

Live Performance Program Guidelines 2017-2018

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Program Overview

1. The Live Performance Program assists Canadian Artists by subsidizing a portion of the cost of touring and showcasing in Canada and abroad.
2. Funding in this Program is a Grant and is calculated as the lesser of (i) the approved Offer, (ii) the final subsidy calculation plus Administration Fee, or (iii) 75% of the Total Eligible Budget; to the Program maximum.
3. The funding limits for the Tour Support and Showcase Components in 2017-2018 are as follows:
 - Artist 3: **\$37,500** in combined tour and showcase support. The Tour component maximum is \$35,000, of which a max of \$15,000 can be used for domestic tours, and up to the full \$35,000 for international tours. The Showcase component maximum is **\$7,500**, \$5,000 of which can be used for domestic showcases, and up to the full \$7,500 can be used for international showcases.
 - Artist 2: **\$32,500** in combined tour & showcase support. The Tour component maximum is \$30,000, of which a max of \$15,000 can be used for domestic tours, and up to the full \$30,000 for international tours. The Showcase component maximum is **\$7,500**, \$5,000 of which can be used for domestic showcases, and up to the full \$7,500 can be used for International showcases.
 - General: **\$7,500** in Showcase support, of which a maximum of \$5,000 can be used for domestic showcases, and up to the full \$7,500 for international showcases.

*Note: General Artists may not apply for Tour Support in the Live Performance Program; however, the Tour Support Component is available to General Artists through all full-length sound recording and marketing programs. **Only Artists rated 3 and 2 may apply for Tour Support in this Live Performance Program.**

These limits include the Showcase Component maximums and apply across all Programs. This means that regardless of what Program you apply under, or which Applicant applies, the amount of Tour Support funding available for the Artist will not exceed the above limits in each FACTOR fiscal year.

4. Review of applications will take six to eight weeks from the date of Application.
5. Please note that the funding received from the Live Performance Program counts toward the New Musical Works portion of the Annual Funding Cap (see [Business Policies: Annual Funding Cap](#)).
6. Funding for this program is provided by Canada's Private Radio Broadcasters and the Department of Canadian Heritage's Canada Music Fund's New Musical Works Component.

Application Deadlines

7. Rolling deadlines. Applications can be submitted as soon as all dates are confirmed. Applicants may submit multiple applications throughout the year, subject to the annual maximum and the availability of funds. NOTE: FACTOR will not recognize any tour or showcase dates that take place before the application is submitted.

Who Can Apply?

- **All Artists for the Showcase Component**
 - **Artists Rated 2,3 for the Tour Support Component**
8. Artists eligible for support from the Radio Starmaker Fund (RSF) are eligible to apply to FACTOR for Tour Support and Showcase funding within the Live Performance Program or as Components of any other Program. However, FACTOR will not fund the same tour or showcase dates nor the same expenses as RSF. Therefore, you may only apply to FACTOR for a different set of tour or showcase dates. In addition, in the event of an oversubscription to the Live Performance Program, FACTOR will give priority to applications from those Artists who are ineligible to apply to RSF.
 9. Record Labels and Artist Managers may fill out the application, but the Applicant must be the Artist in all cases. This means Artists will require their own Applicant Profile that has been reviewed and rated.
 10. Please note: if eligible, you may apply for Tour Support as a Component within this Live Performance Program, or in the following Programs. There are different, and sometimes fewer, restrictions concerning the eligibility of the Applicant, the Artist, or the nature of the project and its cost, depending on which Program you apply under:
 - [Comprehensive Music Company](#)
 - [Comprehensive Artist](#)
 - [Juried Sound Recording Program](#)
 - [Marketing and Promotion for Non-FACTOR-Funded Sound Recordings](#)

