

Thank you for your interest in applying for ScreenSkills co-investment. This document will guide you through making your application to receive co-investment for your training project as a company or training provider, including:

1. About ScreenSkills - This is an introduction to how we co-invest with organisations to create and deliver training
2. How to apply for co-investment from ScreenSkills
3. What to include in your application - our delivery values
4. Completing your supporting documents, including the Project and Budget Report
5. How we assess your application
6. How to work with us during the term of your project
7. Conditions of receiving ScreenSkills co-investment

Read this guide in conjunction with the specific fund guidelines you are applying to, where we have outlined what co-investment is available and what training we are looking to support.

You should discuss your project with the sector manager named in the specific fund guidelines before starting your application.

Other formats

If you need this application pack in another format (for instance, large print) please contact: marketingsupport@screenskills.com

We are also able to provide information and documents to you in Welsh on request.

Drwy Gynllun Iaith Gymraeg ScreenSkills, rydym yn gallu darparu gwybodaeth a dogfennau yn y Gymraeg, ar eich cais.

1. About ScreenSkills

ScreenSkills works with the UK's screen-based creative industries to develop skills and talent from the classroom to the boardroom.

What we invest in

The ScreenSkills Investment Fund is a collective investment in the skills of the Screen Industries for the future.

Working in partnership with industry and informed by industry research, ScreenSkills directs this collective investment to create new and innovative training in priority skills and in-demand roles to ensure industry growth.

What we don't invest in

- Activities that do not meet the criteria of what we are looking to support in a specific call for co-investment and those set out in this guide;
- Activities that do not directly benefit the UK's Screen Industries;
- Finance for TV or film production;
- Activities designed to benefit the sole interests of a single organisation rather than meeting the priorities of the wider industry;
- Activities that have already taken place or started;
- Applications to replace or subsidise statutory funds;
- Capital or building applications;
- Equipment purchases. If you can show that buying small items is essential to delivering your project we may consider this.¹ Equipment rental is allowable.

Who can apply

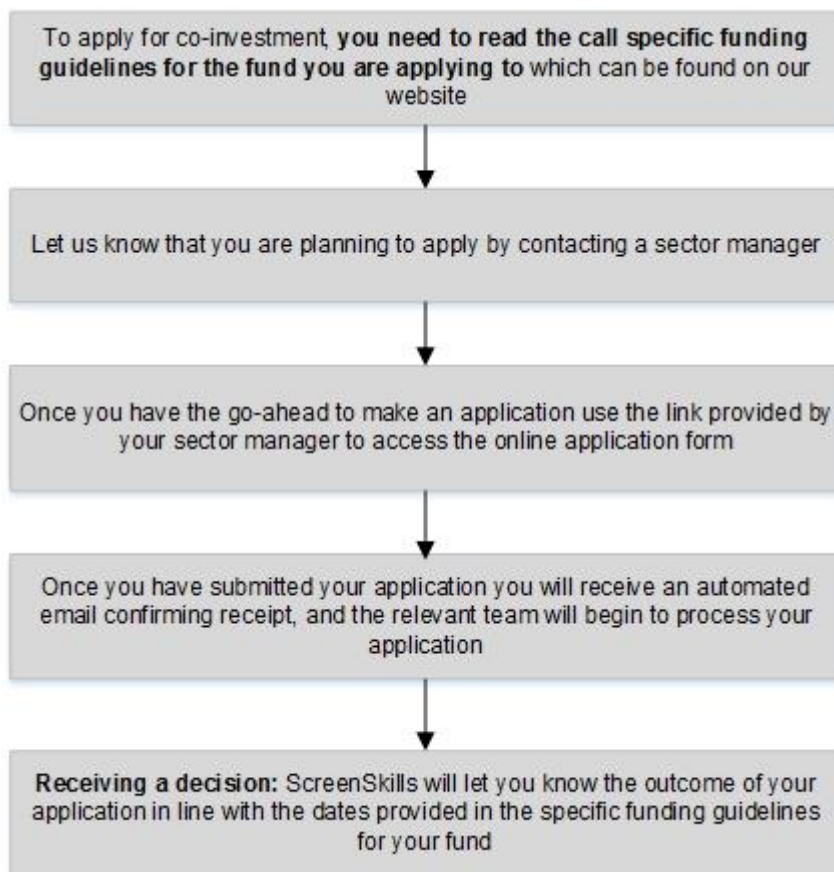
You must be an **organisation** to apply for ScreenSkills co-investment to provide training. For the purposes of co-investment, we consider an organisation to be a:

