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SUMMARY OF KEY CHANGES TO PROGRAM GUIDELINES

TELUS Fund finances exceptional TV programs, feature-length films, and web series that move audiences to think, feel and act. These updated guidelines aim to streamline the application process and increase your chances of receiving funding.

1. Key Partners

The definitions of Key Partners have been clarified. Before applying, you must obtain support forms from at least:

- one **Health Organization**
- one **Platform**

Audience Ambassadors are optional but can strengthen your submission.

TIP: Five weeks before the deadline, submit your Health Organization Support Forms and Platform Support Forms to confirm eligibility. Check the TELUS Fund website for the dates of this pre-approval window.

2. Funding Maximums

New maximum funding amounts have been set for each Financing Stage.

3. Audience Development

If your submission is successful, funds will be allocated to help you engage a pre-approved Marketing Agency to create and execute a Comprehensive Audience Development Plan and meet minimum budget allocations for producer-led audience development.

Note: You no longer need to submit a Preliminary Audience Development Plan or Comprehensive Audience Development Plan (CADP) with your application. However, applications for production financing that include a CADP prepared by a pre-approved Marketing Agency will be more competitive.

4. Special Call for Web Series aimed at Caregivers

TELUS Fund's Special Call for Web Series initiative aimed at Canadian caregivers is now integrated into these program guidelines. Applicants with web series ideas aimed at Canadian caregivers must now meet the eligibility requirements in these program guidelines and will follow the same decision-making process.

If you have a web series idea for caregivers, please email hello@storiesforcaregivers.com to obtain the necessary Platform Support Form and license from the Stories for Caregivers platform to meet the requirements of these program guidelines.

For definitions of capitalized terms, check the appendix. If you have any questions, visit the TELUS Fund website or contact us at info@telusfund.ca.

TELUS FUND OVERVIEW

TELUS Fund finances exceptional content that promotes the well-being of people in their environment. As a Certified Independent Production Fund, we administer financial contributions from TELUS Corporation in support of Canadian content.

WELL-BEING IN STORYTELLING

Storytelling is a powerful medium that connects us to global and local challenges, fostering empathy and understanding among audiences. While the challenges may differ from place to place, they are often intertwined and affect people's well-being everywhere. Real-life narratives make well-being issues relatable and urgent, creating a sense of belonging that can inspire communities to act, preserve cultures and traditions, and strengthen social ties. When underrepresented voices share their experiences, they can spark meaningful change.

TV programs, feature-length films, web series and related content are vital tools for raising awareness about well-being issues. They encourage viewers to engage in conversations, build connections, and advocate for positive health outcomes on local and global scales.

The Fund takes a broad view of well-being, which encompasses:

- **Health Dimensions:** This includes physical, mental, emotional and spiritual aspects that contribute to overall well-being.
- **Living Conditions:** This covers factors such as access to healthcare, community support, lifelong educational opportunities, and essential resources like food, water, and energy.

Key Considerations

Focus on the following areas to create a competitive application for financing:

1. **Well-Being Focus:** Ensure your project directly addresses significant well-being issues and clearly articulates how these challenges resonate with millions of Canadians.
2. **Unique Perspective:** Craft a compelling story that provokes thought and inspires action. Presenting fresh angles on well-being issues can differentiate your project.
3. **Research Support:** Provide robust evidence that substantiates the well-being issues your project addresses and supports your project's claims.
4. **Partner Collaboration:** Secure at least one Health Organization Support Form and one Platform Support Form. Consider including Audience Ambassadors to enhance the competitiveness of your submission.

HOW TO APPLY FOR FINANCING

Follow these steps to apply for financing from TELUS Fund:

1. Check eligibility

- Make sure you are an eligible **Applicant** working on an eligible **Project**.
- Gather the necessary support forms from **Key Partners**:
 - one Health Organization
 - one Platform
- Audience Ambassadors are optional but can strengthen your submission.

TIP: Five weeks before the deadline, submit your Health Organization and Platform Support Forms to ensure eligibility. Dates for this pre-approval window are posted on the [TELUS Fund website](#).

2. Select financing stage

- Determine which **stage of financing** you need:
 - Development Financing
 - Production Financing
 - Post-launch Financing

3. Check alignment

- Try our **Evaluation Tool** to see if your project is a good fit for financing, based on the four evaluation criteria used by the Board of Directors for funding decisions.
- Use our **audience resources** to strengthen your submission.
- Identify the pre-approved **Marketing Agency** you will work with if your submission is successful.

