP] was like, "It will work." And it worked (Director).*

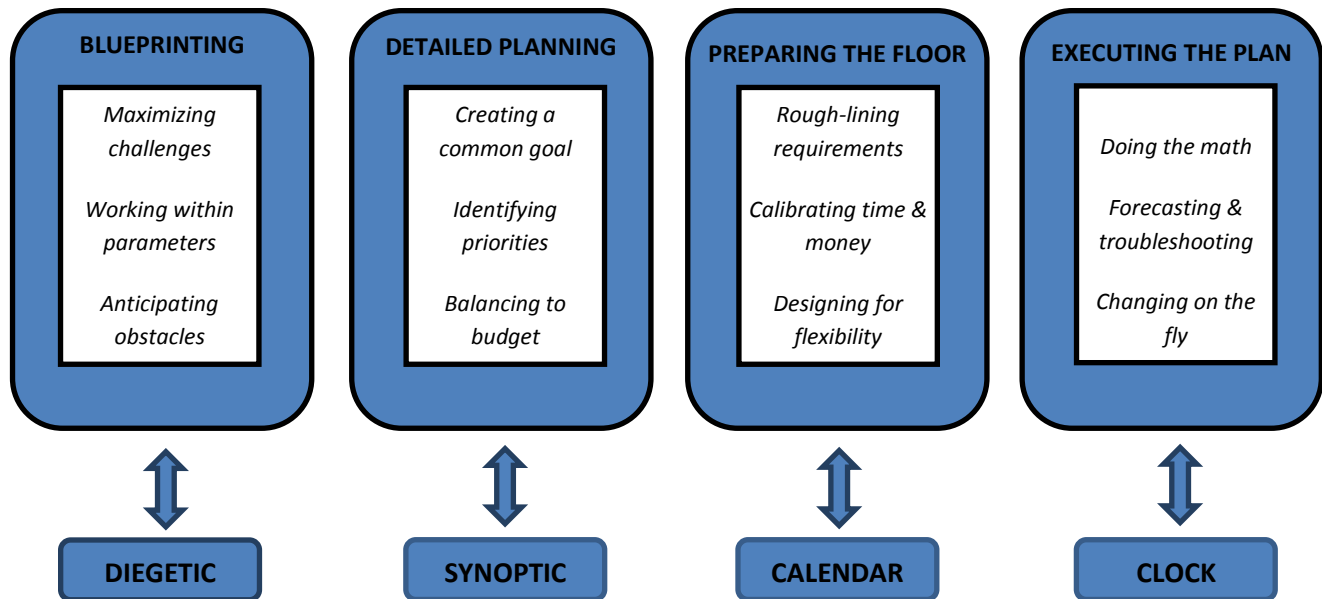
Changing on the fly is also required when the crew is forced to respond to the unexpected. If a prop malfunctions at a critical moment or something was overlooked by the prep departments (e.g. there is no door on the set but there is one in the script), the shooting crew needs to adapt in the moment in order to minimize delays. This is where the additional precautions taken by the 2<sup>nd</sup> AD create additional options for moving scenes around so the crew can keep shooting while repairs are made to the prop or other solutions found (e.g. the Showrunner rewrites the script to remove the need for the door).

### **6.5 Summary: Parallel temporalities**

Figure 6.5 summarizes the second-order concepts specific to the coordinating practices of each group. My induction has focused on what each group does and has shown how these activities sustain one specific group-level temporality. More specifically, I have shown how each group engages in unique coordinating practices that both delineate and delimit their specific temporality. For instance, blueprinting shows how the writers maximize challenges, work within parameters and anticipate obstacles as they write their scripts. Detailed planning illustrates how production creates a common goal, identifies priorities and balances to budget not only for each script or shooting block, but also over the course of the project. The prep crew must rough-line requirements for each script, calibrate time and money when creating the specific elements and design sets for flexibility when they are preparing the floor for each shooting block. Finally, when executing the plan, the shooting crew does the (mental) math to quantify how every second

counts, forecasts and troubleshoots issues that could interfere with the plan, and changes on the fly when necessary.

**Figure 6.5: Parallel Temporalities**



The coordinating practices of the different groups are rooted in their specific experience of time. To create the template (i.e. script) that the rest of the crew will bring to reality, the writers inhabit the world of the story. They experience diegetic time as they write the plots that will unfold over a number of days in the script, which follow a trajectory over the course of the season and build on what has transpired in prior ones. This sense of time guides where they can go with the story as much as the need to work within their parameters.

Synoptic time, on the other hand, requires more breadth than depth in order to provide the necessary scaffolding for the crew to transform the script to a material reality. They coordinate the meetings necessary to bring the different groups together on the same page and identify priorities, so they can chart the course forward for based on the creative aspirations of each script for the season. The weekly cost report provides a snapshot of where they are in the present so

they can forecast where they can go in the future in terms of the creative aspirations of the scripts yet to be written.

While calendar and clock time are both versions of objective time, the distinction between these two groups provides a striking example of how time can be subjectively experienced. The prep crew is always preparing the sets, props, and costumes for the following day and the 12-1/2 day prep period experienced by the synoptic temporality collapses into ensuring everything is in place for the next day, while developing plans for the script(s) in the upcoming shooting block. Their activities are guided by which day of the schedule their specific inputs are required.

The clock temporality works the same standard 12-hour day as the rest of the crew yet the rhythm of their activities is guided by a different sense of time. The departments within this temporality are tightly interdependent and need to respond as unit to any obstacles that arise during the course of the day, as evidenced by the headsets that keep them constantly connected. Constantly challenged to get through all of the scenes scheduled in a standard day, this temporality strives to ensure not a moment is lost because of an unnecessary delay.

Others have identified the importance of establishing group- and organization-level temporalities for the purposes of ordering or pacing activities in chronological time (e.g. Vesa & Franck, 2013) and highlighted different temporalities in LSCCs (e.g. Dougherty et al., 2013). This chapter takes a step further by showing how different group-level temporalities enact specific coordinating practices. In doing so, it begins to reveal how “temporality is an embedded characteristic of a situated community” (Vesa & Franck, 2013, p. 24).

At the same time, group-level temporalities do not happen automatically: substantial effort is required to maintain them. While every group maintains their distinct temporal

orientation, they must also negotiate time with other groups who hold a different and distinct temporal orientation. Each temporality relies on temporal coordinating mechanisms, but they use these quite distinctly. I induce the specific coordinating practices through which each of the four groups uses the script, the shooting schedule(s), the scheduled planning meetings and the project budget to accomplish their own activities. However, assuming that any or all of these temporal structures are sufficient for coordinating across these groups is premature.

I purposely omitted horizontal arrows from Figure 6.5 because examining the Series X from the perspective of who does what tells us a lot about the existence of the four temporalities but very little about how these coexist let alone how their activities blend. The fact that each of the four groups does what they do so consistently over time sets up the unique challenge of reaching across these temporalities as the project unfolds. Chapter 7 takes up this challenge to induce a process theory of coordination across these group-level temporalities.

## CHAPTER 7 – COORDINATING ACROSS TEMPORALITIES

### 7.1 Preview of the emergent model

The coordinating practices of the four different temporalities that constitute the crew of Series X were the focus in Chapter 6. In showing how creativity and control are balanced within each group, Chapter 6 reveals how coordination is accomplished within each temporality. In this chapter, I focus on how coordination is accomplished across temporalities. In doing so, I shift the focal point of my analysis from practices of coordinating within temporalities to processes of coordination across temporalities.

LSCCs are characterized by the need for different kinds of creativity; however, certain forms of creativity are not always recognized. For instance, in a symphony orchestra, we commonly see the creativity of the composer, conductor and soloist(s). Yet the creativity required by the woodwinds, brass, percussion and string sections is also important: there wouldn't be an orchestra without them. Even the second violins that play the harmony (versus the melody played by the first violins) make an important creative contribution to the whole. These different forms of creativity are conjunctive (Adler & Chen, 2011), yet we know little about how seamless connectivity is established among different – and sometimes even hidden – kinds of creativity. My premise is that control is necessary for coordinating across these different kinds of creativity.

Chapter 6 revealed different types of creative contributions, each specific to a distinct temporality. I showed how each makes an important creative contribution to the whole (project or LSCC). For instance, writing requires one form of creativity while the material elements created by the prep crew to realize the story require another. The shooting crew adds another layer of creativity through lighting and cinematography that require yet another set of controls.

In Chapter 7, I explain how control enables the coordination across these different kinds of creativity.

Before moving into the first- and second- order themes in the sections that follow, it is important to note the participants' emphasis on the need for control to balance creativity throughout their day-to-day activities. At no time during the interviews, shadowing and observation of meetings did any participant articulate a desire to give creativity free reign. Without control, the Production Manager noted, "*We wouldn't have a show! It would fall apart: It would be anarchy; chaos.*" Everyone was explicit about the necessity of having both, and all participants spoke about the way they combined the two.

To preview the key findings, I induced four overarching processes that were common across the four distinct temporalities described in Chapter 6. Summarily defined and illustrated in Table 7.1, the four key processes were: (1) conceptualizing; (2) visualizing; (3) materializing; and (4) monetizing. Each of these coordination processes, and the micro-processes of creativity and control that make coordination work, is explored in-depth in the sections that follow.

**Table 7-1: Micro-processes of creativity and control**

<b>Micro-process</b>	<b>What</b>	<b>Illustration</b>
Conceptualizing	Moving from abstract ideas to concrete moments.	<i>I mean I look at [the script] and go, "Okay. How should we do this?" (Production Designer).</i>
Visualizing	Moving from sketchy outlines to precise images.	<i>You cannot help - - as you read [the script] you are creating these images (Art Director).</i>
Materializing	Translating ideas to a physical reality (e.g. sets, props, costumes and performers).	<i>What is important – extremely important – [...] is to understand the character, and infuse the personality and the intrinsic leftovers that that particularly character would leave behind (Art Director).</i>
Monetizing	Converting creative aspirations to 'real' money needed to make it happen.	<i>It really is to a certain degree an estimation. So once you make the budget, it's just numbers on the page as a guideline. [...] However, once you start the engine up, those numbers to a certain degree don't mean as much [but] the bottom-line does (Line Producer).</i>

The balance of this chapter proceeds as follows. The first part of this chapter induces the micro-processes of creativity and control for each process, showing how the links between creativity and control progressively tighten to enable coordination across the different kinds of creativity and control specific to each temporality. In the second part of this chapter, I model how the four coordination processes work across temporalities. I end by inferring and explaining the previously under-theorized role of budgets in coordinating creativity across multiple and overlapping temporalities. In Chapter 8, I discuss the theoretical and practical implications of the temporalities induced in Chapter 6 and the core insight about the role of budgets in coordinating across temporalities developed in Chapter 7.

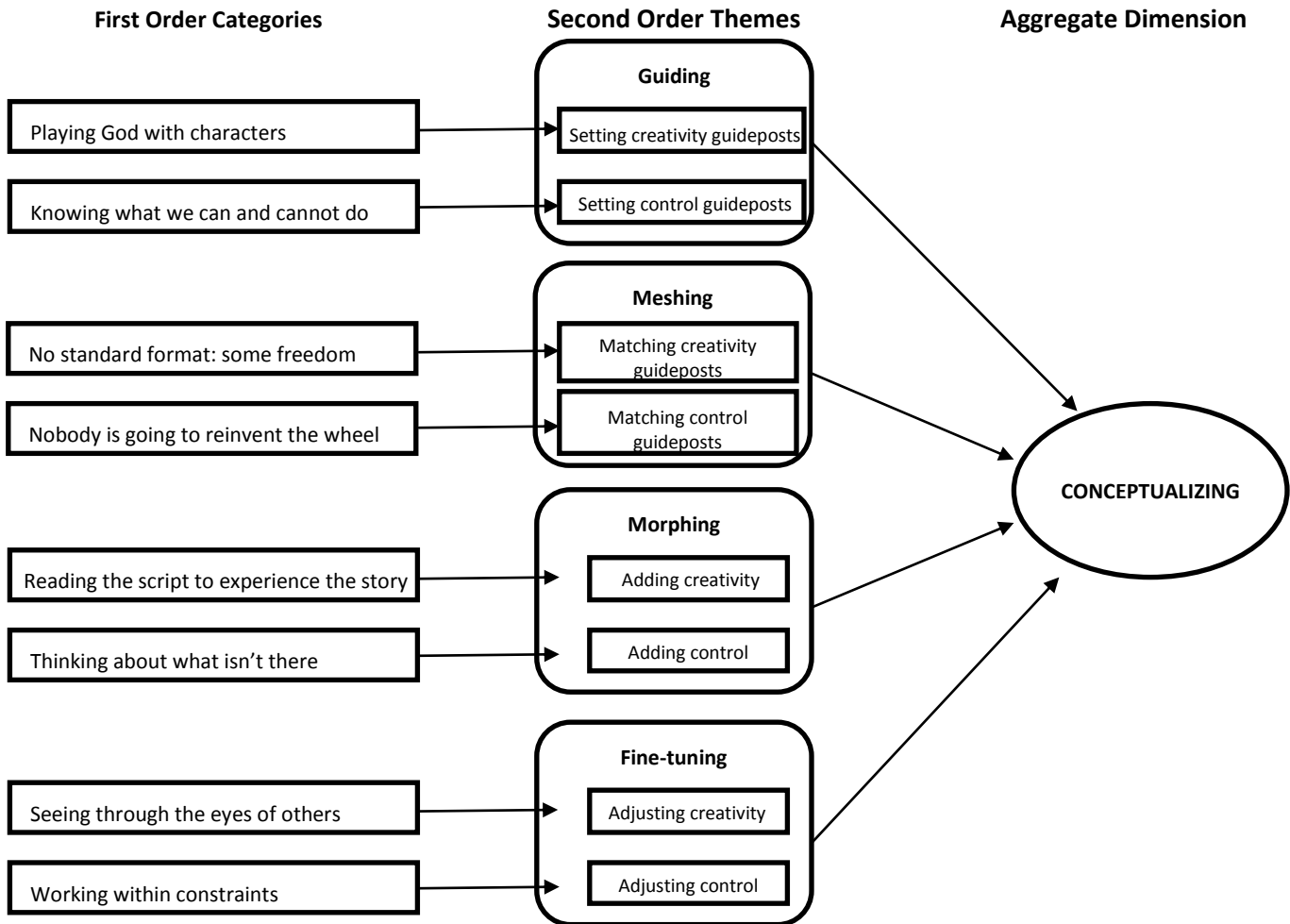
## **7.2 Conceptualizing**

To conceptualize is to form an abstract or general idea about something not yet concrete. It is to conceive of something in broad terms. It is not sensemaking per se, but something that outright precedes and guides the activities of the crew. For the crew of Series X, conceptualizing is the process of developing an idea about something that is going to be, and articulating it cognitively, linguistically and aesthetically in ways that enable others to share and hold the same concept. Conceptualizations include a story, a specific set, or the desired atmosphere in a particular scene. These often start with one in order to build a conceptual image of everything else.

It is the first of the four micro-processes engaged by each of the different groups that typically marks the start of the creative process, and a necessary part of cycling through any restart or adjustment. Figure 7.1 depicts the four different themes that comprise conceptualizing: (1) Guiding (setting creativity and control guideposts); (2) Meshing (matching creativity and control guideposts); (3) Morphing (adding to creativity and control); and (4) Fine-tuning

(adjusting creativity and control). Table 7.2 provides the representative quotes from which the first- and second-order themes emerged.

**Figure 7.1: Data Structure - Conceptualizing**





**Table 7-2: Representative Quotes Underlying Second-Order Themes (Conceptualizing)**

1 <sup>ST</sup> Order Categories	Second-Order Themes		AGGREGATE DIMENSION: CONCEPTUALIZING
	Guiding		
Playing God with characters	<p><u>Setting creativity guideposts</u></p> <p>I always think of writers as though we're like the powerless gods. We're the people that actually create things (Writer-4).</p> <p>Actors live or die; not the actors but their characters. We will kill off a character and I'll have to explain to the guy at the wrap party why! (Writer-1).</p>		DIEGETIC
Knowing what we can and cannot do	<p><u>Setting control guideposts</u></p> <p>We're very lucky in the sense that we know our sets. We know what we can or cannot do to a great extent. [...] At least we understand when we're writing it, what we can pull off (Writer-3).</p>		
No standard format; some freedom.	<p><b>Meshing</b></p> <p><u>Matching creativity guideposts</u></p> <p>The directors have a bit more say in the presentation of the material in that we don't have a standard format that this has got to happen by this time, and this has got to happen at that time (Showrunner).</p> <p>We give the Director a lot of say on this show (Writer-2).</p>		SYNOPTIC
	<p><u>Matching control guideposts</u></p> <p>There's a visual language and a concept already built in. Nobody's going to come in and reinvent the wheel (1st-AD).</p> <p>The things that have to be in a [Series X episode] have to be in a [Series X episode] but they can be slid in, in different ways (Showrunner).</p>		
Nobody's going to reinvent the wheel.	<p><b>Morphing</b></p> <p><u>Adding creativity</u></p> <p>When I first get the script I try to wipe my slate clean [...] and then I read it as though, just as a layman's type of thing (Art Director).</p> <p>When I read a script, I read it as a full story. I just read it for the story. I don't get into the breaking down (Asst. Costume Designer).</p>		CALENDAR
	<p><u>Adding control</u></p> <p>When you're in an Art Department meeting and you're talking about a character's house, they're going to want to know if the person is affluent – if there are certain things that aren't in the script that they should think about (1<sup>st</sup> AD-1).</p> <p>I'll get a final drawing like that. So that's basically what we get [...] obviously looking at that you can't tell what the room is going to be (Set Decorator).</p>		
Reading the script to experience the story.	<p><b>Fine-tuning</b></p> <p><u>Adjusting creativity</u></p> <p>On the tech survey, we [Key Grip &amp; Gaffer] are both representing the DP. We're there to be his eyes and ears and bring his perspective: how the DP thinks (Key Grip).</p> <p>A big part of this job is providing a level of expertise and anticipating what the DP will need in addition to the standard set-up (Gaffer).</p>		CLOCK
Seeing through the eyes of others.	<p><u>Adjusting control</u></p> <p>Where we park has to make sense for the location. We may not be able to park in the most obvious space because the Director is planning on shooting in that direction, so we can't have vehicles in that spot. But I have to know the location well enough to know that (Asst. Locations Manager).</p>		
Working within constraints.			

