

Program Guidelines

The TELUS Fund is made possible by the success of the Optik TV service now reaching more than 1 Million TELUS TV customers in British Columbia, Alberta and Quebec. The Fund is an independently governed, not-for-profit corporation certified by the Canadian Radio-television and Telecommunications Commission (the Commission) as a Canadian Independent Production Fundⁱ. Since launching in 2013, the Fund has allocated over \$14 million toward 70 projects.

In all questions of interpretation of these guidelines, the Fund's interpretation shall prevail. These guidelines are subject to change without notice.

1. HEALTH AND WELLNESS MANDATE

The mandate of The TELUS Fund is to finance content with the potential to entertain, engage and enlighten the health choices of Canadians. We are looking for stories with the potential to influence Canadian audiences to improve their health outcomes. The Fund uses a broad definition of health that encompasses physical, mental and emotional well-being. [Funded projects](#) to date are as diverse as the determinants of healthy Canadians, which range from lifestyle and environment to culture and services.ⁱⁱ

2. ELIGIBLE APPLICANTS

The Fund will receive submissions from companies that are:

- primarily in the business of producing professional media content,
- headquartered in Canada,
- for-profit taxable corporations (within the meaning of Canada's Income Tax Act),
- Canadian-controlled (Sections 26 to 28 of the Investment Canada Act), and
- owners of sufficient copyright permissionsⁱⁱⁱ to create and exploit the content.

3. ELIGIBLE CONTENT

Most of the Fund's financing is allocated to series, mini-series and one-offs intended for broadcast in Canada to mainstream audiences. [Funded Projects](#) also include web series for online audiences, virtual reality content, mobile applications, interactive websites, games, education toolkits, eMagazines and other forms of digital content.

The health area usually features prominently in the central storyline of the content but may also be subtle within sub-plots, the setting, or within the promotion campaign.

PROGRAMMING

At least 90% of financing from the Fund is allocated to the creation and promotion of Programming intended for viewing from beginning to end without significant end-user interaction or customization. Successful submissions typically include multiple episodes of various lengths to drive viewership across more than one platform.

Scripted and unscripted are eligible provided the Programming meets the Commission's definition of eligible program categories^{iv} (except for news, reporting and actualities, and sports).

Programming budgets must include allowances for:

- close captioning^v and described video,
- defining and implementing data tools sufficient to track and report on realistic qualitative and quantitative measures of success for one year from launch, and
- detailed launch campaign plans including for example marketing, publicity and promotion expertise; promotion elements, images, electronic press kits; a basic website; digital marketing activities (e.g. online advertising, permission marketing, social media, data collection); and advertising.

NON-PROGRAMMING

Up to \$500,000 is available each year for financing the creation of Non-Programming that is story-driven, interactive and customizable by the user. Non-Programming includes for example videogames, complex websites, mobile applications, curriculum, and eBooks. Priority within this limited amount is given to Non-Programming that enhances the viewing experience of Programming financed by the Fund and increases the likelihood of positively impacting health choices.

Non-Programming expenditures and financing must be tracked and reported separately from Programming.

CANADIAN CONTENT

Programming and Non-Programming (the Content) financed by the Fund must ultimately be owned and controlled by Canadians and include a significant contribution from the Canadian independent production sector. All Programming must achieve minimum Canadian content points with appropriate exceptions for international ventures^{vi}.

4. MINIMUM SUPPORT REQUIREMENTS

At application, Applicants must demonstrate written support from Expert Organizations, Distribution Platforms and Third-Party Financiers corroborating assertions made about the health problem, target audience, success objectives, and strategies to drive reach and impact.

In those cases where the Applicant is requesting financing for both Programming and Non-Programming, each must individually achieve the Minimum Support Requirements to be eligible for consideration.

EXPERT ORGANIZATIONS

Story-driven content is a powerful medium with the potential to engage our emotions, create empathy, and convey knowledge in entertaining ways. The Fund requires all Applicants to obtain written support from Expert Organizations to ensure in their treatment of the subject area that health choices are not negatively impacted by content that causes gratuitous offence to some viewers, presents editorial bias, or promotes unverified research.

Applicants must include at least one letter of support from a distinguished Expert Organization nationally recognized for their expertise and activities in the health subject area. This letter of support must:

- explain how the Content demonstrates innovation in the field,
- describe how the Content will improve quality of life and transform outcomes,

- commit expertise to ensuring the highest standard of accuracy, integrity, fairness and comprehensiveness in the treatment of the subject matter, and
- commit resources to increasing discoverability of the Content within their network.

In those rare areas where no such national organization exists, the Fund may accept letters of support from provincial organizations and professionals who are active in the field.

DISTRIBUTION PLATFORMS

Priority will be given to submissions providing the greatest opportunity for Canadians to discover health and wellness content on multiple platforms. Applicants must include at least one deal memo with a Canadian or foreign owned Distribution Platform accessible by Canadians. The Distribution Platform must be in the business of transmitting large volumes of content and able to demonstrate a track record of measured success in reaching and engaging the target audience in Canada.

