

THEATRICAL DOCUMENTARY PROGRAM

ESSENTIAL INFORMATION GUIDE

AS OF DECEMBER 15, 2021

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RESOURCE-PERSONS AT TELEFILM CANADA

1. I have read the Guidelines and this Essential Information Guide and have a question. Who do I talk to?

The Telefilm team member you should contact will depend on your question. The contact information for each position and region is listed on the Program webpage.

- **Questions about program eligibility and how to apply to the program:** Contact the Coordinator for your region.
- **Questions about the evaluation and decision-making process:** For the English market, contact the Regional Feature Film Executive for your region, and for the French market, contact the Distribution and Marketing Analyst.
- **Questions from Indigenous creators:** Contact the Lead, Indigenous Initiatives.
- **Questions about equity and inclusion:** Contact the Lead, Inclusion Initiatives (English market); Inclusion Initiatives Advisor (French market).
- **Questions about contracting and drawdowns:** the analyst assigned to your file if it is after a positive decision. If prior to decision, contact the Deputy Director, Business Affairs of your market.

2. Do I need to meet with the Telefilm team before I apply?

It is recommended that you contact your Regional Feature Film Executive to discuss your project before submitting your application, especially if you are a first-time applicant or if you have a project that Telefilm is not aware of. The Feature Film Executive may refer you to the Lead, Indigenous Initiatives, Lead, Inclusion Initiatives, or the Inclusion Initiatives Advisor as appropriate. The contact information for these individuals can be found on the Program [webpage](#).

ELIGIBILITY AND APPLICATION PROCESS

3. Who is eligible for the Theatrical Documentary Program?

Any production company which meets the basic Applicant Eligibility criteria is eligible. Eligibility, however, does not mean that an applicant will receive funding.

4. How does Telefilm determine if an applicant is a Canadian-controlled corporation?

Telefilm uses the parameters of the *Investment Canada Act* for the purposes of determining the Canadian control of applicants.

Please note that, a permanent resident within the meaning of subsection 2 (1) of the *Immigration and Refugee Protection Act* who has been ordinarily resident in Canada for more than one year after the time at which they

first became eligible to apply for Canadian citizenship is not considered “Canadian” under the *Investment Canada Act*.

5. Does the subject matter of my documentary have to be Canadian?

The subject matter does not have to be intrinsically Canadian in terms of content. Telefilm considers the filmmaking approach and point-of-view of the creative team to be a key factor in the Canadian perspective of a project, along with the relevance of the subject matter to a Canadian audience.

6. What are the minimum and maximum budgets allowed in the Theatrical Documentary Program?

There is no restriction on the maximum size of budgets for theatrical documentary projects submitted to Telefilm. There is, however, a minimum budget level of \$400,000 for production applications. There is no minimum budget for postproduction applications.

7. How do you identify the Main Applicant?

The lead production company has to be clearly identified at the time of application for production financing via the *Designation of Main Applicant and Sharing of Performance Ratio Form*. In cases where there is more than one production company involved, Telefilm will not make any assumptions in that regard and will rely on the coproducers’ joint declaration of intentions provided at time of application. Once this designation is confirmed to Telefilm, it cannot be modified.

8. If an applicant is the minority coproducer of an audiovisual treaty coproduction, is the project still eligible?

Yes, projects that are recognized as audiovisual treaty coproductions are eligible to apply to the Program but, as all projects submitted to the Program, they are not guaranteed funding.

In the case of audiovisual treaty coproductions, the determination of eligible applicants and eligible projects will be adapted to reflect international treaties and to ensure that the spirit and intent of the Theatrical Documentary Program guidelines are respected.

Please note that applications for treaty coproduction recommendations must be done separately at the earliest of: 40% of the financing confirmed (exclusive of tax credits) or after an offer of financing from Telefilm has been received and, in all cases, no later than 30 days before the start of principal photography.

9. My project is produced primarily in a language other than French, English or an Indigenous language. Is it eligible under this Program?

Projects produced or completed primarily in a language other than French, English or an Indigenous language due to artistic imperatives are eligible. Telefilm considers that there are artistic imperatives when the story must

be told in a specific language for reasons of authenticity, realism and credibility as described in the submitted materials, e.g., the director's vision, script, creative production or completion plan, community engagement plan.