**Guiding.** Defined as setting the specific goals or guideposts for each script, guiding includes two subthemes: setting creativity guideposts and setting control guideposts. *Setting creativity guideposts* refers to the key story points in each script (e.g. significant events that happen to each character, plot twists, etc.). These are the aspects of the script that break new ground and both invite and require the creative contributions of the rest of crew. The writers of Series X writers “are given a huge amount of freedom” (Writer-2) in setting these guideposts:

*We have the purity of vision as writers and we are – it’s actually kind of fun to play God with these characters. [...] There is obviously an enormous weight because I take that responsibility seriously: I want to deliver a good show. I don’t want to let any episodes fall between the cracks. (Writer-1)*

Each new idea for a story goes through a process where the writers “see how that works through in terms of plot” (Writer-1). These story ideas are interwoven into each script along with the story elements that are part of the series concept and must appear in each episode of Series X. This is where the writers exercise a major aspect of their creativity in terms of their timing and placement in the flow of the story emerging in each script:

*I mean obviously in a show like this there are certain things that have to happen. You’ve got to have a certain amount of action, and [supporting character’s] got to come in and go, “My God! The Russians have invaded!” or whatever (Writer-1).*

*Setting control guideposts* refers to how ‘playing God’ (with characters) is held in check by controls of many kinds. The stories conceived by the writers must also be within the realm of possibility, not just in terms of creating ‘believable stories’ that resonate with audiences, but also in terms of scripts that are physically possible to produce. This comes from a generalized

understanding of what the crew can physically accomplish within the existing sets and the limited number of location days allocated for each script:

*We want our scripts to work so we're not going to write things that can't be shot, so they have to be changed and then affect the story (Writer-3).*

The writers look to maximize creativity within the bounds of the feasible. The guideposts set out in the script through the individual moments for each character and each event establishes the minimum requirements for creativity and control for the rest of the crew in every story. However, these minimums do lie in tension with each other as the creative aspirations of each script must be balanced against what the crew can physically accomplish.

**Meshing.** Defined as synthesizing the abstract understanding of new story ideas and concepts that appear in each script with the existing guideposts of the series concept, meshing comprises two distinct subthemes: matching creativity guideposts and matching control guideposts. The first subtheme, *matching creativity guideposts* refers to the specific aspects of the script that leave room for creative freedom and elaboration by the rest of the crew. Unlike procedural dramas (e.g. *Law & Order*, *CSI*) where certain story elements must happen at a specific time in each episode, Series X has no standard format in terms of timing. This gives the directors some room to play with how they present the material contained in each script:

*The things that have to be in a [Series X episode], have to be in a [Series X episode] but they can be slid in, in different ways (Showrunner).*

This flexibility provides the different directors on the series an opportunity to exercise some creativity rather than just focus on the mechanics of series production. Directors on other series may be “*treated as guests*” (Writer-2), but on Series X they have a little room to maneuver creatively and bring something extra to the episode(s) they direct.

*Matching control guideposts*, the second subtheme, refers to the limits to that creative freedom. Since there is an overarching series concept for Series X, the creative freedom exercised by each director must fall within these bounds. In other words, nobody is going to reinvent the wheel: each episode of Series X must look and feel like a Series X episode. Every script must be approached from the perspective of the expectations for the product established during the first season of the series:

*The reality is that you establish a level of production value on the show, or the movie, or whatever you're shooting. Once that's established, and it's harder in the beginning because when you first start off in season one, I mean you have a sense, but when you establish what the show is going to ultimately be in the end... everything is a reaction to the script (Line Producer).*

In other words, each script must satisfy these expectations, including the level of production values established during the first season. Thus, the creative freedom that can be exercised on any single episode can often lie in tension with the overarching series concept. While the series concept is only loosely defined, it still sets the conceptual guideposts for control.

**Morphing.** Defined as working through the new story elements one-by-one in order to move beyond the minimum guideposts set by the writers, morphing includes two subthemes: adding creativity and adding control. The first subtheme, *adding creativity* refers to the creative imprint made by each of the prep departments as they conceive ideas for the physical objects required to tell the story be they costumes, sets or props. Each script requires a creative contribution from every department:

*I think that every department – and I think it’s like that on every episode – had one or two special things to do (Director).*

Adding creativity requires defying the gravitational forces of past habituation to go beyond what has been done in the past in order to make each episode unique. The props master, for instance, has developed a reputation for going above and beyond in delivering masterful objects that are the product of his own ingenuity. In order to accomplish this, the prep department heads start by reading each new script with a fresh eye in order to experience the story on its own terms before they begin to develop ideas of what is required:

*You read [the script] first and you want to let the magic of the story work for you and see where it goes. Then you can deduce what is important and what isn’t (Locations Manager).*

The second subtheme, *adding control* refers to the need of the prep crew to retain the guideposts set by the writers and contain their creative freedom. This process was evident in the formal planning meetings where the writers often clarified their intentions in the script by using analogies to other shows such as, “I’m pulling off a little *LA Confidential* here” (Writer-4). In a similar vein, the department heads often asked the writers questions about the new characters (e.g. what their history or background is) or settings (e.g. is this an opulent hotel or a dive bar) in order to develop an understanding of things that may be important for the story, but are not contained in the script:

*Even when it’s not written into the script you always form stories about their background so that you actually have something to draw from. (Costume Designer).*

Surfacing these control guideposts sets the creative trajectory for each of the prep departments. This allows them to enhance the guideposts sets by the writers and encourages

additional creativity by allowing for more differentiation (from past episodes). At the same time, there are still tensions between creativity and control as the prep department heads need to contain their creative aspirations in terms of what will work best for the story.

**Fine-tuning.** Defined as mapping out the best way to capture the physical elements and action in the story on camera, fine-tuning contains two subthemes: adjusting creativity and adjusting control. The first subtheme, *adjusting creativity* refers to the requirement of the shooting crew to reconcile the plans the Director has for each scene with the needs of the Director of Photography (DP). This requires an additional layer of creativity that goes beyond the required physical elements.

Since the demands of constant shooting prevent the DP from travelling to locations on the tech survey (i.e. the formal planning session that happens at each location in the shooting block), the Key Grip (responsible for cranes, dolly tracks and other rigging for the camera) and the Gaffer (responsible for electrics and lighting) stand in as his eyes and ears:

*We are another set of eyes for the DP, and sometimes we're the same set of eyes since he can't be everywhere at the same time (Key Grip).*

On the tech survey, the Key Grip and Gaffer map out the plans for the lighting and the camera rigging that the DP will need to shoot each scene. They need to consider both the technical and artistic components of what is required as they develop these plans. The script remains an important focal point in this process as it provides guidance for the overall feeling that must be achieved in each scene.

The second subtheme, *adjusting control*, refers to the need to adapt to the physical constraints of each location, or what the shooting crew calls the 'logistics' of the shoot. The

unique attributes of each location are carefully considered as they develop their plans for how to approach each scene:

*There's also the logistics of moving all of the equipment out to the location. Sometimes there's a space thing as well. How much room do we have for the equipment, for instance, whether we're shooting in a house or in something like an attic or a barn (Gaffer).*

Several transport trailers carry the gear (lights, camera rigging, generators), the portable dressing rooms for the performers and the portable washrooms (i.e. honey wagons) for the shooting crew. In other words, the shooting crew does not have a small footprint. The shooting crew works closely with locations to map out the best use of space on each location to make it workable for the crew in light of the director's plans.

Balancing the demands of creativity and control does not come without tensions for the shooting crew. For instance, locations present a particular challenge since, unlike the standing sets, they are not purposely built for a camera crew. Working within the physical constraints of each location requires adjustments to both creativity and control in order to transform the space into a functioning set.

### **Summary of conceptualizing**

The guideposts for creativity and control set out by the writers in each script are systematically enhanced by each of the other groups. The script is, in effect, the minimum necessity – rather than the maximum – for creativity and control. In other words, conceptualizing enables everyone else to add to creativity and control. By starting with the script, conceptualizing sets the overarching guidelines by providing limits; however, these are inner, rather than outer, limits. The common denominator must be found time and time again for each scene in every script.

Consequently, creativity and control progressively usher in (bearable) tension as the path forward requires balancing creative aspirations within the bounds of what can be physically accomplished.

### **7.3 Visualizing**

To visualize is to form a precise mental image or picture of something. This is where the loosely-formulated individual images of what something might become start to coalesce into a coherent picture. Since no two scripts have the same combination of creative inputs, visualizing establishes the foundation for the elements to be created, whether it is the actual script itself, the physical elements (sets, props and wardrobe) or the lighting needed to create a certain feeling in a scene.

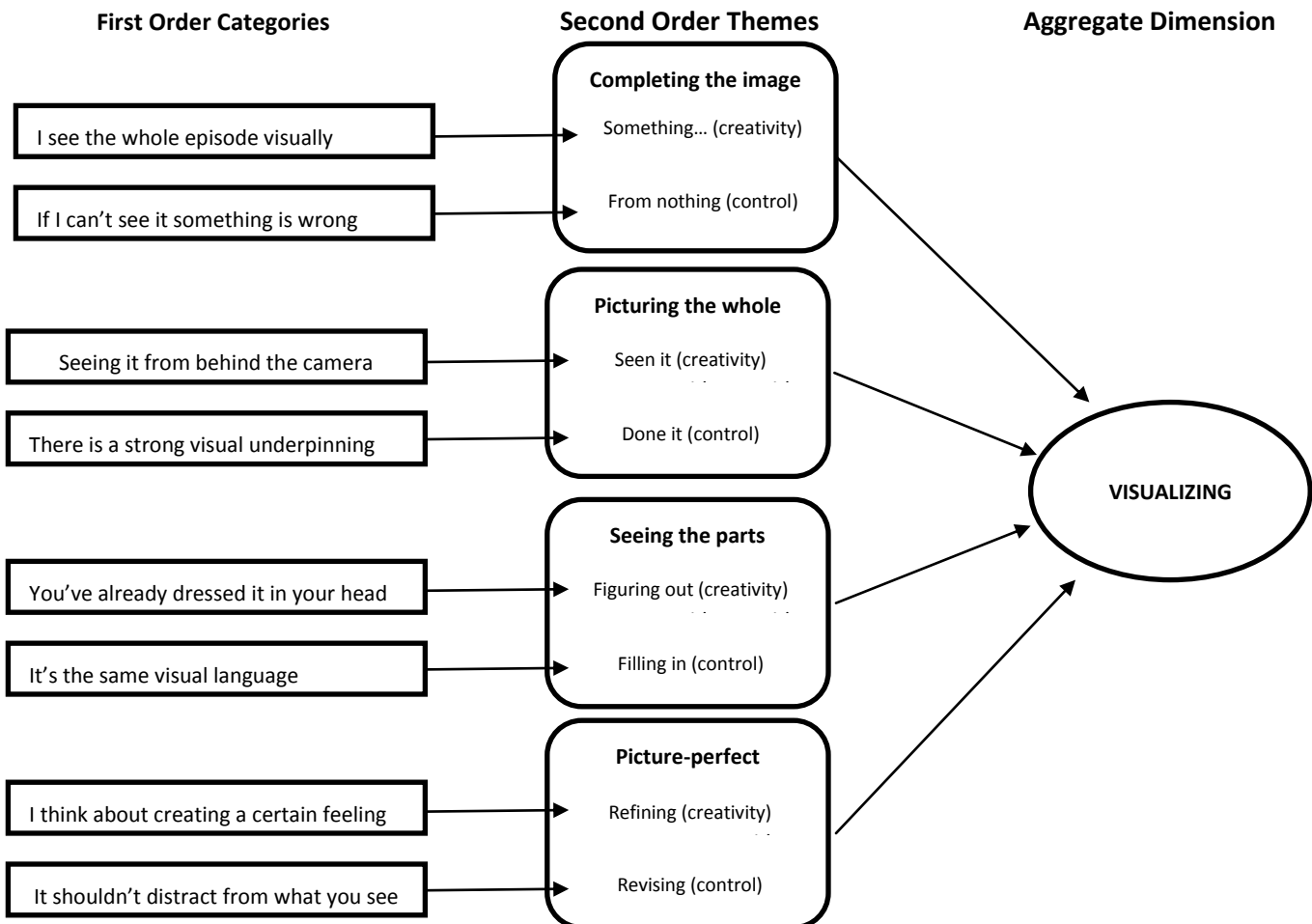
Unlike novels, scripts are based on dialogue not description, so there are only brief references to the physical settings and objects. For instance, the introduction for one scene in a script of Series X contains the following description: “Ext. Clearing – Cedar Trees – Day 1.” While this scene clearly needs to be shot outside (exterior) amongst some trees, there is considerable room for interpretation as to where this scene should ideally happen. Given these brief descriptions, the process of visualizing paves the way for mapping out a visual image of what each script will become, in whole and in part.

Since the physical objects originate from different departments, the practice of visualizing provides the cohesive creative vision for each script. The coherent picture that emerges through visualizing helps to preserve the integrity of each script. As illustrated in Figure 7.2, the temporality-specific functions of visualizing illustrated include: (1) completing the image (the visual template for the story); (2) picturing the whole (guiding images for the visual template); (3) seeing the parts (concretizing images of the individual components); and (4)



Picture-Perfect (imaging the completed scene). The subthemes within each of these subcomponents represent two sides of the same whole.

**Figure 7.2: Data Structure - Visualizing**



**Table 7-3 Representative Quotes Underlying Second-Order Themes (Visualizing)**

1 <sup>ST</sup> Order Categories	Second-Order Themes		AGGREGATE DIMENSION: VISUALIZING
	Completing the image		
I see the whole episode visually.	<u><i>Something... (creativity)</i></u> You come up with a complete vision. I'm not sure what other writers do, but I see the whole thing very visually. I see the whole episode. I don't see where the camera is placed. I don't think to that level of detail but I see if they're carrying a box, I see in my head what that box looks like (Writer-1).  Every time I'm writing a scene, I'm actually acting it out in my head. I can see where they're standing, I can see where they're talking to each other and I can see where they're moving (Writer-3).	DIEGETIC	
If I can't see it, something is wrong.	<u><i>From nothing (control)</i></u> It never ends up happening that way but at least I can see it as a realistic entity. If I can't then I know that there is something wrong (Writer-3)  It was one of these things that when it's written on the page it works one way, but when you start to think about it visually, it doesn't. It needed shadows (Director).		
Seeing it from behind the camera.	<u><i>Seen it (creativity)</i></u> I have already visualized in a lot of ways, how it's going to go [...] quite literally, from behind the camera. The scenarios that I plan in terms of how we do a set shift; [...] what's the last shot that I expect to be in for that set shift to get facilitated (1 <sup>ST</sup> AD-1).	SYNOPTIC	
There's a strong visual underpinning.	<u><i>Done it (control)</i></u> Out of every 6-1/2 days, we spend 3 of them in the [standing sets] so there is a very, very strong visual underpinning. These swing sets have that same kind of visual underpinning. It's all got the same flavour (Production Designer).		
You've already dressed it in your head.	<u><i>Seeing the parts</i></u> <u><i>Figuring out (creativity)</i></u> You start with [the script] and then you start to actually visualize what each of the characters are actually going to look like. And you know where they are placed, what their surroundings are; their lives (Costume Designer).  You've read the script a few times so as they're talking about it, you're in the space and you've already seen it. You've dressed it in your head. You know what it's going to be (Set Decorator).	CALENDAR	
It's the same visual language.	<u><i>Filling in (control)</i></u> Like [the Production Designer and Art Director] don't even ask to see a lot of stuff now because they know that it's going to be a certain thing. Because it's the same language: once you get it [...] you've got the same idea (Set Decorator).  There are the personalities of the directors that you are dealing with and what their visions are. But, then you are almost the one that needs to say, "Well, this isn't right for the show," because you've [...] already created a specific look (Costume Designer).		
	<u><i>Picture-perfect</i></u>		
I think about how to create a certain feeling.	<u><i>Refining (creativity)</i></u> I think about how to light it and where to put the lights [...] For instance the way we use back lights can create a certain feeling in the scene (Gaffer).	CLOCK	
It shouldn't distract from what you see.	<u><i>Revising (control)</i></u> Moving the dollies so you don't feel the camera moving: that's the most important thing. You never want the camera movement to distract you from what it is you're supposed to be seeing (Key Grip).		

**Completing the image.** Defined as creating the visual template through the story, completing the image comprises two subthemes: Something... (creativity) from nothing (control). The first subtheme, *Something...* refers to how the writers realize story ideas through their creative process. The writers actually act out individual scenes in their imagination as they are drafting their scripts. They see the story as it unfolds scene-by-scene and how it comes together as an entire episode. Through this process, the writers effectively establish the visual foundation that will be elaborated by the rest of the crew:

*It is probably the most important role because you're taking something out of thin air and creating a template for something that will actually be created. And you do see that episode in your head. All the lines are spoken; they're in your head before anyone sees them (Writer-1).*

Visualizing transports the writers into the worlds of their characters one word, one line and one scene at a time. This ensures the authenticity of the final product as it is through visualizing that the writers connect with the unique 'voice' (i.e. personality, body language) of each of the characters. It is an important part of their creative process as it allows the dialogue to emerge naturally from the images they see.

The second subtheme, *from nothing* refers to the control provided by the absence of a complete vision, whether it is a scene to be written or how the Director will transform the written word for the screen. If the image fails to crystalize in their mind's eye, it is a signal that something is wrong. The absence of a vision is a signal that additional creativity is required. For the writers, this additional creativity sometimes needs to come from the other writers in the room:

*When I was trying to do [the second script], I couldn't do it by myself. I ran into trouble and I had to throw it to the room (Writer-1).*

As the connections between creativity and control increase through this process, the tensions between them are less pronounced. Controls act as a signal that additional creativity is required. Thinking visually lays the foundation for the visual template emerging from the script. At the same time, it is understood that the final product may not happen exactly as imagined.

**Picturing the whole.** Defined as the guiding images for the visual template, picturing the whole includes two subthemes: *Seen it...* (creativity) and *done it* (control). The first subtheme, *Seen it...* refers to the process of visually breaking the whole into parts so individuals can get each part just right. This process is not confined to the physical objects referenced in each script, but extends to developing a mental image of how each day of the schedule will unfold for each episode. For instance, the 1<sup>st</sup> AD describes the effects of imagining each day on set:

*The biggest challenge ultimately is that I already feel like I've shot it. [...] If I haven't already gone through it in my head in a lot of ways – I don't know how to put it – there's no target, you know what I mean? (1st AD-1)*

At the same time, the 1<sup>st</sup> AD exercises caution in becoming too attached to this image given the tacit understanding that reality has a way of interfering with even the best laid plans (especially on location). Thus, this guiding image not only provides the creative target for each day of the shoot, it is also designed with flexibility in mind. This creates possibilities for different combinations and options should any unplanned or unmapped contingencies arise when the actual day arrives.

The second subtheme, *done it* refers to the enduring scaffolding that exists through the unique visual language of the series. This language has been imprinted in the standing sets

dedicated to specific offices, homes and public spaces that appear in each script. Additions to these sets, such as the multi-purpose swing sets built in the current season, are made through “*a process of accretion*” (Production Designer) that keeps the look similar across all the seasons of the series. All of the physical objects created for each episode of Series X are designed with this visual language in mind.

The visual underpinning of the sets is complemented by the visual style of the DP created through lighting and camera angles. In series production, the visual style of the show is the purview of the DP, not the Director as it is in film. Even though the directors change in each shooting block, the visual style of Series X remains constant:

*I mean, the cinematographer is the same guy [for all of the episodes]. He's been shooting [Series X] now for several years - - he uses the same lighting technique so there's a consistency that is just kind of there, by default (Production Designer).*

The connections between creativity and control in visualizing are, once again, apparent for this group. The subtle nature of the controls is also tilted towards creativity in this temporality. The consistency provided by the visual language and style provide the guiding images for the visual template and ensure that each Series X episode looks like a Series X episode. As long as they stay within this frame, there is considerable autonomy for the rest of the crew.