4. Submit your application

- Keep track of **application deadlines**, which are published [on the TELUS Fund website](#).
- Complete the online [application form](#) for your selected financing stage and upload the [support materials](#).

Important Notes

If you receive a **Letter of Interest**, financing will be reserved for your project for 90 days. During this time, you must meet specific [Conditions of Financing](#); otherwise, the funds will be released to other applicants.

Before entering into a financing agreement, the Fund reserves the right to reduce its financing level, alter its financing allocation among project components, or decline further participation at its discretion.

TELUS Fund retains full discretion over its programs and the application of these guidelines to ensure funding aligns with its mandate. In all interpretations, the Fund's decisions prevail. The Fund reserves the right to modify or withdraw its programs without prior notice. By participating, applicants agree to these guidelines and abide by the Fund's final decisions.

THE DECISION-MAKING PROCESS

Our Board of Directors prioritizes applications based on four criteria:

1. Story

We are looking for compelling stories that provoke thought, emotion, and action. The most competitive submissions tell stories that bring fresh perspectives and showcase innovative approaches. These submissions will demonstrate a thoughtful integration of Programming and Complementary Content that enhances the main story. We prioritize projects with support from Health Organizations delivering healthcare across Canada that can demonstrate a strong connection between the project and its potential positive impact on well-being.

2. Audience

Success is measured by the project's potential to reach, engage and positively impact their intended audience. Competitive submissions demonstrate wide audience appeal and strong backing from Audience Ambassadors and Platforms. These submissions also have sufficient resources to create and execute the Comprehensive Audience Development Plan. While many well-being issues affect people globally, projects that create a significant impact in Canada will be prioritized.

3. Plan

The Fund prioritizes submissions that have already secured other funding and are ready to proceed. The most competitive submissions have adequate resources to create ample Programming and Complementary Content that deepens audience engagement during the audience development campaign.

4. Team

Preference is given to Canadian production companies with a successful track record in comparable content, a deep understanding of the well-being issue, and a commitment to positively impacting the audience. The most competitive submissions reflect Canada's rich diversity of languages, regions, genders, and communities in the production company, key leadership positions, and stories.

Important Notes

The Board of Directors is solely responsible for funding decisions. These criteria are intended as guidelines to help you create a competitive submission without limiting creativity or the Board’s discretion.

An applicant that has been declined may reapply once more for the same financing stage, provided both the applicant and project remain eligible and there are significant increases in support from Key Partners and financial sources.

FINANCING STAGES

Financing is available at three stages to assist in creating and commercializing TV programs, feature-length films, and web series.

1. Development

Apply for development financing when your project has obtained support from Key Partners and you need funding to prepare for production.

Use of Funds	<ul style="list-style-type: none"> ▪ Develop production-ready materials. ▪ Create a professional sizzle reel/trailer and pitch materials. ▪ Create a pilot episode for a web series. ▪ Secure a <u>Marketing Agency</u> to create the Comprehensive Audience Development Plan (CADP). ▪ Prepare a competitive application for production financing.
Maximum Amount	Up to \$25,000 or 75% of the development budget, whichever is less.
Conditions of Financing	Financing is repayable if the project advances into production, or the rights are sold. Minimum marketing allocations and other conditions of financing are detailed in <u>the Appendix</u> .

2. Production

Apply for production financing when you have production-ready materials and support from Key Partners.

Use of Funds	<ul style="list-style-type: none"> ▪ Create Programming and ample Complementary Content. ▪ Secure a <u>Marketing Agency</u> to create and execute the CADP. ▪ Report on the project’s measured success.
Maximum Amount	<ul style="list-style-type: none"> ▪ For web series: Up to \$5,000 per minute, \$200,000, or 75% of the production budget, whichever is less. This maximum amount includes support toward meeting the required minimum marketing allocation of \$50,000 in the project budget. <ul style="list-style-type: none"> ○ In the past 5 years, 38 web series have received an average of \$147K or 61% of the production budget.