Organisation type	Definition
Start-up company	A business or undertaking that has only recently begun operation
Sole trader	Operates as an individual; business finances cannot be separated from personal finances. Carries unlimited liability and is personally responsible for obligations incurred
Small company	Has an average number of employees of 50 or fewer and either: <ul style="list-style-type: none"> • An annual turnover of £5.6 million or less, or • A Statement of Financial Position (Balance Sheet) totalling £2.8m or less
Medium business	Has an average number of employees of 250 or fewer and either: <ul style="list-style-type: none"> • An annual turnover of £22.8 million or less, or • A Statement of Financial Position (Balance Sheet) totalling £11.4m or less
Large limited company	Employs over 250 people or has an annual turnover of over £22.8m
Local authority	County councils and district, borough and city councils in England, Wales, Scotland and Northern Ireland
Publicly funded body	An organisation in receipt of public funds used in the organisation's running
European company	A company registered outside the UK, located within the European Union or accession countries and governed by your own country's regulations

¹ Please discuss intended equipment budget allocation with your Sector Manager.

Your organisation should have experience of delivering successful industry-led training or be able to demonstrate in your application how you will secure this expertise.

2. How to apply for co-investment from ScreenSkills



1. Using the online application form

Applications are made using the online application form link. You can begin an application, save your work and return at any time by clicking on the 'Save and Finish Later' button in the application form. [Click this link at any time to return to your application.](#)

- 1.1. You will need to enter a name and email address to set up your **ScreenSkills Application Account**. Your account also allows you to look at your previous online applications if you apply for co-investment in the future. ScreenSkills staff will not have access to your account.
- 1.2. The application form will ask questions about the project you want to deliver including information about your company, your experience in delivering training, your intended marketing approach to ensure a diverse range of participants and how you intend to evaluate and communicate your impact. These may vary depending on the fund to which you are applying. See the next section to read more about what your application should include.
- 1.3. Complete the application form and attach the required documents, including the **Project and Budget Report**.
- 1.4. When ready press the **submit** button. Until you do this, your application has not been sent to ScreenSkills to be assessed.

- 1.5. **On successfully sending your application you will receive an email confirmation with a tracking number.** Please include your application tracking number in any correspondence and contact a member of the fund team if you do not receive this.

3. What to include in your application – our delivery values

Your application must demonstrate how your training project will deliver the training we are looking to support as outlined in the specific funding guidelines.

Your application should also show how you will embed the following values in your project's delivery. Please discuss how to embed these delivery values in conversation with your sector manager.

1. Industry-led training

- 1.1. The training in which we co-invest is led by industry, innovative and provides value for money.
- 1.2. Your application should demonstrate input from established industry professionals into the training's development and/or delivery.
- 1.3. Trainers and speakers must have a proven track record in providing industry training.
- 1.4. Training should not duplicate what is already available in the UK and must offer value for money.

2. Diversity

- 2.1. ScreenSkills is committed to significantly improving the diversity of the Screen Industries' workforce to better reflect the UK's diverse population. Your programme should include how you will consider diversity in the delivery of your training project (irrespective of whether we have set specific participant diversity targets).
- 2.2. Your application should demonstrate a commitment to meet any targets we have set and describe the strategy you will use to recruit diverse participants and to encourage participation from the widest possible range of socio-economic backgrounds.
- 2.3. This should include active policies to ensure accessibility, such as access provisions for disabled applicants and financial provisions such as childcare subsidies.
- 2.4. All projects must collect diversity data for all participants, including those who apply to take part but are not successful (for more information about this please refer to your specific funding guidelines).
- 2.5. Training must be accessible UK-wide and be accessible for participants. This can be facilitated by regionally-based training and/or financial support arrangements in the project budget.

