

# Program Guidelines

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The mandate of the TELUS Fund is to finance exceptional content that promotes the health and well-being of Canadians. We are looking for stories with the potential to entertain, engage, and enlighten Canadians.

Please subscribe to the [TELUS Fund website](#) to receive the latest news. On the website you will also find answers to [frequently asked questions](#). If you still have questions, contact the Fund by email to [info@telusfund.ca](mailto:info@telusfund.ca).

## 1. ABOUT THE TELUS FUND

The TELUS Fund is made possible by the success of the Optik TV service 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 Fund.<sup>i</sup>

The TELUS Fund has full discretion in the administration of its programs and the application of these program guidelines to ensure funding is provided to projects aligned with the Fund's mandate. In all questions of interpretation of these program guidelines, the Fund's interpretation shall prevail. These guidelines are subject to change without notice.

## 2. HEALTH AND WELL-BEING

The Fund uses a broad definition of health that encompasses physical, mental, and emotional well-being. [Funded projects](#) are as diverse as the determinants of healthy Canadians which range from lifestyle and environment, to culture and services.<sup>ii</sup>

## 3. ELIGIBLE APPLICANTS

The Fund will receive submissions from companies that are:

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

## 4. ELIGIBLE CONTENT

The TELUS Fund finances the creation of two types of content: programming and non-programming. The health subject area must appear in the central storyline of the content and launch campaign. The content must also be ultimately owned and controlled by Canadians and include a significant contribution from the Canadian independent production sector.<sup>iv</sup>

## PROGRAMMING

**More than 90%** of financing from the Fund is allocated to the creation and promotion of programming. TELUS Fund defines programming as audio-visual content intended for viewing from beginning to end without significant end-user interaction or customization (Programming). Programming must be within the Program Categories defined by the Commission (except for News, Reporting and Actualities, and Sports).<sup>v</sup>

## NON-PROGRAMMING

**Up to \$500,000** of financing from the Fund is allocated to the creation and promotion of non-programming. TELUS Fund defines non-programming as digital content that is story-driven, interactive, and customizable by the user (Non-programming). Non-programming includes for example videogames, complex websites, and mobile applications. Priority within this limited amount is given to Non-programming that enhances the viewing experience of funded Programming.

## **5. MINIMUM SUPPORT REQUIREMENTS**

TELUS Fund provides financing to health content with demonstrable demand from Expert Organizations, Third Party Financers and Distribution Platforms.<sup>vi</sup>

When the Applicant is requesting financing for both Programming and Non-programming, each type of content must individually achieve these Minimum Support Requirements to be eligible for consideration.

### EXPERT ORGANIZATIONS

Applicants must demonstrate demand for the content from at least one Expert Organization that is nationally recognized for its expertise and activities in the health subject area of the project. These Expert Organizations will help to ensure the health content is free of editorial bias, presents verified research, and does not cause unnecessary offence.

The Expert Organization must be a not-for-profit organization, headquartered in Canada, and not related to or affiliated with the Applicant. Letters of support from Expert Organizations must:

- describe the health problem and why it matters,
- explain how the content is taking a fresh approach to the health topic in comparison to existing content,
- describe how the content will promote the health and well-being of Canadians,
- 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 health subjects where there is no Expert Organization active in the area, the Applicant may submit a combination of letters from expert individuals and local, provincial, and regional organizations located across the country. The combination of letters obtained must demonstrate a **national perspective** on the subject area.

### THIRD PARTY FINANCERS

Applicants must demonstrate demand for the content from Third Party Financers committing **cash** financing of **at least 5% of the budget**. Third party financing may include, for example:

- a grant from an Expert Organization
- a licence fee from a Distribution Platform
- a repayable advance from a selective funding program
- cash from a crowdfunding campaign
- an equity investment from a private investor
- cash from a sponsorship sale

The letters of commitment from Third Party Financers must confirm that the financing contributes to the creation of the same deliverables for which the Applicant is requesting TELUS Fund financing, detail any rights acquired, include a payment schedule, and define terms of repayment, if any.

The following examples **do not** meet the intent of this requirement and will not be included when calculating the minimum threshold of 5%:

- non-cash financing (e.g. deferrals and in-kind services)
- financing from parties related to or affiliated with the Applicant (e.g. an investment from the production company, a minimum guarantee from a related distributor)
- automatic funding programs based on meeting certain eligibility requirements (e.g. first-come first-served, rebate on expenditures, bonus top-up on financing obtained)
- forecast financing from provincial and federal tax credit programs

### DISTRIBUTION PLATFORMS

Applicants must demonstrate demand for the content by obtaining a deal memo from a Distribution Platform that is committed to making the content available to Canadians within 18 months of delivery. The deal memo must outline the licence terms (e.g. the amount of the licence, fees, commissions, exclusivity, territories, payment schedule, and repayment terms).