	<ul style="list-style-type: none"> ▪ For Stories for Caregivers web series: Up to \$5,000 per minute, \$150,000, or 75% of the production budget, whichever is less. There is no minimum marketing allocation required for Stories for Caregivers web series. ▪ Other Programming: Up to \$500,000 or 75% of the production budget, whichever is less. This maximum amount includes support toward meeting the required minimum marketing allocation of \$50,000 in the project budget. In the past 5 years, 32 feature-length films and TV series have received: <ul style="list-style-type: none"> ○ An average of \$234,000 or 17% of the production budget. ○ 6 of the 32 funded projects received +\$300,000. ○ 2 exceptional submissions received +\$400,000. ○ 4 received +40% of the production budget. ○ None to date has received +50% of the production budget.
<p>Conditions of Financing</p>	<p>Financing is repayable from revenue generated by the project. Minimum marketing allocations and other conditions of financing are detailed in the Appendix.</p>

3. Post-launch

Apply for post-launch financing after your project has premiered to continue building audiences.

If your project **received production financing** from the Fund there are no application deadlines. You may apply for post-launch financing at any time after:

- You have received the final payment of production financing.
- The project has achieved audience success.
- You have obtained support for your post-launch plans from [Key Partners](#).

If your project **did not receive production financing** from the Fund, you must apply at a deadline date published [on the TELUS Fund website](#). Wait to apply until after:

- Your project has achieved over 20,000 views for the feature-length film or an average of 20,000 views per episode for the series.
- You have obtained support for your post-launch plans from [Key Partners](#).

TV and web series must wait to apply for post-launch financing until after all episodes of the **final season** have premiered.

<p>Use of Funds</p>	<ul style="list-style-type: none"> ▪ Acquire rights for long-term exploitation. ▪ Refresh Complementary Content and Non-programming. ▪ Create learning resources and host live event screenings. ▪ Secure marquee attachments. ▪ Hire a Marketing Agency to execute a refreshed CADP. ▪ Conduct global research and attend events.
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	<ul style="list-style-type: none"> Maintain the project website and social channels.
Maximum Amount	Up to \$150,000 or 75% of the post-launch budget, whichever is less. On average, four successful applicants over the past 5 years received \$102,000 or 69% of the post-launch budget.
Conditions of Financing	Financing is repayable from the producer's share of revenue generated by the project. Minimum marketing allocations and other conditions of financing are detailed in the Appendix .

SUPPORT MATERIALS

Prepare the following support materials specific to each financing stage and upload them in the application form. Forms and templates are [available on the website](#).

Story

Support Materials	Development	Production	Post-launch
Health Organization Support Form for this stage	Required	Required	Required
Pitch Video, Sizzle Reel, Trailer or Pilot episode	Required	Required	Required
Creative Materials for the Programming	Required	Required	Required
Creative Materials for Complementary Content, if applicable for this stage	Required, if applicable	Required, if applicable	Required, if applicable
Creative Materials for Non-programming, if applicable for this project	Required, if applicable	Required, if applicable	Required, if applicable
Hyperlinks to all previously released content			Required

Audience

Support Materials	Development	Production	Post-launch
Audience Ambassador Support Form for this stage	This document is optional but, if included, can strengthen your submission.		
Platform Support Form for this stage	Required	Required	Required
Comprehensive Audience Development Plan prepared by a pre-approved Marketing Agency	This document is optional but can strengthen your submission.		
Deal memo from the eligible Platform	Optional	Required	Required, or alternative
Deal memos for other pre-sales or distribution arrangements, if applicable	Required, if applicable	Required, if applicable	Required, if applicable

Plan

Support Materials	Development	Production	Post-launch
Commitment letters from confirmed financial sources for this stage	Required	Required	Required

2025 Program Guidelines



Project Budget for this stage	Required	Required	Required
Project Schedule for this stage	Required	Required	Required

Team

Support Materials	Development	Production	Post-launch
Short bios for Key Positions for this stage	Required	Required	Required



APPENDIX: DEFINITIONS

1. Applicant

To qualify as an eligible Applicant, you must:

- Have experience in producing comparable Programming.
- Be a for-profit taxable corporation as defined by Canada's Income Tax Act.
- Be headquartered in Canada and Canadian controlled, as defined in Sections 26 to 28 of the Investment Canada Act.
- Own all necessary rights to create, produce, distribute, and exploit the project throughout the world in all manners, languages, and media, and on all platforms and devices for at least 24 months at the development stage and 60 months at the production and post-launch stages.