10. How does Telefilm determine the percentage of each language in a project?

The percentage of each language is calculated based on the number of lines of dialogue in that language as a percentage of total lines of dialogue in the script (or rough cut for postproduction applications). One line of dialogue means a line of script of ten (10) words or less including directed but unscripted dialogue. For a project to be considered to be primarily produced or completed in a particular language, at least 51% of the total lines of dialogue must be in that language.

11. Do I need a firm commitment from an eligible Canadian distributor for a theatrical release in Canada within one year of delivery for my project to be eligible?

Yes. You must have a firm commitment from an eligible distributor for your project to be eligible under this program regardless of the budget level of your documentary project. That entity must be an eligible Canadian distributor (as described in the Marketing Program guidelines) in order to access funding under the Marketing Program and in all cases, the distribution entity who has the Canadian rights must be under Canadian control within the meaning of the *Investment Canada Act*, and the distribution agreement must comply with Telefilm's Distribution Terms and Contracts Requirements Policy.

12. How do I know if a distributor is an eligible distributor?

The criteria for an eligible distributor are outlined in the Marketing program guidelines available on Telefilm's [website](#). Please consult with the distributor directly.

13. What officially constitutes a theatrical release for the purposes of the Theatrical Documentary Program?

A theatrical release is the exhibition of the film to the paying public at a commercial theatre. The theatrical release date is the day on which a film is entered into the theatrical distribution system for public viewing in one or more theatres and in one or more cities.

Note: Four-walling is not considered a theatrical release.

14. Do I need to have all my financing sources confirmed when I apply?

It is not necessary to provide commitment letters from all confirmed financial sources at the time of submission, but the proposed financial structure must be realistic and attainable. As such, applicants must be able to

demonstrate the capacity to close the financing within a realistic timeframe in the same fiscal year. (See

evaluation section below.)

15. What should be included in the Previous Works document?

The Previous Work should include links to relevant works of the Director(s) and Co-Director(s) (as applicable) that will help in the evaluation of the project at hand. Note that the advisory committee may not watch every work in its entirety but may review a portion of the works. The team may also include a link to a curation of excerpts (up to 10 minutes) from relevant works by the director(s), demonstrating the director's ability to realize elements of the current proposal, however, this is not mandatory.

The links should all be submitted in one document clearly indicating the project title, format and length and the password (if applicable).

16. I've heard that Telefilm is improving its data collection on self-identification. What does this mean for my application?

When the applicant submits the application for a project, the members of the key creative team will be invited to complete a self-identification questionnaire. This will include all screenwriters, directors, producers and executive producers who are not receiving a courtesy credit for all projects. For more information, please see the [webpage dedicated to data collection](#).

EVALUATION

17. How will projects be evaluated once they are submitted?

The projects will be evaluated based on the evaluation criteria outlined in Section 3 of the Program guidelines.

Advisory committees composed of external and internal experts will evaluate the projects based on the evaluation criteria indicated in the Program guidelines and will submit their recommendations to Telefilm. Each advisory committee will use an evaluation grid to score and rank eligible projects.

The external advisory committee members will be film industry experts with the necessary expertise and experience to be able to assess the strength and quality of the applications according to the evaluation criteria. The internal advisory committee members will come from the Project Financing and Business Affairs teams at Telefilm including National and Regional Feature Film Executives, Content Analysts and Investment Analysts located in Telefilm's offices across the country.

The external advisory committee members will be chosen to reflect regional and cultural diversity and gender parity.

There may be different advisory committees based on language and streams. (See also the Indigenous Stream section below).

The main factors that Telefilm will consider in evaluating submitted projects are:

Creative Elements:

- ✓ The originality of the project;
- ✓ The quality of the research, including sources accessed and expertise consulted on the arguments presented;
- ✓ The quality of the cinematic and narrative potential of the project including the presentation of subject matter and characters, the quality of the script and production plans (for production applications);
- ✓ The quality and level of completion of the production at time of application (for postproduction applications);
- ✓ The director's vision and intentions for the film;
- ✓ For projects working with underrepresented communities, the level and nature of the engagement with those communities.

Track Record of the Key Creative Personnel (i.e., Producer(s), Director(s) and Screenwriter(s))

- ✓ The relevant experience and level of expertise of the Producer(s), Director(s) and Screenwriter(s) relative to the scope of the project and their capacity to execute the creative vision of the project;
- ✓ The past performance of each of the Producer(s), Director(s) and Screenwriter(s) in terms of critical acclaim, audience engagement, visibility, etc.