3. Diversity

- 3.1. It is essential that we are able to demonstrate the quality of your training and impact of our co-investment to reinforce the benefit of continuing to invest in the skills of the UK's Screen Industries

- 3.1.1. Evaluation of your training project should be embedded throughout its delivery so that the training can be improved upon during its lifetime. You must also plan for a dedicated evaluation phase upon training completion.
- 3.1.2. You will need to capture the following fields of information:
 - 3.1.2.1. Feedback from participants assessing the quality of the training provided
 - 3.1.2.2. The total number of training/learning hours received by each participant;
 - 3.1.2.3. Diversity data for each participant
 - 3.1.2.4. Bi-annual update for each participant 24 months following the project
- 3.1.3. You should describe how you intend to evaluate your training clearly within your application, including the measures of success you will look for, how you will collect information and estimated dates of achieving key evaluation milestones.

4. Sustainability

- 4.1. ScreenSkills is committed to environmental and economic sustainability and we work with our partners to raise standards and awareness across the UK's Screen Industries. Your application should demonstrate how you have considered environmental and economic sustainability in the development of your training project.

5. Marketing and Communications

- 5.1. We expect you to actively market your training to its intended audience. Please allow for this in your budget.
- 5.2. We would like you to demonstrate how you will communicate your project, e.g. the opportunities and successes it brings, and how you will extend your training's impact and outcomes both during and after its delivery.

3. Completing your supporting documents

- You must attach a Project and Budget Report with your application. You will be supplied with a template.
- We pay close attention to value for money over all our co-investment. The amount you ask for should be what you need to deliver your project efficiently and effectively. If there is a fixed maximum amount of co-investment we will award, this will be shown in the specific funding guidelines.
- Please note that eligible and ineligible expenditure will vary according to the origin of our co-investment; for instance, whether it is partially derived from public funding. Please see below.

1. Project co-investment: what qualifies?

- 1.1. For some of our projects we expect you to provide a proportion of the money you need for your investment. This is your **project co-investment**. **Please see your programme for the proportion of project co-investment you should provide.** Sources of finance could include:
 - Direct cash co-investment from industry, the applicant or partner organisations;

- Course fees paid by individuals;
- In-kind support. This means items or services that will be provided to you free of charge. These should be realistic, demonstrable and eligible.
- Other public funding depending on the specific programme

2. Eligible and ineligible co-investment and expenditure

2.1. Please note that if you are applying for public funding from ScreenSkills and are in receipt of other public funding this may not be eligible as project co-investment for your project.

2.2. If you have any other questions, please contact a member of the fund team or sector manager for further information and any questions about completing your Project and Budget Report.

2.3. Applications must be submitted with the following company financial information:

- Full company name and address
- Company registration number (if applicable)
- Director's name

2.4. Your organisation type, you may have to supply additional information:

Organisation type	Additional information to be supplied
Start-up companies	<ul style="list-style-type: none"> • Directors' contact details • Most recent management accounts • Business plan
Sole traders	<ul style="list-style-type: none"> • Audited company accounts from the last three years signed by an accountant • Management accounts (if requested by ScreenSkills)
Small company	
Medium business	
Large limited companies	
Local authorities	
Publicly funded bodies	
European companies	5.3. Audited accounts from the last three years signed by an accountant. These must be provided in English.

2.5. Note that failure to provide the company financial information required in 2.1.3 and 2.1.4 may lead to your application being delayed or rejected.

2.6. You will only need to submit your management accounts or audited/signed company accounts once per financial year. If you have already applied for co-investment and are applying in the same year, you will not have to submit them again. Please contact member of the fund team to discuss if you think this applies to your application.

2.7. Your programme will detail any additional documents needed to support your application.

3. Multiple applications

3.1. There may be a limit to the number of applications that you can submit. Please refer to the specific funding guidelines. If you can provide a range of training that responds to several calls for co-investment or funding programmes, please discuss this further with your sector manager before applying.

