

# BFI Doc Society Research and Development Fund

## Making an application for National Lottery Research and Development Funding

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

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## 1. Overview

Doc Society is the delegate partner for the distribution of 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 such as the Research and Development Fund (“**RAD Fund**”), the Fund focuses

on developing new, emerging and established talent and encouraging risk in form and narrative approach.

The RAD Fund supports the development of non-fiction feature length and immersive work (including animation) specifically as follows:(i) feature length documentary films, at least 70 minutes long on completion, and for theatrical release; and (ii) non-fiction immersive work of any duration. In both cases, the amount that you are applying for must be **no less than £3,000 and no more than £5,000 for a single project**, and **no less than £3,000 and no more than £10,000 within a single application covering multiple projects**. The RAD Fund awards are non-recoupable grants. Please refer to our Made of Truth guidelines for information about how to apply for up to £25,000 towards any short documentary film or non-fiction immersive project, and to our Feature Fund guidelines for information about how to apply for the broader development and production costs of feature length documentary films or non-fiction immersive projects.

The RAD Fund supports producers and/or directors, to create **an initial treatment** (a piece of writing that outlines the story, participants, themes and structure of the project) and **related materials** (for example a mood board or other visual content). The RAD Fund only supports documentaries and non-fiction immersive projects that are at the beginning of the development process and that are unlikely to be fully commercially financed and would therefore benefit from National Lottery funding. We intend to support 8 applications overall, including up to 5 applications for single projects and up to 3 applications covering multiple projects.

### **Who and what can be supported by the RAD Fund?**

This RAD Fund will enable filmmakers, who are unable to access commercial financing, to take the time required to actively explore and develop their project(s).

The RAD Fund can support projects from:

- producer and director teams working together on one or more project
- producers working on more than one project, with one or more directors
- directors without producers in place

Successful applicants will either be offered (i) a grant of up to £5,000 to support the development of a single project by a director, or producer and director team; or (ii) a grant of

up to £10,000 to support the development of two or more specified projects led by the same producer or production company, with one or more directors attached to those projects.

In addition to the RAD Fund grant, if your application is successful you will also receive creative and business advice from the Head of the Fund who also may assist you to meet potential collaborators for your project, and other means to gain industry exposure for your work.

### **What can the grant be used for?**

The RAD Fund grant can support a producer and/or director to spend dedicated time on the early stages of their documentary film or non-fiction immersive project moving from the point of initial idea to having dynamic and persuasive materials that can be used to seek support for later stages of development or production. All successful applicants will be required to create and deliver to the Fund team a treatment document of up to ten pages.

The grant can support the costs of the following activities:

- **Writing time** for an initial treatment of up to ten pages
- Creating **visual materials** – e.g. a mood board
- **Actual costs of conducting research** (e.g. archive charges to view materials, travel to visit relevant locations) that contributes to developing your project idea
- **Access to research material**
- **Consultant fees** (for example story consultant or experts)
- **Creating test or research footage** exploring the feasibility or visual style of a project, provided this footage is not intended to be part of the final production.
- **Director and/or Producer fees** for activities such as location visits, equipment testing.

More detail of eligible costs is provided in section four below. This funding is intended to stimulate new approaches and stories for feature film and immersive non-fiction projects. It therefore doesn't support projects that have already attracted other investment.

### **What about rights in the work?**

The RAD Fund aims to get your project to the stage where you or your team have a sufficiently developed treatment of your initial idea that you can successfully pitch to financiers. We won't require you to assign (transfer) any of your rights in the idea to us or to a production company (if applying as a director) and won't require you to enter into a director

or producer agreement while you are in this research and development stage, although you may elect to do so.

## 2. Delivering against the BFI National Lottery Strategy

All activity funded by the Fund should contribute to some of the outcomes identified in the [BFI National Lottery strategy](#). You will be asked to identify which of these outcomes your project will achieve during the application process.

### Core priorities

As a BFI National Lottery funding delegate partner, Doc Society will apply the following six priorities when reviewing BFI Lottery applications:

- **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. The RAD Fund prioritises 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 the RAD Fund using the following Key Performance Indicators (KPIs).