The Distribution Platform must be in the business of making large volumes of comparable content directly available to Canadians and be able to demonstrate a track record of achieving 20,000 Canadian consumers per episode of comparable content. This could be demonstrated with data analytics from the source that confirm the:

- linear broadcast channel typically achieves an Average Minute Audience (2+) of more than a 20,000 per episode with comparable content<sup>vii</sup>
- on-demand service, website, or digital channel typically achieves more than 20,000 average Canadian views or downloads per episode with comparable content<sup>viii</sup>
- distributor typically attracts more than 20,000 Canadians to attend live screenings of comparable content

The Distribution Platform must provide the Applicant with documentation confirming they are in the business of making comparable content directly available to Canadians and

typical results achieved. The Fund will use information provided in the [Distribution Platform Support Form](#)<sup>ix</sup> to determine eligibility of the Distribution Platform to meet this requirement.

Deal memos from distributors and sales agent undertaking to sell the content on behalf of the Applicant **do not** meet this requirement. In those rare situations where there is no identifiable Distribution Platform from which to obtain written support and self-distribution is proposed, the Applicant must demonstrate with data analytics from the source a track record of achieving 20,000 Canadian consumers per episode with comparable content.

## 6. STAGES OF FINANCING

TELUS Fund financing is available to develop, produce and increase the discoverability of health content in Canada. There are no per project maximums for production and discoverability funding. Applicants are encouraged to request only what they need to achieve measured success. At the development stage, Applicants may request up to \$75,000 or 75% of the development budget, whichever is less.

Financing is in the form of a recoupable advance similar in nature to an unsecured, non-interest bearing, forgivable loan. The Fund acquires no right, equity interest or profit participation in the actual production. The recoupable advance is not subject to provincial or federal taxes (e.g. QST, PST, HST, GST). Most provincial and federal tax credit programs have determined financing from the Fund to be akin to a grant or subsidy that reduces the eligible tax credit.

When the Applicant is requesting financing for both Programming and Non-programming, the financing, budget, and costs for Non-programming must be allocated, tracked, and reported separately from Programming.

All Applicants must include a link to a **professional sizzle reel, trailer, or pilot episode** with their submission that showcases the talent, the storyline, and the project's potential to reach and positively impact Canadians. Requests for development financing may include a link to a **pitch video** that is less than 3 minutes and provides a sense of the subject area, the team, and key elements of the project.

### DEVELOPMENT FUNDING

Story ideas that have advanced to a treatment are eligible to apply for development funding 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 professional sizzle reel, trailer, or pilot episode; and prepare detailed plans for the project and audience development.

### PRODUCTION FUNDING

Production funding is available for fully developed, production-ready proposals to create, promote, and drive audience reach, engagement and impact. The production budget must include allowances for:

- closed captioning<sup>x</sup> and described video,
  - data collection tools to report on measures of success for at least 24 months,
  - implementing an audience development plan that extends for at least 6 months.
- The budget allowance must be sufficient to secure experts in marketing and

publicity; implement a paid advertising campaign; and manage digital and social media platforms; and

- creating marketing assets to increase audience engagement and deepen their experience (e.g. a press package, basic website, trailer, short digital videos, photos, graphics, banners, learning tools, newsletters)

When the Applicant is implementing an audience development plan for both Programming and Non-programming, the marketing, publicity, and promotion costs related to the overall project and the Programming may be included in the Programming budget. Similar costs intended solely to raise awareness and drive usage of the Non-programming must be tracked and reported separately in the Non-programming budget.

#### DISCOVERABILITY FUNDING

Discoverability funding is available for exceptional health content that has already launched and achieved measured success (e.g. the combined viewership of Programming and/or users of Non-programming is greater than 200,000 Canadians). Discoverability funding is intended to continue driving viewership, renew and refresh the content, and maintain the audience's experience in Canada. The discoverability budget must include allowances for:

- new content creation,
- closed captioning and described video for existing and new Programming,
- data collection tools to report on measures of success for at least 24 months,
- implementing an audience development plan that extends for at least 6 months, and
- new marketing assets to increase audience engagement and deepen their experience.