- 3.2. When proposing a range of training responding to several different funds, we require individual applications for each project. If you are applying for co-investment to deliver one project in various locations, this can be submitted in a single application with a full breakdown detailed in the budget and cashflow.
- 3.3. If your application to ScreenSkills is successful, we will not usually allow another application for the **same activity** until your project has ended and we have had the chance to evaluate it.
- 3.4. Submission of subsequent applications is subject to the focus of your project remaining a priority for the fund/s you are applying to.

4. How we assess your application

1. The assessment process

- 1.1. Our assessment process takes place in two stages:
 - 1.1.1. **Stage 1:** We review all applications for completeness, assess them against the programme's criteria and scrutinise financial viability.
 - 1.1.2. **Stage 2:** applications will be assessed by a minimum of three assessors. When necessary, external industry assessors will also be engaged.
- 1.2. If there are any delays in the processing of your application we will let you know in writing. Similarly, if you have a problem meeting any deadlines we set for you during the application process, please email us.
- 1.3. We assess applications based on the information we receive when the application is submitted. On rare occasions we may contact you during the assessment process to request that you supply additional information within a certain timescale. Please tell us at the time of our request if you do not think your deadline is achievable, as your application may be rejected if you do not supply this information before the agreed time and date.

2. Assessment criteria

- 2.1. ScreenSkills assesses an application based on the following criteria and on how far it successfully responds to what we are looking to support as outlined in the call for co-investment or funding programme:
 - 2.1.1. The application was made by an **eligible organisation**, as defined in Section 2 above;
 - 2.1.2. The application is for a **specific activity that delivers what we are looking to support**; and
 - 2.1.3. The application can meet the **dates for project delivery** requested in the specific funding guidelines.
- 2.2. We apply the following questions when assessing the extent to which an application successfully responds to what we are looking to support:
 - Do you successfully address what we have asked you to include in your application?

- Does the project address the issues of access and diversity in the UK Screen Industries?
- Does the project have the support of relevant sector/industry bodies?
- Would our funding add value to your project? e.g by supporting new projects or improving the quality, accessibility or number of existing ones.
- Do the people and partners involved have the right levels of skills and experience to deliver industry-standard training?
- How strong are your links with UK industry and, where relevant, internationally?
- Can we see thorough and realistic planning?
- Does the project represent value for money?
- How will you track participants to measure the impact of the training on their career progression?

3. How much has been requested

We pay close attention to value for money over all our co-investment. A successful application's budget will demonstrate consideration of the amount needed to deliver your project efficiently and effectively.

3.1. On occasion we will not always be able to support successful applications for the full amount requested. ScreenSkills reserves the right to offer co-investment subject to a reduction and resubmission of a project budget.

3.2. We may also decide that an application would benefit from increased funding subject to the applicant being able to secure further project co-investment.

4. Managing a balanced portfolio

4.1. There is a high demand for our co-investment and funds are limited. ScreenSkills reserves the right to apply a portfolio approach to ensure the fair distribution of co-investment across industry, subject to meeting the required quality threshold.

4.2. Above all, we want to ensure that we award co-investment fairly, transparently, and that each industry is given equal access to support. As part of the assessment process we track allocation of co-investment in the following ways by considering the following:

- Region / Nation
- Sector
- Size of co-investment funding awarded
- What activity has been supported through other co-investment

5. Due diligence and financial assessments

5.1. All applications will be required to undergo a due diligence check prior to an award being made. ScreenSkills reserves the right to carry out necessary checks at its discretion as part of due diligence to safeguard the investment of the co-investment that we manage.

5.2. ScreenSkills conducts financial assessment on all organisations who apply for funding. This may include a financial viability assessment and web-based searches using information held by Companies House. By making your application to ScreenSkills you agree to such checks taking place.

6. If you are successful

- 6.1. If your application is successful you will be informed by a member of the fund team by email. This co-investment funding offer email will outline the conditions of your offer and any budget amendments required before we issue your investment agreement.
- 6.2. This email will also introduce you to your main contacts in wider ScreenSkills teams and include important attachments which you should read in full.