How This Program Works

11. There are two Components to this Program: the [Tour Support Component](#), and the [Showcase Component](#). Please review the Component rules to ensure your project is eligible.
12. In addition, for the Tour Support Component of this Live Performance Program:
 - a. You must have booked at least eight live public performances.
 - b. If the performance fees for the tour result in an average exceeding \$10,000 per paid performance, the tour is not eligible for FACTOR support. **For clarity: unpaid dates will not be included in the calculation when determining the average performance fee.**
 - c. At least six of the dates must be for a contracted Performance Fee, meaning that you will be paid a guaranteed fee, or a percentage of the gross revenues from ticket sales and/or the take at the door, or some combination of both. Non-cash consideration such as the opportunity to sell your merchandise will not be considered Performance Fees.
 - d. At least 75% of the dates must be contracted for a minimum 30-minute set.
 - e. FACTOR defines a Home Show as a paid, ticketed public performance that takes place in a private residence rather than a commercial venue. Home Shows will be recognized as eligible Tour Dates, only to the extent that the aggregate total of subsidies offered for Home Shows may not exceed 25% of the Artist's annual limit of funding in the Live Performance Program.
 - f. FACTOR defines a School Show as a paid engagement hosted by a school for the benefit of its students. School Shows will be recognized as eligible Tour Dates to a maximum of 25% of the total eligible Tour Dates. For example, in an eight-day tour, only two School Shows will be recognized as eligible Tour Dates. Children's performers are excepted from this limit.

13. The tour dates should take place in more than one city, and in different venues. Repeat performances in the same city (e.g. a “two night stand” or extended engagement) may be eligible, subject to FACTOR approval on application, based on the totality of the tour dates and other such factors as distance traveled, tour routing, audience growth potential, and economic efficiencies. Generally, return engagements to the same venue are recognized only after a six-month absence. “Residencies” (such as playing every Monday night at the same venue for a month) are not eligible.
14. An eligible Tour can include up to two Radio or TV performances, or other promotional performances.
15. To qualify for either the Tour Support or the Showcase Component within the Live Performance Program, you must have either a Current Release or an Upcoming Release.
16. A Current Release is a Qualifying Album (“Album” means a full length sound recording consisting of at least 6 tracks or 20 minutes of music) by the Artist that was released no longer than 24 months prior to the Component submission date.
17. An Upcoming Release is a Qualifying Album by the Artist that is due to be Commercially Released within six months of the latest scheduled Tour or Showcase date; for Tour Support the Upcoming Release must be due to be Commercially Released in the territory of the Tour.
18. Once the Application is approved, changes to the proposed activities having a budget impact of 25% or less of Eligible Costs may be made without FACTOR pre-approval, subject to the cap, if any. All other changes must be approved by FACTOR.

How To Apply

19. Before you can apply, you must have a reviewed and rated Applicant Profile, as well as access to the reviewed and rated Artist Profile in the FACTOR system. Please go to the [How To Apply page on the FACTOR website](#) for instructions on creating and sharing Applicant Profiles, followed by how to submit an application.
20. If you do not have an Artist Profile and/or Applicant Profile, you must submit your new Artist Profile and at the latest one week before your application deadline. If you submit your new Profiles too late, you will not be able to apply.
21. All Applicants should read FACTOR’s [Glossary of Standard Terms and Business Policies](#) before starting an application.

Eligible Costs – General Terms

22. These terms apply to all FACTOR Programs. Please see [Eligible Costs – This Program](#) (below) for details related to the Live Performance program. Applicants are strongly advised to read and understand both sections, and to contact FACTOR prior to submitting an Application to ensure eligibility of the proposed costs.
23. Only those costs identified by the Applicant in the Application and approved by FACTOR will be deemed Eligible Costs.
24. As a general rule, Eligible Costs must be bona fide costs paid out-of-pocket by the Applicant to providers that are not employed by or related parties to the Applicant. Non-cash costs are generally ineligible for reimbursement by FACTOR. Applicants are advised to discuss the eligibility of any and all non-cash costs with FACTOR in advance.
25. Where FACTOR allows Eligible Costs to be expended In-House, those costs must be charged, in FACTOR’s sole opinion, at verifiable fair market value with no mark-up. For In-House services, the party providing the services must be in the business of, or professionally employed to provide such services. Likewise, allowable costs paid to Related Parties must also be charged at verifiable fair market value with no mark-up. Please see the Program Guidelines and Component Guidelines for details.