Applicants must demonstrate demand **for the discoverability plan** from Expert Organizations, Third Party Financers and Distribution Platforms (see [Minimum Support Requirements](#)). The submission must also include a report on current measured success using the [Exploitation and Discoverability Workbook](#) and forecasts for increased measured success with TELUS Fund financing.

## 7. DECISION-MAKING PROCESS

The Board of Directors has sole and exclusive responsibility for funding decisions. TELUS Fund measures its success by the degree to which funded projects reach and positively impact the health and well-being of Canadians. The Directors evaluate and weigh submissions individually and, in comparison to, others in the TELUS Fund portfolio according to the [Evaluation Criteria](#).

Best practices and lessons learned from 57 [funded projects](#) suggest that submissions demonstrating medium to high alignment in the majority of criteria have the highest likelihood of achieving measured success. These submissions are prioritized in the decision-making process and are likely to receive the requested TELUS Fund financing. Submissions demonstrating low to medium alignment in most criteria are a lower priority and should request less financing.

## **8. EVALUATION CRITERIA**

The following evaluation criteria are not intended to restrict an Applicant's creativity nor limit the full discretion of the Board of Directors. They are provided as a guide to determine the level of financing to request from TELUS Fund and make a successful submission.

**Evaluation Criteria**

Low alignment and limited potential to receive <\$75,000 and/or 25% of the budget



High alignment and strong potential to receive >\$300,000 and/or 75% of the budget

**1. Health Innovation**

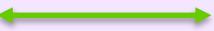
TELUS Fund will prioritize submissions that foster and showcase innovation to improve the health and well-being of Canadians. Health innovation includes for example new ways of thinking and working; and new or improved health technology, systems, policies, delivery methods and services.

How will the project foster and showcase innovation to improve the health and well-being of Canadians?	Characters portrayed in the story will raise awareness of the Canadians dealing with this health problem or issue.	The project will include a “call to action” that mobilizes audiences to adopt new and improved technologies, products, policies, and services based on underlying research in the health area.
	The project will present new ways of thinking and working to improve the well-being of Canadians that are based on underlying research in the health area.	The project will include the creation of content specifically to address the unmet needs of Canadians based on underlying research in the health area.
	The project will inform the choices of Canadians by presenting alternatives and solutions to the health problem that have been obtained from published research in peer reviewed literature.	The project will collect and analyze qualitative and quantitative data to determine the impact of the project on the health and well-being of Canadians.

**2. Project Plan**

TELUS Fund will prioritize submissions that are ready to proceed and include creation of ample content to grow audiences throughout the campaign, deepen audience experience, and drive success

Does the plan include creating both Programming and Non-programming?	This is a <b>one-off</b> show licenced for television and/or theatrical release in Canada.	This is a series of more than <b>13</b> episodes licenced for broadcast in Canada.
	This is a digital series of less than <b>6</b> related episodes licenced for transmission on a digital platform.	This is a digital series of more than <b>20</b> related episodes licenced for transmission on a digital platform.
	This is a videogame, complex website, application, or other type of Non-programming that is not related to a television show or digital series.	This is story-driven, interactive, and customizable Non-programming that will enhance the audience's viewing experience of the Programming.
Which marketing assets will be created to increase audience engagement and deepen their experience?	<b>1</b> professional trailer to promote the project on a variety of platforms.	More than <b>20</b> short digital videos to promote the project on a variety of platforms.
	High resolution, professional images that capture the essence of the project.	Live event posters and billboard displays.
	Press package.	Email newsletters.
	Project specific web landing page.	Whitepapers, case studies, infographics.
	Project specific social media channels.	Audio podcasts.
	Posts, graphics, behind the scenes snippets, and other content for digital promotion.	eBooks, eMagazines, blogs, curriculum, screening guides, and other learning resources.
Is the project ready to apply?	<b>5%</b> of financing for the current project stage is confirmed.	<b>100%</b> of financing for the current project stage is confirmed (except TELUS Fund).
	More than <b>25%</b> of the financing is producer investments, in-kind services, and deferrals.	Less than <b>15%</b> of the financing is producer investments, in-kind services, and deferrals.
	At the development stage, a pitch video exists that is less than 3 minutes and provides a sense of subject area, the team, and key elements of the project.	In addition to the pitch video, the story idea has already advanced to a detailed treatment.
	At the production stage, a professional sizzle reel, trailer, or pilot episode already exists that showcases the talent, the storyline, and the project's potential to reach and positively impact Canadians.	In addition to the professional sizzle reel, trailer or pilot episode, the creative materials are ready for production of the Programming (bible, outlines, and scripts) and Non-programming (wireframes, graphics, story boards, prototype).
	At the discoverability stage, the project has been screened at film festivals, received awards, and earned media coverage.	The project has received critical acclaim and more than <b>500,000</b> Canadians have already either viewed the Programming or used the Non-programming

<b>Evaluation Criteria</b>	Low alignment and limited potential to receive <\$75,000 and/or 25% of the budget 	High alignment and strong potential to receive >\$300,000 and/or 75% of the budget
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**3. Audience Development Plan**  
 TELUS Fund will prioritize submissions that engage marketing expertise with a successful track record with comparable content to conduct market research, validate the target and forecast audiences, define the strategies, and execute the plan.