- Number of projects supported – 5-8

- Number of applications received – 200
- Applications received from outside of London and the South East – 50%

Projects supported by the RAD Fund will contribute to achieving the Fund's overall 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.

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## 3. Check if you're eligible

### Applicant

The following criteria apply to all applications being submitted:

- We expect the lead applicant to be the producer or director of the project(s).
- Applicants can apply either as an individual or through their UK registered company.
- Directors should be applying with their first or second documentary feature film, or non-fiction immersive project.
- Producers should identify as emerging or mid-career in their field, having produced no more than 3 feature documentaries already.
- Directors and producers must be based in the UK and are expected to be able to demonstrate a strong creative track record in documentary film or immersive work (as applicable) as part of the application.
- Individuals coming from creative media outside film do not already need to have made a documentary film or immersive project but do need to have made previous creative work in television, theatre, or another art form that has gained industry recognition, and can be described in an application.
- Directors and producers must be over 18 and not in full-time education. This means they need to have fully completed any student work, meaning submitted course

materials, final project and/or dissertation and have completed all examinations in a final year of study, and not be entering a further year of study before summer 2024

- Directors and producers should wait to hear the outcome of any application to the RAD Fund before submitting another.

## Projects

All projects must:

- clearly engage with some or all of our [core priorities](#)
- if intended as a feature film, have an intended length of 70 minutes and above. There is not a required intended duration for immersive work, but the project needs to be of sufficient scale to warrant significant (e.g. at least six-figure) finance were it to proceed to production
- be for stand-alone works of non-fiction in live action, immersive or animated form (not series or episodic works)
- be seeking between £3,000 and £5,000 where the applicant is an individual director or a producer/director team with a single project
- be seeking between £3,000 and £10,000 where the applicant is a producer with more than one project
- be wholly original to the applicant unless archive or journalistic material is being used to inform the project. In such instances you will need to demonstrate that the material in question is either out of copyright; is being used under permitted uses exemption; or that you intend to obtain the right to use the material in the way contemplated when the project moves to full production
- be in the early stages of development and capable of delivering development materials within 3 months of contracting
- on completion of the final production, be capable of qualifying for certification as a British film or immersive project, either through the applicable cultural test, or as an official co-production. Read more information on [British certification](#). Please note that your own assessment of your project as being capable of qualifying for certification does not mean that it will necessarily pass. Should you need advice as to whether your project is capable of qualifying, please contact [certifications@bfi.org.uk](mailto:certifications@bfi.org.uk) before you submit your application
- if you are developing a documentary feature film, it should be capable on completion of production of obtaining a BBFC certificate which is no more restrictive than [BBFC '18'](#)

- if you are developing an immersive project, it should be capable on completion of production of obtaining a PEGI Certification which is no more restrictive than '18'

### **When your project is ineligible**

You're not eligible to apply for this funding if your project (or one or more of your projects, if you are applying to develop more than one):

- already has a complete treatment or pitch deck/equivalent format for immersive projects
- is not a work of non-fiction in live action, immersive or animation form
- is a feature documentary film idea intended to be less than 70 minutes in length
- is intended primarily for broadcast television
- has an episodic or series format
- focusses on another art form such as literature, dance on film, poetry on film, opera or artists' moving image
- has a director or producer who is not UK-based

This list is not exhaustive and there are other reasons, as referenced elsewhere in these guidelines, why your project may be ineligible. Get in touch with the team if you're unsure that you are eligible to apply to the RAD Fund: [hello@docsociety.org](mailto:hello@docsociety.org)

## **4. What you can use the funding for**

You will be asked to include a brief budget as part of your application for funding. There are specific costs that can be included in this ("eligible costs"). These are:

