

BFI DOC SOCIETY FUND

GUIDELINES

MAKING AN APPLICATION FOR DOCUMENTARY FUNDING - FEATURES

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## 1. Introduction

From 2018 Doc Society is the BFI's delegate partner for documentary funding. Having run a number of international funds for several years it is a privilege and a pleasure to administer the UK's national documentary film fund for features and shorts and we will also be running a dedicated support programme alongside the fund.

These guidelines are intended to help you apply for feature funding. There is a separate set of guidelines for shorts. Please read these guidelines carefully before applying as they should cover everything you need to know. If not, please email [hello@docsociety.org](mailto:hello@docsociety.org) and we would be happy to answer your questions.

As the BFI's delegate partner, Doc Society uses National Lottery funds to support excellence in British documentary filmmaking. The BFI Doc Society Fund (the "**Fund**") aims to champion a breadth of bold and distinctive filmmaking across the UK with a particular focus on:

- Supporting the early careers of ambitious filmmakers
- Supporting work with cultural relevance or progressive ideas
- Filmmaking that takes risks on talent, form and content, where the more commercial sector cannot
- Work that recognises the quality of difference – in perspective, in talent, in recruitment
- An increase in the number of active projects originated by filmmakers outside London & the South East.

We believe that, in order to have a healthy, resilient and world-class documentary community, we need to invest in, develop and promote the best talent we have in the UK. This means that diversity sits at the heart of our decision-making. Our priorities will be to raise up stories and storytellers from all parts of the country and from all communities.

As the BFI's delegate partner, Doc Society adheres to the [BFI Diversity Standards](#) and uses these to gauge the ability of projects to contribute to these aims. We ask applicants to embrace these Standards and explore the opportunities of working with a more diverse workforce, not just for their productions, but for our community as a whole.

The Fund is intended for projects that are unlikely to be fully commercially financed and would therefore benefit from National Lottery support.

Doc Society has a number of other funds and opportunities that may also be suitable for your project. If you think that your project fits the criteria we have set for our other funds and opportunities, we welcome applications to our other funds. In certain circumstances projects may receive funding from the Fund as well as from another one of our funds, but the decision making process is entirely separate. For more information on our other funds please see [www.docociety.org/funds](http://www.docociety.org/funds)

## 2. Can I apply?

We welcome documentary funding applications from both new and established filmmakers. Our documentary funding can support feature projects from their early stages through to completion, helping filmmakers to realise their projects onscreen.

We expect applications for features to be made by the producer on your project (or, if there is more than one producer, the lead producer) although, in appropriate circumstances, we may consider applications from a director without a separate producer, but only in the very early stages of a project. We are happy to facilitate introductions to producers if needed.

While we do welcome films intended for multi-platform release and looking to push the boundaries of documentary storytelling, we are unable to provide funding for filmed productions such as a theatre show, filmed sporting or music event, artist installation work, or material intended primarily for broadcast television. However, you may be eligible for funding from The Arts Council so should check their guidelines [for England \[http://www.artscouncil.org.uk/funding\]](http://www.artscouncil.org.uk/funding), Northern Ireland [\[http://www.artscouncil-ni.org/\]](http://www.artscouncil-ni.org/), Scotland [\[http://www.creativescotland.com/ \]](http://www.creativescotland.com/) and Wales [\[http://www.arts.wales/\]](http://www.arts.wales/).

To be eligible to apply to the Fund, you must be able to tick all of the following statements before submitting an application for funding.

My film is a 'single project' work of non-fiction.	
The production budget is not more than £5,000,000.	
My team (producer, writer and director) are all 18 years of age or over.	
My application is being made by or through a company <sup>1</sup> registered and centrally managed in the UK or another state of the European Union or European Economic Area.	

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<sup>1</sup> Doc Society is not able to offer guidance on setting up a company but advice can be found at Companies House.