26. Eligible Costs are those paid to Canadians and Canadian owned and controlled companies, for goods and services delivered in Canada. Notwithstanding the foregoing, FACTOR will recognize eligible costs related to non- Canadian Artist Members.
27. Goods and services purchased from individual Canadians living outside of Canada will be deemed Eligible Costs. Goods and services purchased from Canadian-owned businesses physically located outside of Canada will be deemed Eligible Costs provided that the business continues to have significant commercial activity or maintains a head office in Canada.
28. Generally, and unless otherwise explicitly allowed by FACTOR, you may not apply for costs that you have already incurred. Eligible Costs will begin to be deemed eligible after the Application has been received at FACTOR. For clarity: as soon as your application has been received by FACTOR, you may begin incurring Eligible Costs. Costs incurred and paid prior to the submission of an Application are generally deemed ineligible. FACTOR may allow certain earlier costs on a case-by-case basis.
29. Costs incurred after the original Completion deadline, and any FACTOR-authorized extensions to that deadline, are ineligible.
30. Costs must be verifiable with invoices, receipts and Proof of Payment. Unless otherwise noted or explicitly allowed by FACTOR, Proof of Payment must be submitted upon Completion, as a condition of funding.
31. Except for specific costs as noted in the Program Guidelines or the Business Policies, costs will only be deemed Eligible if they are incurred and paid prior to the date of submission of the Completion, or prior to the final Completion Deadline, whichever is earlier. Costs that are incurred after the expiration of a Completion Deadline and any FACTOR-approved extensions to the Completion Deadline will not be allowed, except by express permission of FACTOR.
- 32. Cash payments** – for all components excluding Tour Support, Showcase and Business Travel:
 - a. Incidental purchases under \$100 (e.g. gas, small goods) must be supported by a cash register receipt.
 - b. Lease or purchase of goods and services under \$500, excluding per diems, must be supported by a detailed receipt issued by the payee indicating clearly all of the following:
 - i. The name and address of the organization or individual who provided the goods or services;
 - ii. The name of the individual who purchased the goods or service.
 - iii. The goods or services purchased in detail, such as item description, quantity, unit price, extended price, additional charges and applicable taxes.
 - iv. The transaction date (including the dates of service or delivery if applicable).
 - c. Per diems under \$500 must be supported by a FACTOR-provided [Receipt for Services form](#) signed by the payee.
 - d. FACTOR will not reimburse expenses paid in cash where the claim is a lease or purchase of goods and services over \$500 including but not limited to: personnel costs, fees for personal services, per diems, studio and equipment rentals, travel fares, hotel rooms, and vehicle rentals. Such costs must be paid by cheque, email transfer, credit card, interbank transfer, wire transfer or money order and supported by a detailed invoice or receipt as described above.
- 33. *NEW* - For Tour Support, Showcase and Business Travel components, no limit will be applied to payments made in cash provided that:**
 - a. Incidental purchases under \$100 (e.g. gas, small goods) must be supported by a cash register receipt.
 - b. Personnel costs, fees for personal services and per diems paid in cash to individual persons must be supported by a FACTOR-provided Receipt for Services form signed by the payee.
 - c. Lease or purchase of all other goods and services must be supported by a receipt issued by the payee indicating clearly all of the following:

- i. The name and address of the organization or individual who provided the goods or services;
- ii. The name of the individual who purchased the goods or service.
- iii. The goods or services purchased in detail, such as item description, quantity, unit price, extended price, additional charges and applicable taxes.
- iv. The transaction date (including the dates of service or delivery if applicable).

