# FACTOR
### THE FOUNDATION ASSISTING CANADIAN TALENT ON RECORDINGS
#### WITH SUPPORT FROM CANADA'S PRIVATE RADIO BROADCASTERS

# Component Completion Guide

# FACTOR Component Completion Guide

Filling out and submitting a completion is the last thing you'll need to do to meet FACTOR's requirements. The completion process involves several steps and mandatory pieces of information, so we suggest that you use this guide as you prepare to submit your completion.

## Before you begin

- Re-familiarize yourself with your project's program guidelines for full details on program requirements.
- Digitally collect, create, and organize copies of your completion documentation (see section below).
- Read the **Component Completion** section of your project's program guidelines.

## a. Completion Documentation

Required completion documentation may include:

1. **Description of the project's results.**
2. **A variance report**, explaining any changes to the original goals and/or budget.
3. The following mandatory completion documentation, broken down by component:
   a. **Sound Recording**: lyrics and MP3's, studio work log, suppliers declaration, album artwork.
   b. **Showcase:** proof of showcase.
   c. **Tour Support:** proofs of performance.
   d. **Video:** a public link to the supported video.
   e. **Marketing:** proof of logo acknowledgment for any printed or online marketing material.
   f. **Business Development:** a Business Development Results document.
4. All components require a budget with supporting expense documentation and related supporting forms upon completion. The budget used is referred to as FACTOR's **Cost Report** and can be found on the Budget tab of your completion.

## b. Logos and Acknowledgment

Before you print, publish, or commercially release any FACTOR funded material, refer to FACTOR's Logo and Acknowledgment Guide to ensure that you have fully met your requirements. Failure to appropriately acknowledge FACTOR may result in a loss of funding, or an Event of Default.

- **Sound Recording:** the physical album must include the appropriate logos on the back cover and the bilingual acknowledgment wording within the credits. Include FACTOR acknowledgment in the metadata for any digital tracks.
- **Video:** the end credits must include the appropriate logos and wording.
- **Tour and Showcase:** posters, flyers, handbills, evites and newsletters must include the appropriate logos and wording.
- **Marketing:** websites, press releases, advertisements and publicity material must include the appropriate logos and wording.
- **Business Development:** funded social media platforms, websites, apps and publicity material must include the appropriate logos and wording.

**We strongly recommend that you send proofs of all album artwork, press and promotional materials to your Project Coordinator so that issues can be identified and fixed in advance.**

# Starting your Completion

Sign in to [portal.factor.ca](portal.factor.ca) with your user profile (your email address and password).

Select *Projects* from the top menu bar and click on the project name of which you wish to submit a completion.

Click on the name of the component you wish to complete, found in the leftmost component column. Make sure to select the one marked completion, not application. This will open your component's completion.

You will see the following tabs. These tabs must be filled out in full and saved as you go:

## a. Home

All completions open automatically to the Home tab, which displays your funding summary. These fields autofill based on the numbers inputted into the Budget and Component Information tabs. **For now, skip this page and move on to Results.**

## b. Results

The Results tab is where you explain in detail how the project's original goals compare to the actual results. Make sure to list all notable occurrences, achievements, and unexpected results. Tell us what worked, and what didn't. You can type your results in the table provided or upload a document.

## c. Component Information

This tab is where you upload or update mandatory completion documentation. **Make sure to read the tips on this page and follow the instructions provided.** Each component information tab has different steps to be followed.

Generally, you will be expected to provide the following on this tab:

1. Any changes to your component's start date and end date.
2. **Sound Recording:** final MP3 and lyrics for all tracks, and commercial release information. A supplier's declaration for third party producers, and album artwork must also be uploaded.
3. **Tour and Showcase:** proof of performance.
4. **Video:** public link to funded video(s), a supplier's declaration for third party producers.
5. **Business Development:** the results document, and any printed or online material showing proof of logo acknowledgment.
6. **Marketing:** printed or online material showing proof of logo acknowledgment.