My film is capable of obtaining a BBFC certificate which is no more restrictive than BBFC '18'.	
My film is capable of qualifying for certification as a British film through: i. Schedule 1 to the Films Act 1985 (The Cultural Test) <sup>2</sup> ; ii. One of the UK's official co-production treaties; or iii. The European Convention on Co-Production.	
I have secured, or can secure, the rights (including any underlying rights) in the idea proposed and will be able to provide proof of this at a later stage.	
I have considered how my project will meet the BFI Diversity Standards.  Note that before the Fund can award funding to a production, Doc Society will need to have obtained comfort from the BFI Certification Unit that the production is capable of achieving the BFI Diversity Standards.	
If, at the point of financial closing for this project, I have more than £20,000 in my BFI Locked Box <sup>3</sup> , I will use the amount over £20,000 as my own financial contribution to this project and reduce the amount requested from the Fund commensurately.	

As a guide, and in order to determine whether a project may be potentially capable of qualifying as a British film, we will look at the following main criteria:

- whether the project is set in the UK;
- whether the lead contributors are British;
- whether the film is based on British subject matter or underlying material;
- whether the script (if applicable) is intended to be developed in the English language (or in a recognised regional or minority language);
- whether there is a significant representation/reflection of British cultural heritage;

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<sup>2</sup> A summary of how points for the Cultural Test for film are allocated and full guidance on British certification and tax relief can be found on the BFI website at: [bfi.org.uk/film-industry/british-certification-tax-relief](http://bfi.org.uk/film-industry/british-certification-tax-relief).

<sup>3</sup> The BFI Locked Box scheme is administered by the BFI and provides for recouped National Lottery funding on specific projects to be held in a BFI Locked Box for the benefit of the filmmakers (producer, writer and director) to use for future filmmaking and training activities. Further information on the BFI Locked Box scheme can be found on the BFI website at: <http://www.bfi.org.uk/supporting-uk-film/production-development-funding/filmmaker-benefits-bfi-locked-box>

- whether there is a significant representation of British cultural diversity;
- whether there is a significant representation/reflection of British culture through a novel and creative approach to filmmaking;
- nationality or residency of the writer (European Union or EEA);
- nationality or residency of the director (European Union or EEA).
- nationality or residency of the producer (European Union or EEA).

If you are still unsure if you are eligible to apply, please email us at [hello@docsociety.org.uk](mailto:hello@docsociety.org.uk).

### 3. Funding parameters

We fund documentary filmmaking at all stages. You can apply to us at any stage in the life of your documentary including at the completion stage.

Our funding can only be a contribution towards the costs of your film. We are not a commissioner and cannot fully finance the production of a documentary film, regardless of the budget, and expect you to find other finance towards the costs of the project.

This means that if you ask for financing from the Fund equal to 100% of your total budget less the expected value of the UK Film Tax Credit, we will have to automatically reject your application without assessing its contents.

However, we can fully fund any given *stage* of a production. A production to which we have previously awarded funding may, at subsequent calls, apply for further funding from the Fund, so long as the cumulative total of the funding that the production applies for from the Fund represents a contribution only to the production's total budget and not the full amount of the budget (or the budget less the expected value of the UK Film Tax Credit).

As part of your application you will need to state the total budget (or anticipated total budget, if applying at an early stage) for your film and the amount you are requesting from the Fund. As a rough guide, we are able to give up to a maximum of £70-80K over the life of the film, so your request should reflect your project stage and any other funding already obtained and/or available to you for that stage. While we encourage being economical with budgets, we also still want to ensure that the projects we support are produced in accordance with all applicable UK laws, including in relation to minimum cast and crew payments.

When you make an application to the Fund, we will ask you for the following:

- (i) The total budget (or anticipated total budget, if applying at an early stage) required to make the documentary.
- (ii) A feasible draft finance plan (or, if applying at an early stage, details of how you anticipate that the total budget will be financed), including details of any existing



or proposed third party financiers that you are already in touch with in relation to the project.

