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Film
Forever

LEADER
FUNDING
CODE

Making an application to the

PROGRAMMING DEVELOPMENT FUND



Awarding funds from

The National Lottery®

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INTRODUCTION

In our forward plan Film Forever¹ we outline how we intend to encourage people to build a life-long relationship with film, to help create audiences for a broader range of films across all platforms and to ensure that film culture can be accessed and enjoyed by everyone across the UK. Our plans for 2013-17 contain a range of interlinked strategies to help us achieve these aims. At the heart of our plans is the BFI Audience Fund which represent a significant investment of £38 million over four years to boost audience choice and growth across the UK. The five elements of this investment are: the Film Audience Network², the Distribution Fund, the Film Festivals Fund, BFI Neighbourhood, and this, the Programming Development Fund.

BACKGROUND AND CONTEXT

The Programming Development Fund will support programming initiatives of cultural significance, high profile and wide reach; encouraging curatorial ambition, achieving economies of scale and bringing films to audiences across the UK in a fresh and original way.

It is designed to help film programmers and exhibitors put together programmes of films which will be enhanced or underpinned by curation, interpretation or education activity.

AIMS & OBJECTIVES

The overall aim of the BFI Audience Fund is to boost audience choice and increase audience engagement with specialised and independent British film.

Within this aim, the specific objectives of the Programming Development Fund are to:

- Support and promote high-quality, distinctive, diverse film exhibition projects of scale and ambition
- Increase opportunities for more diverse audiences across the UK to engage with a wider range of specialised and independent British film, including those in areas with limited provision
- Enable film programmers to be more adventurous and experimental in their programming choices and in terms of content and/or delivery model
- Encourage greater sharing of programme content and initiatives across the UK
- Develop new ways to build stronger relationships between film venues and audiences
- Create links to other BFI strategic initiatives relating to education and learning, investment in skills and unlocking film heritage

1. See bfi.org.uk/about-bfi/policy-strategy/film-forever for information on Film Forever

2. See bfi.org.uk/supporting-uk-film/distribution-exhibition-funding/film-audience-network for information about the BFI Film Audience network.

OUTCOMES

Through investment in the Programming Development Fund, the BFI will seek to bring about key changes for the longer term:

- An increase in the size, diversity and geographic spread of audiences viewing specialised and independent British film
- UK audiences willing to take greater risks in their viewing choices
- An increased public and media profile nationally of specialised and independent British film
- New or enhanced partnerships created to deliver the objectives of the Programming Development Fund

HOW MUCH IS AVAILABLE?

Up to £1.4m per year will be available through the Programming Development Fund over the four years to 2017.

There are two types of award available through this Fund:

A Research & Development award

These are designed to either support the development stage of a project (e.g. research, development, feasibility testing), or to fund a pilot:

- An ambitious, wide-reaching programme of work can require substantial preliminary work in order to develop the concept, assess its

economic or market feasibility, develop new partnerships, secure partnership funding and/or sponsorship, and to identify what materials are available, particularly if sourced internationally

- Pilot programmes may be needed to test the level of public interest in a programme, theme or approach; or where the proposed main programme presents a particularly high risk in terms of its scale, financing structure or content, and benefits from trialling as a scaled down pilot

Research & Development awards are anticipated to be within the range £5,000 to £30,000, depending on the complexity and duration of the research and development required.

Please note that a successful application for a Research & Development award does not guarantee success for that programme in any subsequent Project Delivery application.

See Appendix B for further guidance when applying for a Research & Development award.

B Project Delivery award

These are designed to support projects which have been fully developed and are ready for implementation. Project Delivery awards are anticipated to be within the range £30,000 to £200,000, depending on the scope and scale of the project.

See Appendix C for further guidance when applying for a Project Delivery award.

BFI DIVERSITY STANDARDS

The BFI's definition of diversity is to recognise and acknowledge the quality and value of being different.

We believe that in order to have a healthy, resilient and world-class film industry we need to invest in, develop and present the best talent we have in the UK. This means that diversity sits at the heart of our decision-making. We recognise the ability of diversity to raise the bar and set the standard, and one of our funding priorities is to support projects that seek to increase the diversity of the UK's film industry.

We have developed the [BFI Diversity Standards](#) to gauge the ability of projects to contribute to these aims. We ask applicants to embrace these Standards and explore the implications and opportunities of working with a more diverse workforce, not just for their productions but for the industry as a whole. More information about the BFI's commitment to diversity can be found on the BFI website at bfi.org.uk/diversity

Applicants for Lottery funding are asked to demonstrate how their projects will tackle under-representation in relation to disability, gender, race, age, sexual orientation and socio-economic status.

At application stage you will be asked to outline how your project seeks to respond to the BFI Diversity Standards. Successful applicants will need to send us a report following the conclusion of their projects, evaluating how they delivered in practice against their aims for diversity.

CAN I APPLY?