34. Receipts in all cases must be sufficiently detailed to show the purchase is connected to the expense claim. Applicants must be able to identify and describe the item(s) or service(s) purchased. FACTOR reserves the right to contact the vendor, and to reject any costs it deems, in its sole opinion, insufficiently supported.

35. Travel costs—Travel costs in all Programs must follow the spirit and intent of the Treasury Board Guidelines, namely that these costs do not exceed the rates specified in the [Government of Canada Travel Directive](#). In the event of a discrepancy between a maximum reimbursable cost published by FACTOR and the same cost published by the Treasury Board Guidelines, the lesser cost shall be applied. In addition to the limits proposed by the Treasury Board Guidelines, travel costs in all Programs are subject to the following:

- a. Hotel room or one-bedroom suite: Costs will be recognized at a maximum of \$300 per room or per suite per night, regardless of the number of occupants.
- b. Hotel suite with more than one bedroom, where the suite is occupied by more than one eligible traveler in the same application: Costs will be recognized at the lesser of (a) the actual suite costs; or (b) \$300 per bedroom per night.
- c. Private room, apartment or house rented through a public, commercial agency (e.g. Airbnb), where the claimant is the only tenant of the rental property: Costs will be recognized at a maximum of \$300 per night.
- d. Private rooms, apartment and house rentals rented through a public agency (e.g. Airbnb), and hotel suites with several rooms, where the claimant is sharing the tenancy with other (non-funded) people: Costs will be recognized at the lesser of: (a) the actual room rental cost for one room as indicated on the agency or hotel invoice, to a maximum of \$300 per room per night; or (b) the total rental cost divided by the number of bedrooms in the property, to a maximum of \$300 per night. In the case of a shared tenancy, all tenants will be presumed to have paid a proportional share of the rental cost.
- e. Private, non-commercial accommodation costs (e.g. rooms in privately-owned apartments and houses not rented through an agency) will be recognized at the maximums published by the Travel Directive.
- f. Flight costs, where eligible, will be recognized by FACTOR for economy-rate tickets only (business and first class tickets are not eligible).
- g. No dollar value will be attributable to air miles, frequent flyer points or similar programs. However, FACTOR may recognize a cash fee charged by the points provider.
- h. Applicants are urged to ensure that each person traveling is covered by trip cancellation, health/medical and accident insurance appropriate to the length and location of the visit to the country in which any funded travel occurs. In the event that a trip or any portion thereof is canceled such that all or any portion of approved Eligible Costs is forfeit, the Applicant is required to recover the maximum amount available under its travel insurance. FACTOR will cover 50% of any remaining non-refundable costs.

36. Ineligible costs in all Programs include, but are not limited to:

- a. Equipment purchases and purchases of capital assets;
- b. Taxes that are subject to rebate to the Recipient (such as VAT, HST);
- c. Musicians' union dues, penalties, fines, pension contributions and any other union-mandated payments;
- d. CD, vinyl or other music media manufacturing and duplication costs, except where allowed within the allowance for promotional, not-for sale costs.

37. FACTOR reserves the right at all times to allow, disallow, or modify costs. It is advisable to discuss any significant changes to your budget before Completion. If you are uncertain about the eligibility of a cost, please contact FACTOR before incurring that cost. In order for a project and costs to remain eligible, Applicants must notify FACTOR immediately of any significant change to the original Application or budget submitted. A significant change would be one that impacts more than 25% of the budget.