- fees for the director and/or producer of the project, which should reflect the amount of work required from each of them, be in line with London Living Wage requirements where appropriate and are equitable
- where one person fulfils different roles on the project – for example researcher and producer – there may be a justification to recompense separately the work undertaken in each role in the budget
- where more than one person share the same role on the project, e.g. co-directors or co-producers, they would need to decide on how to split the budgeted fee for such role equitably
- reasonable research and travel costs - these may include travel or accommodation, the costs of accessing materials or archives, subsistence while travelling (at a



maximum of £40 per day, which must consist of specific receipted costs) or other relevant expenses

- the cost of creation of visual materials, for example graphic design by a third-party contractor
- the cost of creating test visual materials exploring the cinematic form of the project
- sufficient legal costs to secure the contributions / rights required at this stage of the project
- any disability access support you require to complete the RAD work (see below)

VAT is not payable on the RAD Fund awards. The grant funding supplied through the Fund is outside the scope of VAT and the grant is fully inclusive of any and all taxes that may be payable in connection with the granting, receipt or use of the funding. Producers will need to deduct any such taxes out of the RAD Fund award and in no circumstances will Doc Society be required to pay any additional sums in respect of such taxes.

### **Costs that we cannot support**

Costs the award does not cover include:

- general overhead costs
- legal fees/costs of preparing producer or director agreements relating to the project's delivery
- flights within or between England, Scotland and Wales, unless necessary due to an access requirement
- travel by taxi unless it is necessary due to an access requirement
- first class travel
- general subsistence costs
- activity that is already specifically supported by another external source of funding
- cost incurred prior to an offer of funding from Doc Society
- professional editing costs – any material filmed during the research phase is expected to be research driven rather than needing to be professionally edited
- costs of footage intended for the final film production, as opposed to test or research footage
- cost of creation of sizzle reels

The above list is not exhaustive and we may inform you that other types of activity identified in your application may not be supported by an award from the RAD Fund.

## **Access requirements during early development work**

If your director or, if involved, producer has access needs that will incur additional costs during work on 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 budget. For example, this might include a BSL interpreter; additional transport or accommodation costs to attend meetings or conduct a research trip; or costs related to individual assistance during the research and development activity. If you require support for such costs, please include them in your application budget.

If you are already seeking the maximum award amount and have not been able to cover access-related costs within that, you can apply for these costs **in addition to** the maximum award amount.

## **Environmental sustainability**

We ask all teams to plan their project's development with the environment and the climate crisis in mind. This means working to reduce your project's carbon emissions as much as possible, and its impact on the living world, and to maximise the positive environmental benefits your project could have. We are keen to see creative responses to the climate and ecological emergency and will ask you to consider this in relation to your project in the application form. You can find some prompts and inspiration for this on BAFTA albert's [editorial site](#), including their [editorial quiz tool](#). We'll also ask you to consider the potential impacts of your project as a physical production and think ahead about how this is influenced by the creative choices you make now.

## **Delivery materials for funded projects**

All successful applicants must submit:

- A treatment of up to 10 pages including some or all of the following: A short and long synopsis, details of the artistic approach, an explanation of why you are the right person to tell this story, and a topic summary
- A final cost report with invoices or receipts for all expenditure

You may also choose to submit:

- Visual or audiovisual materials such as a mood board or pitch deck addressing the same points as above, or test footage

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## 5. How to apply

### When you can apply

The RAD Fund accepts applications on a rolling basis and is open year-round.

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

Please note that the amount of funding available for research and development activity is extremely limited and we expect high levels of applications; we reserve the right to close this funding strand before the end of a financial year.

### Submitting an application

You need to complete an **online** RAD Fund application form. You can save your form and return to it later. You can view a PDF preview of the application form [here](#).

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

#### **Start a Research and Development Application:**

<https://app.doc society.org/apply/new/rad-fund-research-and-development/>

We can only make awards to projects that have been submitted to us through the online application process. This means that we cannot accept, or read, application materials submitted by any means other than the online application portal.

