

BFI Doc Society Fund

Making an application for National Lottery Documentary Funding – Features and Immersive work

Published 4th July 2023

This guide gives you advice and recommendations on how to write a good application for BFI Doc Society Fund National Lottery funding for documentary feature films and immersive non-fiction projects.

In this guide:

1. [Overview](#)
2. [Delivering against the National Lottery Strategy](#)
3. [Check if you're eligible](#)
4. [What you can use the funding for](#)
5. [Environmental sustainability](#)
6. [How to apply](#)
7. [What happens after you apply](#)
8. [Getting a decision](#)
9. [Conditions of our funding](#)
10. [Appendix A: Full list of BFI delivery materials](#)

1. Overview

Doc Society is the delegate partner for the distribution of the BFI National Lottery funds for documentaries and non-fiction immersive work via the BFI Doc Society Fund (the “**Fund**”): Doc Society believes great documentaries enrich the lives of individuals. They have a unique ability to engage and connect people, transform communities and improve societies.

The Fund is aimed at supporting a diverse range of non-fiction work with creative merit and ambition, which the commercial sector is not able to back, in full or in part, and which would therefore benefit from National Lottery support. Through year-round funding and support programmes, the Fund focuses on developing new, emerging and established talent and encouraging risk in form and narrative approach.

The Fund supports feature length and short documentary films, and non-fiction immersive work. These guidelines are **specific** to (i) feature length documentary films; and (ii) non-fiction immersive work where the amount that you are applying for is **more than £25,000**. Please refer to our Made of Truth guidelines for information about how to apply for up to £25,000 towards a short documentary film or non-fiction immersive project.

The Fund offers support of up to a maximum of £150,000 for feature documentaries and, no less than £25,000 and up to £150,000 for immersive non-fiction projects in the form of non-recoupable grants. The application process is split into two stages: you will need to complete an expression of interest form and, if this meets the assessment criteria, you will be invited to submit a full application form.

Assessment of applications will focus strongly on the talent involved, their progression, their relationship to the story they are telling as well as the creative ambition of the project itself. We are also highly focused on access and inclusivity, to make sure that untold stories from across the English regions and nations of the

UK have the opportunity to be shared with as many audiences as possible and help create a more diverse and inclusive industry.

Please note that we intend to fund in stages and are unlikely to provide many awards of £150,000 as a lump sum, with single award amounts likely to range from £30,000 to £80,000. We have limited funds and may therefore only be able to offer you a lower amount than the one you request.

2. Delivering against the BFI National Lottery Strategy

All activity funded by the BFI Doc Society Fund should contribute to some of the outcomes identified in the [BFI National Lottery strategy](#). The outcomes that feature documentary or immersive non-fiction applicants should seek to meet are detailed below. You will be asked to identify which outcomes your project will achieve during the application process.

Core priorities

As a BFI National Lottery funding delegate partner, the BFI Doc Society Fund. will apply the following six priorities when reviewing applications. These take in the three National Lottery strategic principles, as well as the outcomes identified in the BFI National Lottery strategy:

- **Equity, diversity and inclusion:** addressing under-representation in perspective and representation, talent and recruitment, agency and opportunities, widening the range of voices and audiences served.
- **Impact and audience:** supporting projects with a strong cultural or progressive impact for audiences.

- **Talent development and progression:** supporting early career filmmakers (producers, writers and directors) and projects with a reasonable proportion of early career cast and crew.
- **Risk:** supporting projects that take creative risks.
- **UK-wide:** increasing the number of projects and filmmakers outside London and the South East, looking at location and representation.
- **Environmental sustainability:** addressing sustainability both creatively and practically.

In addition to these BFI National Lottery priorities, the Fund's operations will also be informed by the following Doc Society priorities:

- **Open collaboration:** to develop new voices, to move beyond centres of power toward a truly distributed knowledge base and field building.

Representing all of UK society: to ensure the Fund is representative of society. Creating opportunities for new and emerging talent to access and build relationships as they intersect with the Fund. Attracting, keeping and then building careers in documentary storytelling from across the UK.

Freedom of creative expression: taking smart creative risks on documentary storytelling, in ways that develop and expand the documentary form.

- **Audience right to culture:** working with a range of partners to help audiences and films and non-fiction immersive projects to find each other.

BFI Diversity Standards

We ask applicants to address equity, diversity and inclusion through engaging with the [BFI Diversity Standards for film](#). You will need to demonstrate how your project meaningfully tackles under-representation in relation to disability, gender, race, age,

sexual orientation and socio-economic status, while also considering the interactions of these identities and any other barriers to opportunity. BFI Doc Society Fund feature documentary and non-fiction immersive funding will prioritise projects that will make a significant contribution to improving equity, diversity and inclusion across the industry and so your application will need to make clear, specific commitments to making this change.

Key Performance Indicators

We will measure the success of BFI Doc Society Fund's feature documentary and immersive non-fiction funding using the following Key Performance Indicators (KPIs). They incorporate inclusion targets, and the characteristics of the filmmakers benefiting from awards will contribute towards our performance against these targets:

- Number of projects supported per year: 7 (this is a minimum rather than a ceiling)
- Projects receiving BAFTA albert certification or completing the carbon calculator: 100%
- Projects meet minimum of three Diversity Standards (including mandatory Standards C and E): 100%
- Directors and producers new to BFI Doc Society Fund National Lottery funding: 20%
- Geographic spread of directors and producers: 44% based outside London and the South East; 16% based in Northern Ireland, Scotland or Wales
- Geographic spread of main production base (monitored through the location of lead applicant/production company): 44% based outside of London & SE; 16% based in NI, Scotland or Wales
- Number of projects securing theatrical or festival screenings and/or broadcast within 12 months of delivery: 100%

Inclusion targets for directors and producers supported:

- Disability (including those identifying as D/deaf or neurodiverse or with a longstanding physical or mental diagnosis) **18%**
- Ethnically diverse (London) **40%**
- Ethnically diverse (outside London) **30%**
- Gender (50-50 balance of male and female identifying within the gender binary) **50%**
- LGBTQIA+ (including those identifying outside the gender binary) **19%**

We will also set a target for supporting filmmakers from a lower socio-economic background. We are working with the BFI on aligning our methodology to set this target and will update these guidelines when it has been agreed.