**Seeing the parts.** Defined as visually rewriting the script by adding context and details, seeing the parts includes two subthemes: figuring out and filling in. The first subtheme, *figuring out* refers to the process of finding clues for what's still missing by more fully visually contextualizing the characters and settings included in the script. Each of the prep department heads tailors this process to their own specific areas (e.g. art department, sets and costumes) in

order to develop a clear image of what their respective teams need to deliver. They also look for ways to make improvements to what is on the page. For instance, the Locations Manager describes his approach to this process:

*You [...] start looking at the locations and the action at the location. It may be that what's on the page is not as good as something that you know of that can better do the action and you subtly get that in if you think it helps the story (Location Manager).*

Each of the department heads focuses on a different aspect of the story. For instance, the Costume Designer will focus on what each of the characters will look like, their surroundings and their lives in order to imagine how to dress each character. The Set Decorator, on the other hand, will focus more fully on the surroundings to imagine what each room of a character's home or office will look like. The clues provided in the script help each of these individuals develop concise designs for each physical object.

The second subtheme, *filling in* refers to adding the necessary details to crystalize the images of the visual elements. Their primary aim is to realize the writers' intentions for the script. At the same time, the prep crew looks for ways to enhance the story by visually revealing aspects of the characters or the setting that are not conveyed through dialogue. This is reminiscent of a 'devil-is-in-the detail' type of attention as every fine point in the story is analyzed and interpreted in relation to its potential visual significance. One of the writers describes how this process unfolds in the scheduled planning meetings:

*The AD will walk through everything [in the script]. "Scene 1: Interior restaurant – Café Diplomatica. Day 2. A couple set in front of two half eaten meals; blah, blah, blah..." And then they'll say, "Whoa! Okay, wait a second, what are they eating exactly here? Does it matter?" (Writer-4)*

What is on the characters' plate may or may not be important to the story, but neither is assumed. The additional insights revealed in the answers to these questions fill in a progressively more precise picture. The emerging picture of each specific object is ground in the established visual language of the Series which also gives each of the prep department heads significant autonomy in designing the physical elements required. 'The look' established for the sets and the costumes provide a lens through which they filter the requests by the different directors over the course of the season.

The connections between creativity and control become more closely aligned as certain creative ideas can be easily filtered out if they are not right for the show, no matter the source. Visually rewriting the script provides another form of narrative that is necessary in order to enhance both creativity and control though, once again, the analysis shows how additional controls (e.g. devil-in-the-detail) set the visual tone to enable additional creativity. Creativity is enhanced by adding in missing elements (context or details) so that a fully formed visual is possible.

**Picture-perfect.** Defined as imagining the completed scene, picture-perfect includes two interlocking subthemes that involve thinking visually from the perspective of what will be filmed by the camera: refining (creativity) and revising (control). The first subtheme, *refining* refers to the process of visually inferring how to create the desired feeling in each scene through lighting as well as where and how the camera needs to move to capture the mood and the moment of each scene. This additional layer of creativity requires the technical expertise of the camera crew:

*There's a certain amount of alchemy involved. There's a technical component involved where you scientifically manipulate the light source, but there is the other part of it as*

*well. Then, there are the artistic considerations like how we want to light a particular scene. I love that part of it, but it's also something that's very subjective (Gaffer).*

The second subtheme, *revising* refers to the process of making adjustments based on what will be captured through the lens of the camera. In many ways, the lens of the camera represents the eyes of the audience. By peering through this lens in their imagination, the Key Grip and the Gaffer are able to adjust the balance so the lighting and the camera movement enhance, rather than distract from, what it is the viewer is supposed to see. For scenes scheduled on location, this process often happens as they are physically standing in the space:

*What we need to light the location depends on whether it is a day scene or a night scene. Sometimes that may even change when we're out on a tech survey: things can also go the other way. For instance, the scene may initially call for a big light because it's a night scene, but when we get out to the location on the survey, we find out that it's not really needed because we can light the scene differently (Gaffer).*

In these situations, the original plans for the scene are adapted to fit the particular features of the location. For instance, when the Gaffer sees a night scene in the script, he instinctively recognizes the need for a certain standard set up. Night scenes require a more complex configuration with specialized (and expensive) lights designed for that purpose. However, these plans are easily adapted if the ambient light sources on a particular location make a different combination possible. Visualizing the light needed while physically in the space helps develop those options.

The connections between creativity and control are even tighter for the shooting crew than the other groups in visualizing. For instance, creating 'alchemy' with lighting requires technical proficiency in order to understand how lighting can be used to create a certain feeling.



Standard lighting set ups provide a control in terms of establishing the minimum requirements, but these can be ignored if the setting allows for different options and combinations of equipment. Controls are set by the technical requirements of their craft, but creativity also emerges from their technical proficiency.

### **Summary: Visualizing across the temporalities**

The relationship between creativity and control noticeably tightens through the subcomponents of visualizing as the connections between the two become more pronounced. The balance between creativity and control is tilted toward creativity in visualizing as it is much more about enhancing creativity. Controls are used to contain and encourage creativity within a certain trajectory. This trajectory starts with the script with each added layer of creativity building on what is or is not included in the script.

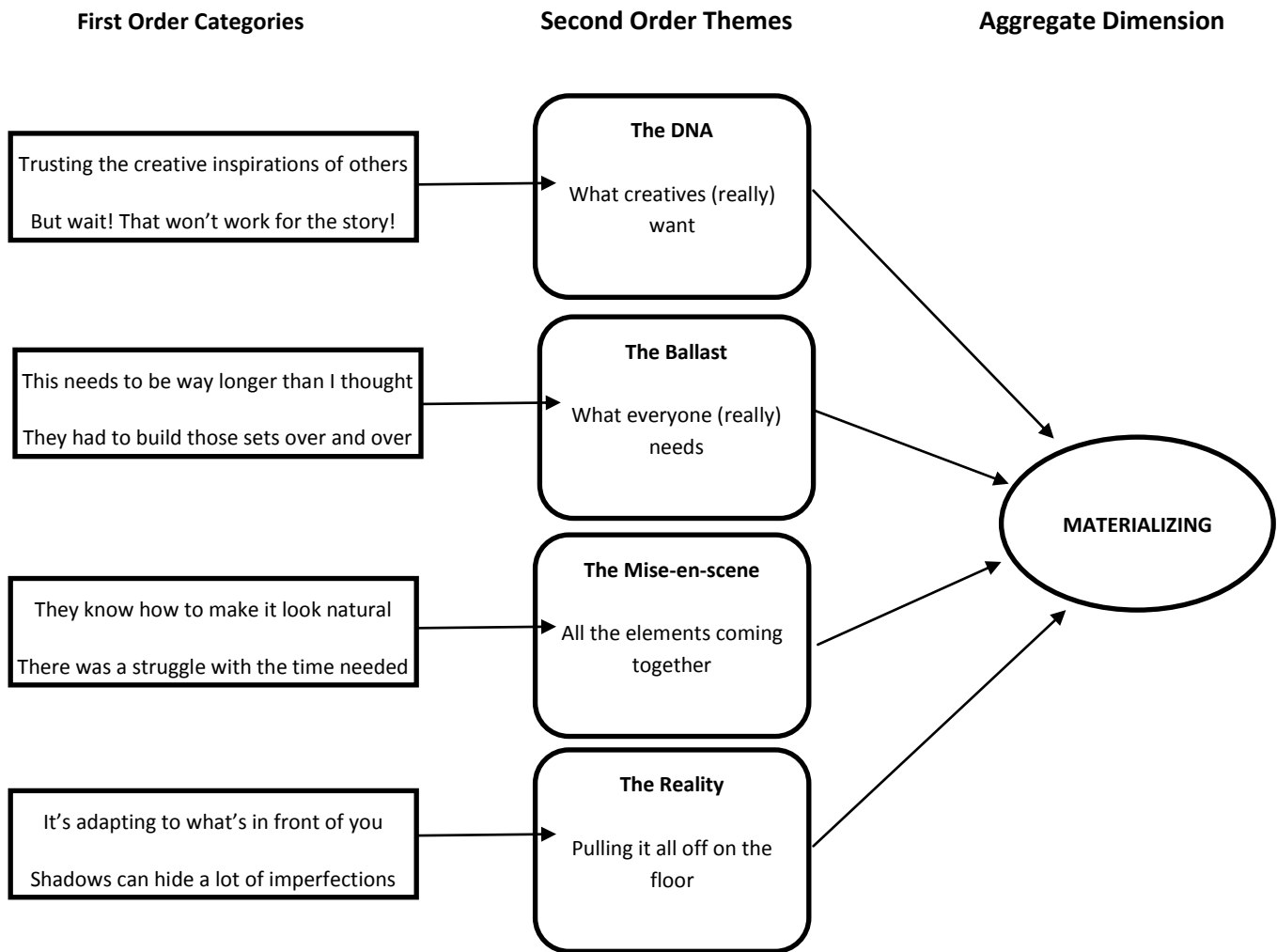
### **7.4 Materializing**

To materialize is to bring something into existence in physical form. On Series X, materializing is the process of bringing all the creative and logistical elements to fruition and capturing the performance on camera. The modest budget of Series X exacerbates this challenge as the shooting crew faces a shooting schedule that is slightly ‘time compressed’ (e.g. shorter standard hours per day and fewer days per shooting block). Materializing is a process centered on realizing the (un)written word in bringing the script to reality. When reflecting on this transformation, the Costume Designer remarked, *“It always amazes me too, that we start out with writing on a page and then what it becomes.”*

Figure 7.3 provides an overview of the four main subthemes in materializing: (1) the DNA (sustaining the core of the story); (2) the ballast (loosening and/or tightening constraints to realize the core of the story); (3) the mise-en-scene (all of the elements placed before the

camera); and (4) the reality (reconciling what *ought* to be with what *can* be). The representative quotes that underpin the first- and second-order themes are shown in Table 7.4.

**Figure 7.3: Data Structure - Materializing**



**Table 7-4: Representative Quotes Underlying Second-Order Themes (Materializing)**

1 <sup>ST</sup> Order Categories	Second-Order Themes		AGGREGATE DIMENSION: MATERIALIZING
	<i>The DNA</i>		
<p>Trusting the creative inspirations of others.</p> <p>But wait! That won't work for the story.</p>	<p><u><i>What creatives (really) want</i></u></p> <p>[The Production Designer] for instance had a different vision for the [key set piece on an episode]. I couldn't say, "No, this is the way it's going to be" because it was now her job to make it look as cool as possible. And she made it (Writer-1).</p> <p>Partly we're there to make sure that what people want is reflected in the script: that what's discussed is also reflected in the script. And it's also in case someone says something and you just go, "Hang on a minute, that won't work for the story." You know if someone has some bright idea and they all fall in love with it (Writer-2).</p>		DIEGETIC
<p>This needs to be way longer than I thought.</p> <p>They had to build those sets over and over.</p>	<p><u><i>The Ballast</i></u></p> <p><u><i>What everyone (really) needs</i></u></p> <p>After we've got the locations, after the dust has settled in all the meetings, we block the scenes. When we block them, then you realize, "Okay, this needs to be way longer than I thought, I have to change the schedule." (1<sup>st</sup> AD-1).</p> <p>Last year, they had to build all those as independent sets and they had to build them over and over and over again. Can you imagine the amount of money that went down the toilet? But, [swing sets] is kind of a trick that I use, and I've used it on series before and I've found it works really, really well. It saves them a whole heap of money (Production Designer).</p>		SYNOPTIC
<p>They know how to make it look natural.</p> <p>There was a struggle with the time needed.</p>	<p><u><i>The Mise-en-scene</i></u></p> <p><u><i>All the elements coming together</i></u></p> <p>They know how to dress; cover it. Even though it seems like an odd thing, but if you don't do it right, it looks like it's fake. Everything has to be natural and that's the biggest talent with the dressers, especially on a show like this, is just making things look natural (Set Decorator).</p> <p>There was a big struggle with how many days were needed. Eventually they relented, and they gave us enough time and we needed it: we worked to the very end. It looked great, but it was so hard to – you're looking at a field, like how long does this take to do? [...] It was more like [the Art Director] just knowing this will take at least three days. It's not a day. And it did: it took three days to do it (Set Decorator).</p>		CALENDAR
<p>It's adapting to what's in front of you.</p> <p>Shadows can hide a lot of imperfections.</p>	<p><u><i>The Reality</i></u></p> <p><u><i>Pulling it all off on the floor</i></u></p> <p>It's just adapting to the realities [...] "I didn't know they were going to back a big [...] school bus into the middle of that street today!" It's like, "Well, it's here now!" "Oh. Okay. Well, we're not shooting that way anymore" because it's going to take too much time to move the [...] school bus. I may as well just move what I had in my head because the school bus is real, and what I had in my head about what I was going to do is going to change (Showrunner).</p> <p>We had this actress in for one episode. She was a beautiful woman: her face was gorgeous, but her neck had gone. It was all crepey. So what can you do about that? When we were figuring out how to shoot that, we cast shadows on her neck so you wouldn't see it. Shadows can be used to cover a lot of imperfections (Key Grip).</p>		CLOCK

**The DNA.** Defined as the essential parts of the story, the DNA represents the key components of the script necessary to realize the writers' creative intentions. The subtheme *what creatives (really) want* refers to the desires of the prep department heads which may or may not align with the DNA as understood by the writers. Negotiating these differences is part of the process of materializing as the writers do make changes to their scripts based on the needs of various departments as well as the Director.

Each script has components that are fluid, malleable, and easily changed to accommodate the needs of others without affecting the DNA. However, there are other parts of the script that are indeed critical for the story that the writers will fight to maintain if necessary. The boundaries between the two are not always evident to the rest of the crew who sometimes err on the side of caution in requesting changes when issues arise:

*Things are far more malleable than anyone out there realizes. Like, we'll [write] "blah, blah blah. [Bob's] office." And it doesn't matter if it's [Bob's] office. [...] It could be just about anywhere. [...] People out there go, "Oh, we can't get that into the schedule! We're going to have to work overtime." It's like, "Dude! Just come in!" (Writer-1).*

The scene written for Bob's office may contain a conversation between Bob and another character that could happen anywhere. Whether the conversation happens in Bob's office, walking down the street or over dinner in a restaurant is not important as long as the conversation happens somewhere. In this particular instance, the constraints of the shooting schedule can prompt creativity as the location of particular scenes can be easily altered (without affecting the DNA) in order to accommodate the shooting schedule.

The writers do not have ultimate say in how their scripts are made material as this requires different forms of creativity that are beyond their ken. However, they do attend the

scheduled planning sessions to ensure that the emerging plans for the script are aligned with the creative aspirations (DNA) of the story:

*Once it's out in production, other people get to weigh in. You don't have ultimate say and that's made clear right off the top. The Art Department, they'll listen to you and what you have every right to do is say, "Okay. That's a story point; it can't be that way" (Writer-1).*

In a blurring of the boundaries between creativity and control, the writers protect the DNA to prevent creative interpretations that are inconsistent with the DNA from carrying the day. It is a delicate balancing act since they need to convey the significance of the particular point and create a different sense of the story in order to maintain the DNA.

**The Ballast.** Defined as the loosening or tightening of specific constraints, the ballast provides the flexibility to realize the DNA of the story. The subtheme *what everyone really needs* refers to the micro-process of distinguishing what is absolutely essential from what would be 'nice to have.' The 1<sup>st</sup> AD elaborates on this theme:

*On any show we have our needs and we have our wants. The first thing we need to do is figure out our needs and then we can move onto our wants (1<sup>st</sup> AD-1).*

The 'needs' of each script represents the minimum required to deliver the product. This minimum is rooted in the expectations established (and anticipated by audiences) regarding the quality of the product. To consistently deliver the expected level of quality, certain scenes in each script are identified as the creative priority. Constraints are loosened for these key scenes but tightened for others that are more routine or less crucial. This allows for additional attention to be focused on the areas that matter:

*You hope that you identify early what I say is the hill to die on. If you don't identify that early, there may be 2 or 3 or even 4 scenes that are the crux of the episode being short-shrived. Then, you're not doing a service to the show (1<sup>st</sup> AD-1).*

In order to ensure key scenes are not compromised, the schedule can be loosened in order to realize the creative intentions of the Director. Constraints can also be tightened in multiple ways. For instance, building multi-purpose sets instead of designing individual sets for each script frees up resources (time and money) to allow for additional creativity (i.e. the 'wants') in other areas.

The overlaps between creativity and control become more apparent as additional controls are added in certain areas to allow for more creativity in others. The distinction between needs and wants sets the minimum standard (control) for each script. However, this does not eliminate the need for creativity. If anything, the need for creativity increases given the additional constraints.

**The Mise-en-scene.** Defined as placing every element inside the scene that will be captured by the camera, the mise-en-scene is about getting everything and everyone ready for the story. The subtheme *all the elements coming together* refers to the props, sets and costumes that must come together in order to create the desired atmosphere. In the words of the Art Director, this process is about "*allowing and creating a path to tell the story. It's all about the story.*"

A special kind of creativity is required to make the sets look natural even though they are staged. Sometimes a single wall needs to convey the feeling of an entire room. Locations present an additional challenge as the existing spaces need to be completely remade for the show. This could involve remaking a public space such as a library into an intimate apartment or carving a fishing camp out of a field of weeds. The spaces need to be transformed under the time pressures

of the shooting schedule where three days is often the maximum time the prep crew can reasonably hope for.

The time constraints leave little margin for error and require controls to direct creative activity along a very specific trajectory. Transforming each location into a functioning set involves a broad set of tasks and each part comes from a very different group. The Art Director talks about how he provides creative direction differently to each of them:

*There are various frames: for construction it's very geometrical. I need this room: this wall from here to there, three doors, three windows, this, that and the other and this finish and that's that. When we are giving art direction to the decorators, we often like to talk about more than just a specific roll-top desk or this and that. We like to talk about mood. I try to remind them that [...] even though it's a material thing, it's not a growing element; they nevertheless have an energy about them **if you are sensitive enough**. And certain pieces will evoke certain feelings (Art Director; emphasis by participant).*

This direction provides control over the creative trajectory by establishing a sense of the atmosphere that needs to be created when all of the individual pieces come together. At the same time, this direction is not so specific that it removes all room for artistic license:

*What we try to do is, is first of all give them an overall, the sense, because they've all also read the script. They are also equally artists like us. And in that, particularly in that area, they are very much part of the design process: of creativity. So we sort of give them a layout in terms of, let's have a pair of these. They get the sense of what we want, so they just don't go and just [do anything] (Art Director).*

The overlaps between creativity and control become more apparent as controls are required to contain creativity with clearly defined parameters. The tight timelines provide little

opportunity for error, but their tasks all require some form of creativity whether it is putting the patina on a newly created ‘antique’ or carving a fishing camp out of the wilderness. While the balance is tilted toward control, materializing does require some form of creativity.

**The reality.** Defined as reconciling what that material reality *ought* to be with what the material *can* be, the reality requires adjusting to what you have to work with. The subtheme *pulling it all off on the floor* refers to the need for an immediate response to unplanned or unmapped contingencies. Given the limits of their standard 11-hour days, the shooting crew must adapt in the moment. For instance, when a rookie actor is too nervous to execute his lines or when the shooting crew arrives on location to find a school bus parked in the street that would be out of place in the planned scene, the shooting crew is forced to adapt their plans.