You can apply if you are a properly constituted organisation:

- Limited liability Company or Partnership registered at Companies House
- Community Interest Company registered at Companies House
- Local authority or statutory body
- Charity or trust registered with the Charity Commission (including UK universities)
- If not registered with the Charity Commission, universities principally regulated by one of the Higher Education Funding Bodies (being the Higher Education Funding Council for England, the Higher Education Funding Council for Wales, the Department for Employment and Learning Northern Ireland and the Scottish Funding Council)

Applicants and/or their partners should have direct experience of film exhibition and audience development activity within the UK, such as cinemas, cinema chains or consortia, film festivals or arts organisations with experience of film curation.

Applicants must be able to demonstrate the clear public benefit of the proposed programme and it should not result in private gain through profit distribution.

Applications can be made in respect of programmes developed outside of the UK including from countries within the European Union/European Economic Area provided they relate to delivery of programmes in the UK and the lead applicant is based in the UK.

Applications can be made on behalf of multiple partners or consortia provided a lead applicant is identified. Any offer of funding will be made to the lead applicant who will be the only point of contact for the BFI's grant awarding and monitoring processes.

Individuals cannot apply.

PARTNERSHIP FUNDING

Partnership funding (including in kind support) is an important demonstration that there is genuine support for the programme from the community and others who will benefit from the project. As such, projects which have secured a significant percentage of partnership funding are more likely to score highly in the assessment process.

Except in relation to Research & Development projects (where we are able to cover the total hard costs associated with the development stage) we require partnership funding of at least 20% of the total budgeted cost of the programme, depending on the scale and curatorial risk of the project. At least 50% of the Partnership funding should be in cash, rather than in-kind. Cash income can include: anticipated income such as box office or other ticket sales; programme booking fees; sponsorship; philanthropic support; private donations; charitable funding; or funding from other public sector sources. When box office is being counted as income, the figure on the budget must be the net amount that is going back into the project budget itself.

Please note however that funding already provided to you or your partners through any other BFI funding schemes cannot be used as partnership funding for this Fund.

In general, the lower the curatorial risk the more partnership funding will be required. Similarly, we expect high value projects to provide more partnership funding.

WHAT CAN I APPLY FOR?

We are looking for well-curated projects which offer a point of difference in terms of content, approach and presentation to that which audiences are currently being offered. Our intention is to support activity which is delivered mainly as large screen communal audience experience(s) rather than as small screen (digital device) private content consumption. However, projects which contain some activity on other platforms such as online, mobile apps etc. are welcome, especially if they make a demonstrable contribution to audience development and show innovative approaches to achieving the Programming Development Fund objectives.

The BFI hopes to support a wide range of exhibition activity through the Programming Development Fund which could include but is not limited to:

- Programmes curated around a particular theme, genre, national cinema or geographic origin
- Major retrospectives or seasons
- Archive programmes
- Touring programmes
- Documentary or non-fiction programmes
- UK-wide ‘event-cinema’ screenings and seasons (for film)

We would expect to see events, contextualisation and interpretation activity (e.g. programme notes/brochures or other publications, online materials and information, speakers, Q&A sessions, visiting talent, educational activity) included in the project in order to raise the project’s profile, stimulate attendance, enhance understanding, and maximise engagement.

We would not normally expect to fund programmes that solely contain material which (at the time of application) is in theatrical distribution, or which is being actively promoted to audiences on other platforms including DVD, on demand and TV.

All applications must be able to demonstrate wide geographic and audience reach and curatorial ambition³ as well as presenting a clear and tangible opportunity to increase profile and attract audiences for specialised or independent British film. It is also important that the proposed project has clear audience appeal.

3. See Appendix A for what we mean by ‘cultural ambition’ in the context of this fund

PROJECTS WHICH FORM PART OF AN OVERARCHING UK-WIDE PROGRAMME INITIATIVE

We would generally expect applications to deliver all elements of a programme. However, we will also accept applications for self-contained projects taking place as part of a larger UK-wide programme initiative (or umbrella project).

Any such applications will need to demonstrate:

- That both the subsidiary (applicant) project, and the overall umbrella programme, meet the objectives of the Programming Development Fund
- That the overall umbrella programme is of sufficient scale to meet our objectives around profile, reach and impact
- That the subsidiary (applicant) project is clearly linked to and aligned with the umbrella project and will derive benefit from the branding, PR and marketing strategies of the umbrella project

OUR PRIORITIES

We are open to new ideas but will prioritise:

- Programmes which are of such scale or innovation that they are likely to attract significant media attention, public notice and generate audience appeal
- Programmes which utilise or complement the resources and infrastructure of the Film Audience Network
- Programmes which link to other aspects of Film Forever especially if linked to the BFI's Unlocking Film Heritage programme and/or the work of our 5-19 Education partners, Into Film⁴
- Programmes where the diversity and social inclusion of audiences are central to their aim
- Programmes which are predominantly focused on specialised or independent British films, that have not previously been widely available or accessible to UK audiences

Applications which address the majority of these priorities are more likely to be successful particularly when higher funding amounts are being requested.