Project Viability

- ✓ The readiness of the project and overall financial viability of the project, including confirmed and achievable financing and the level of confirmed market interest;
- ✓ The feasibility of the production schedule and production budget vis-à-vis the scope and aspirations of the project;
- ✓ The likelihood that the project can close on the proposed budget with the proposed financing within the same fiscal year.

Theatrical Potential, Cultural Impact and Audience Reach Potential

- ✓ The capacity of the marketing/promotional strategy and the proposed plan to identify, understand and engage the intended audience(s);
- ✓ The potential for the project to reach the intended Canadian audiences via community, festival and/or theatrical releases;
- ✓ For projects dealing with the experiences of underrepresented communities, the potential of the project to speak to these communities and to be discoverable and accessible by them;
- ✓ The project's potential for cultural resonance, either within or outside conventional avenues for recognition (e.g., critical reviews, film festival acclaim, adding to representation in content, generating new perspectives and cultural conversations, etc.);
- ✓ The track record and experience of attached distributors, broadcasters and international sales agents and the potential for strong audience performance in Canada and internationally.

18. How will the advisory committees rank and score the applications?

All applications will be evaluated by the advisory committee members based on the evaluation criteria described above and in section 3 of the Program guidelines and scored according to the evaluation grid published on the Program [webpage](#). The advisory committees will meet to jointly discuss and review the projects and the projects will be ranked based on the average score.

As part of the process, a portfolio balancing exercise will be performed to ensure that Telefilm is meeting its objective to foster a diversity of voices in the industry, ensuring Telefilm funds a balanced portfolio of productions reflecting a variety of genres, budget and company sizes, regions across the country, and different viewpoints.

19. What does Telefilm take into account in its portfolio rebalancing?

The decision-making process will take into account Telefilm's objective to foster a diversity of voices in the industry, ensuring Telefilm funds a balanced portfolio of productions reflecting a variety of genres, budgets and company sizes, regions across the country, and different viewpoints. Gender parity will continue to be a priority across all programs in particular within communities where women are still underrepresented. Telefilm may prioritize projects whose key creative personnel (i.e., director(s) and/or screenwriter(s) and/or producer(s)) are members of communities supported through its Inclusion Initiatives: Indigenous, Black, People of Colour, Gender-diverse identities and expressions, 2SLGBTQIA+ individuals, Persons with disabilities and members of Official Language Minority Communities. This prioritization will also consider the intersectionality of identities as a way to better reflect a large spectrum of lived experiences.

Note: Telefilm will rely on the information declared by the members of the key creative team in the self-identification questionnaire submitted with the application. Telefilm does not validate the information submitted by the individuals.

Telefilm acknowledges that terminology is subject to change and evolving language will be part of the ongoing and inclusive dialogue with the industry. For the definitions of the terms used above and for more information on Telefilm's data collection initiative, please see the [webpage dedicated to data collection](#).

20. Who does Telefilm consider to be a member of the Key Creative Team?

All individuals in the role of Screenwriter, Co-Screenwriter, Director, Co-Director, Producer, Co-Producer and/or Executive Producer who is not receiving a courtesy credit, are considered part of the key creative team. This includes the Lead roles (in the Application form) as well as individuals who are not in Lead roles but have these credits.

21. What is the expectation in terms of the experience level and track record of the Key Creative Personnel?

It is expected that the Key Creative Personnel (Producer(s), Screenwriter(s) and Director(s)) have the experience to carry out both the creative and business aspects of the project. The Producer or producing team should have relevant experience delivering projects of a similar scope. At a minimum, the Director should have directed a short film or other audiovisual works that reflect the level of skill necessary to deliver the vision of the proposed feature film.

22. What is a Community Engagement Plan and what should be in it?

A Community Engagement plan is required for all projects. Community Engagement Plans can be a simple statement from the Applicant saying that they don't believe the production of their film requires any particular kind of community engagement. Appropriate engagement will depend on the content of the film, the knowledge of the team, and the territories and communities being represented onscreen. This is a tool to help answer questions that Advisory Committee members may have about the team's approach to underrepresented communities and/or potentially sensitive content. In most cases, Telefilm wants to see evidence that the team has considered the potential impact of their production and that they have a plan to work in ways that are collaborative and respectful of impacted communities. The Plan may also be an opportunity to discuss the identity and lived experiences of the key creative team where it is relevant to the project.