3. Check if you're eligible

Applicant

All applications for funding must:

- Be made by the project's dedicated individual producer, through a limited company registered and centrally managed in the UK.
- Be made by a producer with an established creative track record in successfully delivering moving image work, which means having produced previous projects. These could be feature films, short films, television, music videos, immersive projects, artists' moving image work etc.

Creative team

All projects must:

- Have a director attached.
- Be able to demonstrate that the director has relevant experience through their work in moving image media, although this can be alongside having the majority of their credits in a related creative sector, such as theatre.

- In addition to having a director that meets the above criteria, projects must have a producer attached at the time of application.
- Have a director and producer who are both over 18 and not in full-time education. If any of the creative team are currently in full-time education, you may include them in your application provided that their course or studies will be completed within two months of the offer of any funding being made.

Projects

All projects must:

- Be a stand-alone live action or animated feature length documentary intended for cinematic release, with an intended running time of at least 70 minutes; or be an immersive non-fiction project intended for presentation within the context of moving image festivals or work.
- Have a treatment or creative statement of intent (which will need to be submitted as part of the full application).
- Be seeking funding of no more than £150,000 to be applied as a contribution towards the total budget. Awards will be made in accordance with the scale, ambition and reach of each proposal. We hope to receive applications at a range of budget levels and requests, and do not expect to make many awards at the top award level.
- Include third-party funding, in addition to the amount requested from the BFI Doc Society Fund, in their finance plan. We do not accept applications for the entire project budget amount. You do not need to have all of your other funding in place before you apply to us, but you will need to provide a draft finance plan showing how your project may feasibly be funded.
- Include an initial calculation of the relevant UK creative industry tax credit and any other incentives or subsidies available to the production in their finance plan.
- Be capable of qualifying for British certification, either through the applicable cultural test, or as an official co-production. Full guidance on British certification is available [here](#). Should you need advice as to whether your

project is capable of qualifying, please contact certifications@bfi.org.uk prior to submitting your application.

- Have secured, or have a contractual right to secure, the rights (including any underlying rights) in the idea you are proposing. This includes use of any necessary archive or biographical material. You will be required to provide proof of this prior to any funding offer or payment of any award from the BFI Doc Society Fund.
- Be capable of obtaining a BBFC certificate that is no more restrictive than BBFC '18'. In the case of VR/Immersive projects which are not subject to BBFC certification, they need to be capable of meeting an 18 or equivalent PEGI rating on any platforms they are considering exhibiting with, and in general not contain content that, were it to be presented within a traditional feature format, would exceed a BBFC 18 classification.
- Clearly engage with the [core priorities set out above](#).

Co-productions

We accept applications for international co-productions provided that they meet the eligibility criteria outlined above, including clear engagement with our [core priorities](#). Minority co-production feature films should however consider applying to the [BFI UK Global Screen Fund's \(UKGSF\) International Co-Production strand](#) in the first instance, unless you believe that your project won't meet the applicable eligibility criteria. You should not apply for BFI Doc Society Fund feature documentary funding and UKGSF International Co-Production funding simultaneously, and you cannot receive support from both funds for the same project.

If your application for BFI Doc Society Fund feature documentary or immersive non-fiction funding is declined, you may still subsequently apply to UKGSF if you meet their eligibility criteria, and vice-versa.

BFI Locked Box

If you have a BFI Locked Box from one or more other BFI-funded projects that is accumulating funds, you should tell us this in your application. If you have, or are likely to have, more than £20,000 accrued in any BFI Locked Box at the point of financial closing of your new project, we will require you to invest all sums over £20,000 in the project ahead of additional funding from the BFI Doc Society Fund. Please read our the [BFI Locked Box fact sheet](#) for further details.

When you're ineligible

You're not eligible to apply for this funding if:

- Your project is intended primarily for broadcast television
- Your project is a fiction film.
- Your project focuses on another art form such as literature, dance on film, poetry on film, opera or artists' moving image.
- You have previously applied to the BFI Doc Society Fund at any time for the project, and there has not been a substantial change in elements (e.g. a change of director, or significant developments occurring in relation to the subject matter of the project).
- If the applicant company or, if relevant, the group of companies to which it belongs, has already received public funding or subsidies, labelled as “minimal funding assistance” by the awarding body, totalling £315,000 or more in the period covering the current financial year (i.e., from 1 April 2023) and the two financial years immediately preceding the current financial year. The application will also be ineligible if the amount applied for takes the applicant company or relevant group of companies over this threshold of £315,000. For more detail, please see [the statutory guidance](#) given to public bodies that award funds as subsidy.
- Your project is completed, and you are looking for funding for distribution and/or impact purposes.

If, having read the above eligibility criteria, you're still unsure whether you are eligible to apply for feature documentary or non-fiction immersive project funding, please contact the team on hello@dosociety.org

4. What you can use the funding for

Our funding is a contribution towards the total budget of your project. Your budget should be created using industry norms and market rates, and contain provision for the following:

- All costs you expect to incur in order to complete and deliver the project.
- The costs of clearance of all rights (including in the music) in the project worldwide in all media in perpetuity on a full buy-out basis (save only for PRS payments for music and any applicable US Guild residuals).
- Crew payments, at least in line with the London Living Wage (or equivalent).
- Producer/production fees proportionate to the proposed budget. If we decide to support the project, we will discuss these fees with you. Although there are exceptions, the combined producer fees and/or production fees/overheads are, on average, in the region of 7-8%, and not more than 10%, of the direct costs of production (i.e. the production budget net of the producer fees and production fees/overheads). The BFI Doc Society Fund does not encourage deferral of any fees.
- Adequate publicity, stills and footage.
- Any access support you require in order to produce the project (see [further information below](#)).
- Adequate legal fees and security costs for the production.
- Costs of undertaking training for filming in hostile environments (if applicable).

- Costs of providing mental health support for vulnerable contributors and creative teams.
- All customary production insurances (including errors and omissions) on which Doc Society and the BFI will require to be added as a loss payee (for production insurance) and as an additional insured (for errors and omissions).
- All the delivery materials required by the BFI including enhanced access materials (see [Appendix A](#) for a full list of BFI delivery materials).
- A mandatory carbon offset provision of at least 0.1% of the total budget in order to meet albert certification.
- A mandatory Film Skills Fund (FSF) levy of 0.5% of UK core expenditure (subject to the FSF cap).
- A contingency set at an appropriate level for the risk of the production.
- Sufficient allowance for accounting and audit costs including those related to your UK tax credit application.
- Any other requirements of funding detailed within these guidelines.
- An allocation for paid trainees on your production

We encourage you to be economical when budgeting but we need to ensure that the projects we support are produced in accordance with all applicable UK laws, including in relation to crew payments. You can include contributions ‘in kind’, e.g. of resources or time – these should be clearly identified as such in your budget and you will need to demonstrate that crew are being fairly paid.