4. See bfi.org.uk/education-research and bfi.org.uk/about-bfi/policy-strategy/film-forever/strategic-priority-three for information about the BFI's education and screen heritage programmes

WHAT WE WILL NOT SUPPORT

The following are not eligible for funding under this Fund:

- Film festivals⁵ unless the application relates to touring or cinecasting UK-wide elements of a successful and culturally significant film festival that would otherwise be unable to reach a UK-wide audience
- Programmes that are focussed around other artforms, such as opera, literature, dance on film, or entire programmes of artists' moving image, or where film is not the central art form
- Work which is already fully funded or work which a publicly subsidised venue should reasonably be expected to be offering as part of its core funded programme
- Programmes comprising predominantly student work unless such work is a subsidiary element of a wider, curated programme
- Programmes showcasing locally made shorts unless the shorts are a subsidiary element of a wider, curated programme, or are predominately programmes of short archive films
- Programmes involving filmmaking except where it forms a minor element of the overall programme (for example a young people's engagement activity designed to increase understanding of the films contained in the project)
- The distribution, exhibition or marketing of a single film title⁶ (unless in the context of either a wider umbrella project as described above, or where the title itself is the 'event')
- Programmes where the partnerships required to successfully deliver the project are not in place
- Programmes which have already taken place or which are scheduled to commence before we can complete our assessment (see Timetable for applications below)

5. If you are planning a film festival, please look at the guidelines for the BFI's Film Festival Fund (bfi.org.uk/about-bfi/partnerships/film-festival-fund) or those of your national Screen Agency if your festival takes place in Scotland, Wales or Northern Ireland

6. If you are seeking funding for the marketing costs of the UK-wide release of a film you should read the guidelines for the BFI's Distribution Fund (bfi.org.uk/film-industry/lottery-funding-distribution/distribution-fund)

ELIGIBLE COSTS

These include, but are not limited to, the following:

- Research and curatorial fees
- Staff (although the apportioned costs of existing staff should not exceed 15% of the amount you are asking us for)
- Office costs such as stationery and telephone (this should not exceed 10% of the amount you are asking us for)
- Marketing, publicity materials, advertising and/or promotion costs
- Venue and/or equipment hire
- Training and/or consultancy fees e.g. PR
- Payments to rights holders, distributors and sales agents
- Transportation costs of prints and/or equipment
- Volunteer expenses
- Hospitality and/or travel for VIPs
- Fees for composers or performers of live music accompaniment
- Delivery costs including broadband network hire
- Recording of events within the project for legacy purposes
- Insurances and/or licences
- Production of trailers, event i-dent, DVDs and/or other merchandising materials
- Audit, monitoring and evaluation
- Production of filmed content where it forms part of a wider exhibition project and increases understanding of specialised film e.g. school children making a short film on their mobiles in response to a screening within the main programme
- Restoration or digitisation of films onto new formats (but only where this is fundamental to the delivery of the project, and the costs of this are less than 10% of the overall project budget)

INELIGIBLE COSTS

The funding must be used solely for the purposes of delivering the event or programme, and cannot be used for:

- The general running costs of your organisation or your partners
- Parties, for example opening and closing night galas
- Capital expenditure except where purchase of small scale equipment is less costly than hiring

HOW DO I MAKE AN APPLICATION?

TIMETABLE FOR APPLICATIONS

You may make an application at **any time**, but in order to process your application, we will require **8 weeks** for Research & Development requests, and **12 weeks** for Project Delivery requests.

For Project Delivery requests and Research & Development requests involving a pilot project, you should also build in at least **4 additional weeks** to ensure that you have sufficient lead-in time.

Please bear this timeframe in mind when planning your project and scheduling your application. See *the table below for examples*.

Please note: We reserve the right to decline applications that are not submitted in time. We will only accept applications after the cut off point in exceptional circumstances.

If you anticipate that your application cannot be submitted within this timeframe we strongly advise that you contact us urgently in order to discuss this.

THE APPLICATION PROCESS

A Carefully read these Guidelines. Please contact the BFI Audiences team (via email at progdev@bfi.org.uk) if anything is unclear or you require communications support, or copies of these documents in Braille, large print, audio CD or BSL DVD.

B If you are making a Project Delivery application, we strongly recommend that you advise us of your project in advance of making an application to the fund.

Please send us a brief summary of your project (no more than 1 side A4, including a rough idea of the cost of your project, your target audience, and the number of admissions you anticipate) to our email address at progdev@bfi.org.uk. We will then aim to contact you about this within ten working days.

TYPE OF REQUEST	PLANNED PROJECT START	DECISION NEEDED BY	PROCESSING TIME NEEDED	LEAD-IN TIME NEEDED	LATEST POSSIBLE SUBMISSION DATE
R&D	2 May	2 May	8 weeks	Not needed	7 March – 8 weeks before decision date
R&D Including a Pilot Project	2 May	4 Apr	8 weeks	4 weeks	8 February – 12 weeks before decision date
Project Delivery	2 May	4 Apr	12 weeks	4 weeks	11 January – 16 weeks before decision date

C Once you are ready to make your application, go to our website at bfi.org.uk/programmingdevelopmentfund where you will be able to download the required templates for your application (see table below).

