



THE NATIONAL LOTTERY®



Applications guide for organisations

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 mentoring project as a company or training provider.

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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 we are looking to support.

You should discuss your project with the mentoring 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 us at marketingsupport@screenskills.com

About ScreenSkills

ScreenSkills is the industry-led skills body for the UK's screen industries – animation, film, games, television, including children's and high-end, VFX and immersive technology. We work across the whole country to help build a diverse workforce with the skills needed for continued success, now and in the future.

What we invest in

ScreenSkills manages Skills Funds, including the Film Skills Fund which has invested more than £13 million in skills and training for UK film production, distribution and exhibition since it was established in 1999.

We also lead the delivery of the BFI's Future Films Skills strategy, investing National Lottery funds, and receive funding from the Arts Council England.

Working in partnership with industry and informed by industry research, ScreenSkills directs this collective investment to create new and innovative training, learning and development opportunities 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. Equipment rental is allowable.

Who can apply

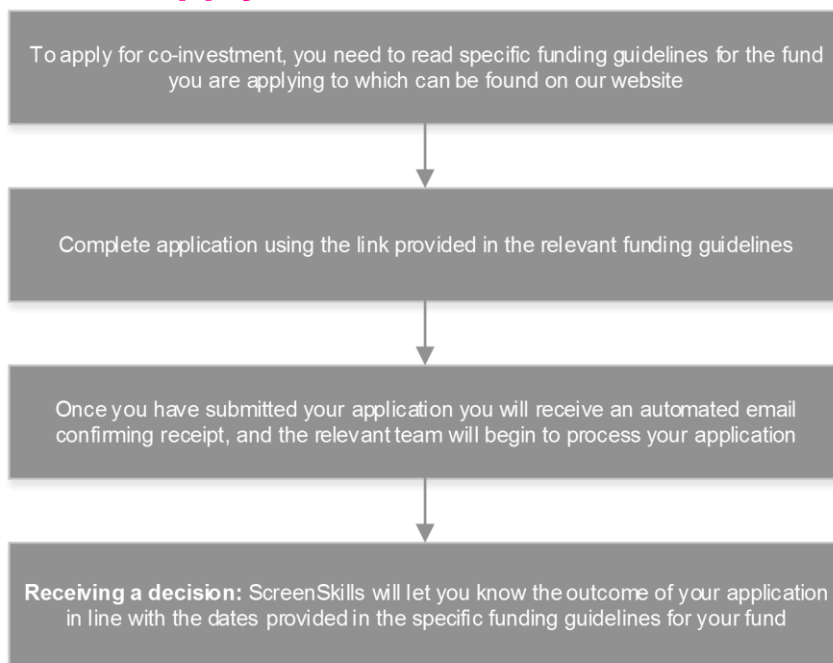
You must be an **organisation** to apply for ScreenSkills co-investment to provide mentoring. For the purposes of co-investment, we consider an organisation to be a:

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

	<ul style="list-style-type: none"> 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

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

How to apply for co-investment from ScreenSkills



Using the online 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.](#)

- 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.
- The application form will ask questions about the project you want to deliver including information about your company, your experience in delivering learning and development activities, 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.

- Complete the application form and attach the required documents, including the **project and budget report**.
- When ready press the **submit** button. Until you do this, your application has not been sent to ScreenSkills to be assessed.

What to include in your application - our delivery values

Your application must demonstrate how your project will deliver the mentoring activity 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.

Industry-led training

- The training, learning and development in which we co-invest is led by industry, innovative and provides value for money.
- Your application should demonstrate input from established industry professionals into the mentoring development and/or delivery.
- Mentors must have a proven track record/experience in the screen industry this includes those at the early stage when working with entry-stage mentees
- Mentoring and must offer value for money.

Diversity

- 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 mentoring project (irrespective of whether we have set specific participant diversity targets).
- 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.
- This should include active policies to ensure accessibility, such as access provisions for disabled applicants and financial provisions such as childcare subsidies.
- 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).
- Mentoring must be accessible for participants. This can be facilitated by regionally-based mentoring and/or financial support arrangements in the project budget.

Evaluating and tracking

It is essential that we are able to demonstrate the quality of the mentoring and the impact of our co-investment to reinforce the benefit of continuing to invest in the skills of the UK's screen industries.

- Evaluation of your mentoring project should be embedded throughout its delivery so that the mentoring can be improved upon during its lifetime. You must also plan for a dedicated evaluation phase upon mentoring completion.
- You will need to capture the following fields of information:
 - feedback from participants assessing the quality of the mentoring provided
 - the total number of mentoring pairs completing the programme
 - diversity data for each participant.
- Bi-annual update for each participant for 24 months following the project.
- You should describe how you intend to evaluate your mentoring clearly within your application, including the measures of success you will look for, how you will collect information and estimated dates for achieving key evaluation milestones.
- ScreenSkills requires all funded mentoring programmes to complete 24 month tracking on all beneficiaries. ScreenSkills will provide a template for you to use for this purpose. It is the provider's responsibility to ensure beneficiaries respond in a timely manner and report back to ScreenSkills every six months. Please note, ScreenSkills will retain 5% of the total budgeted project management fee until all tracking is complete.

Sustainability

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 mentoring project.

Marketing and communications

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

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.

Project co-investment: what qualifies?

- 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

Eligible and ineligible co-investment and expenditure

- 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.
- If you have any other questions, please contact a member of the fund team for further information and any questions about completing your Project and Budget Report.
- Applications must be submitted with the following company financial information:
 - full company name and address
 - company registration number (if applicable)
 - directors' name
- 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	Audited accounts from the last three years signed by an accountant. These must be provided in English.