2. Project

Your project must target Canadian audiences and be produced in English and/or French. The well-being issue must be central to the storyline or sub-plots. Eligible genres include scripted and unscripted formats such as drama, comedy, lifestyle, magazine, variety, reality, and documentary.

Eligible projects must include:

- **Programming:** Core audiovisual content meant for uninterrupted viewing (e.g., TV programs, feature-length films, web series), that earns at least 6 points on the CAVCO point system or is certified as Canadian content by the CRTC or Telefilm Canada. The Programming cannot fall under the CRTC Program Categories of News, Reporting and Actualities, and Sports.
- **Complementary Content:** Additional assets that enhance audience engagement (e.g., website, social media, short videos, behind-the-scenes content). This content is typically available for free and accessible on a non-exclusive basis across various platforms.

On rare occasions, eligible projects may also include **Non-programming**, which refers to interactive digital content (e.g., games, virtual reality experiences, mobile applications) requiring significant user interaction. The Non-programming must be supported by the Health Organization and interrelated with the Programming such that the audience's experience of both is seamless. Access to Non-programming is often exclusive to users who have paid a fee or subscribed to a particular channel or platform.

Non-programming must involve Canadians in key roles and allocate at least 75% of the budget to Canadian expenditures. Additionally, the Fund caps annual funding for Non-programming at \$400,000 across all funded projects at all financing stages. The financing,

budget, and costs for Non-programming must be allocated, tracked, and reported separately from other project components.

3. Key Partners

Before applying for financing, applicants must secure support forms from at least:

- One Health Organization
- One Platform

TIP: Five weeks before the deadline, submit your Health Organization Support Forms and Platform Support Forms to confirm eligibility. Dates for this pre-approval window are posted on the [TELUS Fund website](#). If you miss this window, you can include their forms with your application. However, if the Health Organization and/or Platform are deemed ineligible by the Fund, the application will be immediately withdrawn from consideration.

Securing support from **Audience Ambassadors** is optional and can boost the competitiveness of your submission.

Health Organizations

To qualify for funding, you must obtain at least one support form from a Health Organization for your specific financing stage. The most competitive submissions often obtain support from multiple Health Organizations providing healthcare services across Canada.

These organizations play a crucial role in ensuring the project aligns with the Fund's mandate. Their feedback is essential for verifying research, minimizing editorial bias, and upholding the highest standards of accuracy, integrity, fairness, and comprehensiveness in the information presented.

Key requirements include:

- **Organization:** The Health Organization must be either publicly owned or a not-for-profit organization, unrelated to the applicant, and based in Canada.
- **Healthcare Experience:** The Health Organization must have direct experience delivering healthcare services relevant to the story. These services may encompass a wide range of medical and health-related offerings aimed at promoting health and enhancing overall well-being.
- **Qualified Personnel:** The Health Organization must have at least one authorized medical practitioner, who holds formal medical qualifications and is actively registered with a Canadian medical regulatory authority (e.g. college or board), on their team (including staff, contractors, advisors, or board members).

Exclusions: Privately owned for-profit organizations and individual healthcare professionals do not qualify. Not-for-profit organizations focused solely on raising awareness soliciting

donations, funding research, or advocating for legislative and policy changes do not meet the Fund's definition of a Health Organization.

Exceptional Considerations: For projects aimed at positively impacting the well-being of the Indigenous Peoples of Canada, the Fund encourages Health Organization Support Forms from Indigenous Healing Specialists, Knowledge Keepers, and Elders recognized by their communities. This approach acknowledges and values the unique perspectives and traditional practices of healthcare within Indigenous populations.

Platforms

To qualify for funding, you must obtain at least one support form from a Platform for your specific financing stage. Platforms are essential for ensuring accessibility and audience development for your project in Canada.

Eligible Platforms include:

- **Licensed Broadcasting Services:** Networks, specialty channels, and on-demand services authorized by the CRTC and available across Canada (local/community services do not qualify).
- **Stories for Caregivers:** The platform operated by S4C Media Inc.
- **CAVCO approved Online Services:** These must meet the "shown in Canada" requirement and be accessible across Canada.
- **Eligible Theatrical Distribution Companies:** Companies qualified by Telefilm Canada that have accessed the Canada Feature Film Fund within the last 24 months.

