

## 1. TELUS FUND

### Mandate

TELUS Fund finances exceptional content that promotes the health and well-being of Canadians. More than 100 projects have received over 35M in financing since launching in 2013. The Fund measures its success primarily by the degree to which Canadian audiences view, use, and are impacted by funded projects.

More information about TELUS Fund is available in [published annual reports](#).

### Governance

TELUS Fund is made possible by TELUS TV with 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 (CRTC) as a [Canadian Independent Production Fund](#) eligible to administer TELUS Corporation's financial contributions in support of Canadian content.

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

## 2. APPLICATION PROCESS

There are no application deadlines. When you are ready, follow these 3 steps:

- **Check eligibility.** Start by making sure your [company](#) and [project](#) are eligible.
- **Check alignment.** Determine if your project is a fit for funding by answering the questions in the [alignment tool](#). There are also resources embedded in the tool to help improve the likelihood of receiving a positive funding decision.
- **Request an invitation to apply.** If your project is a good fit for TELUS Fund, you are ready to request an invitation. Request an invitation to apply by answering the questions in the alignment tool and then uploading the documents in this [checklist](#).

Projects that are invited to apply submit a complete application with supporting materials. Applicants typically receive a funding decision within 8 to 10 weeks depending on the volume of submissions under consideration. Positive funding decisions have 90 days to complete their financing and enter into a TELUS Fund financing agreement.

## 3. ELIGIBLE APPLICANTS

Eligible Applicants are companies that are:

- experienced 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 copyright permissions necessary to create and exploit the content worldwide on all platforms and devices for a period of at least 24 months.

TELUS Fund is especially interested in hearing from production companies located outside of the major production centers in Toronto, Montreal, and Vancouver and those that are in the [Official Language Minority Community](#).

#### 4. ELIGIBLE PROJECTS

TELUS Fund looks for stories with the potential to entertain and engage Canadians. Most often, the health issue features prominently in the central storyline of the project. Check out over 70 examples of [funded projects](#) that have already launched in Canada.

##### Health and Well-being

The Fund uses a broad definition of health that encompasses physical, mental, spiritual, and emotional well-being. Potential subject areas are as diverse as the [determinants of healthy Canadians](#) which range from socioeconomic variables and lifestyle to culture and services.

##### Project Plan

The project plan will include creation of ample Programming and Complementary Content.

- Programming is the cornerstone of the project. This audiovisual content is intended for viewing from beginning to end without user interaction (e.g., television series, feature film, web series). The Programming may be comedy, drama, variety, reality, or any other [CRTC Program Category](#) except News, Reporting and Actualities, and Sports.
- Complementary Content refers to ancillary assets that complement the Programming and are created to help develop audiences and deepen their experience (e.g., basic website, short digital videos, newsletters, graphics, images, posts, podcasts, learning resources). These assets tend to work best when they are based on research into the target audience's tastes, interests, and the online platforms they frequent.

On rare occasions, the project plan may also include creation of Non-programming. Non-programming is digital content that requires significant user interaction to progress the storyline (e.g., games, applications, complex websites). The Non-programming and Programming must be interrelated such that the audience's experience is seamless. There is an annual maximum of \$500,000 for Non-programming across all funded projects. The financing, budget, and costs of Non-programming must be allocated, tracked, and reported separately from Programming and Complementary Content.

##### Canadian Contribution

The Programming must either earn at least 6/10 on the [CAVCO](#) point system, be certified by [Telefilm Canada](#) as an official international co-production, or be certified by the [CRTC](#) as either Canadian content or an international co-venture. Non-programming must include Canadians in key roles. At least 75% of the entire project budget must be spent in Canada.

TELUS Fund looks for projects that include new and often overlooked Canadian voices. Projects should ensure that key roles behind the scenes and in front of the camera include diverse representation in all the ways that Canadians differ.

## 5. PROJECT SUPPORT REQUIREMENTS

TELUS Fund looks for projects that have demonstrated support from stakeholders with a strong interest in the health subject and a commitment to growing audiences. Prior experience with health content reveals that this community of support is vital to reaching Canadians and positively impacting their well-being. The Fund has identified 3 stakeholders whose support is essential: Expert Organizations, Distribution Platforms, and Audience Partners.

### Expert Organizations

Before requesting an invitation to apply, you must first obtain support from at least one Expert Organization in the health subject. The [Expert Organization Support Form](#) is used to demonstrate their support and confirm their commitment to helping you ensure the project is free of editorial bias, presents verified research, and does not cause unnecessary offence.

An Eligible Organization is a not-for-profit organization that:

- is headquartered in Canada,
- is not related to or affiliated with the Canadian production company,
- includes health professionals with formal training and expertise in the health subject, and
- delivers services to Canadians across the country in the health subject, and language of the project.

Having trouble finding a national organization in the health subject? In its place, the form may be completed by multiple organizations that deliver services in metropolitan centres, provinces, territories, or regions. The combination of organizations must demonstrate a national perspective.

