



THE
NATIONAL
LOTTERY®



Application Guide for Organisations

Contents

Introduction.....	2
Who can apply.....	3
How to apply for co-investment from ScreenSkills.....	3
Project co-investment: what qualifies?.....	6
Assessment of applications.....	7
How to work with us during your project.....	9
Conditions of receiving ScreenSkills co-investment.....	10
Contact us.....	12



Introduction

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.

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 Future Film Skills Fund and The Film Skills 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, 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.¹ 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 • 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

Please follow the steps below.

- Read the guidelines and take the opportunity to look through the linked studies and ScreenSkills information
- Complete an application using the link provided, including supporting documents
- Expect to receive an automated email confirming receipt once you have submitted your application. The team at ScreenSkills will begin to process your application.
- ScreenSkills will then let you know the outcome of your application in line with the dates provided in the specific guidelines

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.

- 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, marketing plan and project outline.
- 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.

Delivery value	Information
Industry-led mentoring	<ul style="list-style-type: none"> • The mentoring, 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 career stage when working with entry career stage mentees, or those with skills required in the screen industry e.g. business or leadership skills • Mentoring and must offer value for money
Diversity	<ul style="list-style-type: none"> • 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. • Mentoring must be accessible for participants. This can be facilitated by regionally-based mentoring and/or financial support arrangements in the project budget. Please consider how remote mentoring may be executed.

<p>Evaluation and tracking</p>	<ul style="list-style-type: none"> • 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. • Participant tracking: all organisations who run mentoring programmes funded by ScreenSkills must ensure participants complete a ScreenSkills profile to enable ScreenSkills to track participants for up to 24 months from the end of the mentoring programmes. To enable this, organisations must provide ScreenSkills with the names of participants. This tracking includes participant feedback on the value of the mentoring following completion. The questions will be consistent across all elements of the overall FFS project. • All organisations will be required to regularly provide details of the number of mentors recruited and the number of mentors matched. • All organisation will be required to retain evidence of mentoring matches made for audit purposes e.g. in an email introducing mentor to mentee.
<p>Sustainability</p>	<p>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.</p>
<p>Marketing and Communications</p>	<ul style="list-style-type: none"> • 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, e.g. the opportunities and successes it brings, and how you will extend your mentoring's impact and outcomes both during and after its delivery. • ScreenSkills Marcoms team will be available to provide guidance on branding, marketing and communications. These will include requirements for crediting ScreenSkills depending on percentage of co-investment. Organisations must commit to crediting the support of ScreenSkills, BFI and National Lottery Funding. For example for majority funded project (over 50%) of the programme costs, the credit given would need to be: ScreenSkills [Project Title] in association with [3rd party organisation].

Completing your supporting documents

- You will be supplied with a template for the Project and Budget Report. You must attach the completed Project and Budget Report, a project outline and a marketing plan with your application.
- 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 guidelines 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.

Assessment of applications

Multiple applications

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 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 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; and
 - 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? 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 mentoring?
 - How strong are your links with UK screen industry, where relevant, internationally and how strong are your links with other industries who have skills required for those working in the screen industry e.g. business or leadership skills?
 - Can we see thorough and realistic planning?
 - Can we see a commitment to diversity and inclusion monitoring and reporting?
 - Does the project represent value for money?

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' 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/> and can also be provided by the relevant a member of the fund team.

How to work with us during 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, for example progress against agreed financial, diversity and mentee and mentor number targets;
- **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 that all mentees create a ScreenSkills profile and confirm their participation via a link provided by ScreenSkills. The information provided to ScreenSkills for the use of monitoring and evaluation will be held confidentiality, in line with the Data Protection Act 2018.

Marketing and Communications

- If your application is successful, you will receive our Branding and Marketing Guide alongside your funding offer email.
- 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.
- 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.
- Your mentoring can be promoted on our professional website, where you can promote your mentoring programme to an extensive network of creative professionals.
- 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.
- A legacy plan could involve taking high quality images or video of your mentoring, working with us to produce an article from the mentoring highlighting the learning outcomes, 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 mentoring for our website or to speak at ScreenSkills events, and should aim to offer as much insight as possible into the skills required by your industry.

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 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.
- 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.
- 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:
 - Organisations awarded funding of £50,000 and over will be required to conduct an independent 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. Organisations are also 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.
 - Organisations awarded funding 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

- In compliance with data protection and other regulation, records of application paperwork and diversity monitoring information will be held by ScreenSkills for six years, plus one current year.
- 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.

Contact us

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

Jane Saunders

Mentoring Programme Manager
mentoring@screenskills.com

Kate Shalloe

Mentoring Relationship Manager
mentoring@screenskills.com

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

Tanya Masih

Finance Business Partner
mentoring@screenskills.com

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