38. In some Programs, FACTOR allows an Administration Fee to be added to the Total Eligible Costs, calculated as a set percentage of those costs. The current schedule of Administration Fees is set out in [Schedule A of the Business Policies](#), and also in the Component Guidelines. The Administration Fee is intended to contribute to overhead costs such as occupancy, staffing, and other day-to-day costs of running a business, which costs cannot be claimed elsewhere in the budget. The Administration Fee is not required to be documented on Completion.
39. The Administration Fee is not required by FACTOR to be paid to a grant writer, administrator, or any other supplier. The amount and method of payment due to a grant writer or any other supplier is a matter of contract between the Recipient and such supplier.
- 40. Musicians' fees** - Where applicable, fees paid to musicians will be recognized as follows:
- For sound recording work, musicians' fees will be capped at a rate of \$400 per studio session, to a maximum of one session per track. The day rate includes overtime pay for the session, if any.
 - "Leader fees" paid to third-parties will be eligible at up to double the day rate, but only if the session is contracted pursuant to a musician's union contract, and that contract is submitted to FACTOR. Royalty players (i.e. the artist and its members) may not claim a leader fee to FACTOR.
 - For live performances, musicians' fees will be capped at a show rate of \$300 per show. The show rate includes all paid performances in one calendar day.
 - Cash payments to musicians may only be eligible for FACTOR reimbursement if they conform to the policy on Cash Payments set out above. For reimbursement by FACTOR, the musician's fee must be supported by an invoice from the musician to the applicant, along with proof of payment showing the invoice was paid.
 - Per diems paid to musicians will be recognized in addition to the above rates, to a maximum of \$50 per person per day. Claims to FACTOR for reimbursement of per diems paid in cash must be accompanied by a [Receipt for Services](#) form.
 - Additional union-mandated payments such as dues, fines, pension contributions, etc. are not eligible for FACTOR reimbursement.
 - FACTOR may recognize Donated Services only as follows: (i) in the Artist Development Program, provided that the applicant must submit an Artist's Donated Services form; and (ii) when the Artist is the Applicant, FACTOR will recognize donated services for live performances in a Tour or Showcase component, to a maximum of \$150 per Artist Member, per show. Applicants may not claim Donated Services in respect of Hired Musicians or Hired Crew.

Eligible Costs – This Program

41. The Eligible Costs in this section are specific to the Live Performance Program. Please also review [Eligible Costs – General Terms](#) (above). Applicants are strongly advised to read and understand both sections, and to contact FACTOR prior to submitting an Application to ensure eligibility of the proposed costs.
42. In-House costs are allowed in this Program, but certain costs may be capped at 25% of total Eligible Costs. In any event, artists' performance fees will not count towards the In-House cap.
43. Please see the [Component](#) rules for the details of eligible and ineligible costs in each Component.

Funding and Payments

44. Applicants to every FACTOR program must declare any other Public Funding received or expected to be received toward the same project costs they are claiming to FACTOR. FACTOR's contribution plus any other Public Funding cannot exceed 100% of the project's Total Eligible Budget. See [Business Policies: Public Funding](#).

45. If the amount of FACTOR funding offered is \$2000 or less, FACTOR may issue an advance of 100% of the offered amount. If the offer exceeds \$2000, FACTOR may issue an advance payment of 50% of the approved funding request.
46. A final payment will be issued for the balance of the approved funding request after a Completion has been submitted and reviewed by FACTOR for each completed Component. If a Project has further active Components, FACTOR may issue further advances after initial Components have been completed.
47. To receive FACTOR funding, you must submit banking information for [Direct Deposit](#).
48. FACTOR may award the full amount requested in the Application, but reserves the right to award a lesser amount based on its assessment of the Applicant's proposed expenses, or based on the total amount of funding available, or for any other reason.
49. Please note that the funding received from the Live Performance Program counts toward the New Musical Works portion of the Annual Funding Cap (see [Business Policies: Annual Funding Cap](#)).