To overcome these obstacles, actors’ lines may be changed and shooting plans adjusted on-the-spot. At other times, shadows can be cast to hide the imperfections of age or the stage (e.g. aspects of the set that should not be seen). Given the unrelenting time pressures, small things sometimes get overlooked in the translation from the page to the set. In these instances, the shooting steps up to make the necessary adjustments:

*It can be a bit crazy on set sometimes [...]. But, I mean I think there’s a big difference between when you’re visualizing something in your head, then when it’s actually in front of you, it’s not quite the same. And so we just have to adapt to it (Gaffer).*

The headsets worn by each member of the shooting crew allows for a constant flow of communication so they can adapt on the fly – as individual groups and as a collective unit – when they encounter these moments. Unplanned or unmapped contingencies can range from the more mundane (e.g. concealing imperfections with shadows) to close calls with potential disasters, such as a key prop breaking down at a critical moment:



*We all have to have an adaptability to what's going on. For instance, when we were out in the field the other day to get the shot of the plane, it snapped in half before we got the shot. Now, [the Props Master] had been working on this plane for weeks, but the wheels literally fell off the plane! So we had to scramble and change the scene order and try to get the plane fixed (2nd AD).*

Although uncommon, an event such as this stands out for the fast and flawlessly executed response by the shooting crew. It also highlights the overlaps between creativity and control: for the shooting crew creativity is used to regain control momentarily lost. This dual functionality of creativity and control emerges from the daily pressures of the clock for the shooting crew. Their time constraints are even more pronounced than those of the other groups.

### **Summary: Materializing across the temporalities**

Materializing is characterized by the hybridization of creativity and control, where one almost becomes a substitute for the other. In materializing, the balance starts to tilt towards control, but not at the expense of creativity. In fact, as the links between creativity and control become noticeably tighter as we move through the DNA, the ballast, the mise-en-scene and the reality, it becomes easier to see the interpenetration between them. For instance, when the shooting crew is forced to adapt to near-disasters it is a kairos moment of sorts, albeit one that is somewhat akin to making lemonade when life deals you a lemon (i.e. using creativity to regain control).

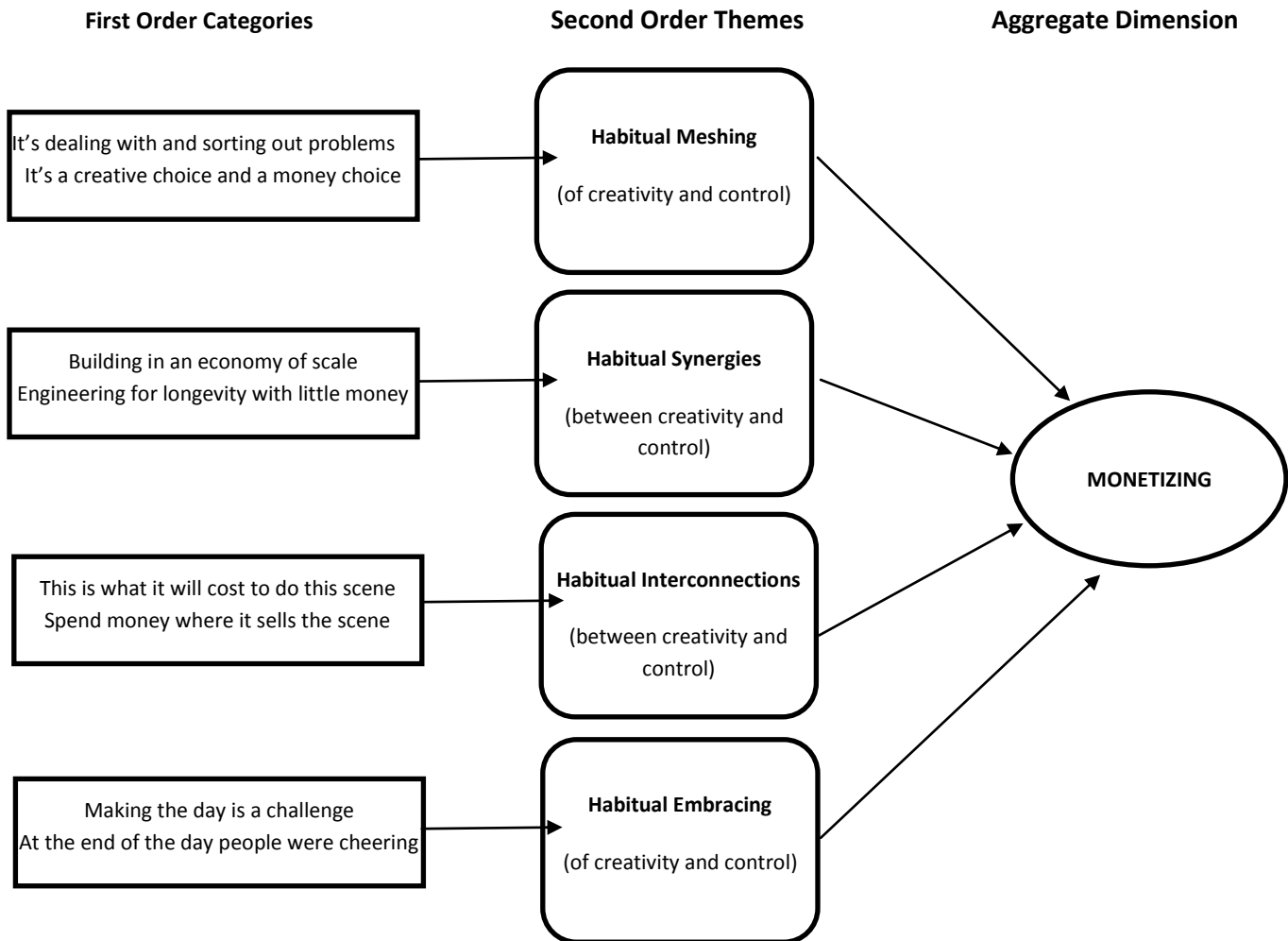
### **7.5 Monetizing**

To monetize is to assess something in terms of its monetary implications by translating specific actions or objects into monetary terms. Since every script demands a unique set of inputs, the costs of realizing creative aspirations must be calculated separately for each script. The time pressures of the schedule are an inherent component of this calculation for the department heads,

as are the boundaries of their department budgets. While financial resources are routinely redeployed to where they are most needed, the project budget can only ‘give’ so much because of the need to balance to the bottom line.

There were four subthemes associated with monetizing as shown in Figure 7.4 with each describing a different relationship between creativity and control: (1) habitual meshing (monetary and creative choices become the same thing); (2) habitual synergies (doing more creatively with less money); (3) habitual interconnections (owning the ‘costs’ of creative choices); and (4) habitual embracing (using creativity for control or vice-versa). The representative quotes from which these themes emerged are detailed in Table 7.5.

**Figure 7.4: Data Structure - Monetizing**



**Table 7-5: Representative Quotes Underlying Second-Order Themes (Monetizing)**

1 <sup>ST</sup> Order Categories	Second-Order Themes			
<b>Habitual meshing (of creativity and control)</b>				
<p>It's dealing with and sorting out problems.</p> <p>It's a creative choice and a money choice.</p>	<p>It's the rough and tumble of it. It's dealing with problems and sorting out problems. [...] It's fun working problems out with other people and you feel important (Writer-1).</p> <p>So either the script gets changed and you don't have them, or you do, so it's a creative choice, but it's a money choice as well (Costume Designer).</p>	<b>DIAGETIC</b>	<b>AGGREGATE DIMENSION: MONETIZING</b>	
<b>Habitual synergies (between creativity and control)</b>				
<p>Building-in an economy of scale.</p> <p>Engineering for longevity with little money.</p>	<p>What I'm trying to do is trying to lock in a bigger picture so there is a built-in economy of scale; an efficiency factor that allows us to do more, deeper, for less money. Which is how we do a show like this for [our budget], right? (Production Designer)</p> <p>The question was, what can you engineer that is going to give you - - where you're not going to be shooting off into a corner, but something that is going to have some sort of longevity, that's going to have some sort of scale for that kind of money. That was the issue, so the aesthetics aside, it was all about what kind of depth of field can we get for that kind of money? (Production Designer)</p>	<b>SYNOPTIC</b>		
<b>Habitual interconnections (between creativity and control)</b>				
<p>This is what it will cost to do this scene.</p> <p>Spend money where it 'sells' the scene.</p>	<p>Then from my perspective, there is the Wardrobe Meeting. [...] That involves the money part of it, so I'll say, "Well, this is going to cost this much. If you want to do this scene, it's going to be that much money" (Costume Designer).</p> <p>We'll go into a space, if it's going to be darker in there, then I'll fake it with a lot of our stock. Then we'll get like nice lamps. We'll rent those. We'll get a nice piece of art, because we'll see it. The rest will just be shapes that will kind of fade away. So we do tricks like that. Or you spend - if it's an expensive place - it's the curtains. The drapes will - if they are built properly and of a certain material, it will sell it (Set Decorator).</p>	<b>CALENDAR</b>		
<b>Habitual embracing (of creativity and control)</b>				
<p>Making the day is a challenge.</p> <p>At the end of the day people were cheering.</p>	<p>[Making the day is] very important, but also as a challenge as much as anything else. You visualize how you can do it and then it happens and you're like, "Hah!" It's a little game that you play with yourself (1st AD).</p> <p>The day before I shot 8-1/2 or 9 pages and it was literally like every half an hour a scene, a scene, a scene. At the end of the day, people were like, "Go, [girl], Go!" (Director).</p>	<b>CLOCK</b>		

**Habitual meshing.** Defined as the interpenetration of creativity and control, habitual meshing refers to the writers' engagement in a process of give and take in order to make their scripts work for the rest of the crew. It is at this point that creative choices become indistinguishable from money choices. There is a cost associated with each element in the script and the writers are sometimes required to reconfigure their creative aspirations:

*Things do change when you have the Concept Meeting and you have the money people, "ch-ch-ch-ch. Oh no!" Then obviously you get your best wishes and fantasies brought down to earth. That happens pretty quickly those first couple of days, "We can't do this. We can't do that. [...]" And that's where there's a negotiation process there too (Writer-1).*

The writers do negotiate any potential changes by reinforcing what is important for the story (e.g. the necessary minimum); however, most changes to the script are made for financial reasons. The 'money people' (i.e. the Line Producer and Production Manager) may be the ones that communicate the information, but the estimates are prepared by the prep crew who are deeply concerned when scripts push them beyond the bounds of their department budgets. They bring their concerns forward as soon as they are known:

*If you go to the decision making people and say, "Look, your decision to do this is actually making it so I have to do this, this and this and it's costing more money, [...] or I need more staff or whatever." They'll often go, "Oh, no! We don't want that!" And they'll rethink it. They'll even rewrite it... (Asst. Costume Designer).*

When monetizing makes changes to the script necessary, the writers take up the challenge as problem-solving for the benefit of the larger collective. They want their scripts to work so they compromise best wishes and fantasies to bring the script in line with the monetary reality.

For the writers, compromising in certain areas of their scripts for the sake of the budget does not mean abandoning their intentions for the story. On the contrary, the writers often use these moments to find ways to make the scene better:

*I think the budget part and trying to make a script work is actually kind of fun. [...] It's very satisfying when you have a meeting where you realize, "I've just saved \$15,000 by removing something that's not going to affect the scene at all." In some cases it often improves it (Writer-4).*

This process gives the writers a sense of creative control as monetizing becomes about the co-generation of creativity and control. By responding creatively to the financial reality, they not only retain some control over the script, they also look for ways to make it more immediate and exciting for audiences.

**Habitual synergies.** Defined as doing more (creatively) with less (money), habitual synergies bring together creativity and control from the broader perspective of the overall project. For instance, when designing the original standing sets for Series X, the Production Designer weighed the aesthetic requirements in relation to the amount of money available (which is never enough no matter the size of the budget). The standing sets need to endure for the duration of the series, which is always unknown at the outset of the project. Yet, the initial design incorporated the need for longevity as well as depth of field to provide flexibility for the anticipated future seasons of the series.

This foresight proved invaluable for a series now in its sixth season. It also highlights the important distinction between saving money and doing more with less:

*Trying to save the money is just going to create even more costs so you have to keep that in mind and there are ways of breaking that down to the micro levels: the effects not only*

*in the overall calendar of the production, but also on the day-to-day operations. And so those are the two things: balancing those two things over the course of the whole calendar and then on the day-to-day operations (Line Producer).*

In order to consistently do more with less, the production team engages in problem-solving to realize habitual synergies in each and every shooting block. During their weekly cost report meetings, the Line Producer and Production Manager review the cumulative costs of creative aspirations incurred to date and forecast the costs of those yet to come in the form of future scripts:

*When you're balancing that cost report, you've got to think, "Did we spend more that isn't in the system?" And also, you know about what's coming up later that no one even knows about yet, but I've read it, or talked to [the Showrunner] about it, and we've got to prepare for this, or put some money aside for that (Line Producer).*

This process paves the way for reallocations of money across departments and/or shooting blocks to better meet the creative expectations of each script. When the outer limits of the project budget are being pushed too far, the simplest way to bring it back in line is to change the story. Although this is never the first course of action, it is sometimes the only option, but even then it is not at the expense of creativity:

*If you're able to weigh [what matters] and be right most of the time, it's fine, you won't go over budget. It's like, "That [...] crowd scene? Well, it just turned into a guy and a girl" but the same point was made and maybe even made better (Showrunner).*

Doing more with less requires the constant vigilance of the Line Producer, Production Manager and Showrunner. The focus is not on generating savings for the sake of reducing costs, but on finding the right balance between the creative aspirations of each script and the financial

reality of the project. In this way, they actively seek out the synergies between creativity and control in each and every script.

***Habitual interconnections.*** Defined as owning the cost of creative choices, habitual interconnections refer to the deep-seated understanding of how money shapes what can be accomplished creatively. It is revealed through the prep crew's acceptance of the limits of the budget and how they embrace these limits as a creative challenge. When there is no room for the budget to give, the prep crew takes it upon themselves to develop less costly alternatives that work just as well creatively.

Habitual interconnections are also evident in the tricks and cheats deployed by the prep crew as they design and dress their sets and performers. They spend on the elements that will be seen and 'fake' the parts that will fade away into the background. Time and money influence every creative choice the prep crew makes:

*The other very important aspect is time and money. Time and money plays a crucial role in how much we design; how much we put out. (The Production Designer) and I like to take it to the threshold: that is what we are good at (Art Director).*

The threshold is where creativity is maximized within the bounds of the monetary resources available in the budget. It requires the right balance of creativity and control to know where those limits are in order to not stray too far over the edge, but not hold anything back creatively either. These habitual interconnections are shared by the rest of the prep crew:

*It's interesting because they all labour under the perception that they don't have enough money to do their job properly. I mean we all do that. At the same time, they all do their job properly, so they kind of do have enough money (Showrunner).*

The habitual interconnections between creativity and control make it possible for the prep crew to do their job properly even when they could arguably benefit from a little more in terms of the budget. However, through the co-generation of creativity and control the prep crew knows how to spend where it matters most to deliver the level of production values established for the series.

***Habitual embracing.*** Defined as using creativity for control and control for creativity, habitual embracing refers to the co-generation of creativity and control that is an inherent part of the everyday tasks for the shooting crew. Habitual embracing is linked to time, which means money for the shooting crew. Every hour in excess of their standard day and every break not taken at the right moment incur additional costs:

*80% of the choices you make are about money: whether it's about can we afford to hire a particular actress or actor or can we afford to do this extra shot that's going to put the crew into overtime. If we don't get through this scene by lunch, will we take a meal penalty which will accrue a particular cost? No matter what show I've ever worked on [...] the primary creative discussion we have is about money (Showrunner).*

Once the cameras start rolling, the creative decisions become indistinguishable from the financial. This calculus happens in situ as each day unfolds on set and plans are adjusted to get through all of the scenes listed on the Daily Call Sheet (schedule). 'Making the day' is the mantra of the shooting crew and it is taken up as a challenge as much as anything else. The shooting crew routinely cheers the Director when they get through the scheduled scenes without going into 'premium' (i.e. overtime), particularly at the end of a challenging day.

Since the directors are also "tasked with the responsibility of bringing it in on time" (Showrunner), they need to find creative ways to make it through all the scenes scheduled in a



given day. Since the schedule often pushes the bounds of what can be reasonably accomplished by the shooting crew, creative compromises are a regular occurrence:

*Like for all of us, it's all about time. And we know during the course of a day that things happen: maybe you allowed for two hours to do this scene, and now you've got 45 minutes. We've all seen it happen where the Director gets resourceful, then you know what he had planned for a four shot becomes a one (Art Director).*

Creativity and control are generated simultaneously as the Director finds new ways to cover the scene by controlling the number of shots. Reducing the number of shots also requires creativity as the scene still needs to convey the same emotional intensity that different camera angles capture more readily. Thus, the lighting and camera movement are adapted in the moment to make this possible.

### **Summary: Monetizing across the temporalities**

The co-generation of creativity and control in monetizing reveals a specific type of creativity that is almost impossible to see unless you peel away the other layers first. The combination of creativity and control becomes deeply ingrained when everything is monetized. For the prep crew, calendar time can sometimes give when the budget cannot (i.e. more time means less money). However, for the shooting crew, the budget has to give because clock time cannot. Since there is little room for the budget to give when it comes to overtime, the focus of the shooting crew is on managing the clock. Yet the discipline of the clock introduces another form of creativity as adjustments are made every day by the shooting crew.