For projects submitted to the Indigenous Stream and/or having indigenous content. Applicants are encouraged to add information about the Indigenous identities of the team as described in question 30 below.

Applicants may outline plans involving (but not limited to) hiring advisors, involving community members in their creative team, having counsellors on set, hiring local crew, and entering into written agreements with communities. The details of the plan will depend entirely on the specific needs of the project, the communities involved, and what the filmmakers deem is appropriate for their project.

For further information, applicants may contact their Feature Film Executive, the Lead, Indigenous Initiatives, the Lead, Inclusion Initiatives or the Inclusion Initiatives Advisor.

23. What information should I include in the sustainability plan? Will it be considered in the evaluation of my application?

The sustainability plan is an optional document and will not be considered in the evaluation of the project. However, Telefilm is interested in better understanding the environmental and sustainability practices our clients are using. The information may be used to help develop initiatives, programs and reporting tools in the future. If you choose to submit it, please describe your practices in making your production more sustainable and environmentally responsible, for example, carbon emission calculations, waste reduction, sustainable/local food, reusable supplies, etc.

24. What should be included in the Creative Plan, the Creative Completion Plan and the Director's vision?

The Creative Plan (production) or the Creative Completion Plan (postproduction) is the document which describes the proposed execution (or completion) plan for the project including (but not limited to) the summary of the research, proposed interview subjects and locations for shooting. This is specific to Theatrical Documentaries which are relatively unscripted and provides the overall plan for what will be shot, the research plans and the intended scope of the documentary project.

The Director's vision, on the other hand, is the Director's particular take on the project. Every Director's vision statement is different, although a more visually dynamic document is often useful. The Director's statement often includes (but is not limited to):

- A personal statement from the director which discusses their connection to the material, their motivations for making the film, and their perspective on the subject matter
- Notes on their unique directorial approach to cinematic elements which will elevate the film beyond what can be understood in the documentary treatment or script.
- The artistic imperatives dictating the choice of language, if the project is primarily in a language other than French, English or an Indigenous language.

25. I want to request a Telefilm amount greater than the financing cap indicated in the Program guidelines. What will Telefilm take into consideration in my request?

Telefilm may, in its discretion, and subject to the availability of funds, exceed the cap for projects whose production budgets are greater than \$2M. The project must demonstrate a financial need (including but not limited to remote shoot location, specific creative vision costs, etc.). In all cases, Telefilm's financial participation may not exceed 49% of eligible Canadian costs.

INDIGENOUS STREAM

26. I am an Indigenous filmmaker and want to apply for funding for my project. Is there someone I can reach out to with my questions?

Telefilm has a [webpage](#) dedicated to Indigenous initiatives and Telefilm programs which includes information about Telefilm's commitment to an accurate representation of Indigenous stories and various Indigenous streams, the application and decision-making processes as well as links to helpful guides and tools. On the webpage, you may also find a useful Indigenous Initiatives Resources Guide for Indigenous clients including contact information.

An applicant may apply to any stream under which they are eligible. Indigenous creators do not have to apply to the Indigenous Stream.

The Lead, Indigenous Initiatives is your liaison with Telefilm and is available to discuss your application strategy and other issues.

Note: The application materials must be submitted exclusively in one language, either in English or French.

27. What does Telefilm consider in its review of “creative, financial and distribution control” in its review of the eligibility of an application submitted to the Indigenous Stream of the program?

In its review, Telefilm will consider elements such as the decision-making authority and creative control as documented in coproduction agreements, budget remuneration, revenue sharing, performance ratio sharing, chain of title, etc. Telefilm recognizes that every project is different, and control may manifest in different ways depending on the Indigenous team members' expertise and roles. The intent is to support companies that are

controlled by Indigenous people who are meaningfully involved in all relevant decision-making related to the creative, financial and distribution elements of the project.

28. If I am applying to the Indigenous Stream with a theatrical documentary project, do I need to have an eligible Canadian distributor attached?

On a case-by-case basis, Telefilm reserves the right to accept a firm written commitment from a non-eligible Canadian distribution company.