D For all applications we ask you to complete a BFI DIVERSITY STANDARDS form. You should use this form to describe your plans and intentions for diversity in your project, responding to the [BFI Diversity Standards](#). This means detailing how you will address under-representation on and off-screen, in relation to disability, gender, race, age, sexual orientation and socio-economic status.

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.

E Complete the appropriate PROPOSAL, BUDGET and KPI & PROGRAMME DATA Templates, depending on which type of award you are applying for. Use the templates provided: other formats will not be accepted.

F **Complete and submit the relevant online application form** (dependent on type of award, as above) available at bfi.org.uk/programmingdevelopmentfund and **upload your completed templates**.

Further details on how to apply are contained in Appendices B and C.

If you are applying for one element of a wider project (see ‘projects which form part of an overarching UK-Wide programme initiative’ in the ‘what can I apply for?’ section) you will also need to supply **from the lead organisation delivering the umbrella project:**

- A letter of support for your element
- An outline of any project marketing activities and materials that your programme will benefit from

When first using the on-line application form you will need to create an account which allows applications to be saved and reviewed before submission. Once the account is set up future applications will be pre-populated with your contact details. You will be able to access all your past online applications and in-progress applications at any point by logging into your account. If you already have an account you can complete the application by logging in with your existing account details.

RESEARCH & DEVELOPMENT APPLICATION	PROJECT DELIVERY APPLICATION
R&D Proposal Template	Project Delivery Proposal Template
R&D Budget Template	Project Delivery Budget Template
R&D KPI & Programme Data Template	Project Delivery KPI & Programme Data Template
BFI Diversity Standards form	BFI Diversity Standards form
<i>online R&D Application Form</i>	<i>online Project Delivery Application</i>

WHAT HAPPENS TO MY APPLICATION?

Acknowledgement

When you submit your completed application, you will receive an automated response to confirm it has been received.

The BFI will then confirm by email that the application has been received, and provide the unique reference number (URN) that has been assigned to it.

The BFI will also check your application for eligibility. If it fails to satisfy any of the eligibility criteria your application will be declined and you will be notified in writing.

Assessment

Your application will be assessed by members of the BFI Audiences team and other BFI staff as appropriate. We may also consult other agencies, strategic partners and independent specialists.

All eligible applications will be assessed against the following criteria:

- Contribution to BFI's strategic objectives and to the objectives and priorities for the Programming Development Fund
- Quality of the proposed programme

- Public and cultural value
- Strength of the marketing and audience development plans
- Strength of project delivery and management plans
- Strength of the financial plan
- For Research & Development applications in particular, strength of the monitoring and evaluation plan

You can find out more about how these criteria are applied in **Appendix D**.

In deciding which applications to support we will also give consideration to:

- the amount of funding applied for (requests for large awards must necessarily score higher than requests for smaller awards);
- the geographical and thematic balance in the portfolio of applications under consideration and awards already made

Please note that as part of our assessment process we may ask you to attend a meeting to discuss your project in more detail in order to help inform our decision making.

Recommendation

Following assessment, and with input from our finance and legal departments, who may undertake due diligence on all applicants and applications, the BFI Audiences team will decide whether to recommend your application for approval or to decline the application (in which case you will be informed of the decision in writing).

On receipt of the recommendation, the BFI's Lottery Finance Committee will make the final decision on whether to support the application. Please note that the BFI may decide to offer an award amount that is greater or less than you have applied for, and may discuss your budgets and plans with you as part of the assessment process.

FEEDBACK

Our decision on whether we wish to support your project is final.

We aim to make the application process as transparent as possible, but as a result of the volume of applications we receive, we do not have the resources to provide feedback on projects where we are not requesting further material or a meeting.

In these circumstances, we will send you a standard rejection email and the documentation held on file for the assessment of these projects will simply state “pass”.

On projects that have received further consideration or that we have met to talk about, we will try to provide some feedback, if requested, and if we have some constructive advice to offer beyond the meeting.

We welcome constructive feedback from you on our application process, so we can continue to improve.

RESUBMISSION

No resubmissions can be made to the Film Fund for projects that it declines, unless this has been specifically requested by a member of the Film Fund team.

SUCCESSFUL APPLICATIONS

If the application is successful, you will be sent an Offer of Funding setting out the terms and conditions attached to the funding. This Offer of Funding must be counter-signed and returned to the BFI within 14 days of issue.

The Offer of Funding will contain, at a minimum, the following terms and conditions:

USE OF AWARD

Any award must be used exclusively for the purpose for which it was requested as set out in your application. Projects are intended to be for public benefit and not private gain.

Any income received by the successful applicant or its partner is expected to be applied against the budgeted cost of the project. Any underspend on total budget should be reimbursed to the BFI in the proportion that the amount of the award bears to the total budgeted costs.

PAYMENT OF THE AWARD

The BFI will set out a cash flow schedule for payment of instalments of the award with the successful applicant. This will include a holdback against delivery of the final report (see below).