### **7.6 A Grounded model of coordination over time in LSCCs**

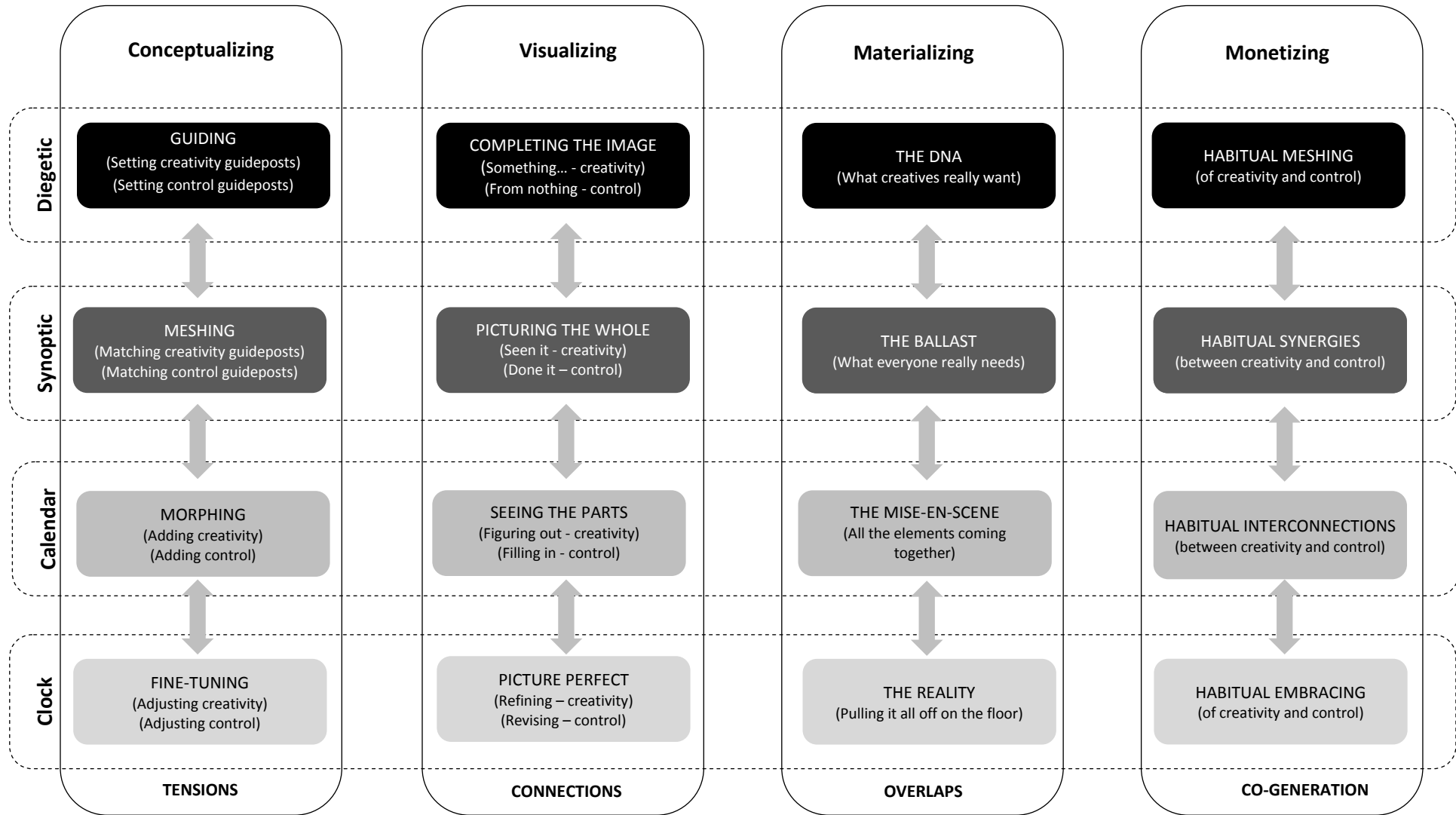
The preceding sections have outlined the constituent components – or sub-processes – of the four overarching concepts (meta-processes). The emerging framework presented in Figure 7.5

displays these components and their relationship within each major concept in general form. The emerging framework shows that horizontally, different combinations of creativity and control are accessible for coordinating within each temporality. Because the relationship between creativity and control is different for each one of these meta-processes, coordinating across temporalities is a unique challenge in series production. Explaining how the project budget enables this coordination affords insights that can inform other LSCCs given that they typically unfold over time with different groups in different phases.

The focus in this part of the chapter is on establishing the links between the sub-components of each meta-process introduced in the first part of the chapter. Thus, rather than move horizontally across the emergent framework, I explore the vertical relationships depicted in the emergent framework that make coordinating across temporalities possible within each meta-process. One way to think about these processes is to imagine them each as separate gears. Conceptualizing (the starting point) represents the first gear which needs to happen before shifting into the second gear of visualizing. Thus, moving across the meta-process requires a shift in gears. Decomposing these gears allows us to see the distinct roles creativity and control play across different temporalities to reveal how coordinating is accomplished in each of the different gears.

In the sections that follow, I introduce a process model for each of the four ‘gears’ or meta-processes. These process models illuminate the gradual processes within each temporality and highlight the relationships between them that link them together under the overarching meta-process.

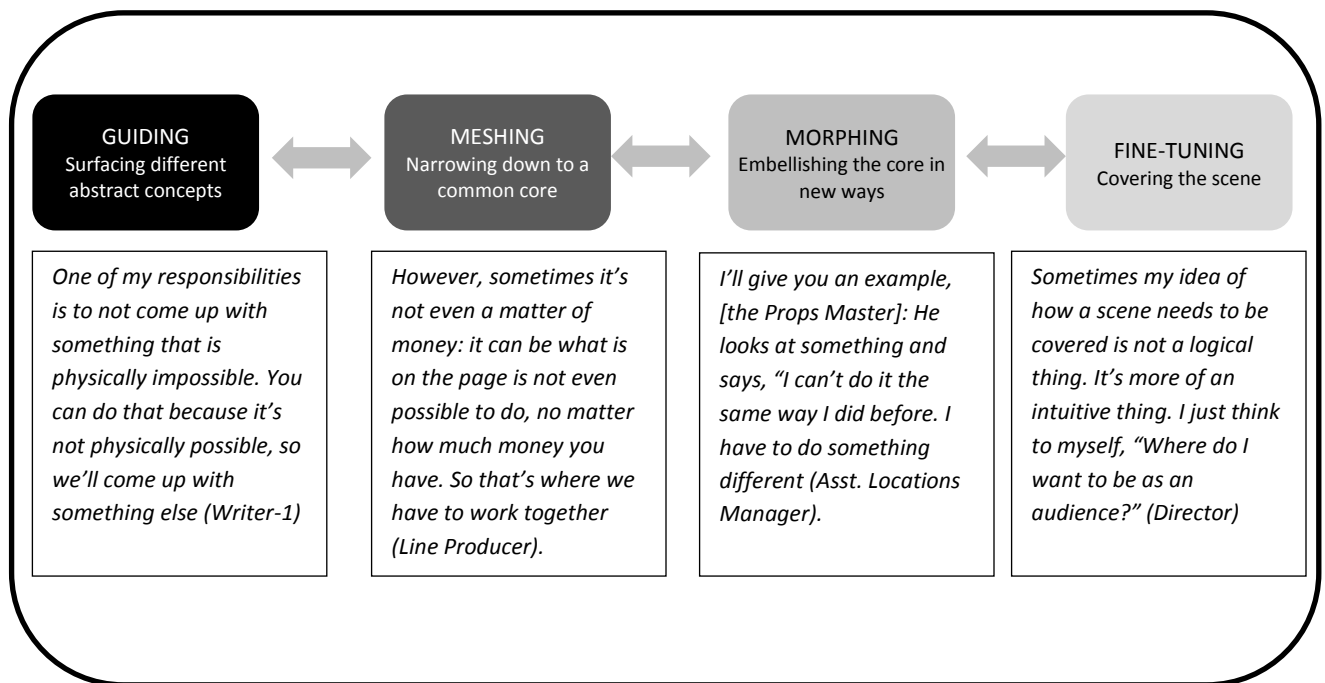
**Figure 7.5: Emergent Framework**



## 7.7 Linkages across guiding, meshing, morphing and fine-tuning (conceptualizing)

Figure 7.6 shows the temporality-specific processes that link the different groups together within the overarching process of conceptualizing. The double arrows between each of these groups illustrate the bi-directional nature of the creative flows between them. The data analysis indicated creative movement across the different temporalities as new ideas for each script are filtered and disseminated across the crew.

**Figure 7.6: Linking subcomponents of Conceptualizing**



*Surfacing different abstract concepts* refers to the new story ideas (e.g. characters, events and plot twists) that the writers include in each of their scripts. The writers have their own process for filtering new story ideas and the completed scripts are the product of this process. While the writers aim is to create scripts that are physically possible to produce, their understanding of what the rest of the crew must do to transform the text to reality is inherently

partial. Thus, each script must go through a process of discovery to establish what is required from each group.

*Narrowing down to a common core* refers to the process initiated by production (i.e. synoptic temporality) to identify what needs to happen to realize the creative aspirations for each script. This process establishes a common ground for each script and accommodates the different directors in each shooting block. Much of this process transpires in the Concept Meeting:

*The Concept Meeting is essential, but it's funny, we never used to do them. It's something that's evolved and I think it's because there's a little bit more accountability. Because what it does is it starts the ball rolling to confirm what is on the page of the script to reality and that's really the purpose of the meeting. As I said, all of us can read the script and interpret it however we want and then the problem that used to happen without the concept meetings is that someone would interpret it, and they'd go off and start planning (Line Producer).*

*Embellishing the core in new ways* refers to how the prep crew generates new ideas to deliver what is required in each script. Once the common core is established, the prep crew looks back at what they have done in the past, not to replicate it but to push past the gravitational forces of what worked in the past in order to break new ground. They look for new ways to approach each scene since their ultimate goal is to ensure that each new episode stands out as a unique creation.

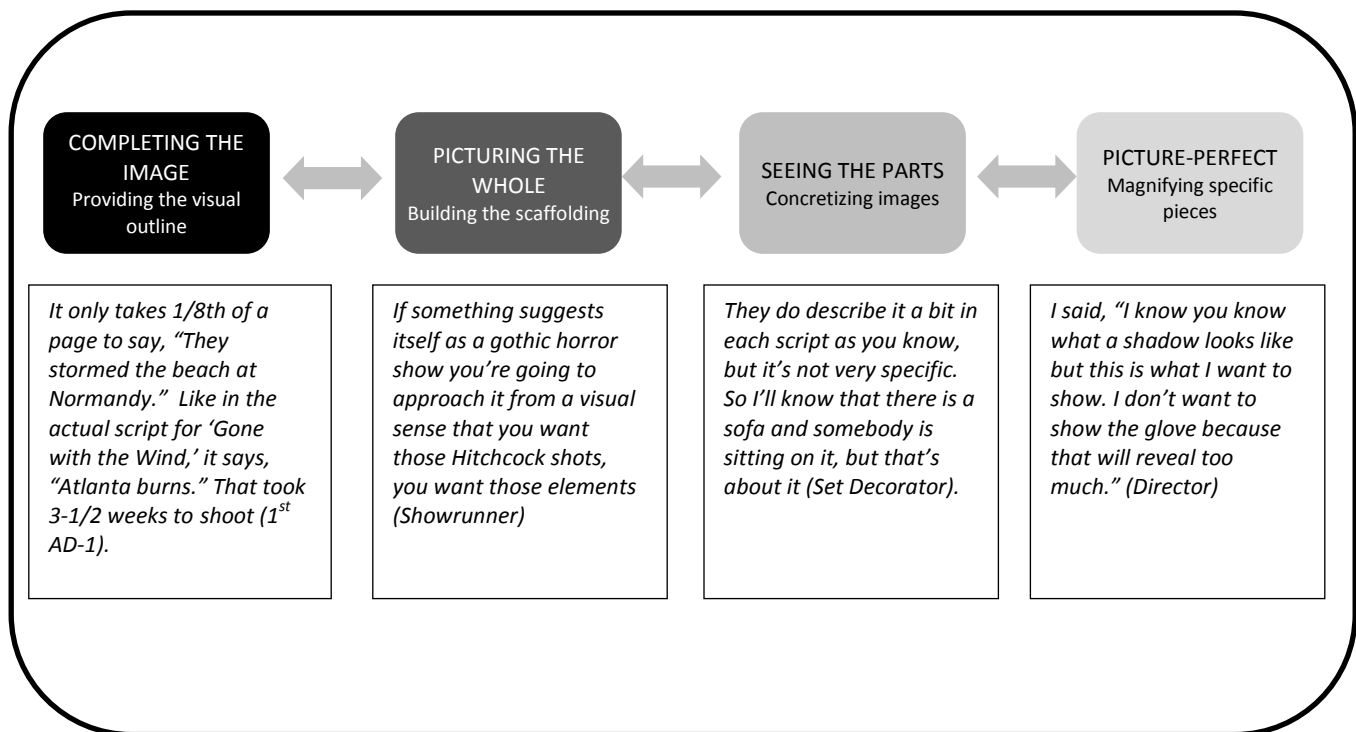
*Covering the scene* refers to how the shooting crew works with the common core established as well as the plans for embellishing that core developed by the prep crew. They approach this process from the perspective of the camera, which represents the perspective of the audience. By thinking of the camera as the eyes of the audience, the shooting crew develops

ideas for how to ‘get inside’ each scene with the camera. This lays the foundation for creating intimacy with the audiences and helps deliver the writers’ creative intentions to the screen.

### 7.8 Linkages across completing the image, picturing the whole, seeing the parts and picture-perfect (visualizing).

The gradual processes of visualizing inherent within each temporality that provide the linking functions across temporalities are shown in Figure 7.7. As with the previous model, the double-headed arrows highlight the dual-direction of flows across the different temporalities. Analyzing the relationships between the subcomponents of the model reveals how each layer of visualizing builds on the prior.

**Figure 7.7: Linking subcomponents of Visualizing**



*Providing the visual outline* refers to one of the key functions of the script. It comes from the story itself as well as the brief descriptions contained in the script. These brief references are

sometimes deceptive of the magnitude of a particular element or scene, and what needs to happen to transform the text on the page. Since creative interpretations can vary widely, a common visual framework is required so all of the individual elements will cohere as a single whole.

*Building the scaffolding* refers to the process of establishing the overarching visual framework for each script. Since each script often suggests a different visual approach, this framework establishes the kind of elements required to realize that approach. This process not only defines how big the picture is going to be, but by unfolding the whole, it becomes possible to more clearly imagine each of the parts. This includes deciding which scenes will be shot on location as the physical setting has an impact on the visual framework developed:

*I look at (the script) and go, “Okay. How should we do this? Should we go out on location or can I accommodate this on our standing sets? Or is this kind of a special one-off where we’re going to have to build something specific?” I mean there was a moment there when we were doing the (department) store: we couldn’t find a location. It was like, “Where are we going to shoot this sucker?” (Production Designer).*

*Concretizing images* refers to the process of crystallizing specific images (i.e. the individual pieces of the visual puzzle) of the required elements. Since these pieces must fit within the visual framework, this is only possible once the scaffolding is in place. The tech surveys are an important part of this process as the prep crew can develop a better visual as they are physically in the space. Through this process, details are added or removed in order to make the non-specific certain.

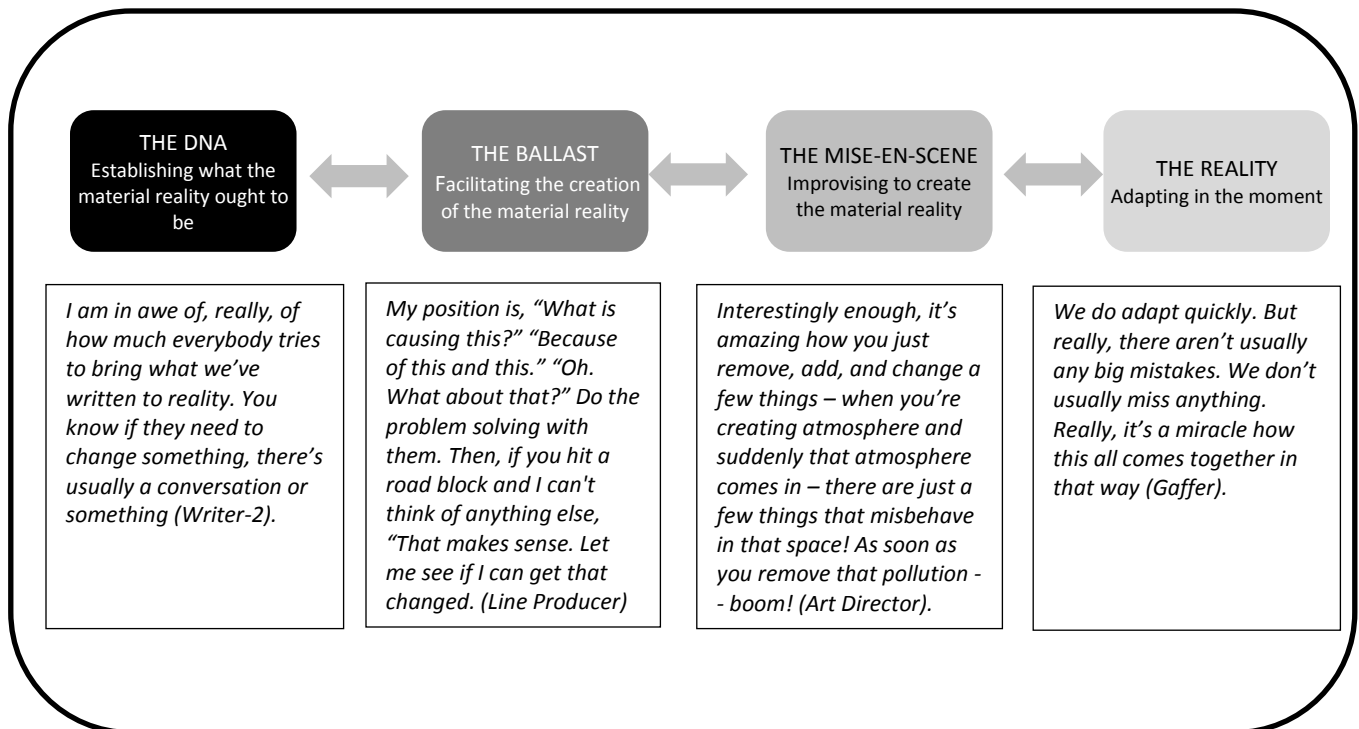
*Magnifying specific pieces* refers to how the shooting crew adds texture, tone and mood to the sets prepared by the prep crew. Taking their cues from the scripts, sets and locations, the

shooting crew uses lighting and shadows to reveal and conceal different visual elements for the audience. For instance, shadows can be used to conceal details from the audience to build suspense and tension at different points in the story.

### 7.9 Linkages between the DNA, the Ballast, the Mise-en-scene and the Reality (materializing).

Figure 7.8 shows the gradual process specific to each temporality that functions to link the different temporalities within the process of materializing. Analyzing the relationships between the sub-components revealed the dynamic interconnections across the different groups that emerged through the shared goal of doing what's best for the story.

**Figure 7.8: Linking subcomponents of Materializing**



*Establishing the intended material reality* refers to the writers' creative intentions for each script.

These intentions are clarified to the larger group through the scheduled planning meetings in



each shooting block. This leads directly to the second subcomponent in the overarching process of materializing.

