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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

Before applying, you must obtain support forms from at least one **Health Organization** and one **Platform**:

- **Health Organizations:** The definition has been clarified to include organizations with authorized medical professionals on their team who provide healthcare services (previously referred to as Expert Organizations).
- **Platforms:** The definition has been expanded to create more opportunities for securing licenses for well-being content.
- **Audience Ambassadors:** Their support remains optional and can boost your submission's competitiveness (previously known as Audience Partners).

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

### 2. Funding Maximums

We've established new maximum funding amounts for each [Financing Stage](#).

### 3. Audience Development

The **Preliminary Audience Development Plan** is no longer required with applications for development financing. The **Comprehensive Audience Development Plan** is no longer required with applications for production financing.

However, if your submission is successful, financing will be allocated to help you engage a pre-approved [Marketing Agency](#) to create and execute the Comprehensive Audience Development Plan and meet minimum budget allocations for producer-led audience development.

### 4. Special Call for Web Series aimed at Caregivers

The Special Call for Web Series targeting Canadian caregivers is now integrated into this program. If you have a web series idea for caregivers, please visit the [Stories for Caregivers](#) platform or email [info@storiesforcaregivers.com](mailto:info@storiesforcaregivers.com) for more information on how to obtain their Platform Support Form, which is required to apply for financing.

For definitions of key terms, check the [appendix](#). If you have any questions, visit [the TELUS Fund's website](#) or contact us at [info@telusfund.ca](mailto:info@telusfund.ca)

## TELUS FUND OVERVIEW

At the TELUS Fund, we are dedicated **to financing 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 for a Competitive Application

Focus on the following areas:

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 support forms from Key Partners:
  - Health Organizations: Must provide relevant healthcare services in Canada and include an authorized medical practitioner on their team.
  - Platforms: Should offer comparable content across Canada.
  - Audience Ambassadors: Have at least 20,000 online subscribers or followers in Canada.

**TIP: Five weeks before the deadline**, submit your Health Organization and Platform Support Forms to confirm they meet eligibility requirements. Dates for the pre-approval window are posted on the TELUS Fund's website.

### 2. Select financing stage

- Determine which stage of financing you need:
  - Development Financing: To prepare a competitive application for production financing.
  - Production Financing: To create content and execute the Comprehensive Audience Development Plan (CADP).
  - Post-launch Financing: To continue building audiences for well-being content already in market.

### 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 Marketing Agency you will work with if your submission is successful.

### 4. Submit your application

- Keep track of application deadlines, which are published on TELUS Fund's 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 bring fresh perspectives, innovative approaches, or advancements in health technology and services. 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 potential positive health outcomes.

### 2. Audience

Success is measured by the project's potential to reach, engage and positively impact their intended audience. Competitive submissions will have strong backing from Audience Ambassadors and Platforms willing to provide data on the measured success of the Programming. 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 launch 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. We favor submissions that 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 if your compelling story has already obtained support from Key Partners.

<b>Uses:</b>	<ul style="list-style-type: none"> <li>▪ Develop production-ready materials.</li> <li>▪ Create a professional sizzle reel/trailer and pitch materials.</li> <li>▪ Create a pilot episode for a web series.</li> <li>▪ Secure a <u>Marketing Agency</u> to create the Comprehensive Audience Development Plan (CADP).</li> <li>▪ Prepare a competitive application for production financing.</li> </ul>
<b>Maximum Amount</b>	Up to \$25,000 or 75% of the development budget, whichever is less.
<b>Conditions of Financing</b>	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 your creative materials are production-ready, and you have support from Key Partners.