MONITORING AND PERFORMANCE REVIEW

As part of your application you will be asked to identify key targets and performance measures in order to help both you and us monitor the success of your project. The Offer of Funding will contain a set of agreed performance measures, including targets and the specific categories for audience diversity against which you will need to collect data. There will be a requirement to report back against these in a final report to be submitted no later than 2 months after project completion.

We will provide you with a set of templates for your final report, which will include the following sections at a minimum:

- A budget report signed off by the award recipient which sets out actual expenditure incurred and income received against the original budget
- Your summary of what happened
- Analysis of successes and areas for development. Conclusions and recommendations outlining the project's legacy and potential for sustainability
- Your audience demographic breakdown against the agreed categories

Diversity Standards Report –

Successful applicants will be required to submit a formal assessment of their project against the BFI Diversity Standards. Guidance for completing this submission will be provided.

Projects achieving a high level of good practice will be provided with the Screen Diversity logo and can display this to advertise to the industry and audiences the contribution that their project has made to sector diversity

Subject to the nature and duration of the programme, the BFI may in addition require occasional project meetings, a mid-term report, or updates to review progress.

As part of the on-going promotion, review and development of this new fund, we may ask you to undertake a case study or provide the BFI with additional information or material. We will discuss such requirements for this with you in advance of any award.

BRANDING

The BFI Audience Fund comprises National Lottery funding. The BFI will require acknowledgement of the award through prominent display of a strapline and a logo (as supplied by the BFI) on all publicity materials issued in respect of the project. The BFI will issue Branding Guidelines to successful applicants; these will cover use of the BFI/National Lottery logo and a communication strategy for the Programming Development Fund.

We may also ask you to supply us with photographs, film and/or promotional materials created by you during the project, for us by us in our publicity, reports and/or similar.

INTELLECTUAL PROPERTY

To the extent our funding is being used to acquire distribution or other rights in cultural assets, or new rights content is being created, then you must ensure that either such content or assets are made publicly available either through your own resources or by deposit with a suitable organisation (for example a public archive) and made freely available to the public or, if exploited, that a share of any revenues is provided to the BFI in proportion that the funding bears to the project budget to be made available to new programmes of activity.

OTHER CONDITIONS

The Offer of Funding may be terminated and any funding already advanced may be required to be repaid in the event that any of the requirements set out in these guidelines are breached.

QUESTIONS AND GETTING IN TOUCH

If you have any queries about these guidelines, please first refer to the Frequently Asked Questions on our website at bfi.org.uk/programmingdevelopmentfund

If you then require further information you may get in touch with us via the contact form on the website or email us on: Progdev@bfi.org.uk

Our postal address is:

Programming Development Fund
Film Fund
BFI
21 Stephen Street
London W1T 1LN

BFI LOTTERY FUNDING GENERAL CONDITIONS

- 1** The information in these guidelines can change. The law and Government regulations on distributing National Lottery funds may also change. The BFI therefore reserves the right to review this funding scheme and/or change its policies, procedures and assessment criteria.
- 2** The application form does not necessarily cover all the information the BFI uses to decide which applications to fund. The BFI can ask applicants for extra information.
- 3** All applications are made at the applicant's own risk. The BFI will not be liable for loss, damage or costs arising directly or indirectly from:

 - the application process;
 - the BFI's decision not to provide an award to an applicant; or
 - dealing with the application
- 4** Please check your application form carefully. The BFI will not process applications which are incomplete or which do not comply with these guidelines.
- 5** The BFI's decisions on applications are final.
- 6** The BFI will not pay any funding until it has received a fully executed copy of the funding agreement and any conditions precedent to that agreement have been satisfied or waived by the BFI.
- 7** The BFI will publicise information on the number of applications it receives and the awards made. This information will include the name of the successful applicant, award amount, project name and project details.
- 8** The Freedom of Information Act 2000 gives members of the public the right to request certain information held by the BFI. This includes information held in relation to applications to the BFI's Lottery funding programmes or schemes. Therefore if you choose to apply to the BFI you should be aware that the information you supply, either in whole or in part, may be disclosed under the Freedom of Information Act.

9 Sometimes the BFI's Governors or members of staff may be involved in some way with applicants. This interest has to be declared in applications from such applicants. The relevant Governor or staff member will not be involved in assessing the application or the decision to make an award. Applicants are advised not to try to influence the success of their application by approaching a Governor or staff member.

10 It is important that applicants carefully check the information given in the application form. The BFI standard terms and conditions entitle it to withhold or reclaim an award in the following circumstances:

- if the application was filled in dishonestly or with incorrect or misleading information about the organisation or the project whether deliberately or accidentally; and
- if the award recipient acts dishonestly or negligently to the disadvantage of the project

The BFI will follow up cases of suspected fraud and will pass information to the police.