Costs that we cannot support, and which should not be included in your budget, include the following:

- Core costs for day-to-day running of your production company not associated with the project.
- Activity that is already specifically supported by another source of funding.
- Costs incurred prior to a formal offer of funding from the BFI Doc Society Fund.

The above list is not exhaustive and we may inform you that other types of activity identified in your application may not be included in your production budget.

Access support costs

If any members of your core team, contributors and/or crew have personal access needs that will incur additional costs during the production of your project, you can include these costs in your application. We define such needs as specific support required by people who are disabled or have a physical and/or mental health diagnosis, which will result in a verifiable additional cash cost to your production budget. For example, this might include a BSL interpreter to work with contributors or crew; additional transport or accommodation costs for disabled team members; or the personal assistant of a team member with a learning disability or mental health diagnosis who requires assistance during the production.

If you require support for such costs, please include them in your budget under the category *Access Support*. If you are already seeking the maximum award amount and have not been able to cover support costs within that, you can apply for these **in addition to** the maximum award amount.

BFI delivery materials

A full list of the delivery materials that will be required if we fund your project is provided at [Appendix A](#). The BFI Doc Society Fund is committed to ensuring that the cinema experience is open to all, especially to disabled audience members. It is therefore a requirement of our funding that the film or immersive project is delivered with subtitles and audio description, and that the availability of these materials is publicised and they are made available in time for any UK screenings of the film or showings of the immersive project.

5. Environmental sustainability

Environmental sustainability

All teams applying for feature documentary funding need to plan their project, from development stage onwards, with the environment and the climate crisis in mind. Application will need to tell us about how the project will embed the principle of environmental sustainability into the production. This means working to reduce carbon emissions as much as possible, and the project's impact on the living world; and to maximise the positive environmental benefits the project could have. This will require thinking about the impact of the project; where its energy comes from, in offices and on location; what materials are consumed and how to plan for reduction, re-use and recycling, etc. We ask all applicants to share and embed sustainable values and behaviour with their collaborators and their supply chain, and promote sustainable production to colleagues across the wider industry by complying with [BAFTA albert certification requirements](#).

What is sustainable production Certification?

albert certification ("Certification") is the easiest way to be introduced to sustainable production techniques and get rewarded for putting them into place.

Certification is achieved by completing a Carbon Action Plan and paying to offset any remaining, unavoidable emissions at the end of production. This offset fee generally amounts to approximately 0.1% of a total production budget and an allowance for this should be included in the production budget. Projects can use the [albert Creative Offsets estimator](#) to predict the likely amount of the carbon offset cost.

Successful completion of a Carbon Action Plan and offset payment will allow a production to be given use of the albert logo which can be displayed on the end credits.

How to obtain Certification

Productions are asked to use an online scoring system and take part in training sessions focusing on sustainable production, to embed sustainable principles from an early stage. Full details are available in albert's [Production Handbook](#) and upcoming training dates are listed [here](#).

Teams awarded funds in the early stages of their project will need to complete an initial Carbon Action Plan (CAP) before more than a third of the total filming has taken place, then continue the process of completing the CAP and carbon footprint map as the production continues.

Awards to teams that have already shot more than an estimated 30% of the footage to be used in the final film will not be able to secure full Certification. The BFI Doc Society Fund will accept a calculation using the carbon calculator to measure the production's carbon footprint and offset it instead.

Successful applicants will be advised by the BFI Doc Society at the point of award whether they will need to complete a full CAP or submit evidence of offset only.

6. How to apply

When you can apply

The BFI Doc Society Fund accepts applications for feature documentary and immersive non-fiction funding on a rolling basis and is open year-round.

Applications are made in two stages, as follows: (i) first you must submit an **expression of interest** form; and if our review confirms that your project is eligible and has the potential to deliver against the Fund's priorities then; (ii) we will invite you to complete a **full application** form.

As the fund is open all year, applications are assessed as they are submitted. The sooner you apply, the sooner we can process your application.

Video/audio applications

We offer all applicants the option to upload a video or audio recording instead of a written response to application questions where the written answer is expected to exceed 25 words.

Each longform question shows a maximum word count and has an upload box where you can submit an audio or video recording instead of a written response to the question. Where this option is available, you will be given a suggested recording length in place of the word count.

Recorded submissions should not include any music, graphics, filmed footage, sizzle reels, showreels or teasers; production values will not be taken into account in the assessment process. This option is intended to be used as an accessible alternative to long form written answers.

If you require guidance materials in an accessible format that is not available on our website, please contact kit@docsociety.org.

If you require one-to-one access support with your application, please contact Tape Community Music and Film at hello@tapemusicandfilm.co.uk or call (01492) 512 109.

Submitting an Expression of Interest

You need to [create an account](#) to complete the expression of interest online form. You can save your expression of interest form and return to it later. You can view a PDF preview of the expression of interest form [here](#).

Make sure you complete all the sections as incomplete forms will automatically be deemed ineligible.

Start an Expression of Interest: [Apply Here](#)

Summary of information you need to provide

In the expression of interest form you'll need to provide the following information:

Applicant information

You will need to provide the organisation and contact details of the applicant production company, and of the dedicated individual producer, including where they currently reside.

We will also need to know about the level of subsidies or public funding received by the production company under the UK minimal funding assistance provisions (as set out in the Subsidy Control Act (2022)) over the period including the time elapsed since the 1st April of the current financial year and the previous 2 financial years. If you are not sure about whether any grant or investment that the production company has received in that period qualifies, please ask the funding body making the grant or investment.

Please note that grants or investment awarded to you through the BFI Film Fund or the new Filmmaking Fund, BFI Network or from our own Made of Truth shorts fund, have been made under a BFI notified subsidy scheme and do NOT count towards the UK minimal funding assistance provisions cumulative cap. If you have previously received a grant from one of the BFI Global Screen Fund programmes you will need to check the applicable funding agreement to confirm whether or not it was granted under the UK's minimal funding assistance provisions.