Examples of eligible Distribution Platforms may include, but are not limited to, a broadcast channel operating in Canada^{vii}, an influencer on social media platforms with a large and engaged network in Canada, a qualified distributor guaranteeing a minimum theatrical release in Canada, or an Alternative Digital Platform.^{viii} The deal memo must:

- outline the terms of transmission including license fees, exclusivity, and territories,
- confirm the level and nature of their commitment to the launch campaign,
- provide analytics from comparable Content relevant to the subject matter,
- forecast realistic and measurable success objectives for the Content, and
- commit to providing detailed reporting on forecast measurable success objectives.

THIRD PARTY FINANCIERS

Decision making at the Fund is strongly influenced by the level of financial support obtained by the Applicant from third party sources. Applicants demonstrate demand for the content to be created by including diverse sources willing to share in the financial risk. At application, Applicants must include letters from third party sources committing to provide cash financing of at least 10% of the Programming and Non-Programming budgets.

Third party sources may include, but are not limited to, Expert Organizations, Distribution Platforms, provincial agencies, public and private funding agencies, successful crowdfunding campaigns, investments, sponsorship funding, and grants. Forecast provincial and federal tax credits based on budget expenditures do not meet this minimum requirement.

5. EVALUATION PROCESS

Eligible applications achieving the Minimum Support Requirements are assessed individually and in comparison, to each other according to the following Evaluation Criteria. These Evaluation Criteria are not intended to restrict creativity or limit the full discretion of the Board. They are provided as a guide to applicants in making a complete submission.

HEALTH AND WELLNESS INNOVATION

The Fund will prioritize submissions that:

- include an exceptional level of support and corroboration from Expert Organizations,
- feature a health subject impacting a significant number of Canadians,

- demonstrate original and fresh approaches in the health field,
- challenge our routines and enlighten our health choices,
- present novel solutions that are more efficient, effective, or just than existing solutions,
- portray the use of information and technology to improve quality of life, and
- reference underlying research and solid evidence in describing the health and wellness problem, why it matters, and how their Content will contribute to improving outcomes.

REACH AND MEASURABLE SUCCESS

The Fund will prioritize submissions that demonstrate:

- an exceptional level of support and corroboration from Distribution Platforms with considerable reach and engagement with the target audience on relevant topics,
- an exceptional level of support from Third Party Financiers sharing in the financial risks of the Content,
- content plans that include multiple episodes of Programming, complementary content, marquee elements and key influencer attachments to drive reach and engagement over a one-year period,
- a strong understanding of their target audience, strategies for how they will reach this audience, and how their Content will influence positive health choices, and
- qualitative and quantifiable measures of success that are clear, concise, realistic and achievable.

6. STAGES AND LEVELS OF FINANCING

TELUS Fund financing is available to develop, produce and increase the discoverability of health and wellness content in Canada.

DEVELOPMENT FUNDING

Development funding is available to secure the project team, subject matter experts and financial sources; undertake further research on the subject matter and target audience; advance the creative materials; prepare pitch materials, create a trailer or pilot episode to aid in obtaining support; develop marketing and impact strategies; and prepare detailed implementation plans.

- Applications for financing at the development stage are received between September 5, 2017 and May 31, 2018.
- Applicants may request up to \$75,000 or 75% of the development budget.
- Applicants are required to submit:
 - a completed application form found at www.telusfund.ca,
 - a “pitch” video providing a sense of the subject area, the production team, and key elements of the Content proposal ([Kickstarter](#) has great tips for pitch videos), and
 - copies of Minimum Support Requirements.^{ix}

At the Executive Director’s discretion, submissions well-aligned to the mandate and evaluation criteria will be reviewed for funding by the Board of Directors.

PRODUCTION FUNDING

Production funding is available for fully developed, production-ready proposals to create, launch, promote, and drive reach and engagement leading up to and during the first year of the launch.

- Requests for production financing are received at the published deadlines in September, February and May.
- Applicants are encouraged to request the level of financing they need to achieve the measured success objectives. The table in Appendix A will assist applicants in requesting an amount aligned to the Fund's mandate and evaluation criteria.
- Applicants are required to submit:
 - A completed application form found at www.telusfund.ca,
 - A professional sizzle reel or trailer of 3-5 minutes in length,
 - Copies of Minimum Required Support for Programming,
 - Copies of Minimum Required Support for Non-Programming,
 - Creative materials, marketing strategies, budgets and detailed implementation plans are not required at the initial application stage, but may be requested during the evaluation process.

Decision making is the sole discretion of the TELUS Fund Board of Directors who select between 15 to 25 submissions each year.

DISCOVERABILITY FUNDING

Discoverability funding is also available for exceptional health and wellness content that has achieved measured success during the first year following their launch to continue driving viewership, renew and refresh the programming, and maintain the audience's experience.

- Applications for financing up to \$75,000 (or 75% of the budget) are received between September 2017 and May 2018. Those requiring more than \$75,000 are received at the published deadlines in September, February and May
- Applicants are required to submit:
 - A completed application form found at www.telusfund.ca,
 - Hyperlinks to digital versions of the content that has achieved measured success,
 - Copies of Minimum Requirement Support for discoverability plans,
 - Creative materials, marketing strategies, budgets and detailed implementation plans are not required at the initial application stage, but may be requested during the evaluation process.