*Facilitating the creation of the material reality* refers to the role the production team takes on for each and every script. This process involves trouble-shooting to remove all obstacles in the path of creating the intended material reality of the story. Whenever possible, additional resources (time and money) are directed towards the departments that require them to realize the intended material reality. Set designs are scaled back wherever possible (e.g. when a full 360 degree set is not required) without compromising the creative priorities of each script:

*There is the issue of, “Well, I will create whole of set of 360 degrees, it’s very inspiring for performers.” Well, yes it is. However, if [...] you can sacrifice so much of [that] and give you three times over there, it makes the whole picture much bigger and better (Art Director).*

*Improvising to create the material reality* refers to the familiar process for the prep crew given the ever-present time constraints of the schedule. When the days on the calendar run out and the prep crew needs to make way for the shooting crew, they are forced to work with what they’ve got. For instance, the Art Director recalled a moment when the set was not ready on the morning of the shoot. He walked on set to find a mural being painted on the wall of what was supposed to be an abandoned building only half-completed. The artists had literally run out of time:

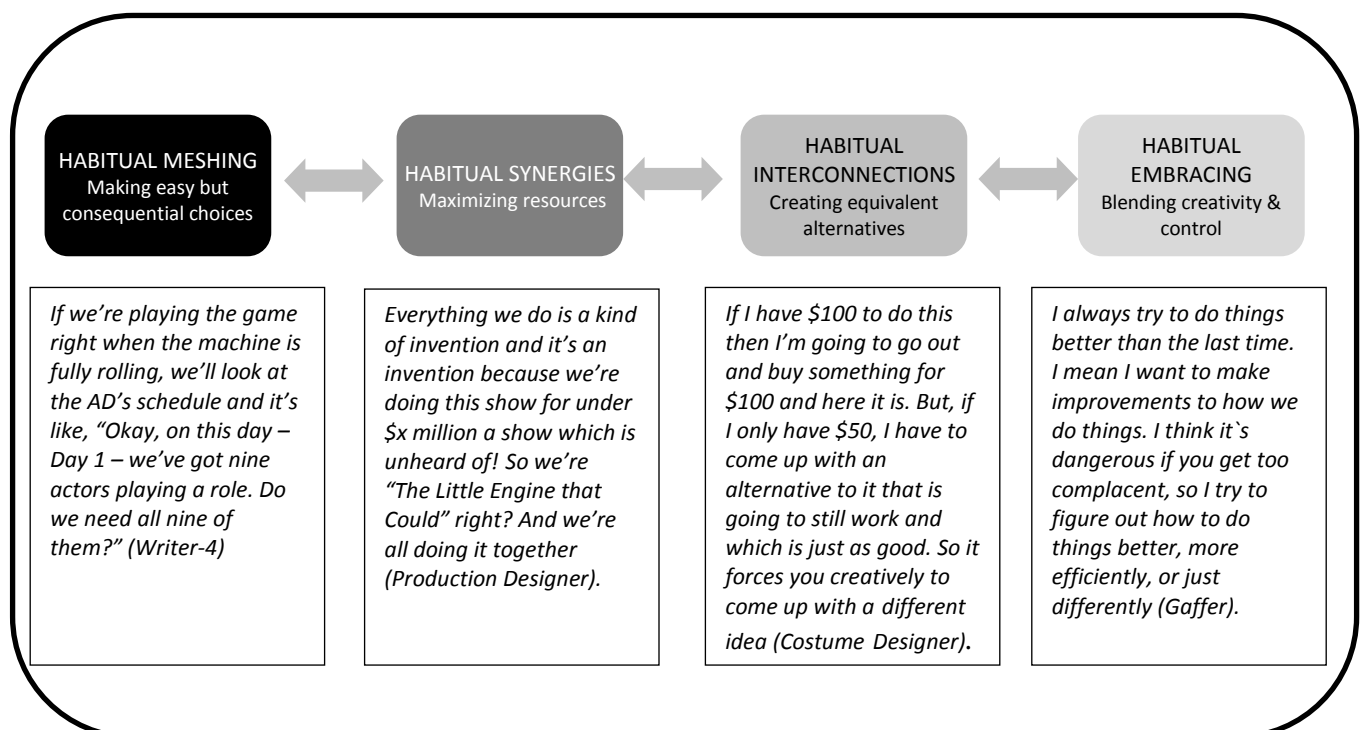
*I said, “Great. You just helped me improve the set.” I said, “Let’s lean some ladders up there. Let’s put [up] some tarps. Let’s put [out] some dust. Give me the trestle, da-da-da.” So there it was [...] I call it forced design. Forced design: necessity is the mother of invention, right? (Art Director).*

By working with what was on hand, the Art Director transformed a half-finished room into a functioning set. This spirit of working with what you have carries forward to the shooting crew. *Adapting to what the material reality can be* refers to how the shooting crew adapts in the moment given the identified possibilities and constraints. Although ‘big’ mistakes are uncommon, the shooting crew needs to move quickly since their biggest constraint is time. They also have an arsenal of tricks and cheats up their sleeve to deploy when they capture the scene.

### 7.10 Linkages across Habitual meshing, habitual synergies, habitual interconnections and habitual embracing (monetizing)

The gradual processes specific to each temporality in monetizing are highlighted in Figure 7.9. The linkages across monetizing may be the last gear in terms of the different meta-processes identified through the analysis, but the exploration of the links across monetizing revealed that the budget exerted a powerful influence across the different groups.

**Figure 7.9: Linking subcomponents of Monetizing**



*Making easy but consequential choices* refers to how the writers take money into account, but this process is timed for the right moment. Although the writers contemplate money in an abstract sense throughout the scriptwriting process, they are careful not to let it interfere with the creative process. However, there is a point when the schedule has settled for each shooting block that they are able to engage with the budget in a more precise way. For instance, scenes are tweaked to minimize the number of performers paid on a daily basis (i.e. day players) without impacting the DNA of the story. The ensuing savings are viewed as possibilities for future scripts.

*Realigning resources* reinforces this process by redirecting monetary resources to where they are most needed to realize the creative priorities of each script. When the estimated costs for a particular script exceed the bounds of the budget for a particular department, money is reallocated whenever possible:

*The cost report is a confirmation of where we are. So that's how, that's why I'll go, "Oh, we do actually have that savings." So now I can say go back to them, "Even though it's going to put you 20% over your budget, we can afford it" (Line Producer).*

*Creating alternatives* refers to the process of creating less costly options that work just as well creatively as the original. Since there is not always room to shift money around, new ways to approach the creative requirements must be found. This allows a superior balance to be 'locked-in' to the bigger picture.

*Blending creativity and control* refers to the daily patterns of activity for the shooting crew. Not only are they under constant time pressures, but their costs can quickly escalate if they

encounter any delays. Thus, there is a concerted and collective effort to keep things moving to get through each day. They also search for new and different ways to do things more efficiently.

### **7.11 Summary: A process model of creativity and control**

The process models presented in the preceding sections show the relationships between the subcomponents that emerged from my analysis of the data. They also show how the links between creativity and control tighten not only through the progression within each one of the processes, but also through the shifting between gears (e.g. from conceptualizing to visualizing or from materializing to monetizing). Each process includes multiple practises (Chapter 6) as well as different micro-processes of creativity and control introduced in the first half of this chapter. Most importantly, each of the processes coordinates across all four temporalities.

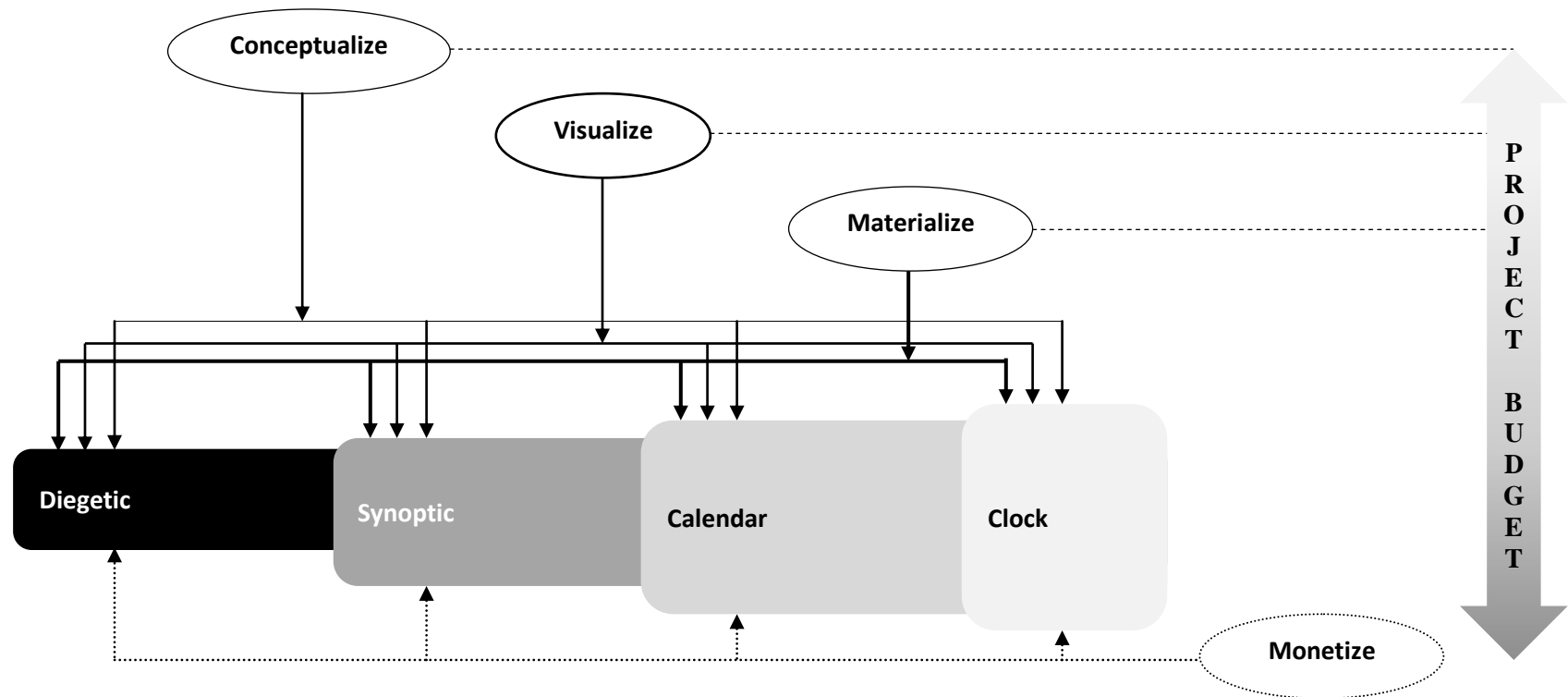
This is important on Series X because the four temporalities are distinct and largely non-overlapping. Yet, many activities of each temporality co-occur in time and different layers of creativity are often quite precisely orchestrated across them. Traditional mechanisms of temporal coordination (e.g. the centrality of the schedule) are necessary and present within each temporality, as shown in Chapter 6. However, temporal coordination is not sufficient to coordinate across each of the four temporalities. The budget links the different temporalities at multiple points in time.

This insight is the key to the emerging model as it establishes how the project budget facilitates coordinating across different temporalities in LSCCs. Budgets are commonly connected to clock time or some other form of ‘real’ time, such as the calendar of the fiscal year, but this study reveals how the project budget connects different groups with different conceptions of time. The project budget is not reducible to an artifact or to connections among practices or different roles on the crew. The project budget evolves as it is enacted over time and

it also provides temporality-specific meanings and metrics that nonetheless add up across all of the temporalities. Figure 7.10 illustrates this insight and shows the progressive influence of the budget across each of the processes.

In Chapter 8, I combine the insights from Chapter 6 and 7 to explain how the cross-temporal coordinating function of project budgets advances the theories of coordination (especially time-based and temporality-specific coordination processes). I also discuss how the project budget informs creativity in LSCCs. Returning to the opening analogy of the hidden layers of practices and processes of creativity in orchestras, the induced role of budgets as a cross-temporal coordinating mechanism in Series X reveals how practices and processes of creativity in LSCCs are shaped by the budget to complete the project “on time and on budget.” I also underscore the granular and processual level at which the project budget works not merely to create constraints but, most importantly, to shape the creative direction of the project, one script at a time. The critical and complementary creative inputs contributed by the different temporalities working simultaneously on different aspects cohere in the final product, even though these inputs cannot be fully anticipated nor coordinated in any of the usual ways.

**Figure 7.10: A Process Model of Creativity and Control**



In figures 7.6 through 7.9 I show the induced linkages between the four temporalities in each of the four micro-processes (conceptualize, visualize, materialize and monetize), establishing that the project budget helps LSCC progress through each of these micro-processes. This figure underscores that the project budget also operates as an overarching theoretical concept that links all four micro-processes together.

## CHAPTER 8 – CONCLUSION

### 8.1 Overview

Based on the prior literature on creativity, we know that creativity and control have been typically, but often unfavourably, positioned as opposing – or even antithetical – forces (e.g. Amabile 1998; Zhou & George, 2003). From the management control literature, we know that controls have both constraining and enabling dimensions (Simons 1990; 1995). We also know that budgets can be used to mitigate tensions between creativity and control (Jeacle & Carter, 2011). Further, recent literature on coordination suggests that creativity and control play off each other (e.g. Jarzabkowski et al., 2012). Both are necessary for coordinating within and across different temporalities and their interplay changes over time.

In organization theory, time and temporality have often been taken for granted. While the former is a social accomplishment (Bluedorn, 2002; Ballard, 2007; Sorokin & Merton, 1937), the latter is the way in which time is experienced by individuals and groups in organizations (Blount, 2004; Rubin, 2007; Vesa & Franck, 2013). Recent research on workplace temporalities has highlighted how group-level temporalities emerge through the patterns of work activities and functions of particular groups (Ancona et al., 2001; Barley, 1988; Ballard 2007) as well as their interactions (Blount, 2004; Perlow, 1999). Temporalities in organizations are shaped by the temporal structures (e.g. schedules and deadlines) enacted in the pacing and timing of different activities (Orlikowski & Yates, 2002). Although temporality cannot be measured (Vesa & Franck, 2013), it is threaded through the practices that shape the day-to-day activities of individuals and groups in organizations (Hernes, Simpson & Soderlund, 2013).

The complex interdependencies in LSCCs give rise to the need for choreographed transitions across phases (Brown & Eisenhardt, 1997) and temporalities (Ancona et al., 2001;

Dougherty et al., 2013). Since project members are required to produce a novel outcome within a given timeline, and the path to producing that outcome cannot be specified in advance, temporal coordination is required (Gersick, 1994). The creative contributions of different individuals and groups are highly differentiated (Adler & Chen, 2011). Because the creative tasks are idiosyncratic and not cyclical in nature, explicit processes that focus on the timing and pacing of different activities are necessary in LSCCs (Gevers et al., 2004). However, even these are not sufficient for coordinating across temporalities when the creative inputs that are the product of their activities must be conjunctive.

Chapter 6 describes the four temporalities that perform different functions as part of the crew of Series X and clarifies how the temporality specific to each group is revealed through their relationships with the four key temporal structures that guide everyone's activities: the script; the scheduled planning meetings; the shooting schedule(s); and the project budget. The use of multiple temporal structures is consistent with prior theory, as different temporal structures communicate different things (Ballard, 2007; Bluedorn & Standifer, 2004; Orlikowski & Yates, 2002). Because each group performs different creative functions on the project, and because specific temporal structures allow for a creative flow as their different perspectives are integrated (Bluedorn & Standifer, 2004), a great deal of coordination happens within each of the group-level temporalities described in this chapter. I show how these structures are enacted by each of the four temporalities not only to order and pace their activities (Vesa & Franck, 2013), but also to shape the specifics of what those creative inputs need to be (e.g. specific sets, costumes, props, lighting, etc.). This helps me reveal the coordinating practices within each temporality. Specifically, I explain how each group working within their specific temporality



anticipated the problems and constraints of others to sustain their own creativity (Dougherty, 2008).

These same four temporalities were also used to develop the grounded theory presented in Chapter 7 that inductively models cross-temporal coordination, which is coordination across the four temporalities described in Chapter 6. This model is the main contribution of the dissertation. It shows how control enables coordination across the different kinds of creativity required from each of the different temporalities. It also shows how the links between creativity and control progressively tighten through each of these processes. Because each temporality goes through the same set of four processes, I show that coordinating creativity across temporalities is not only possible, but essential, in LSCCs.

The unique contribution of this process model is its explanation of coordinating creativity over time and across different temporalities. Central to this process model are four discrete themes: conceptualizing; visualizing; materializing; and monetizing. While prior work focused on phases or roles (e.g. Baker & Faulkner, 1991; Beckhy, 2006; Jones, 1996; Jones & Lichtenstein, 2008), I induce the processes of coordinating across temporalities. This model highlights the changing relationship between creativity and control over time and specifies how the succession of temporalities allows each group to build on the creative contribution of the other groups despite the minimal overlap between them.

The grounded theory of cross-temporal coordination developed in Chapter 7 also highlights the role of the project budget in shaping the activities of each of these groups. My analysis reveals the progressively pronounced influence of the project budget through each of these four processes. In conceptualizing, this influence is minimal in order to give priority to the emerging creative ideas that form the basis of the final product. As the relationship between

creativity and control changes across the different processes, the influence of the project budget becomes stronger. In monetizing, the creative and financial imperatives become intertwined as each group becomes focused on delivering the best show possible within the bounds of time and money.

This process model works with the coordinating practices of each temporality outlined in Chapter 6, but moves beyond those insights to identify several themes and concepts that have been discussed in the literature on temporal coordination. For instance, scheduling, pacing, prioritizing and synchronizing are all prominent themes with the literature on workplace temporalities (Hernes et al., 2013; Rubin, 2007). Deadlines are a form of interaction regulation (control) required for temporal coordination (Faraj & Xiao, 2006). Prioritizing is linked to establishing common goals that also impact the pacing and timing of different activities, including the allocation of temporal resources (Blount & Leroy, 2007).

The concept of meshing also appears in the literature on temporal coordination and workplace temporalities. As used in this literature, meshing refers to the process where the pacing, cycle and/or rhythm of different activities are aligned with each other (Ancona et al., 2001; Ballard, 2007). In this dissertation, meshing refers to aligning the action and activity within each script with both the overarching series concept (synoptic-conceptualizing) and with the timing of the crew's activities in 'real' time (diegetic-monetizing).

Finally, the different controls revealed through this study and how they are used bear remarkable resemblance to Dougherty's (2008) theorizing on effective controls in LSCCs. For instance, in the schedule planning meetings, problems and interdependencies are surfaced as the group begins to map out possible pathways for the future (i.e. developing the plan to transform

each script into a material reality). Controls are focused on shaping the creative trajectory of the project by aligning the creative efforts of each group around a common core or vision.

## **8.2 Insights from the grounded model**

Several new concepts emerged in the development of this model that have theoretical implications for our understanding of creativity and control in organizations. Perhaps most importantly, my analysis reveals how the project budget informs the creative practices within each temporality and enables coordination across them. My research builds on the notion that budgets can be used to mediate the tensions between creativity and control (Jeacle & Carter, 2012) by showing how the budget is implicated in different processes that may, on the surface, seem quite removed from its influence.

While the detailed shooting schedule developed for each block outlines the when (time) and the where (place) each creative contribution is required, the project budget shapes ‘how’ each input will be realized. The project budget is not given primacy over the creative aspirations of each script, but its internalization as a parameter does influence all four processes. It is a factor in the changing relationships between creativity and control across these processes.

### ***8.2.1 The changing relationships between creativity and control***

My analysis of the linkages across the different temporalities within each process reveals how different kinds of creativity come together in a set of layered processes where each temporality builds on what has come before. Coordinating across temporalities becomes possible because each group engages in the same set of processes to balance creativity and control, albeit from a different perspective. Each of these different perspectives adds to a clearer and more complete view of the overall picture; however, for these multiple perspectives to coalesce in the final

product, the individual pieces must be combined and arranged in a meaningful way (Bluedorn & Standifer, 2004).

The temporal structures enacted by each of the different groups act as a control for their different temporal perspectives (Ancona et al., 2001). This form of control is enhanced by each of the four processes. For instance, establishing a common core (i.e. creative vision) provides the minimum creative requirements for each script. In this way, conceptualizing provides the basis for the shared mental model (Bluedorn & Standifer, 2004) developed for each script. Although there are tensions between creativity and control, these tensions are seen as productive as they shape and refine the contours of the emerging shared mental model.

In contrast, visualizing is centered on elaborating the specific images of the particular pieces that each group needs to contribute. The interplay between creativity and control becomes more apparent as each group tries to enhance the creative minimum established for each script. Since the path to the final goal cannot be specified in advance (Faraj & Xiao, 2006; Perlow, 1994), this process is a crucial step in charting that course. Controls are centered on containing creativity within a certain trajectory so that the pieces do come together in a meaningful way.