Project Information

- Project title/working title, logline and synopsis

- Details of the key creative team, including the director.
- Why the director is the right person to tell this story.
- Whether the project is a first feature or immersive project for the producer and/or director.
- Whether the project has previously been submitted to the BFI Doc Society Fund; and, if so,
 - , details of how it has progressed since the last application and why you believe that this makes the project eligible for resubmission.
- Which of the following stages of production has your project reached: research, development, pre-production, production or post-production, as defined in the *Documentary Accountability Working Group's Framework*
- The total (estimated) project budget.
- The amount you are seeking from the Fund for application towards the project budget.
- The gap between the funding amounts you have already secured and your estimated total budget.
- Whether you will be including access costs in the budget, and the anticipated amount of such access costs.
- An explanation as to why you believe that your project is capable of qualifying as “British” under one of the applicable cultural tests or as an official co-production.
- An explanation as to why you believe that the film is suited to primary exploitation in cinemas or, if an immersive non-fiction project, your anticipated exploitation plan.
- Confirmation that you have secured or have a confirmed means of securing access, including any relevant legal rights, to the story at the heart of the film or project.
- What outcomes a grant will enable, for example: a treatment; documented access; research footage; core production; teaser; rough cut; fine cut; mixed cut; graded cut; or comparable outcomes for a non-fiction immersive project.

Diversity

We work alongside the BFI to support the adoption of the BFI Diversity Standards throughout the industry. The information contained in these standards also informs our understanding of your project and its stage of development. A specific Diversity Standards form is available to download from our website. You should complete each section of this [form](#) offline and upload it into the expression of interest form.

Equality monitoring

You'll be asked to complete an equality monitoring form once you have submitted your expression of interest form. The data that you submit on this form will be confidential and anonymous, and will not be seen by the staff assessing your application. Please note that we will not be able to put forward your expression of interest for assessment until you have completed the equality monitoring form.

Additional guidance on the type and form of information we are seeking in relation to each of the sections set out above is provided in the expression of interest form. If you have any further questions when completing the expression of interest form, please contact us on hello@docsociety.org

What happens after you submit an expression of interest

Once you've submitted an expression of interest form, we will send you confirmation of receipt **within five working days**. If your expression of interest does not meet our eligibility criteria, we will email to tell you that we will not be able to consider it. If you have made a mistake in your expression of interest then, if that is the only reason that the expression of interest is considered ineligible, we may allow you to correct this.

Progressing to a full application

Following submission of your expression of interest form, Doc Society team members, including the Head of the Fund, and external readers will check your submission against the eligibility criteria and the Fund's priorities. If your project is considered eligible and demonstrates that it is relevant to the Fund's priorities, we will invite you to submit a full application online. **Applicants will be advised of the status of their expression of interest within 8 weeks of the date of its submission at the latest.**

If you are invited to submit a full application, we will send you a link to the full application form. The questions in the form are aligned with those used in the [Non-Fiction Core Application](#). The form will automatically include the information you have given in your expression of interest form and will prompt you to provide the additional details set out below within one month two weeks of receipt of the invitation to apply:

Creative proposal

- *Key Creative Personnel. Provide brief biographies for the producer, the director(s) and, if attached, the cinematographer, and/or editor. For each key creative team member, include information about relevant expertise and the individual's role in the project. Please provide a bullet point list of the names and titles of any confirmed advisors, such as subject experts or scientific advisors who are attached to the project.*
- *Director's prior work. Include a link to a previous work (any length or genre) by the director. Emerging filmmakers with no previous directing experience may apply without a previous directing sample, and may instead provide a link to previous work in other media. Discuss the relevance of the work to the current project. If the current project is a departure from the previous work, how will this project differ?*

- Topic summary. *Explain the relevant cultural, historical, political, or social context for the project. Detail the topics, issues, themes, challenges, stakes, or questions that your project will cover.*
- Story or concept summary. *Give an overview of your story, introducing the main participants and potential plot points. Describe the anticipated story and narrative trajectory or potential character arcs for your project. If your project is non-narrative or not character-driven, what is your project's concept, and how is it constructed? Give an overview of the subject matter and your primary questions and ideas to be explored. Please be clear about the elements that remain unknown or unclear and highlight the questions that may steer the direction of your project.*
- Artistic approach. *Describe your creative vision for the finished project. What are the visual and audio elements that will bring your project to life? Explain your intended use of artistic devices or any particular creative approach that informs the storytelling (e.g., animations, re-creations, transitions).*
- Connection and Access. *What is your connection and access to the story (i.e., participants, community, location, archives etc.)?*
- Accountability. *If relevant, describe your relationship with the participants or community being filmed? What are your processes of accountability, including consent, transparency, feedback, and any other steps being taken to ensure the participants or communities that are featured in your or project have agency in the production process, from pre-production through to distribution?*
- Power and positionality. *What is your power and positionality in relation to the story and/or those featured in it? What unique lens, perspective, insights, or bias do you bring to the story – i.e., your values, interests, underlying assumptions, worldview, or motivations?*
- Creative Control. *Who has creative control and, if applicable, ownership of the project?*
- Community Care and Safety. *What are the guiding values or ethics of your practice of care? If relevant, please reflect on any known safety and security*

concerns throughout the lifecycle of your project — from development through to distribution. Tell us how you plan to or have been mitigating any negative impacts or harm (emotional, physical, material, digital, etc.) on the project's participants, communities, and the creative team.