All components require a variance report. **Budget changes that affect more than 25% of your total budget must be approved by your Project Coordinator in advance**. Failure to clear these adjustments may result in a reduced final payment.

**You may notice that FACTOR has carried over some of the information entered in your application** (such as track details for sound recording components or event start and end dates). Ensure that all this information is up to date.

# d. Public Funding

Public funding is funding from:

- A federal, provincial, or municipal source (such as Canada Council for the Arts or Manitoba Film & Music).
- A private radio broadcaster approved by the CRTC as a contribution to an eligible Canadian Content Development initiative (such as the Radio Starmaker Fund or the Peak Performance Fund).

If you have received public funding and put it toward the same costs you are claiming to FACTOR in your completion, click "Add" underneath the table and enter the funding source, entity, amount, and confirmation of funding received.

For example: if you used both your FACTOR funding and a $500 grant from Ontario Arts Council to pay your producer, enter $500 on this page. However, if you used the $500 to pay for the producer fee and you are not claiming that cost to FACTOR, do not enter it. Do not enter revenue raised by crowdfunding (such as Kickstarter or Indiegogo).

# e. Budget

This tab is where you upload your completed Cost Report spreadsheet, which is acceptable only in Excel, Open Office, or Google Drive formats. This spreadsheet details what expenses you incurred toward your finished project.

Upload legible, organized, and scanned copies of your invoices, receipts, and proofs of payment for each expense listed in your Cost Report. This material is referred to as your **expense documentation**, and it must be uploaded in a single zip file.

To create a zip file: for Windows, right click your folder, select Send to, select Compressed (zipped) folder. For Mac, right click the folder, then select Compress Items. Files can be up to 100mb.

**Before you upload your expense documentation:**

- Organize each expense as it is listed within your Cost Report. You may upload both invoice and proof of payment for a claimed expense into a single document.
- Use the following naming convention for each Cost Report item:

    Expense number - vendor name and/or documentation type

    **Example:** "1 - Producer Fee Invoice and POP" or "2 - Air Canada - Invoice"

**Budget Tips:**

- Refer to our Expense Documentation Guide for a full explanation on what FACTOR considers as eligible for your invoices and proof of payments.
- Refer to the **Eligible Costs** section of the program guidelines for your component to ensure the costs you are claiming are eligible.

# Submitting your Completion

After you have filled out the Results, Component Information, Public Funding, and Budget tabs, you are ready to submit your completion. Take this time to make sure you have uploaded and completed all the necessary steps before proceeding.

Go to the main page for your project. Select the **completion** variant and then click the **Validate/ Submit** button. The first validation step checks for mandatory information that may be missing. If the validation is unsuccessful, return to your completion to make the necessary changes noted within the error message. Repeat the validation step once this is completed.

Press the **Submit Components** button, review the Applicant Agreement, and press Yes to confirm your submission. Wait until you see a green bar confirming your submission. You will also receive an email confirmation within 24 hours.

Your Project Coordinator will review your submitted completion within a few weeks and will email you if the final review has been completed without any issues.

If any information or documentation is unclear or missing from your completion, you will be given a Grace Period of 7 days to submit the requested material. No further extensions are available. Should the Grace Period pass, you will be put On Hold for 30 days. After 30 days, you will be placed in Pre-Default. If the material is still not provided within six months from the date of the Grace Period notice, you will be in Default with FACTOR, and your funding will be owed back. To prevent this from happening, please remember to keep in touch with your Project Coordinator. We're here to help!

# Next Steps

Sound recording projects have additional commercial release requirements post completion. For all sound recording components, you will be delivering to FACTOR a digital copy of your album within 30 days of its commercial release. You will also need to include the finalized metadata and album artwork. The artwork must clearly show the required logo and acknowledgment text. You will be notified by email closer to your release date with a reminder that this material is required.

# Additional Helpful Documents

Expense Documentation Guide

FACTOR's Business Policies

Supplier's Declaration

Receipt for Services and/or Per Diems

Personal Vehicle Log