The temporal mapping that transpires during the design of each detailed schedule not only establishes that path forward, it also incorporates temporal requirements of the different groups (Ancona et al., 2001; Perlow, 1999). When deadlines are accepted as a creative challenge, they become a source of inspiration (Amabile et al., 1996) that facilitates coordination over time. Further, the vision of how each day should best unfold over the course of the schedule is not held as fixed or rigid, but is developed with flexibility in mind (Bluedorn & Standifer, 2004).

Creativity and control can also become substitutes for each other in LSCCs, as shown in the process of materializing. Creativity is required to respond to unexpected events or

interruptions, particularly given the clearly established time constraints (Bluedorn & Standifer, 2004; Eisenhardt, 2004). While unexpected events and interruptions manifest in different ways for each of the different groups, creativity is often deployed to regain control. This relationship between creativity and control is also implicit in the study by Jarzabkowski and colleagues (2012) where new coordinating mechanisms were created in response to disruptions that required new ways of organizing interdependent activities, revealing new interdependencies in the process.

### ***8.2.2 The project budget as a social accomplishment***

In the literature on temporal coordination, much attention has been focused on how temporal structures facilitate communication across different temporalities (e.g. Ballard, 2007; Montoya-Weiss, Massey & Song, 2001). Schedules, meetings, deadlines and even the patterns of email exchanges in virtual teams have all been explored from this perspective (e.g. Orlikowski & Yates, 2002). For instance, as a communication device, the assignment of a deadline not only signals its importance of completing specific activities, it also regulates interactions (Ballard, 2007). Project members may increase or decrease the level of interactions to meet the deadlines depending on whether their tasks are collective or individual in nature.

The communicative capacity of budgets has been identified in the management accounting literature as something that inheres in their ability to provide a common vocabulary for disparate organizational groups (e.g. Czarniaskwa-Jorges & Jacobsen, 1989; Hansen & Van der Stede, 2004). Budgets are not only used to communicate priorities, but they can also provide managers with the autonomy and flexibility required to respond to changing circumstances (Frow et al, 2010). My findings reinforce the importance of both and show how the autonomy and flexibility enabled by the project budget is leveraged by the creative practices of managers in

LSCCs. I also extend these findings by showing how autonomy and flexibility are complementary to the shared understanding of common priorities, including the importance of attaining budgetary targets.

The temporality-specific meanings and metrics associated with the project budget contribute to understanding budgets as a collective accomplishment. Each group plays a unique role in this process from the writers avoiding certain kinds of scenes in their scripts to the prep crew creating designs that maximize depth of field per dollar and the shooting crew taking additional precautions on complex scenes given their association with increased costs. Although these metrics may not be precise, they reflect the constant attention paid by each to balance the creative aspirations with the available monetary resources.

If the project budget is not attentively managed within and across temporalities, creativity suffers and disruptions in the creative process may jeopardize the quality of the product. However, merely observing the quality of the final product cannot illuminate the role of the project budget in coordinating the creative inputs across different temporalities, particularly since its effectiveness in temporal coordination hinges on how the budget is used. In my setting, the parameters of the project budget are so embedded in the practices of each group that they might be easily overlooked, rather than seen as something actively and deliberately managed. Yet by accepting these parameters as part of their role, individuals draw on their respective areas of expertise to find innovative (and less costly) ways to enhance the quality of the final product.

The project budget also has important temporal implications. Its fluidity allows resources to be reallocated across departments as well as over time. These reallocations are made whenever necessary (and possible) to realize the specific creative aspirations of the project. This approach to the budget is possible because it is viewed as an estimate, not a standard. Consequently,

variances against the initial estimate are not seen as a signal that something is wrong or to punish those who may have gone astray (Dougherty, 2008), which would be consistent with a diagnostic use of budgets. Rather, variances are interpreted in relation to the accuracy of the initial estimate since the specific creative requirements of the project only become apparent over time and continue to evolve as the project unfolds. Cost estimates are continually updated through the detailed planning process, which continues for the duration of the project. This interactive use of the budget is focused on dialogue and idea generation, which allows monetary resources to be reallocated proactively based on the creative requirements as they become known.

Series X is an exemplary case not just because of the seamless flow of activities across the different groups, but also because of the pride of place that was so clearly evident among the crew. The crew consistently delivers a product with production values in excess of what would be expected given its modest budget. ‘The Little Engine that Could’ spirit permeated the crew and was reinforced through the leadership approach taken by both the Showrunner and Line Producer (i.e. senior management). A carrot-and-stick (i.e. reward and punishment) approach to management was viewed as counterproductive, while creating an environment of psychological safety was seen as a necessary component to inspire the creative performance. The autonomy created through the delegation of budgetary responsibility was enhanced by the problem-solving approach to control practiced by the senior managers on the project. This, in addition, contributed to the creation of an environment of professionalism that also enhanced creativity across individuals and groups.

### **8.3 Summary of contributions**

This research makes three main contributions. First, I contribute to the literature on organization and group temporalities by showing how creativity and control are balanced within, and across,

temporalities. Temporal coordinating mechanisms are necessary to accomplish collective action over time. However, they are not sufficient in situations where the creative inputs must be conjunctive, particularly when these inputs come from different groups with different perspectives on time.

Second, my research contributes to our understanding of how cross-temporal coordination is accomplished in LSCCs. In these environments, coordination requires a balance of creativity and control. My research shows how different temporalities engage in the same processes, albeit from slightly different perspectives, yet each of these perspectives brings a specific contribution to the complete image of what the final product will become.

Finally, I contribute to the literature on creativity by showing how, similar to deadlines, finite financial resources can also be embraced as a creative challenge. This inspires individuals to seek out different ways to accomplish their tasks by experimenting with inventive ways to approach the creative requirements for each script. This motivation is further enhanced by the autonomy granted through the delegation of the relevant parts of the project budget to each department head.

This study identifies key practices and processes that have largely been left implicit in theories of coordination where the influence of the budget on the day-to-day activities of individuals has largely been left as a black box. More specifically, my findings suggest that the project budget can actually enhance creativity, especially when the finite monetary resources are embraced as a challenge and enacted differently by each group over time. This is augmented by a problem-solving approach in relation to balancing creative aspirations with the financial parameters. It also requires on-going and sustained efforts from each group involved in the project.



## 8.4 Limitations

In qualitative studies employing interviews as a key method of data collection, there is always the potential for retrospective bias of the participants. While the interviews are the primary source of data that appear throughout this thesis, I used several methods of data collection throughout the course of this study to mitigate this bias. Perhaps most importantly, the detailed field notes taken during my 'real-time' observations allowed me to triangulate interview data to minimize (if not eliminate) the potential for retrospective bias in the data.

Whenever a single case study has been used to generate theory, questions are inevitably raised about the generalizability of the findings (Lincoln & Guba, 1985). While a case provides the opportunity for in-depth and accurate observation of the phenomenon of interest, there is always a trade-off in terms of how broadly the findings can be transferred to other domains. The focal organization in this study was, in many ways, an exemplary example of an LSCC and selected on that basis. Thus, the transferability of these findings is aimed at other LSCCs and not organizations in general. However, any complex creative project may take a few important lessons from this work, specifically those that require coordination over time and across multiple groups.

My initial research questions focused on the role of the project budget in coordinating day-to-day activities in LSCCs as well as how it might be used to mediate the tensions between creativity and control. Consequently, my inquiry was focused on the individuals that were accountable for different parts of the project budget (i.e. managers). My exploration focused on conversations around the project budget, particularly in the individual department meetings where the cost estimates for each scene were the primary topic of conversation. This exploration extended to the negotiations over the scale, approach to the creative inputs and the trade-offs the

department heads frequently made when the bounds of their budgets had been reached. Thus, my focus was on the budget as a coordinating structure and how it was enacted by individuals in their day-to-day activities for that purpose, not on how it was made or compiled. Further explorations in this area may yield surprising insights into the relationship between the budget, time and temporality.

The distinction between project budgets, operating budgets and capital budgets is an important boundary condition for the transferability of my findings to other settings. These three different kinds of budgets are used in organizations for very different purposes and each is concerned with a very different set of activities. In this study, I focused on project budgets in LSCCs that were not connected to performance bonuses of any kind (see also Frow et al., 2010). Studies have shown that dysfunctional behaviours can result when performance bonuses are tied to the attainment of budget targets (e.g. Jensen, 2003). This does present an opportunity for further research to determine whether performance bonuses are commonly tied to project budgets in LSCCs in other contexts and what impact this has on delivering projects ‘on time and on budget.’

The industry context also leads to another potential limitation of this study. Bringing projects in ‘on time and on budget’ is the cultural norm for domestic film and television projects in Canada. However, anecdotal comments in the interview data and articles in the industry trades suggest that this is not necessarily the case for U.S.-based projects. Nor is this necessarily the case in other LSCCs such as large-scale software development projects where timelines and project budgets are routinely exceeded by as much as 200% (Lientz & Rea, 2001). While this does limit the transferability of these findings, it also presents an opportunity for future research

to explore the connections between the project budget and the evolving path to creative and emergent goals in other LSCCs.

More specifically, it opens up an opportunity to further understand how projects stay ‘on budget’, particularly when navigating complex challenges. While this thesis establishes that project budgets facilitate coordinating creativity across temporalities in one type of LSCC, we need more comparative studies of how the social accomplishment of the budget is linked to coordinating over time in other contexts. Exploring how project budgets inform activities in other types of LSCCs where overruns are common could inform theorizing on project management both within and across organizational boundaries.

Finally, given the qualitative nature of this study, I present a statement of reflexivity since my prior experiences and beliefs undoubtedly shaped this research (Willig, 2001). The purpose of this statement is to allow readers to “explore the ways in which a researcher’s involvement with a particular study influences, acts upon and informs such research” (Nightingale & Cromby, 1999, p.228). The film and television industry has long held my fascination. My first paid position in the industry was as a background performer in a feature film that was shot in Vancouver. It was 1980, I was still in high school and the city was not yet known as “Hollywood North”. The film was initially ‘shelved’ (i.e. not released) by Paramount and I went on to pursue an accounting designation, which seemed a more reliable career path than acting. But my passion for the industry never left and in 1993, I began my 15-year career behind the camera as the Controller/Business Affairs Manager for an independent production company. There were several moves over the course of my career, which took me to New York City, Toronto, San Francisco and back to Toronto again where my final position in the industry was VP Finance for Canwest Broadcasting. Thus, I began my research with an in-depth understanding of the inner workings of the industry and its unique culture. This familiarity shaped the nature of my interactions with the participants in this study in a way that allowed me to penetrate beneath surface observations to explore the deeper experiences of the crew members. While the nature of my prior responsibilities as a financial executive in

the industry rarely brought me into close contact with the mid-level managers (i.e. department heads) on production crews, I have always held a great deal of personal and professional respect for their work. During the course of this study, my level of respect for this group increased as I developed an in-depth understanding of the creative nature of the work they perform, which is largely invisible to the public given their fascination with the stars, directors and producers. Thus, in collecting and analyzing the data contained in this study, I am undoubtedly biased towards the crew. Readers of this thesis should be aware of this perspective as they assess my research and findings.

### **8.5 Future research directions**

This study generated a grounded model of creativity and control that can be used as a guide to explore collective processes of creativity and innovation in organizations. The introduction of the budget as a cross-temporal coordinating mechanism that can facilitate creativity shines a new light on a taken-for-granted feature of organizational life. While the literature on time and temporality in organizations consistently references the importance of quarterly reporting cycles, fiscal years and year-ends in structuring day-to-day activities in organizations (e.g. Ancona & Chong, 1996; Orlikowski & Yates, 2002), to my knowledge, virtually no empirical studies exist in this area. Given the close connections between strategy, strategic planning and budgets (both capital and operational) in organizations, there is much potential for interesting insights into the interactions of senior managers with the budget as strategies are crystalized into plans.

Competitive advantage increasingly comes not from structural positioning but from the ability to effectively manage shorter product cycles for existing products and time-to-market for new products (Ancona & Waller, 2007). Yet, the implications of temporality on strategy and strategizing are only now beginning to emerge. For instance, Vesa and Franck (2013) point out that when strategies are initially conceived, they emerge absent of any chronological ordering. Organizations need methods for working with multiple temporalities within the organization to

create the budgets, schedules and plans that are an inherent part of strategizing (Vesa & Franck, 2013). Opening the black box of budgets in all their different forms (e.g. capital, operational and project) may help researchers access the full range of micro-processes that underpin strategizing in organizations.

### **8.6 Implications for practice**

The shift to a knowledge-based or post-industrial economy in Western societies has not only changed the way competitive advantage is sustained and maintained (Ancona & Waller, 2007), technology has also altered the structure(s) of organizing, particular in relation to the collection and dissemination of information in organizations. Concurrent with this development, accounting practices in general, and budgeting practices more specifically, have moved beyond the confines of accounting and finance departments as they became embedded in the enterprise-level information systems that diffuse these practices throughout the organization (Hopwood, 2007).

This research has important implications for practice, particularly in environments where creativity is required to deliver a product, service or technology. It reveals the often taken-for-granted role of budgets as coordinating mechanisms by fleshing out two critical insights: 1) budgets serve as a temporal structure that aligns different activities within each group; and 2) budgets are practiced not just by accountable managers but are also deeply embedded in everyone's practice. Budgets also evolve as they are enacted and often prompt creative action as they unfold over time and targets are missed, met or exceeded. Different groups have different perceptions of the budget as it shapes, and is shaped by, the planning and accomplishment of their day-to-day activities. Staying 'on budget' is, thus, a collective accomplishment.

## **8.7 Concluding thoughts**

Scholars focused on time and temporality in organizations have often expressed surprise that time had not been problematized in organizations until relatively recently (Ancona et al., 2001; Bluedorn, 2002; Lee & Liebenau, 1999; Rubin, 2007). I share a similar surprise at how budgets have been typically left as a black box in organization theory. Like time, budgets are often a taken-for-granted feature of organizational life and often viewed as objectively given. However, budgets and the numbers that comprise them are socially generated (e.g. Bower, 1970) and achieving budget targets is a social accomplishment. In LSCCs project budgets are an essential part of coordinating creativity over time. Instead of taking budgets for granted in organization theory, we should take them seriously in all their various incarnations. I hope my dissertation will serve as a call to action for further study of the various roles that budgets play in organizations and how they inform the activities of those who enact them. I also hope that the reviews of controls in general, and budgets more specifically, from accounting viewpoints stimulate new bridges and connections between these two fields.

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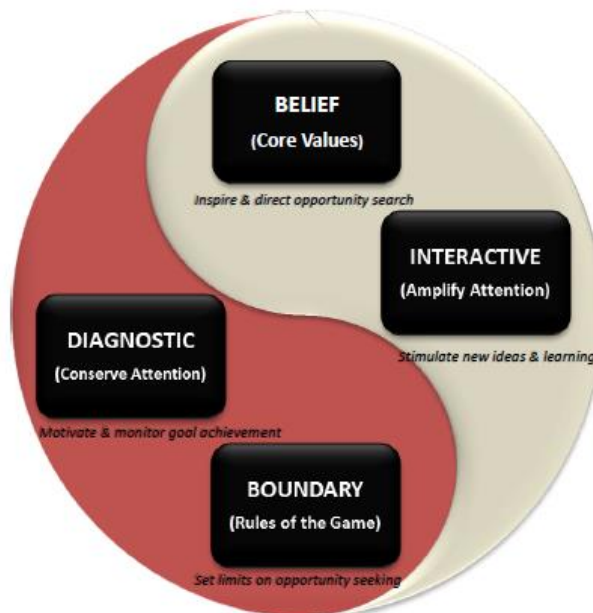
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**APPENDICES**

## Appendix A. Levers of Control Framework

In the levers of control framework, Simons (1995) emphasizes the distinction between rules that constrain (boundary and diagnostic systems) and those that open up new possibilities for action (belief and interactive systems). As shown in Figure A.1, the first two levers, referred to by Simons as the yin forces of the model, ensure compliance through the creation of constraints. Although these are associated with cold and darkness, they are not necessarily ‘bad’ forms of control (Tessier & Otley, 2012), but they do prescribe certain behaviours that are often reinforced through sanctions. The other two levers represent the sun, warmth and light and these are used to motivate, guide and promote learning (Simons, 1995; Tessier & Otley, 2012). Similar to an electrical current that relies on positive and negative poles, the interplay of both forces is necessary for controls to function effectively.

**Figure A.1: Levers of Control Framework**



All four levers operate simultaneously, albeit for different purposes, and are used to maintain balance between the two forces and (Henri, 2006; Simons 1995). Table A.1 provides an

overview of each of the four levers as well as their purpose. The interconnections between the levers have important consequences for maintaining the balance that creates productive tensions. For instance, Mundy (2010) shows how strategic objectives (belief systems) are cascaded into managers' goals and embedded in performance measurement systems (interactive or diagnostic). The levers can also be used in combination to offset potentially detrimental effects of one lever, such as the need to control resource allocations (boundary systems) among different projects. This can place limitations on creative outcomes in certain projects, but if combined with the use of interactive systems, creativity can still flourish (Canonic and Soderlund, 2010).