- *Creative statement to be completed by Director(s) and/or Producer(s). Explain who you are as a creator and, if applicable, how this project is expanding or evolving your creative practice. What does success look like for you as an artist? What are the creative, professional, or holistic barriers and challenges you are facing?*
- *Project stage and timeline. Explain the current status of the project. Outline the projected production timeline from the project's current state to the anticipated completion date. Your timeline should detail major project activities, production schedules, and anticipated post-production and release dates. If you have applied to this fund previously, please share how your project has progressed.*
- *Treatment or Pitch Deck. Upload a document setting out the project treatment, if you have one.*
- *Current sample/rough cut. Upload a link where available.*

Market

- *Audience Consideration. Describe the audience you'd like to reach and why. How do you plan to reach your target audience?*
- *Distribution and marketing. Describe the intended distribution of your project. Specify any plans for festival, theatrical, and/or community screenings, as well as your plans for securing distribution generally. How do you envision the relationship between the finished project and the project participants and/or community, if relevant? Who will benefit from the project's release and how?*
- *Environmental Impact. Describe how the story of climate crisis is included in the project, if at all. Describe how your production processes will take into account and mitigate any environmental impacts.*

Budget and Finance

- Budget. *Provide a detailed budget for the project.*
- Finance Plan. *Provide a detailed finance plan for your budget, including all sources and amounts raised to date, as well as amounts still to be raised and potential sources for further funding. Clearly distinguish between potential sources of funding and secured amounts. List the status of other sources of funding currently under consideration, whether to be applied for or pending.*
- Fundraising Strategy. *Describe the overall fundraising strategy for the project, with reference to your finance plan.*
- Grant impact. *Should you receive a BFI Doc Society grant, describe how our funding would enhance your project, including how it might affect your access to other funds, or make the project possible in ways that might not otherwise be the case.*

Diversity

If your project has specific accessibility, impact or training components which are additional to those set out in the BFI Diversity Standards and you would like to share them, you will have the option to tell us about:

- Accessibility. *What are your plans to make your project accessible during production for D/deaf, blind/low vision, disabled, and neurodiverse crew and/or participants, and also to make your project accessible to D/deaf, blind/low vision, disabled, and neurodiverse audiences?*
- Intended impact. *Articulate your vision for the influence or impact you hope the project will have on the participants, community, and/or broader society – be these social, cultural, political or otherwise. What is your impact strategy and goals, if you have determined them? If you are planning an impact campaign, what steps are you taking to develop it (i.e., how are you building partnerships with organisations or others leading or influencing change around the issues in the project)? Whose interests will your project serve and who will benefit and how – in both its production and distribution phases?*

- Training plan. *Please set out how you will support the project team to engage with training opportunities, including bringing on emerging creative talent to the team; providing more experienced team members with an opportunity to stretch their skillset or offering placements to trainees through a formal or accredited scheme.*

If you have any questions when completing the full application form please contact us on hello@docsociety.org.uk

7. What happens after you submit a full application

Assessment criteria

Your full application will be assessed against how well it meets the BFI National Lottery core priorities and the Doc Society priorities set out in section 2 above. We will also consider:

- The ambition of the creative proposal.
- The extent to which the proposed project is likely to represent a creative progression in relation to the team's previous work, and particularly for the director and producer.
- The strength of the case made for the potential career impact of the project for the creative team.
- The feasibility of the budget, its value for money and whether the project as described in the application requires the amount of money requested from the BFI Doc Society Fund.
- Your demonstration of need for National Lottery funding. Our funding is not intended to substitute or replace existing or commercial funding or other income that would or might otherwise be available, or to fund activity at the same scale that can be achieved without our funding. National Lottery funds

can only be awarded to applicants who demonstrate a compelling case for National Lottery support and a clear public benefit from the activity being funded.

- The overall balance of projects receiving support, to ensure variety in the nature of the projects funded by the BFI Doc Society Fund.

When assessing applications, we will also take into account previous BFI Doc Society Fund awards received by the applicant producer and their company. In order to widen the range of recipients of BFI National Lottery funding, we will be mindful of ensuring that the slate as a whole maintains a balanced approach to supporting and developing new and established talent. Applicants who have previously received BFI Doc Society Fund support will need to demonstrate exceptional engagement with the BFI National Lottery [core priorities](#), including through presenting a case for significant talent progression and wider industry impact.

Assessment process

The assessment process is as outlined below. During the assessment process, we may contact you to ask for more information, in which case it may take us longer than the timeframe outlined below for us to reach a decision on your application.

Stage one: Full applications will be reviewed by the Head of the BFI Doc Society Fund (or, in their absence, a delegated Doc Society Executive Director) and an independent external reader to provide us with an additional perspective. Three peer reviewers will also provide moderation and additional assessment of full applications. External readers participating in the assessment process will not be provided with any of the applicant's equality and monitoring information and will be required to maintain confidentiality regarding the application contents and to agree not to retain application materials following their review. Readers will provide their

assessment to Doc Society Fund staff, including a recommendation about whether they should progress to the next stage.

Stage two: A broader range of Doc Society Fund staff including the Head of the BFI Doc Society Fund, the Film and Production Executive and the Production Coordinator will review and discuss the assessments generated from stage one of the assessment process and agree a shortlist of projects that best meet the Fund objectives. We will also review the budget, finance plan, schedule and general production plan submitted with the full application at this stage and create a further shortlist. Shortlisted projects will proceed to the next stage. A significant number of projects will not progress beyond this point.

Stage three: The creative team for each shortlisted project will be invited to an interview to discuss the vision of the project further. This does not mean that we have made a commitment to fund the project. All members of the creative team should try to attend. We may ask you to supply further information after the meeting.

At this stage, we will also request the personal address and date of birth of the CEO or Managing Director of the company applying. Please note that our request for this information is not an indication or confirmation of funding and you will be informed separately of the funding decision on your application. We will use this data to run an identity check. This is not a credit check and will not affect the ability of the CEO or Managing Director to receive credit from other organisations. We will be unable to submit your application to our decision-making committee until we have received your completed form.

Following discussion within the BFI Doc Society Fund team, a final list of selected projects will be drawn up. Progressed full/applications will go to the next stage.

Stage four: Those full applications which are selected for funding in accordance with the steps set out above will be submitted to the BFI Doc Society Fund Funding Committee, which includes the Head of the BFI Doc Society Fund, a designated Doc Society Executive Director and one or more representatives of the BFI Filmmaking Fund, for formal approval.

We aim to inform all applicants who submit a full application of our final decision **within 12 weeks of their submission**. However, if we receive exceptionally high numbers of applications, or when there are other circumstances out of our control, it may take us longer to give you a decision. We will keep applicants updated if the timeframe is likely to be extended.

In exceptional circumstances, where a project is submitted with non-negotiable time sensitive elements, we may be able to expedite the assessment process. A very strong case for this will need to be presented within the application, and we will decide whether we are able to expedite the assessment process on a case-by-case basis.