### Information you need to provide

In the application you'll need to complete the following sections:

#### **Applicant details**

This section will ask for:

- Name and contact details of the director or producer who will be the lead contact for the application

### **Project(s) and team**

These sections will ask you for information including:

- Whether you are applying with one or more projects
- CV summaries for the director and/or producer depending on whether both are involved in the project(s) at this stage
- a description of how your project idea will advance your creative development
- a brief summary of the project(s)
- a story summary
- a statement describing your creative vision for the finished project(s)
- a statement describing any previous work you have done and how the current project(s) relates to, or departs from it. You can upload samples and videos to this section
- a statement explaining why you are the right person to tell this story
- how secure your access to the story is

### **Finance and budget**

This section will ask for:

- the amount of funding you are seeking from the RAD Fund
- what you will do with the funding
- whether access costs are included in the budget

### **BFI Diversity Standards**

This section asks you to describe how your project responds to the [BFI Diversity Standards for film](#) with a focus on addressing Standard A. Please note that the information provided by applicants within their Diversity Standards forms will be anonymised and used to help inform future funding decisions, research and strategy.

### **Equality monitoring**

You'll be asked to complete an equality monitoring form when you submit your application.

The data that you submit on this form will be confidential and anonymous and will not be seen by the staff assessing your application. It requests information about the director(s) and, if attached, producer(s) on your project, to help measure how effective the RAD Fund is

in attracting a diverse range of applicants for funding. When filling it in, you can select 'prefer not to say' if you'd rather not share the information requested. Please note that we will not be able to put forward your application for assessment until you have completed the equality monitoring form.

If you have any questions when completing the application form please contact us on [hello@docsociety.org](mailto:hello@docsociety.org). We welcome your feedback on the application process and how we might improve it.

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## 6. What happens after you apply

Once you've sent us your application we will send you confirmation that we have received it within five working days. We will then check whether your application is eligible for funding using the criteria identified in the [Check if you're eligible](#) section. If your application 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 application, then we may enable you to correct this, if that is the only reason that the application is considered ineligible.

### How your application is assessed

Once you have passed initial eligibility checks, we will confirm by email that your application will progress to assessment and a unique ID number will be assigned to the application.

### Assessment criteria

Your application will be assessed against how well it meets the criteria stated in [section two](#).

We will also consider:

- the strength of the project idea
- how the project might connect with audiences
- the impact of the previous work of the director and, if involved, the producer
- the strength of the case made for the creative development for the director and, if involved, the producer
- the feasibility of the project to become a longform work, bearing in mind the potential costs of production
- 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 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 funding is only intended to support filmmakers who otherwise will not be able to undertake the work involved (e.g. because without National Lottery funding for their time during early development, they would be compelled to take on other paid work). Projects that have already secured third-party finance are not likely to be prioritised

- the overall balance of projects receiving support, to ensure variety in the nature of the projects supported by the RAD Fund

### **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.

Following completion of eligibility checks, all eligible applications will be assessed against the assessment criteria set out above by at least two internal reviewers, including the Head of the Fund (or, in their absence, a delegated Doc Society Executive Director) and where required an independent external reader to provide us with an additional perspective. We may share parts of your application with other Doc Society teams, the BFI, or external readers, to help with our assessment. Neither internal nor external readers participating in the assessment process will be provided with any of the applicant's equality monitoring information and will be required to maintain confidentiality regarding the application contents and to agree not to retain application materials following their review.

The Head of the Fund will lead on making recommendations for funding to the BFI Doc Society Fund Funding Committee which is the final decision stage.

After reviewing your budget, we may request that you amend specific lines and allocations before we make a final funding decision. We may also offer you a different amount to the one you've requested.

All applicants will be informed in writing of the decision on their application. Unsuccessful applicants will be contacted by email. Our decision as to whether we wish to support your application is final.

We will request the bank details of the lead applicant for projects put forward for consideration by the BFI Doc Society Fund Funding Committee, which includes the Head of the Fund, a designated Doc Society Executive Director and one or more representatives of the BFI Filmmaking Fund.

We will also request the personal address and date of birth of (i) the CEO or Managing Director of the production company applying, or (ii) if applying as an individual, the primary individual making the application. 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 individual applicant / 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.