Project Completion

50. Please see the Component rules for the detailed completion requirements of each Component.
51. If approved, you will be given a Completion deadline to finish your Tour and/or Showcase activities. On or before that deadline, you must compile and organize all invoices, receipts and Proofs of Payment, then login to the Online System and fill out the Completion.
52. Remember that although the funding is calculated as a flat subsidy per eligible Tour Date, Tour Support and Showcase Component funding cannot exceed 75% of your final actual costs for the Component. You are required to spend at least 25% of the total eligible costs out of your own pocket. For example, if the amount of the Tour and/or Showcase Subsidy calculated on Application was \$7,500, then when the Tour is finished you must have spent and be able to show receipts for at least \$10,000 in expenditures ($\$10,000 \times 75\% = \$7,500$).
53. For every component of the project, Applicants must compile and organize all invoices, receipts and Proofs of Payment, then enter the amounts being claimed into the FACTOR Cost Report which can be downloaded from the Budget page of the Completion. Applicants must then upload the Cost Report along with all related payment documentation, then complete and submit all other sections of the online Completion for the project component.
54. Applicants should retain all their invoices, receipts and Proofs of Payment for seven years for FACTOR and Revenue Canada taxation purposes.
55. FACTOR reserves the right to remove ineligible items from your Completion Budget. In the event that final costs are lower than Approved costs, FACTOR may reduce the final payment to you, or, if the result is a balance owing to FACTOR, FACTOR may demand repayment of the balance owing. Please consult FACTOR's [Business Policies: Eligible Costs – General Terms](#) for general rules of eligibility of costs.

Included in this PDF:

[Showcase Component](#)

[Tour Component](#)

Showcase Component Guidelines 2017-2018

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Eligible Artists

1. To be eligible for funding under the Showcase Component in any Program, the Artist must be Canadian.
2. Artists eligible for support from the Radio Starmaker Fund (RSF) are eligible for FACTOR Showcase funding; however, FACTOR will not fund the same showcase dates nor the same expenses as RSF. Therefore, you may only apply to FACTOR for non-RSF-funded showcase dates. In addition, in the event of an oversubscription to the Live Performance Program, FACTOR will give priority to applications from those Artists who are ineligible to apply to RSF.

Funding Limits

3. The funding limit for the Showcase Component in 2017-2018 is **\$7,500 per Artist** of which a maximum of \$5,000 can be spent on domestic showcasing and up to the full \$7,500 on international showcasing, across all Programs. This means that regardless of what Program you apply under, or which Applicant applies, the amount of Showcase funding available for the Artist will not exceed \$7,500 in each FACTOR fiscal year. Note that any funding awarded in the Showcase component will be deducted from the annual [Tour Support](#) limits for the artist.

Eligible Showcases

1. FACTOR defines a Showcase as a performance for a target audience of music industry professionals more so than the general public; the goal of a Showcase is to attract interest of potential industry partners, such as booking agents, managers and record labels. The Showcase must be organized and presented by a third party and the Artist must be invited by the event organizers to showcase, and a Showcase confirmation (such as an official invitation or a performance contract) must be included with the application.
2. Showcase Component applications must be submitted to FACTOR at least one calendar day before the start of the Showcase.
3. “No-cases” may be eligible provided they are organized to coincide with a significant music event (such as a showcase event, festival or conference) and it can be demonstrated that music industry professionals have been invited to the no-case and can be reasonably expected to attend. A no-case must also be organized and presented by a third party.
4. In the majority of cases, Eligible Showcases are part of a larger industry event or conference. A private Showcase may be eligible if it meets the “no-case” definition, is demonstrably targeted towards industry professionals, and offers genuine commercial opportunity for the Artist. An Applicant may prove this by uploading supporting documentation about the nature of the event, including a list of industry personnel invited.
5. *NEW - A private showcase organized by the Artist’s own record label, publisher or team that features only Artists represented by the organizer will not be recognized as an eligible Showcase for this Component.
6. A sample list of [eligible Showcase events](#) is available on the FACTOR website. This is not an exhaustive list of eligible Showcase events; if your event is not on the list, please contact FACTOR before applying.