7. If you are unsuccessful

- 7.1. If we are not able to support your application, we will provide feedback in writing and give you a contact name if you would like more detailed information. Any request for additional feedback has to be made within three months of receiving notification of the decision.
- 7.2. You are very welcome to apply again at the next deadline. Before you do so, however, we strongly recommend that you first understand and take advice on why you were not successful this time around.

8. Appeals procedure for funding

- 8.1. ScreenSkills' decisions to award co-investment are made entirely at our discretion. There is an appeals mechanism you can use, but only if you believe we did not apply our assessment or decision-making procedures correctly.
- 8.2. You cannot use the appeals procedure to appeal against our decision on awarding co-investment if we have followed our decision-making process correctly. If you would like a copy of our Appeals Procedures please contact the relevant a member of the fund team.
- 8.3. If you would like to make an appeal please note that ScreenSkills must have been notified of your decision to appeal within three months of your receiving notification of the decision.

9. ScreenSkills' Customer Complaints Procedure

- 9.1. ScreenSkills is committed to being open and accessible and we welcome all comments on our work and the services we provide. We strive to provide the very highest standards of professionalism and customer service. If you are dissatisfied with any aspect of the service you have received from ScreenSkills, we have a Customer Complaints Procedure you can use. A copy of this is available on [our website](#) and can also be provided by the relevant a member of the fund team.

6. How to work with us during the project

If your application is successful, the funding offer email you receive from the Fund Team will introduce you to your main contacts who will support you over the life of your project.

1. The Fund Team

- 1.1. Please ensure you update us with course and project dates as soon as possible if these change.

- 1.2. When your application is approved, we will also provide you with template project evaluation forms as part of your funding offer. These templates may include:
 - 1.2.1. **Interim progress reports** that tell us about the progress of the project being delivered;
 - 1.2.2. **A final evaluation narrative report** at the end of the project that tells us about what went well with the course and how it could be improved. The report should draw on feedback collected from participants, tutors and industry partners during the course about their views on the organisation and delivery of the training;
 - 1.2.3. **Contact and diversity details** for all participants that attended the training;
 - 1.2.4. **Learning hour outputs for each participant on the training**, this is submitted in your project and budget report;
 - 1.2.5. **Customer satisfaction survey** (online survey provided by ScreenSkills);
 - 1.2.6. **Tracking** for all participants that attended the training.
- 1.3. At the end of your project we may also ask you to attend an evaluation meeting with us.
- 1.4. At the start of the project the training provider will be required to request information about each participant's current role and responsibilities. For 24 months after the end of the project the training provider will contact the participants at 6 monthly intervals requesting the same information. This will be used to gauge the short and longer term impact of the training and success in meeting its initial objectives. You will be provided a template to submit this information
- 1.5. The information provided to ScreenSkills for the use of monitoring and evaluation will be held in confidentiality, in line with the Data Protection Act 1998.

2. Marketing and Communications

- 2.1. If your application is successful, you will receive our Branding and Marketing Guide alongside your funding offer email.
- 2.2. Please read this guide fully when accepting your funding as it contains essential information about how you must credit your co-investment and how we can support you.
- 2.3. The Marketing and Communications Team will work closely with you to help you to communicate the co-investment and promote the activity. You should contact the Marketing and Communications Team shortly after accepting your offer.
- 2.4. Your training can be promoted on our professional community platform, Hiive, where you can promote your course to an extensive network of creative professionals.
- 2.5. We will ask you to provide a short Marketing, Communications and Legacy outline of your planned activity when you accept your funding offer. In some cases you may also be asked to attach a full Marketing Plan with your application.
- 2.6. A legacy plan could involve taking high quality images or video of your training, working with us to produce an article from the training highlighting the learning outcomes, making a swarm on Hiive for participants to discuss the training after it ends and encouraging participants to blog about their experiences so that others can share their learning. You should highlight outstanding individuals to us to help us produce case studies of industry-leading training and should aim to offer as much insight as possible into the skills required by your industry.