11 The BFI requires that any measures taken by applicants to address underrepresentation are fully in compliance with the Equality Act 2010 – see more at equalityhumanrights.com

12 Complaints and Appeals: The BFI's decision is final. Inevitably applications will be turned down and applicants may be disappointed by this result. Formal appeals against the final decision will not be considered unless the applicant has good cause to believe that the procedures for processing the applications were not adhered to, or applied in such a way as to prejudice the outcome of the application. A copy of the BFI's Complaints and Appeals procedure can be obtained on request from the BFI's Communications Office.

APPENDIX A: FURTHER INFORMATION ON THE FUND

TERMS OF REFERENCE

What constitutes a programme?

For the purposes of the Programming Development Fund we expect a ‘programme’ of work to comprise several or many films with supporting interpretation and engagement activity.

A programme consisting of a small number of titles might be eligible if it forms a subsidiary element of a wider ‘umbrella’ project. See ‘projects which form part of an overarching UK-Wide programme initiative’ in the ‘what can I apply for?’ section of the Guidelines for more on subsidiary projects.

What constitutes wide reach?

‘Wide reach’ means projects that are delivered in a number of different locations in the UK and attract the widest possible audiences.

An event which is held in a single venue but which is likely to attract significant audiences due to its content and profile might be eligible, provided that access by geographically dispersed audiences has been incorporated into the programme (for example by simultaneous satellite broadcasting, or live streaming).

A project which is taking place in one geographical location might be eligible if it forms part of a UK wide umbrella project.

As a general rule, a higher financial request should reflect wider audience reach.

What constitutes curatorial ambition?

Demonstration of ‘curatorial ambition’ might include:

- Programmes which introduce new work or the work of filmmakers who may be unknown to the targeted audience but have an international profile or are critically acclaimed
- The creation of a film-going experience which breaks new ground in terms of the content, context or contextualisation
- Programmes which put together films in an interesting, unexpected or audacious context based on a theme, geographical area, time or the work of particular directors, actors or cinematographers
- Programmes which seek to offer, through interpretation and/or programme content, an unusual or surprising insight into the films, filmmaking process or filmmaker(s)

APPENDIX B: HOW TO APPLY FOR RESEARCH & DEVELOPMENT FUNDING

1. R&D PROPOSAL

We will ask for information in the following sections:

Development project:

- Outline the project activity for this development phase, including timeline, and key personnel or partners
- Outline your rationale for the necessity of a separate research, development or pilot phase, detailing what you hope to discover/determine by this phase
- Outline your monitoring and evaluation plan, detailing how you will collect the information you need, and judge the success or otherwise of this stage
- Where the application relates to staging pilot event/s, outline the marketing strategy and target audience (numbers and demographics) for the event/s

Proposed Main project:

- Describe the proposed Main project as a whole, including why you believe it is culturally important
- Outline who your potential target audience will be for the Main project (numbers and demographics)
- Provide a list of indicative partners and their role, indicating their status as regards the project (confirmed, proposed, in discussion etc.)

General:

- Outline your relevant experience and qualifications to deliver the projects

2. R&D BUDGET

Please provide an income and expenditure budget for the development of the project, and an indicative income and expenditure budget for the proposed project itself.

Partnership funding is not required for Research & Development, although it may enhance your application if additional resources have been secured.

3. R&D KPIs & PROGRAMME DATA

Please provide as many details of your development project as possible, and as much information as you have at present regarding your proposed programme.

The following assessment criteria will be applied to your application:

- The rationale for testing or trialling the programme
- The quality of your plans for doing so
- The quality of your monitoring and evaluation plans. (Please note, for pilot projects we recommend at least 5% of your overall project budget should be allocated to monitoring & evaluation)
- The quality of plans for marketing (if appropriate)
- Your track record in delivering similar programmes to that of the Main project
- The potential contribution that the Main project would make to BFI's strategic objectives and priorities
- The Main project's potential public and cultural value including audience reach and indicative cost

See **Appendix D** for the full assessment criteria.

Please note: a successful application for Research & Development from the Fund does not guarantee a successful outcome for any future Project Delivery application.

APPENDIX C: HOW TO APPLY FOR PROJECT DELIVERY FUNDING

1. PROJECT DELIVERY PROPOSAL

Your proposal should set out programme content and outline resource requirements (people, partnerships, locations and costs), project milestones and key metrics to be used to measure performance. Please complete this proposal on the Project Delivery Proposal Template provided.

Your proposal should contain the following sections and as a minimum address the questions and points set out below:

A. Artistic vision/rationale

(max 1,000 words)

- What is the cultural context and vision for the programme?
- What are trying to achieve in terms of cultural impact?
- What are your aims, objectives and intended outcomes?
- Why do you believe your project is culturally important?

- Describe what you believe will be the legacy of your project e.g. long term audience development for specialised or independent British film; physical assets (DVDs, books, websites/pages); knowledge transfer for staff, the sector or audiences; building trust in programming offer between audience and venue; educational and cultural impact, etc.
- Will it be possible to sustain any aspect of the programme after initial delivery?

B. Programme content

This section should include a description of the curatorial approach and the films to be programmed, along with the other activities planned within your programme. It should include a level of detail appropriate to the stage you are at in the planning process.