7. Each Showcase Component within an Application can cover multiple performances at any one Showcase event. For clarity, if the Artist is invited to showcase at an event and performs three times while there, that is one Showcase and equals one subsidized date, not three.
8. An Applicant may add as many Components to an Application as there are confirmed Showcases, to the Component funding limit or the Program funding limit, whichever is achieved first.
9. Each Showcase must take place at least 300kms/3 hours' drive away from the Artist's home city. If the Artist band members live in different cities, then the Showcase location must be least 300 kms/3 hours' drive away from the city where half or more of the Artist members live.
10. Applicants must provide specific details as to the strategic merits of the Showcase in the Goals and Expected Results section. You must upload a list of industry personnel whom you have invited to the Showcase, including their name, title and company.
11. You are obligated as a condition of funding to include the appropriate logos and acknowledgment in all materials created in a FACTOR-funded project. Please review the [Logo and Acknowledgment Guide](#) for specific instructions. Remember, the failure to provide appropriate logos and acknowledgment could result in a loss of some or all of your funding.

Eligible Costs – Showcase

12. The Eligible Costs in this section are specific to the Showcase Component. Please also review [Eligible Costs – General Terms](#) as well as the [Eligible Costs – This Program](#) in the Program Guidelines for the Program under which you are applying. Applicants are strongly advised to read and understand these sections, and to contact FACTOR prior to submitting an Application to ensure eligibility of the proposed costs.
13. FACTOR funding under the Showcase Component will equal the lesser of (i) the approved Offer, (ii) the final subsidy calculation plus Administration Fee, or (iii) 75% the Total Eligible Budget, to the Program maximum.
14. Showcase Component funding is calculated as a flat rate per Eligible Showcase (the “Total Subsidy”), the base rate of which is based on the number of Eligible Travelers, with additional amounts for the distance traveled.
15. An Eligible Traveler is a person who is:
 - a. A credited, full-time member of the Artist group; or
 - b. A Hired Musician or Eligible Crew member whose paid services have been engaged by the Artist for the duration of the Showcase;
 - c. A person who is not receiving funding to attend the Showcase under the Business Travel Component; AND
 - d. Has been approved by FACTOR as an Eligible Cost.
16. A Hired Musician is a musician who is hired to provide his or her services on a contracted, project basis, in exchange for wages. If claimed as an Eligible Cost, the Hired Musician must be Canadian, unless otherwise approved by FACTOR. A full-time member of the Artist, or an Eligible Crew member, cannot also be claimed as a Hired Musician.
17. An Eligible Crew member is a person hired by the Artist for a Showcase to provide only the services of Tour Manager, Driver, Road/Equipment Technician, Lighting Technician, Sound Mixer, Merchandise Seller, nannies hired to care for the Artist's children, or a combination of the foregoing, in exchange for wages. If claimed in the final Completion Budget, Eligible Crew must travel with the Artist for all or a substantial portion of the Showcase. Eligible Crew must be Canadian unless otherwise approved by FACTOR. An Eligible Crew member cannot also be claimed as a member of the Artist or as a Hired Musician.
18. A signed agreement or Deal Memo for Hired Musicians and Eligible Crew must be submitted on Application. It should set out at a minimum the names of the contracting parties, a description of the services to be provided, the rate of pay, and the dates for which the person is being hired. A [Sample Deal Memo](#) is available on the FACTOR website.

19. Per diems and accommodations will be recognized to a maximum of five days for a domestic Showcase/seven days for an international Showcase. Per diems are recognized to a maximum of \$50 per person per calendar day.
20. A Subsidy Calculator is embedded in the Showcase Component in the Online System and will be available when you apply. For reference, see the rates below, which are effective April 1, 2016.