7. Conditions of receiving ScreenSkills co-investment

1. The length of a project

- 1.1. The call for co-investment or funding programme will outline how long we expect projects to last in the delivery criteria and project dates stated in the specific funding guidelines.
- 1.2. The duration of your co-investment funding will correspond with the life of your project as outlined in the project plan submitted with your application.
- 1.3. Should a project overrun for reasons outside of your control, we will endeavour to adapt the payment schedule accordingly. Due to the restrictions of some of the co-investment sources we work with, this may not be possible in all cases, but we will always work with you to ensure that the requirements of the project are met as far as is possible.

2. Project and Budget Report

- 2.1. Each time you wish to submit a claim for co-investment, we will require this claim to be accompanied by your updated Project and Budget Report.
- 2.2. For each claim, we will require an up-to-date cashflow, reflecting your actual spend against the forecasted spend you submitted with your application, and an up-to-date project plan, letting us know how the project is progressing.
- 2.3. The claim form contains formula that should automatically calculate how much is owed to you based on the cashflow. You do not need to change this formula. If you think that the claim form is not right when you submit your claim, please let us know.
- 2.4. An indicative schedule of claims will be included in your contract. If you are not able to comply with the dates listed in your contract, please contact us as soon as possible. We will work with you throughout your project's duration to suit your project needs.

3. VAT

- 3.1. If you are registered for VAT, the figures in your Project and Budget Report should not include VAT that you can claim back. If you are not registered for VAT, your costs should include VAT. Funding offers we make are outside the scope of VAT (this means that they are not a business activity) and must be listed in your accounts as a grant.
- 3.2. You should get financial advice from your own accountant or the relevant tax office if you are unsure about your VAT status.

4. Evidencing spend

- 4.1. You must retain evidence of your project co-investment and project spend, which must be submitted with each claim that you submit. Typically we will request evidence in the following ways:
 - 4.1.1. **Tier 1: Funding awards of £50,000 and over** will be required to conduct an audit and submit the audit to ScreenSkills alongside a fully completed Project and Budget Report for assessment. We will provide you with guidance about what we need you to submit. The independent audit will be kept on record as evidence of the project's entire spend. Periodical drawdowns are subject to random sample requests of expenditure in line with periodical claims.

- 4.1.2. **Tier 2: Funding awards of under £50,000 and above £20,000** are required to retain evidence of all income and expenditure. We will schedule periodical monitoring visits to review the progress, spend and request a random sample of expenditure evidence.
- 4.1.3. **Tier 3: Funding awards of £20,000 and under** are required to submit on request a sample of expenditure selected at random in line with periodical claims.
- 4.2. We may also ask you to submit full proof of expenditure on occasion to meet our internal audit requirements.

5. Administration

- 5.1. Administrative records will be maintained for all applications irrespective of whether or not they were successful. These records will be held by ScreenSkills for 11 years.
- 5.2. In order to ensure good administration, reasons for decisions about applications and claims will be recorded on file at all stages by ScreenSkills.
- 5.3. If you have been awarded co-investment, you will be required to keep this record for 11 years.

6. Freedom of information

- 6.1. ScreenSkills is subject to the Freedom of Information Act 2000 (FOI Act) and we will expect your cooperation and assistance in order to comply with the obligations under the FOI Act.
- 6.2. Please be aware that information provided in confidence is likely to be exempt under the terms of section 41 of the FOI Act and that the operating department will respect its confidentiality.

7. State Aid

- 7.1. Some of the funding awarded by ScreenSkills is subject to EU funding requirements as it is public money. Where relevant, we have registered funds under the Training Aid exemption in the General Block Exemption Regulation (the full text of which can be found via the following link: [\(EU\) N°651/2014 of 17 June 2014](#)).
- 7.2. If you are awarded public funding from ScreenSkills, this will be outlined in your contract. Please contact us if you have any questions about State Aid and your funding.

Contact us

Please contact a member of the Fund Team to discuss completing the Project and Budget Report or any queries related to any part of the application process. To discuss your project in more detail or any aspect of completing the application form please contact your sector manager.

Sector managers

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We look forward to receiving your application for co-investment and supporting you to deliver world-class training.