<b>Uses:</b>	<ul style="list-style-type: none"> <li>▪ Create Programming and ample Complementary Content.</li> <li>▪ Secure a <u>Marketing Agency</u> to create and execute the CADP.</li> <li>▪ Report on the project’s measured success.</li> </ul>
<b>Maximum Amount</b>	<ul style="list-style-type: none"> <li>▪ <u>For web series</u>: Up to \$5,000 per minute, \$150,000, or 75% of the production budget, whichever is less. In the past 5 years, 38 web series have received an average of \$147K or 61% of the production budget.</li> </ul>

	<ul style="list-style-type: none"> <li>▪ <b>Other Programming:</b> Up to \$500,000 or 75% of the production budget, whichever is less. In the past 5 years, 32 feature-length films and TV series have received:             <ul style="list-style-type: none"> <li>○ An average of \$234,000 or 17% of the production budget.</li> <li>○ 6 of the 32 funded projects received +\$300,000.</li> <li>○ 2 exceptional submissions received +\$400,000.</li> <li>○ 4 received +40% of the production budget.</li> <li>○ None to date have received +50% of the production budget.</li> </ul> </li> </ul>
<b>Conditions of Financing</b>	Financing is repayable from revenue generated by the project. Minimum marketing allocations and other conditions of financing are detailed in <a href="#">the Appendix</a> .

### 3. Post-launch

You can apply for post-launch financing if your project has completed the initial audience development plan, and you have secured support for your post-launch plans from [Key Partners](#). For series, you must wait to apply for post-launch financing until after the final season has premiered and the initial audience development plan is finished.

If your project has **not** received production financing from the Fund, you must:

- Demonstrate that 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.
- Apply at a deadline date published [on TELUS Fund’s website](#).

If you have received production financing from the Fund, you can apply for post-launch financing after getting your final payment. There are no application deadlines for projects that have received production financing; you can apply for post-launch financing whenever you’re ready and have secured support for your post-launch plans from [Key Partners](#).

<b>Uses:</b>	<ul style="list-style-type: none"> <li>▪ Acquire rights for long-term exploitation.</li> <li>▪ Refresh Complementary Content and Non-programming.</li> <li>▪ Create learning resources and host live event screenings.</li> <li>▪ Secure marquee attachments.</li> <li>▪ Hire a <a href="#">Marketing Agency</a> to execute a refreshed CADP.</li> <li>▪ Conduct global research and attend events.</li> <li>▪ Maintain the project website and social channels.</li> </ul>
<b>Maximum Amount</b>	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.
<b>Conditions of Financing</b>	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 <a href="#">the Appendix</a> .

## 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 for the project	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 existing content for the project			Required

### Audience

Support Materials	Development	Production	Post-launch
Audience Ambassador Support Form for this stage	Optional	Optional	Optional
Platform Support Form for this stage	Required	Required	Required, or alternative
Preliminary Audience Development Plan Comprehensive Audience Development Plan	These documents are no longer required with your application. However, there are minimum budget allocations for marketing and other conditions of financing detailed in <a href="#">the Appendix</a> .		
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
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

For definitions of key terms, check the [appendix](#). If you have any questions, visit [the TELUS Fund's website](#) or contact us at [info@telusfund.ca](mailto:info@telusfund.ca).

## 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. 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

Applicants must secure support forms from two Key Partners - **Health Organizations** and **Platforms** – before applying for financing.

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

Key requirements include:

- **Organization:** The Health Organization must be either publicly owned or a not-for-profit organization and unrelated to the applicant.
- **Healthcare Experience:** The Health Organization must have direct experience delivering relevant healthcare services to Canadians. 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, not-for-profit organizations focused solely on raising awareness soliciting donations, funding research, or advocating for legislative and policy changes, and individual healthcare professionals do not qualify.

**Exceptional Considerations:** 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 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. Additional marketing budget allocations 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

Engaging marketing expertise is crucial for building audiences and driving engagement with well-being content. The Fund provides financing to help applicants engage recognized Marketing Agencies to create and execute the Comprehensive Audience Development Plan (CADP) and measuring success.

## Recognized Marketing Agencies

Recognized 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 audience engagement strategies that extend beyond social media.
- Established key performance indicators.
- The capacity to execute audience development plans with minimal outsourcing.

## Exceptional Considerations

**Stories for Caregivers web series:** Selected web series will have an exclusive premiere on the Stories for Caregivers platforms and 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 recognized 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.