### **Timeline**

You'll get a decision within 12 weeks of receiving confirmation that the application will be considered. If we receive exceptionally high numbers of applications, if we approach you for additional information, or if there are other circumstances out of our control, it may take us longer to give you a decision. We will keep all applicants updated if the timeframe is likely to be extended.

## **7. Getting a decision**

### **Successful applicants**

If we confirm we intend to fund your project, you will need to provide us with the following final information which, subject to Doc Society's rights of approval, will be included in your grant offer:

- final budget
- full legal names and addresses of the director and/or producer(s) of a selected project
- your proposed delivery materials
- your proposed delivery date

Once we have reviewed and approved that information, you will receive the RAD Fund grant offer (**Offer**) by email, setting out details of how you'll receive the funding, how you must use it and how we expect you to report to us (see [conditions of funding](#) below). You will need to accept the Offer and return it to Doc Society within 14 days. This Offer will remain subject to signature of a grant agreement (**Agreement**) within three months of the date of the Offer. In the event that the 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.

BFI 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 awards made. Receiving the RAD Fund award does not mean you will automatically be eligible for, or be more likely to receive, further support from the Fund.

## **Unsuccessful applicants**

We have a limited amount of funding to distribute and unfortunately this means we can only support a small percentage of the applications we receive. The funding opportunity is competitive and we receive many strong applications, which means some applications will be turned down even when they meet the assessment criteria outlined in these guidelines. We may have turned down your application because we determined that your proposal:

- did not sufficiently meet our [core priorities](#), including in relation to engagement with the BFI Diversity Standards
- featured an initial idea that was not substantial or persuasive enough to constitute a compelling longform proposal for a feature documentary or immersive work
- was not a realistic project for development as a longform work, in terms of the challenge of raising later production finance
- did not demonstrate enough relevant experience on the part of the director or producer
- did not demonstrate sufficient need for National Lottery support and could be financed by other means

Your proposal may also be rejected for other, project-specific reasons.

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 (for a project where the original application was made by a producer who remains involved); 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 application, 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.

## 8. Conditions of Funding

If your application for funding is successful then, in addition to the [General Conditions of National Lottery Funding](#), the following conditions will apply to your award. These will be set out in more detail in your Agreement.

1. The award will take the form of a non-recoupable grant.
2. Doc Society will not ask for a share of copyright in your project as a condition of funding. We expect the rights in the project to be held by the applicant director, producer or production company as applicable during the term of the funding.
3. You will be required to include specified credits (for the BFI Doc Society Fund and the National Lottery) on the development materials for the project and on the final project if it goes into production.
4. You will be signing a legal undertaking that the work being funded is wholly original to you and your team and that all third-party materials incorporated in the project are cleared, or will be capable of being cleared, for use in the fully developed project throughout the world, in all media in perpetuity.

5. We will pay the award to the lead applicant (the director, or producer if they are applying on behalf of the project) to be used only as per the budget and cashflow, as set out in the Agreement.
6. You will be required to finish work on your development materials and submit them to Doc Society by a specified delivery date for review and acceptance.
7. The RAD Fund award will usually be paid in 2 stages (cashflowed), the first on signature of the Agreement and the second and final payment subject to submission to us of your delivery materials in their final form. Any underspend on the award will be retained by, or reimbursed to, Doc Society.
8. The support provided by the Fund is only possible because of the National Lottery. We ask the filmmakers we fund to do everything they can to acknowledge the National Lottery as the source of this funding. This includes displaying the National Lottery logo on your documents created with the support of the RAD Fund; in film credits if your project later goes into production; related marketing materials, press releases and on the front pages of the project and producer's websites. We ask beneficiaries to actively acknowledge and spread the word about their project being made possible by money raised by National Lottery players, whenever they can. This includes mentioning the National Lottery, at a minimum, on press releases, on print and marketing materials, online including through social media, and when speaking to the industry and the wider public about the project.
9. 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 those initial undertakings without good cause may affect your ability to receive future project funding from Doc Society and the BFI.
10. Where applications are made by a production company, you will be required to confirm that the 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.
11. The Agreement will include standard termination provisions.