8. Getting a decision

If you're successful

Upon confirmation of BFI Doc Society Fund Funding Committee approval for your project, the Doc Society Business Affairs Executive will issue by email a letter setting out our formal offer of funding in respect of the project ("Offer Letter"), which must be acknowledged and returned to us within seven days of issue. The formal offer of funding will remain subject to signature of a funding agreement (the "**Funding Agreement**") with Doc Society within three months from the date of the Offer Letter. In the event that the Funding Agreement is not signed within that

three-month period, then Doc Society shall be entitled to review its decision to invest in your project and may elect to withdraw the offer entirely.

Please refer to [section 9](#) for a summary of the conditions that will apply to our funding.

BFI Doc Society National Lottery funding is project-based, time-limited funding, and as such, there should be no expectation of ongoing support beyond the term of any award made. In exceptional circumstances however, such as when a project encounters unexpected challenges during production, we may offer to provide additional production funding, subject to approval by the BFI Doc Society team. If we do identify a need for additional funding, and we have sufficient funds available, then we will ask you to make a short additional application to us for the amount required, provided that any such additional amount does not result in the total aggregate BFI Doc Society funding for the project exceeding £150,000.

If you're unsuccessful

We may have turned down your expression of interest or full application because we determined that the proposal or individual applicant was ineligible, or that the proposal:

- Did not sufficiently meet the BFI National Lottery [core priorities](#), including in relation to accessibility and engagement with the BFI Diversity Standards
- Was better suited to broadcast than cinema;
- Did not demonstrate that the project would be materially enhanced as a result of the requested BFI Doc Society funding;
- Did not demonstrate sufficient public benefit or need for National Lottery support and should be financed by other means; or
- The proposal was rejected for another specific project related reason.

The rejection email you will receive will identify which of the above reasons apply to your project.

Resubmission

If your application has been declined then, unless there is a significant change to your original proposal, you will not be able to resubmit it. A significant change would usually be a change of director, a significant change in the approach to the project, and/or a change in circumstance of the participants.

We will also allow you to resubmit a project in situations where we have directly recommended further development of the project, where a project has been voluntarily withdrawn, or where a previous Offer Letter has expired and we have confirmed that we remain interested in the project.

If your project meets any of the above criteria and you submit a new application, please ensure that you clearly identify the revised elements of the project in the new application.

In person feedback on an unsuccessful application

The following applicants can request in person feedback:

- applicants invited to interview but whose projects are not progressed further;
- applicants with projects that have been unsuccessful on more than one occasion;
- applicants who the team has met during festivals or forums; and
- past grantees.

In person feedback will be given during a 15 minute telephone conversation.

We will store the data and supporting materials submitted by you in line with our records retention policy.

We welcome your feedback on the application process and how we might improve it.

9. Conditions of Funding

If we offer you an award, in addition to the [General Conditions of National Lottery Funding](#), the following conditions will apply to your award.

1. All awards will be made by way of non-recoupable grants.
2. The BFI Doc Society Fund will pay the grant in accordance with an agreed cashflow to a separate dedicated production account in the name of the applicant company or, where applicable, to another limited company registered in the UK established by the applicant specifically for the project.
3. The BFI Doc Society Fund will not commence cashflow until you have signed a Funding Agreement and have complied (to the BFI Doc Society Fund's satisfaction) with the conditions set out in your Funding Agreement.
4. You will be required to include the BFI/National Lottery Doc Society Fund logo and presentation credit at the start of the production and certain closing credits and logos at the end of the production. At the producer's discretion, the applicable Doc Society Fund executive may also be accorded an Executive Producer credit.
5. You will need to establish clear title to your project i.e. demonstrate you have or can acquire all the rights necessary to produce and exploit the production.
6. You will be required to clear worldwide rights in all media in perpetuity from all individuals or organisations who are contributing to, or whose material is to be featured in, the production on a full buy-out basis (save only for music public performance rights).
7. You will be required to provide a contribution to the Film Skills Fund levy of 0.5% of the project's UK core expenditure (subject to the Film Skills Fund cap).
8. As set out in Section 5, and as directed by the BFI Doc Society team, you will be required to either ensure your production achieves full albert certification or paying to offset remaining unavoidable emissions by the end of production.

Please see <https://wearealbert.org/albert-toolkit-resources/> for more information.

9. You will be expected to put in place all customary production insurances (including errors and omissions insurance) on which Doc Society and the BFI must be named as a loss payee or (in the case of errors and omissions insurance) as an additional insured.
10. The BFI Doc Society Fund is keen to ensure that you receive a reasonable producer fee and production company overhead from within the production budget and does not encourage deferral of any such amounts.
11. If you deliver your production within budget, the BFI Doc Society Fund will support you in being able to receive up to 50% (subject to an agreed cap) of any production underspend after payment to any UK tax credit funder of an amount equal to the reduction in the UK tax credit as a result of the underspend.
12. You will be required to ensure that your project is produced in accordance with the requirements of all unions and guilds having jurisdiction and with all applicable laws and statutes.
13. You will be required to provide certain delivery materials to Doc Society and the BFI, the costs of which must be included in the budget of the production.
14. You will be required to procure that Doc Society, the BFI and/or the National Lottery are entitled to use the materials delivered to them to publicise by any means the involvement of Doc Society, the BFI and/or the National Lottery in the production, for their own internal purposes, for the general promotion of Doc Society, the BFI and/or the National Lottery by way, inter alia, of use of clips from the production in their corporate videos and/or on Doc Society, the BFI and/or the National Lottery website, and for the BFI to deposit any of such delivery materials at the BFI National Archive.
15. You will be required to ensure that any agreement for the distribution of your production in the UK provides for the availability of soft-subtitling and audio-description materials in cinemas and on any video-on-demand, DVD or Blu-ray disc release of the production.