C. Programme schedule and venues/locations

- What is the indicative schedule of screening dates and associated activities?
- Where are the locations and venues (where applicable) in which the programme will be taking place? Please indicate which are confirmed and which are aspirational
- Where applicable include information on the other platforms or media being used for your programme

- What are the outline terms or conditions of any licences?
- What is the anticipated income from exploitation of those rights and who will receive them?
- Are rights being acquired beyond the life of the programme, in which case how will they be used in the future?
- Identify how you can deliver the project in terms of ensuring you have the legal right to do so, particularly in relation to other venues and other platforms (e.g. DVD publishing, TV broadcast, online availability)

D. Terms of Agreements

- What will be the financial terms of agreement made variously between you as the applicant, exhibitors that are taking part in the project, and distributors that are supplying content for the project? Please ensure to include any and all relevant agreement terms between these three, and between any other relevant organisations taking part in your project

E. Rights Strategy

- What rights need to be obtained to deliver the programme and from whom? Please indicate if they are secured, in negotiation or aspirational

F. Marketing and audience development

- What audience numbers do you hope to attract to your project? This could be specific to each location/venue
- Who are the proposed target audiences for your project? This could be specific to each location/venue
- What is the marketing/audience development plan you will use to achieve these numbers and to reach the target audience/s? You should give consideration to local, national and UK wide marketing/PR opportunities

G. Experience and qualifications to deliver the programme

- Who are the key personnel to be involved in the curation and production of all aspects of your programme? Please provide names and outline their experience of similar projects
- What is your organisation's track record in delivering similar events or projects? This should include appropriate measures of success such as audience numbers, audience profile including diversity, local, regional and national press coverage gained, measures of financial success including box office receipts, fundraising and sponsorship
- What advisory or specialist input have you received or will you be seeking?
- Who are the partners in the project? This should include funding partners, strategic partners and delivery partners. You should give the name of the organisation, its remit, whether it is a member of the Film Audience Network, the status of any support (early negotiation, agreed in principle, confirmed) and the nature of their contribution to the project. You should also describe the status of any negotiations with external parties that are central to the success of the programme for example rights holders, composers, performers, curators etc.

H. Programme Delivery, Organisation and Management

- Please provide a brief project delivery plan, including the timeline through the planning, preparation, delivery and post project activities, and incorporating the key project milestones
- How will you organise and manage the delivery of the programme? This section should outline how you plan to co-ordinate the work of any partners to the project. For example who will be responsible for managing each area of the project – overall, artistic, financial, marketing and operational delivery?
- Please outline your organisation's policy towards diversity

I. Monitoring, evaluation and research

- How will you measure the success of your programme, including key performance indicators? Your proposal should include both quantitative and qualitative research with a particular focus on audience feedback and audience diversity. (Please note, we recommend at least 5% of your overall project budget should be allocated to monitoring & evaluation)

J. Risk Assessment

- What are the risks to your project? You should carry out a risk assessment that identifies all possible risks to the project, assesses the likelihood of each occurring and shows mitigating actions. This should be presented in the form of a risk register

Expenditure

We expect budgeted costs to mirror industry standard pricing and for you to negotiate the best possible deals, particularly for distributors' minimum guarantees or film costs. If you require specialist advice in this area we would recommend you contact the Independent Cinema Office (independentcinemaoffice.org.uk).

2. PROJECT DELIVERY BUDGET & CASHFLOW

You should prepare a statement of projected income and expenditure for the project and a monthly cash flow forecast. Please use the template provided for this, and include in the 'notes' column as much detail as possible on how your figures were determined. Before you begin, review the list of eligible and ineligible costs (as per the 'what can I apply for?' section above). Please indicate clearly which costs you are asking the BFI to fund.

Income

You should identify all sources of funding and identify its status (i.e. confirmed, unconfirmed or application in process, anticipated revenues including box office, other ticket sales, merchandising or publishing if applicable.) Where funding or sponsorship has been confirmed, you should provide written evidence of this. Please ensure that income forecasts are realistic and achievable.

3. PROJECT DELIVERY KPIS & PROGRAMME DATA

Please provide details of your KPIs and programme data, which should be completed on the template provided. Please include as much detail as you can at this stage – and indicate proposed/confirmed as appropriate.

APPENDIX D: ASSESSMENT CRITERIA IN DETAIL

When considering your application, assessors will consider the following questions under each criterion:

A. THE CONTRIBUTION TO BFI STRATEGIC OBJECTIVES AND PRIORITIES

- Does the project have a strong curatorial or artistic vision?
- Does the project increase audience choice across the UK?
- To what extent is the project likely to contribute to the Fund's objectives and target outcomes?
- How many of the Fund's priorities have been met?
- Where appropriate, has the applicant engaged effectively with the Film Audience Network, including its Strategic Partners?⁷
- Is there adequate address to diversity of content and audiences?
- Will the project have a long term impact on audience development for specialised and independent British film?