How familiar are Canadians with this health issue?	500,000 Canadians are directly impacted by the health issue featured in the project.	At least 3 million Canadians are directly impacted by the health issue featured in the project.
	The health issue has received some coverage in the media.	The project is based on an underlying property that is well-recognized in Canada or is dealing with a subject matter that has received sustained media coverage.
Who is the target audience and what is the plan to reach them?	Marketing experts have not yet been secured.	Marketing experts have already defined the target audience and created a detailed audience development plan.
	Marketing experts will begin audience development 2-4 weeks prior to launch and continue for at least 6 months.	Marketing experts will begin audience development 8-10 weeks prior to launch and continue for at least 12 months.
	At the development stage, \$5,000 has been earmarked to secure marketing expertise, undertake research on the target audience, and advance the audience development plan.	At the development stage, at least \$20,000 has been earmarked to secure marketing expertise, undertake research on the target audience, and advance the audience development plan.
	At the production or discoverability stages, \$50,000 has been earmarked for implementing the audience development plan in Canada.	At the production or discoverability stages, at least \$150,000 or 10% of the budget (whichever is more) has been earmarked for implementing the audience development plan in Canada.
Which platforms and channels are committed to project success?	Celebrity influencers, experts, and talent committed to driving awareness of the project have online reach (subscribers, followers, and fans) of more than 150,000 Canadians.	Celebrity influencers, experts, and talent committed to driving awareness of the project have online reach (subscribers, followers, and fans) of more than 500,000 Canadians.
	Forecast more than 20,000 Canadians will either view the Programming or use the Non-Programming based on the Distribution Platform's track record with comparable content.	Forecast more than 250,000 Canadians will either view the Programming or use the Non-Programming based on the Distribution Platform's track record with comparable content.

**4. Project Team**  
 TELUS Fund will prioritize submissions from diverse teams experienced in the business of developing, producing, and launching comparable content.

Where is the production company located?	The production company is headquartered in Toronto, Montreal, or Vancouver.	The production company is headquartered more than 150km outside of Toronto, Montreal, or Vancouver.
	The production company is not in the Official Language Minority Community.	The production company is in the Official Language Minority Community.
What is the experience of the project team?	This is the first time the project team has created a project of this nature.	The team has a solid track record of success with comparable content.
	The key leadership team does not include women or self-identifying members of the BIPOC community <sup>xi</sup> .	The key leadership team is inclusive of at least 3 women and self-identifying members of the BIPOC community.



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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 all platforms and devices for a period of at least 24 months from first transmission of Programming in Canada or launch of Non-programming (whichever occurs last).
  - iv Programming must either earn a minimum of 6 out of 10 points as certified by the [Canadian Audiovisual Certification Office \(CAVCO\)](#), be certified by Telefilm Canada as an [official international co-production](#), or be certified according to [the Commission's requirements](#) as Canadian content or an international co-venture in collaboration with non-treaty international partners. Non-programming must include Canadians in key roles and spend at least 75% of the budget on Canadian costs.
  - v [Link to the Commission's definition of eligible program categories](#) NOT including news, reporting and actualities, or sports.
  - vi The Fund in its sole discretion may consider, on a case by case basis, waiving or delaying receipt of letters of commitment from Third Party Financers **or** deal memos with Distribution Platforms, particularly at the development stages. The Fund's decision making will be strongly influenced by the written support obtained from Expert Organizations.
  - vii Canadians access television series and one-off 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 digital series and one-off Programming via hundreds of **digital platforms** delivered through the internet, smart phones, and wearable devices. Provided the 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 Use this [Distribution Platform Support Form](#) for production and discoverability financing submissions and this [Distribution Platform Support Form DEV](#) for development financing submissions.
  - x The quality standards are set out in Quality standards for English-language closed captioning, [Broadcasting Regulatory Policy CRTC 2012-362](#), 5 July 2012.
  - xi BIPOC: Black, Indigenous and People of Colour.