- (iii) A summary breakdown of the amount spent to date and how such spend has been financed.
- (iv) A comprehensive breakdown of the costs in respect of which you are seeking funding at this stage.

Please note that, as part of your finance plan you will be required to include an initial calculation of the UK tax credit (if applicable) and any other incentives or subsidies available to the production.

Further guidance on UK film tax relief can be found on the [UK Creative industry tax reliefs page of the BFI website](#).

### **Additional funding**

If we fund your project during its early stages, we will discuss with you how and when we might provide funding for subsequent stages of production. If you wish to apply for such additional funding, you will need to complete another online application which will provide an up to date snapshot of the project at the time of application and how the project has developed since your previous application(s). This application should be made during one of the three annual open calls and your project will be considered in the same way as other applications. Only in very exceptional circumstances (e.g. urgent production needs), will we consider additional funding outside of open calls.

The criteria we will use to decide whether to provide additional funding include: how the film has developed since your previous application(s); how previous funding has been spent; the quality of creative discussion and communication; the finance plan and fundraising strategy; and the potential audience.

An application for additional funding should include: a revised treatment (if appropriate), and (if these have changed since your last application) updated budget, finance plan, (including the commercial terms and proposed recoupment schedule where the finance plan includes any other recoupable funds) and production plan.

**Other projects supported by the BFI Doc Society Fund**

Producers can make multiple simultaneous applications and also have multiple projects that are being supported by the Fund, provided they have different creative teams attached.

However, we expect producers to demonstrate that they will have sufficient time to dedicate to each project that we support, so you should bear this in mind when making applications for more than one project.

If you are applying for early-stage funding for your documentary, please note that if we have another project that is already active with the same director attached, this may have a bearing on our decision. If we do decide to award funding, it may be held back or staggered until the other project is nearing the end of its award.

#### **4. How do I make an application?**

##### **Calls for applications**

There will be three open calls for applications per year, and the opening and closing date of each call for applications will be posted on the Fund page of our website (<https://docsociety.org/bfi-doc>), on our social media, and will be advertised in our bi-monthly newsletters. Each call will be open for one month; applications to the BFI Doc Society Fund can be made at any point during the month before a given round's closing date. We will only consider applications for funding outside an open call from productions which are already receiving funding from the Fund, and only in exceptional circumstances (e.g. urgent production needs).

##### **Online application**

To apply for funding you will need to complete an application online, using our online application form at <https://apply.docsociety.org>.

The application form is posted online in word format on the Fund home page (<https://docsociety.org/bfi-doc>), so you can prepare it offline if you want. The form is part of the Common Application Project, an initiative by international documentary funders to reduce the burden on filmmakers by providing the same application form across funders. Guidance can be found at <https://www.documentary.org/funding/documentary-core-application-project>.

When first using the online application form you will need to create an account which will allow your applications to be saved and reviewed before submission. You will be able to access all of your past online applications and in-progress applications at any point by logging into your account from any of the Doc Society funds and programmes.

If you need additional support using the application form please contact us at [hello@docsociety.org](mailto:hello@docsociety.org)

##### **Contents of the application**

The application form consists of a series of questions regarding your company, the filmmaking team and the project itself. You will be asked to include links to relevant samples of the director's previous work along with any other visual materials you think might be relevant, e.g. trailer, select scenes etc.

Please remember that we will be reviewing a considerable number of applications and have to turn down many more projects for funding than we are able to support, so it is important to make an impact with your application.

Your application should cover both your creative and strategic ideas for the project. You will be asked to cover the following areas in your application:

- Your story and story structure
- Why this topic is important, timely or relevant.
- How are you going to tell this story? Your creative vision for the finished project - its visual look and feel.
- Intended distribution life for your film.
- Anticipated audience for your project, including any underserved audiences.
- Audience engagement strategy
- Key creative personnel
- Budget breakdown
- Finance plan
- Award amount requested and impact of that funding
- Fundraising strategy

### **Speculative submissions**

As a National Lottery fund we can only consider funding projects that have been submitted to us through the formal online application process. This means that we cannot accept, or read, informal submissions submitted by any means other than the online application portal.