**Table A.1 The Four Levers of Control**

	<b>ENABLING</b>	<b>CONSTRAINING</b>
<b>CULTURE (BELIEFS &amp; VALUES)</b>	<p align="center"><b>Belief systems</b></p> <p>Define, communicate &amp; reinforce basic values, purpose, &amp; direction</p> <p align="center"><b>Manifest in:</b></p> <p>Credos, mission statements, statements of purpose</p> <p align="center"><b>Key Variable:</b> Core Values</p> <p align="center"><b>Purpose:</b></p> <p>Provide inspiration &amp; promote commitment; Direct &amp; inspire (not proscribe) search for new opportunities</p>	<p align="center"><b>Boundary Systems</b></p> <p>Establish &amp; communicate explicit limits on opportunity search</p> <p align="center"><b>Manifest in:</b></p> <p>Codes of conduct, strategic planning tools, standards, capital acquisition routines</p> <p align="center"><b>Key Variable:</b> Business risk</p> <p align="center"><b>Purpose:</b></p> <p>Rules create, &amp; are created by, organizational culture; Allow delegation of decision-making to achieve flexibility &amp; enhance creativity</p>
	<p align="center"><b>Interactive Systems</b></p> <p>Formally used by managers to regularly involve themselves in subordinates' decisions (requires reforecasting of future states)</p> <p align="center"><b>Manifest in:</b></p> <p>Business plans and budgets, project monitoring systems, management by objectives, standard costing</p> <p align="center"><b>Purpose:</b></p> <p>Facilitate the emergence of new ideas &amp; strategies; Focus attention to create dialogue &amp; stimulate learning</p> <p align="center"><b>Time frame:</b> present &amp; future</p>	<p align="center"><b>Diagnostic Systems</b></p> <p>Provide feedback to monitor outcomes &amp; correct deviations from pre-set standards (only appropriate if these can be established)</p> <p align="center"><b>Purpose:</b></p> <p>Provide motivation &amp; direction to achieve goals; Provide autonomy so individuals have freedom to choose, but are also accountable for results</p> <p align="center"><b>Time frame:</b> past &amp; present</p>
<b>INFORMATION (WAYS OF USE)</b>		

### Appendix B. Key Roles on a Dramatic Series Production

<b>Group</b>	<b>Role</b>	<b>Responsibility</b>
Story	Writers	Scriptwriting
Directors	Director	Oversight of visual approach to storytelling
Production	Showrunner	Oversight of creative elements
	Line Producer	Oversight of logistical elements
	Production Designer	Oversight of set design
	Production Manager	Oversight of logistical elements
	Production Accountant	Oversight of cost reporting
	1 <sup>st</sup> AD	Designing and executing the detailed shooting schedule
Prep Crew	Art Director	Oversight of construction, sets, and painting
	Costume Designer	Oversight of wardrobe for cast and background performers
	Locations Manager	Oversight and selection of locations for each script
	Props Master	Oversight of prop design and construction.
	Set Decorator	Oversight of furnishing sets
Shooting Crew	Director of Photography (DP)	Oversight of cinematography (including lighting)
	Continuity	Oversight of scene and dialogue continuity while filming
	Gaffer	Oversight of electrics and lighting
	Key Grip	Oversight of camera rigging (e.g. cranes, dolly tracks, and other equipment required)
	Hair & Makeup	Oversight of preparing performers for camera
	Transportation	Oversight of servicing the transportation needs of the cast and crew

## Appendix C. UWO Ethics Approval

### Pilot Study



Richard Ivey School of Business  
The University of Western Ontario

Richard Ivey School of  
Business  
The University of Western  
Ontario  
1151 Richmond Street North  
London, ON N6A 3K7

#### Use of Human Subjects - Ethics Approval Notice

Principal Investigator: **Dana Branzel**

Re PhD Candidate: **Esther Maier**

Review Number: **013/11 BREB**

Protocol Title: **The creation of film and television properties: The accounts behind the story**

Ethics Approval Date: **April 11, 2011**

Expiry Date: **April 11, 2012**

Documents Reviewed and Approved: **Ethics Protocol with Appendices**

This is to notify you that The Ivey School of Business Research Ethics Board for Non-Medical Research Involving Human Subjects (NMREB) which is organized and operates according to the Tri-Council Policy Statement: Ethical Conduct of Research Involving Humans and the applicable laws and regulations of Ontario has granted approval to the above named research study on the approval date noted above.

This approval shall remain valid until the expiry date noted above assuming timely and acceptable responses to the NMREB's periodic requests for surveillance and monitoring information. If you require an updated approval notice prior to that time you must request it using the UWO Updated Approval Request Form.

During the course of the research, no deviations from, or changes to, the study or consent form may be initiated without prior written approval from the NMREB except when necessary to eliminate immediate hazards to the subject or when the change(s) involve only logistical or administrative aspects of the study (e.g. change of monitor, telephone number). Expedited review of minor change(s) in ongoing studies will be considered. Subjects must receive a copy of the signed information/consent documentation.

Investigators must promptly also report to the NMREB:

- a) changes increasing the risk to the participant(s) and/or affecting significantly the conduct of the study;
- b) all adverse and unexpected experiences or events that are both serious and unexpected;
- c) new information that may adversely affect the safety of the subjects or the conduct of the study.

If these changes/adverse events require a change to the information/consent documentation, and/or recruitment advertisement, the newly revised information/consent documentation, and/or advertisement, must be submitted to this office for approval.

Members of the NMREB who are named as investigators in research studies, or declare a conflict of interest, do not participate in discussion related to, nor vote on, such studies when they are presented to the NMREB.

Signature: \_\_\_\_\_

Roderick White

Associate Dean - Faculty Development & Research

*This is an official document. Please retain the original in your files.*

## Main study phase (original)



Richard Ivey School of Business  
The University of Western Ontario

Richard Ivey School of  
Business  
The University of Western  
Ontario  
1151 Richmond Street North  
London, ON N6A 3K7

### Use of Human Subjects - Ethics Approval Notice

**Principal Investigator:** Oana Branzei

**Re PhD Candidate:** Esther Maier

**Review Number:** 008/12 BREB

**Protocol Title:** The accounts behind the story: Budgets and budgeting practices in film and television production

**Ethics Approval Date:** April 26, 2012

**Expiry Date:** April 26, 2013

**Documents Reviewed and Approved:** Ethics Protocol, Letter of Information and Consent Form

This is to notify you that The Ivey School of Business Research Ethics Board for Non-Medical Research Involving Human Subjects (NMREB) which is organized and operates according to the Tri-Council Policy Statement: Ethical Conduct of Research Involving Humans and the applicable laws and regulations of Ontario has granted approval to the above named research study on the approval date noted above.

This approval shall remain valid until the expiry date noted above assuming timely and acceptable responses to the NMREB's periodic requests for surveillance and monitoring information. If you require an updated approval notice prior to that time you must request it using the UWO Updated Approval Request Form.

During the course of the research, no deviations from, or changes to, the study or consent form may be initiated without prior written approval from the NMREB except when necessary to eliminate immediate hazards to the subject or when the change(s) involve only logistical or administrative aspects of the study (e.g. change of monitor, telephone number). Expedited review of minor change(s) in ongoing studies will be considered. Subjects must receive a copy of the signed information/consent documentation.

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Signature: \_\_\_\_\_

Roderick White

Associate Dean - Faculty Development & Research

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## Main study phase (revised)



Richard Ivey School of Business  
The University of Western Ontario

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1151 Richmond Street North  
London, ON N6A 3K7

### Use of Human Subjects - Ethics Approval Notice

**Principal Investigator: Oana Branzel**

**Re PhD Candidate: Esther Maier**

**Review Number: 008/12 BREB**

**Protocol Title: The accounts behind the story: Budgets and budgeting practices in film and television production**

**Ethics Approval Date: August 16, 2012**

**Expiry Date: August 16, 2013**

**Documents Reviewed and Approved: Notification of Revision**

This is to notify you that The Ivey School of Business Research Ethics Board for Non-Medical Research Involving Human Subjects (NMREB) which is organized and operates according to the Tri-Council Policy Statement: Ethical Conduct of Research Involving Humans and the applicable laws and regulations of Ontario has granted approval to the above named research study on the approval date noted above.

This approval shall remain valid until the expiry date noted above assuming timely and acceptable responses to the NMREB's periodic requests for surveillance and monitoring information. If you require an updated approval notice prior to that time you must request it using the UWO Updated Approval Request Form.

During the course of the research, no deviations from, or changes to, the study or consent form may be initiated without prior written approval from the NMREB except when necessary to eliminate immediate hazards to the subject or when the change(s) involve only logistical or administrative aspects of the study (e.g. change of monitor, telephone number). Expedited review of minor change(s) in ongoing studies will be considered. Subjects must receive a copy of the signed information/consent documentation.

Investigators must promptly also report to the NMREB:

- a) changes increasing the risk to the participant(s) and/or affecting significantly the conduct of the study;
- b) all adverse and unexpected experiences or events that are both serious and unexpected;
- c) new information that may adversely affect the safety of the subjects or the conduct of the study.

If these changes/adverse events require a change to the information/consent documentation, and/or recruitment advertisement, the newly revised information/consent documentation, and/or advertisement, must be submitted to this office for approval.

Members of the NMREB who are named as investigators in research studies, or declare a conflict of interest, do not participate in discussion related to, nor vote on, such studies when they are presented to the NMREB.

Signature

Roderick White

Associate Dean - Faculty Development & Research

*This is an official document. Please retain the original in your files.*



## Appendix D. Interview Protocols

### Pilot Study

1. General background questions for the participant:
  - a. What is your current occupation?
  - b. How long have you been working in this role? In the industry?
2. Briefly describe your role in terms of your involvement in development and production.
3. Does your role change as a project moves from development to production? If so, how?
4. In your view, what are the most important elements of the development process? The production process?
5. What are the key factors you consider when assessing in the potential of a project?
  - a. This could be in assessing whether or not a project should proceed further into development, or for a freelancer, it could be an assessment of whether or not they work on the project.
6. Do you have any involvement with either development or production budgets? If so, can you describe this for me?
  - a. How do budget issues affect the work that you do, either directly or indirectly?
7. Do you have any involvement with the revenue projections or sales forecasts for projects? If so, can you describe this for me?
8. Do you – or your organization – have a formal process for assessing potential projects? If yes, what is the nature of your involvement in this process?
  - a. How important are project budgets and forecasts in this process?
  - b. In your view, what role do budgets and forecasts play as a project moves from conception to completion?
  - c. How integral is the Canadian Media Fund (CMF)<sup>8</sup> in this process?
9. How do you view the creative vs. the commercial or financial aspects of the project?
  - a. Is either one more important to you? Why?
  - b. Have you ever had to make trade-offs between the two?
10. What do you think of the recent changes the CMF made with respect to the required digital media component?
  - a. Were there any implications for your current project(s)?
  - b. How do you see digital media evolving in the future? How do you think it will change the work that you do?

---

<sup>8</sup> The CMF requires the use of standardized budgets and forecasts with all its funding applications.

## Main study phase (original)

### Outline of Questions for Semi-structured interviews

1. General background questions for the participant:
  - a. Can you provide a brief overview of your background in the industry and how you came to be in your current role?
  - b. How long have you been in your current role?
2. Briefly describe your role in terms of your involvement in development, production and/or post-production.
3. If you are involved in more than one aspect (e.g. development and production) does your role change as a project moves from development to production? If so, how?
4. Do you – or your organization – have a formal process for assessing potential projects? If yes, what is the nature of your involvement in this process?
  - a. How important are project budgets and forecasts in this process?
  - b. How integral are funding eligibility guidelines (e.g. CMF, tax credits) in this process?
5. In your view, what are the most important elements of the development process? The production process?
6. Do you have any involvement with either development or production budgets? If so, can you describe this for me?
  - a. How do budget issues affect the work that you do, either directly or indirectly?
7. How do you view the creative vs. the commercial or financial aspects of the project?
  - a. Is either one more important to you? Why?
  - b. Have you ever had to make trade-offs between the two? If so, can you describe the process that you went through?

## Main study phase (revised)

### Outline of Follow-up Questions for 2<sup>nd</sup> Round of Semi-structured interviews

1. Specific questions to elucidate a deeper understanding of how numbers – or a proxy for numbers<sup>9</sup> – are internalized in different roles. In different roles the numbers appear to have a different basis in which they are made concrete, so the objective here is to find out the specifics of what matters in different roles in terms of numbers:
  - a. In your role, what kind of numbers matter to you on a day-by-day basis?
  - b. How do you make these numbers – or calculations – concrete in terms of what you have to do or what you delegate to your team?
  - c. How do you deal with them in carrying out your tasks?
  - d. How do you know whether these numbers – or calculations – worked out or didn't work out? (e.g. Does someone talk to you about it?)
  - e. How do you learn not to make the same mistake twice?
  - f. How do you carry that forward in terms of learning?
  
2. Specific questions for individuals regarding performance of their task(s) in relation to others:
  - a. Do you have tensions with anyone where you worry about whether something is going to cause cost overruns or scheduling issues? (e.g. delays)
  - b. If something happens that has the potential to impact the numbers, when and how do you tell people about it?
  - c. How do you approach the numbers – or calculations – that you do which may have an impact on other departments?
  
3. Specific questions for individuals that attend the planning meetings:
  - a. Do the different planning meetings (e.g. concept, department, tech survey, and production) have complimentary functions? Could you explain how these work (whether yes or no)?
  - b. Are you concerned with different numbers in one meeting vs. another? For instance, are you concerned with different numbers in the concept meeting vs. the production meeting? Why is that?
  - c. How does your function or role change when the episodes move from planning to the floor (i.e. production)?

---

<sup>9</sup> Some individuals may think of numbers in terms of things such as: time delays; time required for a specific task; background actors; "dailies;" call times; etc.

## **Appendix E. Comparison of Canadian and American Film Industry**

Series X is produced in Canada, where the film and television industry is regulated under the auspices of the broader cultural industries policy. Given the significant volume of Hollywood projects shot in both Toronto and Vancouver, many Canadian crew members have built their careers by accumulating credits on both American and Canadian productions. While there are many similarities between the two, there are some unique aspects of the industry structure in Canada that should be highlighted in this study.

Many aspects of the Hollywood production model (DeFillippi & Arthur, 1998) are also relevant in Canada. For example, projects are produced in temporary organizations staffed by freelance crews and collective action takes place in semi-autonomous units (Faulkner & Anderson, 1987). The role structure transported from project to project in these temporary organizations is also virtually identical. Crews are unionized in both jurisdictions and software designed for scheduling, cost reporting and scriptwriting are also consistent.

The most significant difference between the Canada and its American counterpart is the fact that the Canadian industry is not organized on purely commercial grounds. A variety of state supports exist to combat commercial pressures arising from a small, domestic market. Two of the more notable financial incentives offered to projects produced in Canada are the enhanced license fees available to qualifying domestic productions and the labour-based taxed credits which are directed at both domestic and foreign productions.

While stories of largesse and extravagance are legendary in Hollywood (Faulkner & Anderson, 1987), this is one aspect not replicated in the Canadian industry. Even with the financial incentives in place, as shown in Table E.1, the budgets for qualifying domestic productions are typically smaller than their American counterparts.

**Table E.1 Estimated budgets for dramatic series**

Name of Series	Country of Origin	Lead Broadcaster	Estimated Budget (millions)	
			Total	Per Episode
Game of Thrones	US	HBO	\$40.0 - \$50.0	\$4.0 - \$5.0
True Blood	US	HBO	\$36.0	\$3.0
Mad Men	US	AMC	\$39.0	\$3.0
The Tudors	Ireland/Canada (US)	CBC	\$35.0	\$3.5
The Borgias	Ire/Can/Hungary	Bravo!	\$32.0	\$3.2
The Listener	Canada	CTV	\$26.4	\$2.3
Rookie Blue	Canada	CTV	\$26.4	\$2.3
Being Erica	Canada	CBC	\$22.4	\$1.7

In the industry trades, *Game of Thrones* is often referred to as the most expensive television series produced to date. The budgets for high profile dramatic series produced primarily for an American audience are more in line with the estimated \$3 million per episode budgets of *True Blood* and *Mad Men*. For a Canadian series to reach the same budget threshold, financing from multiple countries must be secured as illustrated by *The Tudors* and *The Borgias*. In contrast, the estimated episodic budgets of \$2.3 million for both *The Listener* and *Rookie Blue* are considered high for Canadian Content (i.e. CanCon) series and were only attainable as both these shows attracted a pre-sale (financing) to an American Broadcaster. The estimated episodic budget of \$1.7 million for *Being Erica* is much more reflective of the average budget for dramatic series qualifying as CanCon.

Canadian broadcasters are acutely aware of the challenges presented by a small domestic market and the regulatory framework they must operate within. While American networks frequently abandon pilot episodes before they go to air, or cancel new series after airing only a few episodes, this is not the case in Canada. Canadian broadcasters are obligated to air every pilot and every episode of a series so the production company producing the series is eligible to

receive the tax credits that form part of the financing. These elements combine to create a much leaner production environment where largesse is rare and detailed planning by production crews is essential to ensure that limited financial resources are maximized in terms of production values.

## **CURRICULUM VITAE**

### **ESTHER R. MAIER**

#### **EDUCATION**

2013 (Anticipated)	PhD (General Management) - Richard Ivey School of Business, University of Western Ontario
2007	MBA (with distinction) - Schulich School of Business, York University
2001	Certified Public Accountant (CPA) – Vermont
1995	Certified General Accountant (CGA) – University of British Columbia

#### **ACADEMIC EMPLOYMENT**

2012 – Present	Lecturer/Assistant Professor, Accounting – Wilfrid Laurier University
2008 – 10	Richard Ivey School of Business – Teaching Assistant (MBA Program)

#### **COURSES TAUGHT**

2012 – 13	Introduction to Management Accounting
2009 – 10	Managerial Finance (TA)
2008 – 09	New Venture Creation (TA)

#### **PUBLICATIONS**

##### **Refereed Journal Articles**

Maier, E., & Branzei, O. (Forthcoming). Manufacturing illusions for the screen: Creativity and control in large-scale projects. *International Journal of Project Management*.

##### **Book Chapters**

Maier, E., & Branzei, O. (2010). Creative Conflict in Digital Imaging Communities. N. Ashkanasay, C. Hartel, and W. Zerbe (Ed's) *Research on Emotions in Organizations: Emotions and Organizational Dynamics*, Bingley UK: Emerald Group.

##### **Papers in Refereed Conference Proceedings**

Maier, E. (2012). "The accounts behind the story: Budgeting practices in cultural production." Paper Presented at the European Group for Organizational Studies (EGOS) Colloquium, Helsinki, Finland.

Maier, E. (2011). "The accounts behind the story: Inspired by Hopwood's Vision." Paper presented at the Critical Perspectives on Accounting Conference, Clearwater, Florida (July)

Maier, E. (2010). "Strategy and management control: Parallels in practice." Paper presented at the International Federation of Scholarly Associations of Management (IFSAM), Paris, France.

Maier, E., & Branzei, O., (2009). "The social production of creativity in digital imaging communities." Paper presented at the European Group for Organizational Studies (EGOS) Colloquium, Barcelona, Spain.

Maier, E., & Branzei, O., (2007). "Mainstreaming uniqueness in digital imaging: Generative microdynamics of institutional entrepreneurship." Paper presented at European Group for Organizational Studies (EGOS) Colloquium , Vienna, Austria

### **Other: Refereed Conference Presentations**

Maier, E. (2012). "The intersection of budgeting and strategizing in cultural production." Paper presented at the Emerging Scholars Colloquium at the Interdisciplinary Perspectives on Accounting Conference, Cardiff, Wales.

Maier, E. (2009). "Blurred Transitions: How Online Social Interactions Pattern Creative Practices." Paper presented at the Academy of Management (AOM) Conference, Chicago, Illinois

Maier, E., & Branzei, O., (2007). "Mainstreaming Uniqueness in Digital Imaging: Generative Microdynamics of Institutional Entrepreneurship." Paper presented at the Administrative Sciences Association of Canada (ASAC) Conference, Ottawa, Canada

### **SELECTED MANAGEMENT EXPERIENCE**

2005 – 2008	VP Finance (Broadcasting), CanWest Communications, Toronto, Ontario (GLOBAL Television Network, CH/EI and Specialty Channels-HGTV, Showcase, Food)
2003 – 2004	Finance Director, Euro RSCG LIFE, Toronto, Ontario (Member of the Havas Advertising Group; clients included Bayer, Aventis, Sanofi)
2002 – 2003	VP Finance, Cinenova Productions Inc, Toronto, Ontario (produced documentary films for Discovery Communications, National Geographic)
2001 - 2002	Finance Director, Euro RSCG MVBMS PARTNERS, San Francisco, California (Member of the Havas Advertising Group; clients included Intel, Juniper Networks, The Picture People)
1997 – 2001	Chief Financial Officer, Catalyst Entertainment Inc, Toronto, Ontario (an affiliate of The Gullane Entertainment Group; properties included Thomas the Tank Engine)
1996 – 1997	Controller, The Ink Tank Animation Studio, New York, NY (owned by R.O. Blechman; clients included Bozell Communications, Nickelodeon)
1994 - 1996	Controller, Forefront Productions Corp, Vancouver, BC (produced programming for CanWest Global, BBC)