16. The BFI Doc Society Fund will hold back up to 10% of its funding until delivery to Doc Society and/or the BFI of specified delivery materials, including disability access materials, an Equality Monitoring Report (which helps us to measure against the BFI Diversity Standards form that you submitted), confirmation of albert certification or the carbon calculation relevant to your production and a final cost statement.
17. The BFI Doc Society Fund will expect to receive information about the progress of the production e.g. regular production reports and rushes where appropriate, and to be able to attend any stages of production.
18. The BFI Doc Society Fund will have consultation rights over all cuts of the production.
19. You may also be asked to provide access to the production, or the completed project, for other Doc Society and/or BFI activities such as film education or fundraising screenings and/or from time to time to make yourself, the director(s) of your production available (subject to professional commitments) to provide industry training or mentoring, if the BFI reasonably requests.
20. You will be required to monitor your delivery against the undertakings made by you in relation to the BFI Diversity Standards. Failure to share the learnings from this monitoring against your initial undertakings without good cause may affect your ability to receive future funding from Doc Society and the BFI.
21. You will be required to adhere to and promote the set of principles aimed at tackling and preventing bullying, harassment and racism in the screen industries commissioned by the BFI and partner organisations. This entails taking active steps to help tackle and prevent bullying, harassment and racism in the screen industries and, in particular, in connection with the funded project. Further resources are available here
<https://www.bfi.org.uk/inclusion-film-industry/bullying-harassment-racism-prevention-screen-industries>.
22. You will be required to confirm that the production company has not received more than £315,000 minus the value of the grant in Minimum Financial Assistance subsidies or comparable types of subsidies (see section 42(8) of the Subsidy Control Act)

between 1 April of the year beginning the calculation period and the date of the Offer Letter.

Appendix A – Full list of BFI delivery materials

Successful applicants will be provided a copy of this list featuring the BFI and Doc Society contact details needed for submission.

Delivery items for feature films

Initial items to be delivered BEFORE final credit sign off

A fully completed **online BFI Equality Monitoring Report**, which can be accessed using the following URL: <https://form.jotformeu.com/71504083576356>. Productions that are deemed by BFI to have met the Diversity Standards will be entitled to receive a Screen Diversity Mark of Good Practice static logo. This logo will be provided by BFI and should be included in the end credit sequence of the film.

An Albert report and/or carbon calculator, which can be found at the following URL: <https://calc.wearealbert.org/uk/>.

The **animated logo sequence** in a low resolution QuickTime or equivalent file format. Links to streaming platforms are acceptable. For the avoidance of doubt the animated logo sequence shall contain the BFI and Doc Society animated logos in a form provided and approved by BFI and Doc Society.

The **end credit sequence** in a low resolution QuickTime file format. Links to streaming platforms are acceptable. For the avoidance of doubt the end credit sequence shall contain the BFI and Doc Society static lottery logos in a form provided and approved by BFI and Doc Society. The static logos must be placed immediately before the copyright credit and immediately after the wording 'Made with the support of the BFI/Doc Society Film Fund'.

Digital items to be supplied to the BFI National Archive

Delivery of the following digital items is a requirement of BFI Doc Society production financing. The items are acquired by the BFI National Archive for the purposes of long term preservation.

Documentaries and low budget films

For films produced for digital cinema exhibition, we require the following set of materials:

1x unencrypted format Digital Cinema Package (“DCP”)

- The DCP is delivered on a professional quality portable hard drive suitable for use with Digital Cinema Distribution (CruDrive or CruDrive Mini are preferred), or, with prior agreement, the DCP is supplied via a secure file transfer portal as a .zip file
- The drive containing the DCP is formatted in compliance with the Digital Cinema Initiatives (DCI) specifications given in the BFI Digital Cinema Delivery Specifications, Appendix 2.2
- The DCP includes the required enhanced access materials as described in the BFI Digital Cinema Delivery Specifications, Appendix 2.7
- A suitable DCP validation report is included as a file in the DCP package, or in the .zip file transfer as described in the BFI Digital Cinema Delivery Specifications, Appendix 2.9
- The DCP is the final version of the film as used for UK theatrical release and created in accordance with the SMPTE and DCI specifications

The DCP drive will be returned if it is encrypted and the package fails to include enhanced access materials as described in the BFI Digital Cinema Delivery Specifications document, Appendix 2.7.

1 x Broadcast quality master files from Pro Res QuickTime mezzanine file (“ProRes”)

- The broadcast file will be delivered on a professional quality portable hard drive or, with prior agreement, transferred via an appropriate secure file transfer portal
- The broadcast file is delivered on a separate hard drive
- The broadcast file is supplied at the same frame rate as the DCP
- Supplied as one of the following:

When production is mastered @24fps for Cinema distribution:

ProRes 4444 QuickTime [.mov] file1

Rec2020 - RGB - Full Range – 2.6 Gamma – frame rate and resolution as DCP

When production is mastered at 24fps for Cinema distribution or 25fps for HD Broadcast:

ProRes 422HQ QuickTime [.mov] file2

1080p[frame rate as mastered] - Rec709 - Y,CbCr – SMPTE range – 2.2or 2.4 Gamma

When production is mastered at 25fps for HD Broadcast:

DPP compliant AVC Intra100 AS-11 [.mxf] file3

1080i25 Rec709 – 4:2:2 Y,Cb,Cr – SMPTE range – 2.2or 2.4 Gamma

All born-digital non-moving image deliverables (credits, stills, posters, certificates) should be included on its own drive. The folder should be called ‘non-moving image deliverables’.

All digital files should be accompanied by the following:

- A per file MD5 checksum for integrity checking purposes. Supplied as list in either .txt or .csv file (Not required for DCP).
- The MD5 is generated from the finished files prior to their transfer to a hard drive or file transfer portal for delivery to BFI.
- The automated quality control (AQC) or eyeball quality control (EQC) documentation for DPP compliance (AS-11 AVCIntra100 only) , or a suitable DCP validation report (DCP only).

1 x Password protected Vimeo link of the final film.

Enhanced Access Materials specifications

The following enhanced access materials are supplied to the BFI as part of the DCP:

- Narrative audio track for the visually impaired: narrative description of content on screen

- Open captions (English): Open captions are text displayed to assist hearing impaired audience members. Captions' text includes scene dialogue and descriptions of key sounds i.e. "phone rings" or "door slams". Open captions are rendered by the server or projector and will display the timed text captions on screen, visible to the entire audience
- Closed captions (English): Closed captions are text displayed to assist hearing impaired audience members. Captions' text includes scene dialogue and descriptions of key sounds i.e. "phone rings" or "door slams". Closed captions are generally presented off-screen on dedicated devices and are not generally visible to the entire audience

The following enhanced access materials are supplied to the BFI as part of the ProRes:

- Hearing impaired captions in .stl format or timed text format as described in the BFI Digital Cinema Delivery Specifications document, Appendix 3.7
- Visually impaired narrative [VI-N] audio track as described in the BFI Digital Cinema Delivery Specifications document, Appendix 3.8

Credits and Publicity Materials

Credits

We require the following **credits**:

1 x Word or Excel document (not PDF) of the final approved version of the full list of the main and end credits for the Film. These will be imported into the BFI's Collections Information Database