### **BFI Locked Box**

If you have a BFI Locked Box, which is accumulating funds from other BFI funded projects, you should tell us this in your application.

Under the terms of Doc Society's agreement with the BFI, Fund awards are recoupable by the BFI. Subject to conditions, some of those recouped funds may be held in a BFI Locked Box for the benefit of the filmmakers (producer, writer and director) to use for future filmmaking and training activities. The purpose of the BFI Locked Box is to reward financial success, ensure revenue from successful BFI backed films is invested directly back into the British film industry, and reduce reliance on National Lottery funds.

If you have, or are likely to have more than £20,000 accrued in a BFI Locked Box at the point of financial closing of your new film, we will require you to invest all sums over £20,000 in the project ahead of additional funding from the BFI. Further information on the BFI Locked Box scheme can be found on the BFI website at: <http://www.bfi.org.uk/supporting-uk-film/production-development-funding/filmmaker-benefits-bfi-locked-box>.

### **BFI Diversity Standards**

As part of your application, we ask you to write about how you intend to meet BFI Diversity Standards. You should use this paragraph in the application to describe your plans and intentions for diversity in your project, responding to the [BFI Diversity Standards](#). This means detailing how you will address industry under-representation in relation to age, disability, gender, race, sexual orientation and socio-economic status.

If your plans are not fully developed at the point of application, then please state the stage you are currently at and explain how you will turn your aims into actions.

If your team or organisation has a long-standing commitment to diversity, enabling you to meet the BFI Diversity Standards by continuing your current practice, your application should outline how you will build on past achievements and show leadership to the wider industry.

Successful applicants will be required to submit an **Equality Monitoring Report** before final credit sign off. This will request information on the contributors to your project and will be used to measure success against the BFI Diversity Standards. Projects achieving a high level of good practice will be able to display the Screen Diversity mark of good practice in the end credits to advertise to the industry and audiences the contribution that their film has made to sector diversity.

The information provided by applicants within both their Diversity Standards and Equality Monitoring forms will be anonymised and used to help inform future funding decisions, research and strategy.

### **Environmental sustainability**

There is an increasing recognition that environmental sustainability needs to be placed at the heart of all our activity. As a distributor of public funds we ask you to consider how your production might contribute to this.

While we do not ask you to detail environmental sustainability at application stage, you should be aware, before you apply, that it is a requirement of our funding.

The BAFTA albert certification scheme and carbon calculator introduces greener ways of working for film productions, allowing teams to measure their efforts in mitigating their film's impact on the environment.

Star ratings, determined by the range and effectiveness of green initiatives implemented, are awarded to productions for their sustainable production techniques and achieving carbon reduction.

Starting at the pre-production stage, teams can work through a range of ideas and suggestions from a bespoke checklist, decide which aspects work for them, and then put them into practice. To ensure the rating system is robust and meaningful, each action must be supported with evidence or other auditable information to verify the process.

Productions should follow these core principles:

- Seek to reduce the negative environmental impact of film production wherever possible
- Share and embed sustainable values and behaviour with cast, crew and their supply chain
- Promote sustainable production to colleagues within the production and across the wider industry.
- All productions in receipt of BFI funding are required to complete and submit an albert report and carbon calculator to us at the end of the production:  
<https://calc.wearealbert.org/uk/>.

To help you achieve this, BAFTA albert delivers free carbon literacy training to understand climate change, the environmental impacts of film production, how to calculate the carbon footprint of your film, and understand what actions can be taken to create a more sustainable production. We encourage at least one person from your team to attend one of these sessions. Please check here for upcoming training dates:

<http://wearealbert.org/help/get-trained>.