29. How will Indigenous Stream projects be evaluated?

Projects submitted under the Indigenous Stream will be assessed by an advisory committee comprised of internal and external experts, having Indigenous representation, who will make recommendations to Telefilm. In its assessment, the advisory committee will take into account Telefilm's objective to foster a diversity of voices, ensuring Telefilm funds a balanced portfolio of productions reflecting a variety of genres, budget and company sizes, regions across the country, and different viewpoints as well as a balance of Indigenous nations and Indigenous languages.

All projects will be evaluated based on the evaluation criteria set out in Telefilm's Theatrical Documentary Program's guidelines. The objectives of narrative sovereignty outlined in the *On-Screen Pathways and Protocols: A Media Production Guide* will also be a factor in the consideration of all Indigenous projects and content, including projects submitted to the main stream of the Program.

30. How is Telefilm assessing Indigenous identity for the purposes of an application under the Program?

All members of the key creative team of each project submitted under the y Program will be asked to complete a self-identification questionnaire at application submission.

Indigenous creatives should know and be able to articulate their relation and connection to their Indigenous identity. The applicant may want to include a short introduction of the key creative personnel and their identities in the Community Engagement Plan. We do not expect private information about the key creative team members to be provided that might cause them harm. Furthermore, all personal information must be provided only with prior consent of the individuals concerned.

Telefilm reserves the right to request additional information.

If you have questions, please contact the Lead, Indigenous Initiatives.

31. What is considered a remote location for the purposes of Remote Location funding?

A remote location is generally defined as a location 350km or more from a city with an active film industry, or any region where production expenses are expected to be significantly higher as a result of that location's remoteness.

The advisory committee may recommend additional funding for Indigenous projects being shot in a remote location when the production expenses are higher due to the remoteness of the region and the additional funding is considered essential to the success of the project. **Note:** Only projects submitted under the Indigenous Stream are eligible for this additional funding.

Teams will be expected to submit a Remote Location Plan including a budget (whose expenses will be included and reported in the main Production budget) and a summary of the remote location elements and why it is necessary for the project. For recommended projects, a report on the Remote Location Plan will be required at the time of the final cost report submission.

Note: The advisory committee may recommend the project for production funding but not Remote Location funding.

32. I am interested in applying for Capacity-Building funding. What should my proposal include?

Telefilm recognizes the need to support Indigenous filmmakers in the growth of new Indigenous talent and therefore, applicants may submit proposals for projects that have a Capacity Building element and will use the production of their film to train, mentor, and otherwise develop Indigenous production talent. **Note:** Only projects submitted under the Indigenous Stream are eligible for this additional funding. Applicants must be able to demonstrate the training/mentoring efforts put in place on the project, the additional costs incurred for the capacity building efforts and the measurable outcomes.

A Capacity Building Plan must be submitted including a budget (whose expenses will be included and reported in the main Production budget) and a summary of the proposal including but not limited to training/mentoring approaches and objectives, positions being mentored, mentors and mentees, etc. The request for these costs may not exceed \$100,000. For recommended projects, a report on the plan and outcomes will be required at the time of the final cost report submission.

Note: the advisory committee may recommend the project for production funding but not Capacity-Building funding.

33. Is it possible to request additional funding for both Remote Location and for Capacity-Building for the same project?

Yes. The project must be recommended for production financing support, to be considered for Remote Location and/or Capacity-Building support. Each request will be considered separately, and the applicant may receive support for only one or the other proposals. In the event that both proposals are recommended, the cumulative additional funding cannot exceed \$100,000 and the total financial participation of Telefilm shall not exceed 49% of the eligible Canadian production costs, including the production funding for the project.

CONTRACTING

34. I have received an offer of financing. What happens next?

The Business Affairs team will work with you to translate this offer into a firm contractual commitment. It is your responsibility to review all the conditions to commitment in the decision letter. We strongly suggest you review each of them with the investment analyst assigned to your file to make sure you understand all the requirements. Pay special attention to the expiry date: if all conditions to commitment are not met by that date, the financing that has been conditionally reserved for your project could be reallocated without further notice.

35. What happens if I don't proceed to production by the date specified in my Telefilm agreement or if I'm unable to fulfill any of the other conditions in my Telefilm agreement?

It is the applicant's responsibility to update Telefilm with any changes to its project. Please contact your investment analyst and Feature Film Executive as soon as possible if there are updates to your project.