- Note that failure to provide the company financial information required may lead to your application being delayed or rejected.
- 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.
- Your programme will detail any additional documents needed to support your application.

Multiple applications

- 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 mentoring that responds to

several calls for co-investment or funding programmes, please discuss this further with your sector manager before applying.

- When proposing a range of mentoring 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 cash flow.
- 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.
- Submission of subsequent applications is subject to the focus of your project remaining a priority for the fund/s you are applying to, the focus of your project remaining a priority for the fund/s you are applying to.

How we assess your application

The assessment process

- Our assessment process takes place in two stages:
 - Stage 1: We review all applications for completeness, assess them against the programme's criteria and scrutinise financial viability.
 - Stage 2: Applications will be assessed by a minimum of three assessors. When necessary, external industry assessors will also be engaged.
- 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.
- 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.

Assessment criteria

- 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 applications for mentoring funding and:
 - The application was made by an eligible organisation, as defined in Section 2 above
 - The application is for a specific activity that delivers what we are looking to support
 - The application can meet the dates for project delivery requested in the specific funding guidelines.
- 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 under-represented groups and/or skills gaps in the UK Screen Industries?
 - Does the project have the support of relevant sector/industry bodies?

- Would our funding add value to your project? eg 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 mentoring?
- How strong are your links with UK screen 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 mentoring on their career progression?

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.

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

Managing a balanced portfolio

- 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 screen industry sectors, geographic location, under-represented group, skills gaps and shortages, subject to meeting the required quality threshold.
- 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

Due diligence and financial assessments

- 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.
- ScreenSkills conducts financial assessments 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.

If you are successful

- 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.
- This email will also introduce you to your main contacts in wider ScreenSkills teams and include important attachments which you should read in full.

If you are unsuccessful

- 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.
- 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.

Appeals procedure for funding

- ScreenSkills's 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.
- 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.
- 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.

ScreenSkills' customer complaints procedure

- 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 at <https://www.screenskills.com/about-us/making-a-complaint/>

How to work with us during the term of your 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.

The fund team

- Please ensure you update us with project dates as soon as possible if these change.
- 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:
 - **Interim progress reports** that tell us about the progress of the project being delivered;
 - **A final evaluation narrative report** at the end of the project that tells us about what went well and how it could be improved. The report should draw on feedback collected from mentors, mentees and people running the programme as well as any

- industry partners about their views on the organisation and delivery of the mentoring programme;
- **Learning outputs** for each participant on the mentoring, this is submitted in your project and budget report;
- At the end of your project we may also ask you to attend an evaluation meeting with us.
- At the start of the project the mentoring provider will be required to request tracking information which will include participant's current role and responsibilities. For 2 years after the end of the project the mentoring 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 mentoring and success in meeting its initial objectives. You will be provided with a template to submit this information
- The information provided to ScreenSkills for the use of monitoring and evaluation will be held confidentiality, in line with the Data Protection Act 1998.

Marketing and communications

You must ensure that you comply with the marketing and communications requirements outlined in branding and marketing guidelines you will be send with your offer. As part of this offer, you will be required to provide an outline of the marketing and communications plan for your project detailing how you will promote your funded activity and engage with ScreenSkills during the process.

To guide you through, please [follow this link](#) and complete as much of the requested information as possible as this will provide a simple template for producing your plan. All training providers are responsible for promoting their courses. However, the information we collect from you in this document will enable us to help promote and market your ScreenSkills-supported course or programme across our own website, social media and marketing channels.

All attendees on your courses must then be invited to sign up to ScreenSkills in order to be able to list their training achievements on their profiles in the future. The ScreenSkills digital team can assist you through this process and can be contacted at: support@screenskills.com.

At the end of the process, you will be required to evaluate the success of the marketing and communications plan for your project and submit to ScreenSkills, upon request, materials produced so that we may assess the impact.

Conditions of receiving ScreenSkills co-investment

The length of a project

- 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.
- 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.
- 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.

Project and budget report

- For each claim, we will require an up-to-date cash flow, 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.
- The claim form contains formula that should automatically calculate how much is owed to you based on the cash flow. 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.
- 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.

VAT

- 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.
- You should get financial advice from your own accountant or the relevant tax office if you are unsure about your VAT status.

Evidencing spend

- 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:
 - 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. We may schedule periodical monitoring visits to review progress.
 - Funding awards of under £50,000 are required to retain evidence of all income and expenditure. Periodical drawdowns are subject to random sample requests of expenditure in line with periodical claims. We may schedule periodical monitoring visits to review progress.
- We may also ask you to submit full proof of expenditure on occasion to meet our internal audit requirements.

Administration

- Administrative records will be maintained for all applications irrespective of whether or not they were successful. These records will be held by ScreenSkills for seven years.
- In order to ensure good administration, reasons for decisions about applications and claims will be recorded on file at all stages by ScreenSkills.

- If you have been awarded co-investment, you will be required to keep this record for seven years.

Freedom of information

- 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.
- 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.

State aid

- 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](#)).
- 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

For more information or queries about mentoring or the content of your application, please contact:

Jane Saunders

Mentoring Manager

mentoring@screenskills.com

Kate Shalloe

Mentoring Coordinator

mentoring@screenskills.com

For more information or queries about the funding process, please contact:

Tanya Masih

Fund Manager

mentoring@screenskills.com

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