## 5. What happens to my application?

We aim to review applications as transparently and efficiently as possible. Once you have submitted your application, we will confirm by email that it has been received and a unique ID number will be assigned to the application. You should receive this acknowledgment within two weeks of the deadline for submissions.

### **Eligibility**

We will check that your application is eligible for funding, using the criteria identified previously in **Section 2: Can I apply?** If it is ineligible, we will send you an email to inform you that your application will not be progressing further. An incomplete application will be considered ineligible. If incompleteness is the only reason for rejecting your application we may contact you and ask you to submit a complete application. However, do please double check that your application is complete before pressing submit!

If your application is eligible, it will progress to the Assessment stage.

### **Assessment**

An initial assessment of the application will be made by the Doc Society reading team, who have experience reading across our other film funds. Projects will be assessed on their creative vision and the perceived ability of the team to deliver that vision. Criteria will include strength of story and characters and the cultural and social resonance and ambitions of the project. We are primarily interested in stories that push the boundaries of non-fiction filmmaking, with an emphasis on distinctiveness of voice and perspective.

Assessment will also take into account:

- Whether your financial ideas are reasonable and appropriate for your project.
- How you have managed any previous BFI Doc Society Fund funding you have received.
- How your project sits in the mix of other films that the Fund has already supported, given our commitment to regionality and diversity.



### **First stage of assessment**

Following the initial assessment, we will send you an email to tell you that:

- We have reviewed your application and are not considering it further and that your application is now closed; or
- We suggest that you need to do some more development (for instance, carrying out further research, refining the treatment or script, or shooting some test scenes or other materials) before we further consider your funding request. In these circumstances we will ask you to withdraw your application and reapply for funding at a later stage; or
- Your application is progressing to the second stage of assessment.

### **Second stage of assessment**

In the second stage of assessment, applications are reviewed by Doc Society executives and an external panel of industry experts, who will be selected on the basis of their documentary experience and vetted for any potential conflict of interest. The experts will provide their views and comments which will be taken into account when drawing up a shortlist.

Depending on the outcome of this review, we may send you an “Email of Interest”, inviting you to a meeting to discuss your project further, including your budget (for each stage of funding you require from the Fund and your overall budget).

Depending on the outcome of this meeting, and following further internal discussion your application may be submitted to the Fund Committee. We will inform you by email if we intend to take your project to the Fund Committee.

### **Fund Committee consideration**

The Fund Committee is comprised of the Fund executives, a representative of the BFI, and Doc Society executive directors. The Fund Committee will decide whether to award funding to an application.

Successful and unsuccessful applicants will be informed by email of our decisions as soon as possible. Our decision on whether we wish to support your project is final.

### **Timeline summary**

Deadlines for the submission of applications are listed on Doc Society's website.

<b>Stage</b>	<b>Time from deadline for applications</b>
Email acknowledgement of your application	Within 14 days
Application rejected at first stage	Within 4 weeks
Email of Interest	Within 4 weeks
Application rejected at second stage	Within 8 weeks
Decision to take application to the Fund Committee for approval	Within 8 weeks
Application successful	Within 9 weeks

Applications for additional funding made outside an open Call should be confirmed within five weeks of our receiving them.

### **Feedback**

We aim to make the application process as fair and transparent as possible, but as a result of the volume of applications we receive, we do not have the resources to provide detailed feedback on projects where we have not requested 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 "reject".

If we have met with you to discuss your project and then declined it, we will provide some feedback and offer constructive advice on how best to proceed with your project.

We are only able to support a very small percentage of the applications we receive so have to say 'no' far more often than we are able to say 'yes'.

If you have constructive feedback on the application process please do contact us on [hello@docsociety.org](mailto:hello@docsociety.org) - we'd love to hear from you!

## **7. Resubmission**

Resubmissions can be made to the Fund for projects that it has previously declined, but your project will have a greater chance of acceptance the second time round if:

- There is a substantial and significant change in elements, or
- We have directly recommended further development on the project.