### Distribution Platforms

Before requesting an invitation to apply, you must first obtain a deal memo from at least one Distribution Platform that commits to making the Programming available to Canadians within 18 months of it being delivered and, wherever possible, with [closed captioning](#) and described video. The deal memo must detail terms such as the channels and platforms on which the Programming will be available, the time-period for transmission, any exclusivity, the licence fee, and payment schedule.

An eligible Distribution Platform is in the business of curating a large volume of original Programming for purposes of making it accessible to Canadian audiences on their channel or platform. They have prior experience on at least 2 comparable projects:

- overseeing production and delivery of high-quality content,
- planning and executing an audience development plan, and
- achieving on average more than 20,000 Canadian views to substantial completion per episode.

In addition to the above criteria, an eligible distribution platform will either be:

- a [CRTC-licensed television channel](#) (e.g., conventional, specialty, pay, VOD),
- a [CRTC recognized non-Canadian programming service](#) authorized in Canada, or
- any [online service accepted by CAVCO](#).

After the project is invited to apply, the Distribution Platform will complete the [Distribution Platform Support Form](#) to demonstrate their support for the project and prior experience with comparable content.

Not sure if your distribution platform is eligible? No problem! Include the [Distribution Platform Support Form](#) when you request an invitation, and we will confirm eligibility. Deal memos with distributors and sales agents undertaking to sell the Programming on your behalf to Distribution Platforms **do not** meet this requirement.

At the earliest development stage, the Fund in its sole discretion may consider, on a case-by-case basis, waiving or delaying receipt of a deal memo. The Fund's decision making will be strongly influenced by the support obtained from Expert Organizations.

### Audience Partners

Projects that are invited to apply can increase the likelihood of receiving a positive funding decision, by demonstrating support for the project from a community of Audience Partners.

An Audience Partner is an individual or organization with a large online reach in Canada of at least 20,000 subscribers, followers, or fans. Audience Partners may include, for example, social media influencers, sponsors, expert individuals, and celebrity talent. Expert Organizations with a large online reach in Canada can also be an Audience Partner to help build audiences for the project.

The [Audience Partner Support Form](#) is used to demonstrate their support and confirm their commitment to helping you develop audiences for the project.

Distribution Platforms are the foremost audience partner and as such have their own [Distribution Platform Support Form](#). There is no need for them to also complete the audience partner form.

## 6. FINANCING

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

### Repayment Terms

At the development stage, financing is repayable to the TELUS Fund if the project moves forward to a next stage or if project rights are transferred, sold, or exploited in any manner. At the production and discoverability stages, financing is repayable from revenue, if any is earned. Amounts paid back to the Fund are reinvested into the financing of more exceptional projects.

### 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,
- secure marketing expertise to create the [comprehensive Audience Development Plan](#),

- advance the creative materials,
- prepare pitch materials,
- create a professional trailer or pilot episode, and
- prepare a detailed project implementation plan.

At the development stage, the maximum amount of TELUS Fund financing is \$75,000 or 75% of the development budget, whichever is less. To date, successful projects have received on average \$30,000 or 60% of the budget.

### Production Funding

Production funding is available for fully developed, production-ready proposals to create the project and implement the comprehensive audience development plan.

The production budget must provide for:

- Programming to be available with [closed captioning](#) and described video,
- a [comprehensive Audience Development Plan](#) that starts at least 8 weeks before the launch of Programming and extends for at least 6 months after, and
- data collection tools to report on measures of success for at least 24 months.

Successful submissions that receive a positive production funding decision but have not yet completed the [comprehensive Audience Development Plan](#) will receive a conditional commitment. Entering into TELUS Fund financing agreement will be subject to approval of this plan.

At the production stage, TELUS Fund financing will not exceed 75% of the budget. There is no per project dollar maximum. To date, successful projects have received on average \$250,000 or 35% of the budget.

### Discoverability Funding

Discoverability funding is available for projects that have already launched and achieved measured success (e.g., at least an average of 20,000 Canadian views to substantial completion per episode of Programming).

Discoverability funding is intended to continue driving success and maintain the audience's experience **in Canada**. The discoverability budget must include allowances for:

- Programming to be available with [closed captioning](#) and described video,
- a [comprehensive Audience Development Plan](#) for the discoverability stage, and
- Data collection tools to report on measures of success for at least 24 months.

Successful submissions that receive a positive discoverability funding decision but have not yet completed the [comprehensive Audience Development Plan](#) will receive a conditional commitment. Entering into TELUS Fund financing agreement will be subject to approval of this plan.

At the discoverability stage, TELUS Fund financing will not exceed 75% of the budget. There is no per project dollar maximum. To date, successful projects have received on average \$50,000 or 75% of the budget.

## 7. CHECKLIST

The table below lists the supporting materials that will be required during the application process.