At the Executive Director's discretion, submissions well-aligned to the mandate and evaluation criteria will be reviewed for funding by the Board of Directors.

7. QUESTIONS?

Answers to frequently asked questions are available [on the Fund's website](#). You may also contact us at info@telusfund.ca

8. APPENDIX A

There are no per project maximums for production and discoverability financing at the Fund. Applicants are encouraged to request only what they need to achieve realistic measured success objectives. Each year 15-25 projects have received on average \$200,000 in production financing or 35% of the Content budget. A few exceptional submissions have received more than \$500,000 or 75% of the Content budget. The table below is a guide to help Applicants request an amount aligned to the key evaluation criteria that tend to distinguish successful from unsuccessful submissions.



Level of TELUS Fund financing

\$0

>\$300,000 or 75% of budget

Health and Wellness Innovation criteria	Low alignment	High alignment
<ul style="list-style-type: none"> Level of support from those with expertise in subject area 	Local experts and organizations; small networks of influence; no resources to support success	Nationally recognized organizations; marquee experts; large networks of demonstrated influence; resources to support success objectives
<ul style="list-style-type: none"> Target audience impacted by health issue 	Less than 500k Canadians	More than 1,5m Canadians
<ul style="list-style-type: none"> Programming is an original and fresh approach in subject area 	High volume of content already exists in the health area; little track record of measured impact	Content presents novel solutions; use of innovative information and technology
<ul style="list-style-type: none"> Underlying research of distinguished subject matter experts 	Limited evidence of positive results; highly debatable alternatives	Published research; demonstrated positive impact of storytelling in subject area
Reach and Measured Success criteria	Low alignment	High alignment
<ul style="list-style-type: none"> Content plans 	One-off program, topical, short shelf life	Television series renewal, multiple episodes of programming, evergreen, long shelf life
<ul style="list-style-type: none"> Level of third-party financing support 	Request to TELUS Fund is >49%, minimum support from third party sources	Request to the TELUS is <35%, Third Party Financers sharing in >50% of the financial risk
<ul style="list-style-type: none"> Level of support from Distribution Platforms 	Less than 20k subscribers and average video views; local community reach; no demonstration of track record in reaching audience in relevant topic areas	More than 750k subscribers, average video views, and broadcast ratings; national reach; multiple platforms; track record in reaching audience with comparable Content
<ul style="list-style-type: none"> Marketable attachments 	No recognizable attachments	Television series with strong brand recognition, highly recognized Expert Organization, celebrity talent, narrator; key influencer support
<ul style="list-style-type: none"> Marketing expertise and resources allocated 	Allowance for unit publicity; reach depends on festival invitations, word of mouth, and earned media; less than 3% of Content budget set aside for audience building	Marketing experts involved in completing the application form; media budget with paid advertising; more than 10% of Content budget set aside for promotion assets and audience building

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- i [Broadcasting Regulatory Policy CRTC 2016-343](#)
 - ii [What Makes Canadians Healthy or Unhealthy](#)
 - iii Copyright clearances for exploitation worldwide on multiple platforms and devices for a period of at least two years from first transmission of Programming in Canada or launch of Non-Programming (whichever occurs last)
 - iv [Link to the Commission's definition of eligible program categories](#) NOT including news, reporting and actualities, or sports
 - v The quality standards are set out in Quality standards for English-language closed captioning, [Broadcasting Regulatory Policy CRTC 2012-362](#), 5 July 2012.
 - vi Earning a minimum of 6 out of 10 points on the [Canadian Audiovisual Certification Office \(CAVCO\)](#) scale, or are certified by Telefilm Canada as an [official international co-production](#), or are certified as an international co-venture in collaboration with non-treaty international partners according to [the Commission's requirements](#)
 - vii Canadians access Programming via hundreds of **broadcast channels** delivered on a linear schedule through a cable, satellite, internet protocol television, or antenna-based system. Provided the channel is accessible by Canadians, the Distribution Platform may include for example Canadian or foreign owned networks; local, regional, affiliated broadcasters; educational broadcasters; Category A services and Canadian or foreign owned discretionary services operating in Canada.
 - viii Canadians access content via hundreds of **Alternative Digital Platforms** delivered through the internet, smart phones, and wearable devices. Provided the Alternative Digital Platform is accessible by Canadians, the Distribution Platform may include for example: On-demand channels; Pay per view channels; Over the top services; Influencers on social media platforms; Multi-Channel Networks; Websites; custom applications; game consoles, and virtual reality platforms.
 - ix The Fund will consider, on a case by case basis, waiving or delaying receipt of letters of commitment from Third Party Financiers and deal memos with Distribution Platforms, particularly at the early development stages, for content considered exceptional according to the mandate and evaluation criteria. The Fund's decision making will be strongly influenced by the written support obtained from Expert Organizations.