- Does the project contribute to any of the BFI's other strategic priorities outlined in Film Forever relating to film heritage, education and skills?
- Is there evidence of appropriate levels of partnership/engagement in place across the UK?

B. QUALITY OF THE PROPOSED PROGRAMME

We are looking for programmes of work which are inspiring, engaging, adventurous and challenging, delivered with flair, ambition and which have partnership at their core.

- Is the proposed programme of high quality?
- Is the cultural rationale and context for the project convincing?
- Is the programme likely to engage the proposed audience?
- Does the project contain elements of innovation in relation to, for example content, curation, marketing or technology?

⁷. The BFI's Strategic Partners for the Audience Network include the Independent Cinema Office, the British Federation of Film Societies and the Cinema Arts Network

- How accessible is the programme?
- Is the project likely to attract high-profile media attention?
- Does the programme address under-provision either in content or audience terms?
- Is high quality contextualising, interpretation or engagement activity planned?

C. PUBLIC AND CULTURAL VALUE

- How many people are anticipated to benefit from the project?
- What is the impact of the project in terms of cultural breadth and depth, geographic reach and audience diversity?
- What contribution will the project make to long term audience development for specialised and independent British film in the UK?
- Does the project offer value for money in terms of audiences reached?
- Is the project likely to leave a tangible and lasting legacy?

D. STRENGTH OF THE MARKETING PLAN

We will expect considerable thought to be given to promotion and marketing of the proposed project, and a detailed plan provided on how the event or programme will be sold to the widest possible audiences in the given locale(s). This is likely to include national promotional activity as well as the use of social networking and local media.

- Have appropriate target audiences been identified?
- Are the projected audience numbers appropriate?
- Is the proposed approach to marketing appropriate, maximising all opportunities for profile and reach?
- Does the applicant provide convincing evidence of its ability to reach its target audience numbers and types of audiences?
- Does the applicant provide evidence of a plan to address harder to reach and under represented groups?
- Are there plans in place to enhance accessibility for disabled audiences?
- Will the project have a long term impact on audience development for specialised or British independent film?
- Are the allocated budget resources adequate to deliver against the plan?

E. STRENGTH OF PROJECT DELIVERY AND MANAGEMENT

- Is the project technically and logically viable?
- Do the applicant and its partners have the relevant skills and expertise to deliver the project?
- Is the milestone plan realistic with reasonable lead times including research?
- Are there sufficient human and other resources dedicated to each part of the project?
- Have potential risks to the project been identified and appropriate mitigating action planned?
- Is the rights strategy realistic and appropriately costed?

F. STRENGTH OF THE MONITORING & EVALUATION PLAN

- Is the monitoring and evaluation plan sufficiently developed and robust?
- Does it include both qualitative and quantitative data?
- Have sufficient resources (human and financial) been allocated to this plan?

G. STRENGTH OF THE FINANCIAL PLAN

- Are costs and revenues, including box office and sponsorship, realistically budgeted?
- How much partnership funding is included and what is the status of this funding?
- Are plans for unconfirmed partnership funding and box office revenues realistic?
- Does the project represent good value for money in terms of project costs? Have all opportunities for revenue generation been exploited?
- Is it clear what BFI funding will be used for?

APPENDIX E: DEFINITION OF SPECIALISED FILM

The BFI's definition of 'specialised film' relates to those films that do not sit easily within a mainstream and highly commercial genre. The BFI believes in the diversity of film and of audiences. We want films to find their audiences and audiences to build their appreciation of a wide range of films. A wider knowledge of film gives us a wider knowledge of different cultures and ideas. We believe that the ongoing development of film culture relies on both familiarity with the great titles of film history, and on experimentation with new ideas and forms.

FOREIGN LANGUAGE FILMS WITH SUBTLES

In almost all circumstances foreign-language films will be classified as 'specialised' due to most audiences' lack of familiarity with and resistance to subtitles.

DOCUMENTARIES

In almost all circumstances feature-length documentaries intended for theatrical distribution will be classified as 'specialised' because non-fiction cinema tends to have a narrower appeal than fiction.

ARCHIVE / CLASSIC FILMS

Films from the beginning of cinema's history until the last 10-20 years, older titles shown again on the big screen so that today's audiences can experience important or overlooked titles in their original format.

ARTISTS FILM / EXPERIMENTA

Feature-length films or programmes of shorts that express an artistic vision or particularly experiment with the film form for aesthetic purposes.

DOCUMENTARIES

Short films give new filmmakers a chance to learn their craft, find their cinematic voice and to see how audiences respond to their work. Classic short films can give audiences the chance to see the first films by now famous filmmakers, and students of filmmaking the chance to see the format at its best. For these reasons, feature-length (70 mins+) programmes of short films will be considered.

OTHER CRITERIA

Films that fall outside of the above parameters may also be considered on the basis of unusual or undefinable genres; complex and challenging subject matter; innovative or unconventional storytelling/narrative structure.

Films with stories and subjects relating to diversity (for example Black, Asian and minority ethnic people; disability; LGBT) may also be classified as 'specialised'.