If you meet one of the above criteria and submit a new application for the same project, please ensure that you clearly identify the revised elements of the project in the new application.

## 6. Successful applications

If your application is successful, you will be made an **offer of funding**.

As the funding is an investment of National Lottery funds, there are a number of terms and conditions which will automatically apply and will be reflected in a funding agreement that you will be required to enter into with us. These terms and conditions will include the following:

1. We will pay the funding only to a limited company registered in the UK (either as a company incorporated in the UK or incorporated in the European Union or European Economic Area and registered as a branch in the UK).
2. The funding will be recoupable and any such recoupment will be paid directly to the BFI.
3. The BFI Corridor will apply to the funding. This is a 25% share of the amount of the funding recouped by the BFI until the BFI has recouped 50% of the funding, rising to 50% of the amount of the funding recouped by the BFI until the BFI has recouped 100% of the funding. This corridor of revenues is payable into a Locked Box bank account held by the BFI for the benefit of the UK production company, writer (if applicable) and director of the film who may draw-down those funds and spend them on development or production of film projects, or on staff skills training, subject to certain conditions.
4. The BFI supports the UK production company being entitled to recoup an amount equal to the UK Tax Credit advance included in the final finance plan for the film (subject to a cap of the actual amount of the UK Tax Credit proceeds, if lower). This is known as the UK Tax Credit Entitlement, and it will only be available to the UK production company if the other recouping financiers of the film agree. If available, the UK Tax Credit Entitlement will be payable, either alongside or (if required by the other recouping financiers of the film) after the BFI's recoupment of the funding, into the Locked Box for the sole benefit of the UK production company, who may draw-down those funds for

future development or production activity, or on staff skills training, subject to conditions.

Further information on the BFI's Locked Box scheme is available on the BFI website at: <http://www.bfi.org.uk/supporting-uk-film/production-development-funding/filmmaker-benefits-bfi-locked-box>. In order to access any monies held in a BFI Locked Box in respect of your project, the filmmakers will be required to enter into a standard form entitlement agreement with the BFI.

5. A proportionate share of financier net profits will also be payable to the BFI in respect of the funding.
6. You will be required to include our standard animated or static (at our discretion) logos and presentation credits at the start of the film, as well as certain closing credits and logos at the end of the film, which will include specific reference to the National Lottery. The Fund may request an Executive Producer credit at the producer's discretion.
7. 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 film (save only for music public performance rights).
8. The Fund may withdraw any offer of funding if it has reasonable concerns relating to the terms of any third party finance.
9. You will be required to pay the SIF levy of 0.5% of the film's UK core expenditure (subject to the SIF cap).
10. You will be expected to put in place all customary production insurances (including errors and omissions insurance) on which Doc Society must be a named insured and the BFI must be an additional insured.

11. You will be required to provide certain delivery materials, including specific disability access materials, to the BFI, the costs of which must be included in the budget of the film. The usual cost of creating the required disability access materials is approximately £4,000.
12. All revenues for the film must be collected by an independent collection agent, and the production and/or the sales agent for the film (as applicable) will be required to direct all distributors and direct exhibitors of the film to pay all sums derived from the exploitation of the film (including, without limitation, all minimum guarantees and overages) directly to the collection account established by the collection agent.
13. The Fund will require certain consultation and approval rights over your film, which may cover (depending on what stages of the project that we fund) the terms of all other finance, the identity and terms of appointment of the sales agent and distributors, and all key production and financial documents relating to the film.
14. 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 film.
15. If you deliver your film within budget the Fund will support you in being able to receive up to 50% 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.
16. You will be required to ensure that your film is produced in accordance with the requirements of all unions and guilds having jurisdiction and with all applicable laws and statutes.
17. You will be required to ensure that any agreement for the distribution of your film 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 film.