Publicity Materials:

We require the following **publicity materials**:

All born-digital non-moving image deliverables (credits, stills, posters, certificates) should be included on its own drive. The folder should be called 'non-moving image deliverables'

1 x full master set of approved production stills

To include behind the scenes and any special stills publicity campaigns. Stills should be submitted in the format in which they were produced and

distributed, whether born digital or print. These should be in colour for full colour campaigns, or black and white where this has been prioritised for the campaign. As either embedded metadata or a separate listing, the stills should include full title; photographer credits; and any captions used in the campaign. Any necessary rights credits, restrictions or proof of clearances should be supplied, including studio rights, photographer rights, and approval rights of any individuals featured. Where possible, please supply files as uncompressed TIFFs, ideally 600ppi at true size (minimum 300ppi at true size). If TIFFs are not available, JPEGs should ideally be uncompressed JPEG 2000s, 600ppi at true size (minimum 300ppi at true size).

1 x written publicity pack

Where available: A written publicity pack/press release, ideally including a short and/or long synopsis and other publicity copy such as biographies of Principal Contributors, Individual Producer(s), Director, Writer(s) and key crew, production information, interviews with actors and other persons connected with the Film, feature stories and news releases. This may be in hard copy or electronic format.

Digital copies of any flyers, postcards or promotional paper-based ephemera (excludes large format standees.)

Post Production Script

1 x PDF copy of the final post production script

Posters

1 x print copies of the lead poster

1 x hi-res digital file of the lead poster artwork by large file transfer

1 x any alternative posters or special campaigns (including teaser, DVD etc.)

Please indicate the design or advertising agency responsible for the poster where possible

Additional documentation

1 x PDF copy of the ScreenSkills Film Skills Fund Levy invoice

1 x PDF copy of the trainee list

The document should contain a list of all trainees and interns engaged on the Film including names, positions held and where sourced, or confirmation and explanation as to why no such trainees or interns were so engaged.

Within 3 months of delivery

1 x Copy of the Final British Film certificate

1 x Final Cost Statement

Prior to any distribution by a third party UK distributor:

1 x Copy of the UK Distributor Letter

Delivery materials for non-fiction immersive projects

The immersive items will be acquired by the BFI National Archive for the purposes of long term digital **storage** only. The files we require from you will depend on the project type and intended platform as outlined at A to D below. If any custom instructions are required for installing or running the content these should be provided in an accompanying README file. For any other immersive delivery platforms (i.e. not covered by A to D below) an appropriate format for these deliverables will need to be agreed in advance with the Doc Society and the BFI. Enhanced access deliverables for immersive projects should be agreed prior to funding.

All trailers/walkthroughs should be uploaded to Sharefile unless the file size is larger than 100GB.

A. Desktop VR (PC Windows):

1 x Application file including executable launcher and complete with required build data, linked libraries (DLLs) and asset files – please provide these together in a single TAR file. Application should run smoothly on target platform without stutter or uncomfortable low frame rates.

- 1 x MD5 checksum for the TAR, provided as a .md5 file with the same filename as the TAR – eg VR_Project_ExampleTitle.tar / VR_Project_ExampleTitle.md5

1 x Linear (non-immersive) trailer and/or walkthrough version to showcase the project in a non-immersive environment. This should be a Pro Res 422 Quicktime file 4096x2048 or larger in equirectangular 2:1 format (ie. top/bottom or side by side), encoded in one of these ProRes codecs, in order of BFI preference: ProRes444XQ, ProRes4444, ProRes422HQ.

Note: if an HDR version is available, we would seek to obtain one HDR and one SDR version of the trailer and/or walkthrough.

- 1 x MD5 checksum for the QuickTime file, provided as a .md5 file with the same filename as the MOV – eg VR_Walkthrough_ExampleTitle.mov / VR_Walkthrough_ExampleTitle.md5

B. Mobile VR (Android based platforms such as Quest):

1 x Android Package File (.APK) containing full build and required assets of the application. Application should run smoothly on target mobile platform without stutter or uncomfortable low frame rates.

1 x Linear (non-immersive) trailer and/or walkthrough version to showcase the project in a non-immersive environment. . This should be a QuickTime file, 4096x2048 or larger in equirectangular 2:1 format (ie. top/bottom or side by side), encoded in one of these ProRes codecs, in order of BFI preference: ProRes444XQ, ProRes4444, ProRes422HQ.

Note: if an HDR version is available, we would seek to obtain one HDR and one SDR version of the trailer and/or walkthrough.

- 1 x MD5 checksum for the QuickTime file, provided as a .md5 file with the same filename as the MOV – eg VR_Walkthrough_ExampleTitle.mov / VR_Walkthrough_ExampleTitle.md5

C. Mobile AR:

1 x Android Package File (.APK) containing full build and required assets of the application.

1 x Linear (non-immersive) trailer and/or walkthrough version to showcase the project in a non-immersive environment. This should be a QuickTime file, 4096x2048 or larger in equirectangular 2:1 format (ie. top/bottom or side by side), encoded in one of these ProRes codecs, in order of BFI preference: ProRes444XQ, ProRes4444, ProRes422HQ.

Note: if an HDR version is available, we would seek to obtain one HDR and one SDR version of the trailer and/or walkthrough.

- 1 x MD5 checksum for the QuickTime file, provided as a .md5 file with the same filename as the MOV – eg VR_Walkthrough_ExampleTitle.mov / VR_Walkthrough_ExampleTitle.md5

D. 360 Video:

1 x QuickTime file, 4096x2048 or larger in equirectangular 2:1 format (ie. top/bottom or side by side), encoded in one of these ProRes codecs, in order of BFI preference: ProRes444XQ, ProRes4444, ProRes422HQ.

- 1 x MD5 checksum for the QuickTime file, provided as a .md5 file with the same filename as the MOV – eg VR_360_ExampleTitle.mov / VR_360_ExampleTitle.md5- 1 H264/H.265 .mp4 file

1 x H264/H.265 .mp4 file

1 x password protected Vimeo link uploaded to sharefile

1.4 Immersive Project Technical summary

1 x text document summarising the basic technical overview of the project, detailing the following information:

- Bitrate:
- Resolution:
- Frame Rate:
- Summary of underlying technology:
(e.g. Desktop VR (Windows); Mobile VR (platform name); Mobile AR; 360)