Other platforms may be considered on a project-by-project basis. The platform must provide evidence in the Platform Support Form of its commitment to making professional-quality programming accessible to Canadians. Additionally, they must demonstrate two examples in the past 24 months of:

- Overseeing production and delivery of comparable Programming.
- Planning and executing the audience development plan.
- Achieving an average of 20,000 Canadian views for comparable feature-length films or 20,000 views per episode for comparable series.

Exclusions: Distributors and sales agents who act as intermediaries or sell the Programming on your behalf do not meet the Fund's definition of an eligible Platform.

Audience Ambassadors

While not mandatory, support from at least one Audience Ambassador is highly encouraged. Audience Ambassadors are individuals or organizations with a significant online presence, having at least 20,000 subscribers or followers in Canada. They play a crucial role in audience development and can include sponsors, experts, celebrities and other marquee

attachments. These ambassadors are passionate about the project's potential to positively impact well-being and are dedicated to using their platforms to raise awareness and engage their audience.

Health Organizations and Platforms may also qualify as Audience Ambassadors, but they have their own support forms. There is no need for them to also complete the Audience Ambassador Support Form.

4. Conditions of Financing

When preparing the support materials to upload to your application, please keep in mind the following:

Tax Credits: The Fund offers a recoupable advance akin to an unsecured, non-interest-bearing, forgivable loan. The Fund does not acquire an equity interest in copyright or share in profits. If your financing plan includes provincial or federal tax credits, verify how the Fund's financing impacts those credits, as many programs view it as a grant or subsidy, which reduces the tax credits.

Marketing Allocations: The Fund allocates financing to support producer-led marketing efforts, ensuring well-being content effectively reaches audiences. The project budget should include the following minimum amounts for marketing:

- **Development Stage:** Allocate at least \$5,000 in the development budget to hire a Marketing Agency to create the Comprehensive Audience Development Plan.
- **Production Stage:** Allocate at least \$50,000 in the production budget for a Marketing Agency to create and implement the CADP and execute paid advertising. It is recommended to also set aside **at least** an additional 10% of the B+C sections of the production budget for creating Complementary Content to support the CADP.
- **Stories for Caregivers web series:** These web series benefit from marketing expertise and audience development managed by S4C Media Inc. Marketing allocations in the project budget are not required.

Agreements with eligible Platforms: Production financing is conditional on the producer entering into a license agreement with the eligible Platform ensuring the Programming is accessible to Canadians within 24 months of delivery, including closed captioning and described video, where possible. For theatrical distributors, financing is conditional on a distribution agreement committing to make the feature-length film accessible in at least five venues across Canada. Post-launch financing requires either a license agreement with a Platform or an alternative arrangement ensuring the project remains accessible to Canadians during the post-launch stage.

5. Marketing Expertise

Effective marketing expertise is essential for building audiences and driving engagement with well-being content. The Fund supports applicants by ensuring they meet minimum marketing allocation requirements and provides financing to engage pre-approved Marketing Agencies. These agencies help create and implement a Comprehensive Audience Development Plan (CADP) and track audience success.

Pre-approved Marketing Agencies

Marketing Agencies on our website have demonstrated their capacity to manage all aspects of audience development in-house. They have a dedicated and diverse team with:

- A proven track record of developing and executing CADPs for at least three recent Canadian screen media projects.
- Skills in identifying and validating target audiences in English or French.
- Experience creating omni-channel audience engagement strategies.
- Established key performance indicators.
- The capacity to execute audience development plans with minimal outsourcing.

Exceptional Considerations

Stories for Caregivers web series: These web series benefit from marketing expertise and audience development managed by S4C Media Inc. They do not need to hire a Marketing Agency or allocate a marketing budget.

The Fund may consider alternative marketing expertise in exceptional cases where:

- **Cultural Insights:** Deep understanding of the audience's culture, language, and behavior is crucial to creating authentic, respectful and effective marketing strategies and may not always be available within pre-approved Marketing Agencies.
- **Proven Success:** The applicant company has a strong track record of successfully developing and executing Comprehensive Audience Development Plans, backed by evidence of measurable success. This includes having a dedicated marketing strategist and skilled team. Access to tools and platforms for executing the CADP is also required.