18. The Fund will not release any funding until it is satisfied that you have complied with certain conditions as set out in the agreement.
19. The Fund may hold back 10% of its funding until delivery to Doc Society and, where applicable, the BFI of specified delivery materials. In the case of final stage funding, these will include disability access materials (and a letter from the UK distributor or sales agent (if attached) confirming receipt of the same), an Equality Monitoring Report (which helps Doc Society to measure against the BFI Diversity Standards form that you submitted), a BAFTA albert report and carbon calculator and a final audited cost report certified by an independent auditor.
20. Our funding must be paid into a separate dedicated production account in the name of the production entity.
21. The Fund will expect to be provided with information about the progress of the production.
22. The Fund will have consultation rights over the assembly and all cuts of the film.
23. You will be required to deliver against the undertakings made by you in relation to the BFI Diversity Standards. Failure to deliver against those undertakings without good cause may affect your ability to receive future project funding from the Fund.
24. The funding agreement will include standard termination provisions.

## **7. Our commitment to you**

When we fund your film we come on board as collaborators, partners and your biggest champion. We see our role as the “friend of the filmmaker” and the team here being at your service; whether you need help negotiating with other funders, work on your budget, connecting to festivals and sales agents or help crafting your outreach strategy.

Our goal for the Fund will be to ensure strong representation of UK documentary internationally, enabling and empowering a diverse range of British filmmakers to deliver the best and most creative non-fiction films and get them in front of audiences globally.

All of this is included as part of our investment, as well as first class creative input and editorial feedback.

This approach ensures that every single BFI Doc Society Fund supported project has the best possible opportunity to aggregate sufficient resources and find audiences both at home and abroad.



## **8. National 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. Doc Society 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 Doc Society uses to decide which applications to fund. Doc Society can ask applicants for extra information.
3. All applications are made at the applicant's own risk. Doc Society will not be liable for loss, damage or costs arising directly or indirectly from:
  - the application process;
  - Doc Society's decision not to provide an award to an applicant; or
  - dealing with the application.
4. Please check your application form carefully. Doc Society will not process applications which are incomplete or which do not comply with these guidelines.
5. Doc Society's decisions on applications are final.
6. Doc Society 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 Doc Society.
7. Doc Society 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 Doc Society. This includes information held in relation to applications to Doc Society's National Lottery funding programmes or schemes. Therefore if you choose to apply to Doc Society 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. A conflict of interest arises where a board member or employee of any Doc Society entity (Doc Society, Doc Society Charitable Trust, Doc Society Inc.), or persons connected to any of these, or family members of any of these, may stand to benefit financially if an application to the Fund succeeds. This interest has to be declared in applications from such applicants. The relevant Board member or employee will not be involved in assessing the application or the decision to make an award, and Doc Society will notify the BFI of any such conflict of interest. Applicants are advised not to try to influence the success of their application by approaching a board member or employee.
  
10. It is important that applicants carefully check the information given in the application form. Doc Society will be entitled 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.

Doc Society will follow up cases of suspected fraud and will pass information to the police.

11. Doc Society requires that any measures taken by applicants to address underrepresentation are fully in compliance with the Equality Act 2010 – see more at [www.equalityhumanrights.com](http://www.equalityhumanrights.com).
  
12. **Complaints and Appeals:** Doc Society’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 Doc Society’s Complaints and Appeals procedure can be obtained on request by emailing [hello@docsociety.org](mailto:hello@docsociety.org) with the subject line “Complaint”.

### **Recognition of the National Lottery:**

The Fund distributes ‘good cause’ National Lottery Funding. We ask all of our partners and award recipients to increase the visibility of the National Lottery by:

- Promoting and proudly displaying the National Lottery logo; and
- Warmly and energetically finding ways to get all beneficiaries to spread the word.

It is therefore an important condition of this funding that the source of the funding (being the National Lottery) is prominently acknowledged through conspicuous use of the Fund logos, which include reference to the National Lottery and through agreed verbal and written acknowledgement. Also that partners and beneficiaries take frequent opportunities to highlight not just the fact of the funding but why it is funded and therefore the good work that is possible through the National Lottery.