When you are ready to request an invitation to apply, answer the questions in the <a href="#">alignment tool</a> and be ready to upload these supporting materials:
<ul style="list-style-type: none"> <li>▪ A synopsis of your project, the health problem your project is attempting to address, and why it matters.</li> </ul>
<ul style="list-style-type: none"> <li>▪ Short bios for the project team.</li> </ul>
<ul style="list-style-type: none"> <li>▪ At least one <a href="#">Expert Organization Support Form</a>.</li> </ul>
<ul style="list-style-type: none"> <li>▪ At least one deal memo with a <a href="#">Distribution Platform</a>. You may request an exception if the project is at the earliest stage of development.</li> </ul>
<ul style="list-style-type: none"> <li>▪ The <a href="#">Audience Development Preliminary Plan</a></li> </ul>
Projects that are invited to apply will receive the application form to complete and return along with these supporting materials:
<ul style="list-style-type: none"> <li>▪ Most recent creative materials.</li> </ul>
<ul style="list-style-type: none"> <li>▪ Detailed project implementation plans appropriate to the stage of the project.</li> </ul>
<ul style="list-style-type: none"> <li>▪ <a href="#">Distribution Platform Support Forms</a> for each Distribution Platform that has provided a deal memo.</li> </ul>
<ul style="list-style-type: none"> <li>▪ At the development stage, a pitch video less than 3 minutes that provides a sense of the subject area, the team, and key elements of the project.</li> </ul>
<ul style="list-style-type: none"> <li>▪ For production and discoverability financing:           <ul style="list-style-type: none"> <li>- A professional sizzle reel, trailer, or pilot episode that showcases the talent, the storyline, and the project's potential to reach and positively impact Canadians,</li> <li>- Either the <a href="#">Audience Development Preliminary Plan</a> or comprehensive <a href="#">Audience Development Plan</a>, and</li> <li>- <a href="#">Audience Partner Support Forms</a>.</li> </ul> </li> </ul>

## 8. EVALUATION CRITERIA

The Board of Directors has sole and exclusive responsibility for funding decisions. The Directors evaluate and weigh submissions individually and, in comparison to, others in the TELUS Fund portfolio according to the 4 evaluation criteria in the table below.

The questions in the [alignment tool](#) are based on the 4 evaluation criteria used by the Board of Directors to render funding decisions. Best practices and lessons learned from over 70 [funded projects](#) suggest that submissions that respond favorably to these questions have the highest likelihood of achieving measured success and are prioritized in the decision-making process.

The 4 evaluation criteria, alignment tool and questions are not intended to restrict your creativity nor limit the full discretion of the Board of Directors. They are provided as a guide to making a successful submission.

## 1. HEALTH INNOVATION

TELUS Fund will prioritize submissions that include strong support from Expert Organizations and demonstrate innovation in the subject area. Health innovation includes for example new ways of thinking and working; and new or improved health technology, systems, policies, delivery methods and services.

- Has the [Expert Organization Support Form](#) been completed by an organization with demonstrated expertise delivering services across Canada in the subject area?
- How will the project improve the well-being of Canadians dealing with this health issue?

## 2. PROJECT PLAN

TELUS Fund will prioritize projects that include creation of ample content to grow audiences throughout the campaign, deepen audience experience, and drive success.

- How many episodes of Programming will be created to support developing audiences in Canada?
- Does the Non-programming seamlessly interrelate with the Programming?
- Does the plan include short digital videos to promote the project?
- Does the plan include creating ample Complementary Content?
- What is the status of the creative materials?
- What percentage of the total financial structure is already confirmed?
- What percentage of the budget is financed by producer investments, in-kind services, and deferred fees?

## 3. AUDIENCE DEVELOPMENT PLAN

TELUS Fund will prioritize submissions with resources sufficient to engage marketing expertise with a proven track record building audiences for comparable projects and involving partners committed to driving project success.

- What is the status of the project's [Audience Development Preliminary Plan](#)?
- How much of the Production budget has been earmarked to implement the [Audience Development Plan](#) for the project in Canada?
- For how long will marketing expertise be retained by the project?
- How many Canadians are directly impacted by the health issue featured in the project?
- Has there been recent media coverage in Canada about the health issue or the underlying property featured in the project?
- Has the [Distribution Platform Support Form](#) been completed by an organization with demonstrated success releasing comparable original content in Canada?
- What is the online reach of celebrity influencers, experts and talent that have completed the [Audience Partner Support Form](#) and confirmed to help drive audiences?
- How many Canadians are forecast to either view the Programming or use the Non-programming?

## 4. DIVERSITY AND REPRESENTATION

TELUS Fund will prioritize submissions from diverse teams experienced in the business of developing, producing, and launching comparable projects.

- Is the production company headquartered more than 150km outside of Toronto, Vancouver, or Montreal?
- Is the production company in the Official Language Minority Community?
- How many women, people of colour, and/or individuals identifying as Indigenous will fill the roles of Producer, Director, Writer or Lead Performer?