Showcase	A = Base Rate	B = Territory	C=Subsidy per Showcase
For each Showcase	Add up the Eligible Travelers. The result equals A. First Eligible Traveler =\$800 Each additional Eligible Traveler = add \$100 To a max. of 8 Eligible Travelers	Multiply A using these rates. The result equals B. Canada = 0 US X 50% UK/Europe x 80% Rest of World x 140%	A+B=C

21. Although the Showcase funding is calculated as a subsidy, you will have to submit a final Completion Budget on Completion. FACTOR will only recognize and reimburse up to 75% of the Eligible Costs in your budget. If you claim costs that are ineligible, FACTOR will remove them from the budget and your subsidy may be reduced accordingly. If you have any questions about the eligibility of a particular cost, please contact FACTOR in advance.
22. Generally, and unless otherwise explicitly allowed by FACTOR, Eligible Costs are those paid to Canadians and Canadian owned and controlled service suppliers, the exception being non-Canadian members of the Artist group. FACTOR may make an exception if the cost of hiring non-Canadian musicians and tour personnel who are resident in the territory of the Showcase is significantly more cost effective; however, this must be approved in advance by FACTOR.
23. When a privately owned vehicle is used, the Eligible Cost will be tallied at an all-in gas and mileage rate of \$0.50/km. Applicants will be required to submit odometer readings taken before and after the Showcase. If the all-in private vehicle rate is claimed, then gas receipts will not be eligible. A Vehicle Log is available [here](#).
24. Basic vehicle maintenance costs resulting from traveling to and from the Showcase, such as oil changes, are allowable. FACTOR reviews these costs on a case-by-case basis, and the dates of the costs must be consistent with the dates of the tour or showcase.
25. Both vehicle costs and airfare are eligible.
26. Pre-Showcase expenses, such as rehearsal time, will be capped at 15% of Total Eligible Costs.
27. Costs of designing, manufacturing and producing items of non-music merchandise sold at the Showcase (e.g. t-shirts, tote bags) will be considered Eligible Costs. For non-Canadian tours, the costs of non-music merchandise items manufactured outside of Canada may be eligible. Manufacturing receipts or account statements from label or distributing showing the per-unit cost must be provided at completion to claim these costs.
28. The costs of not-for-sale promotional CDs, vinyl, and dropcards are eligible to an aggregate maximum of 500 units. Manufacturing receipts or account statements from label or distributor showing the per-unit and total cost must be provided at completion to claim these costs.
29. Merchandise shipping costs within Canada and to destinations outside of Canada will be allowed as Eligible Costs.

30. The cost of printed materials, such as handbills, posters, banners etc., will be capped at \$400 per Showcase Component (all Programs).
31. Musical supplies subject to normal wear and tear, such as guitar strings, drum skins, and batteries may be Eligible Costs; however, capital purchases of musical instruments and equipment, or PA equipment, are considered equipment purchases (not supplies), and are subject to cap.
32. Equipment purchases will be recognized up to a maximum of 10% of the total cost of the purchase. Date of the purchase receipt must be consistent with the dates of the showcase.
33. ***NEW** - For Tour Support, Showcase and Business Travel components, no limit will be applied to payments made in cash, provided that:
 - a) Incidental purchases under \$100 (e.g. gas, small goods) must be supported by a cash register receipt.
 - b) Personnel costs, fees for personal services and per diems paid in cash to individual persons must be supported by a FACTOR-provided [Receipt for Services form](#) signed by the payee.
 - c) Lease or purchase of all other goods and services must be supported by a receipt issued by the payee indicating clearly all of the following:
 - i. The name and address of the organization or individual who provided the goods or services;
 - ii. The name of the individual who purchased the goods or service.
 - iii. The goods or services purchased in detail, such as item description, quantity, unit price, extended price, additional charges and applicable taxes.
 - iv. The transaction date (including the dates of service or delivery if applicable).
34. Receipts in all cases must be sufficiently detailed to show the purchase is connected to the expense claim. Applicants must be able to identify and describe the item(s) or service(s) purchased. FACTOR reserves the right to contact the vendor, and to reject any costs it deems, in its sole opinion, insufficiently supported.
35. Artist and Hired Musician fees will be capped at \$300 per performance (or \$300 per day if the Artist performs more than once in a day). Donated Services are ineligible when the Applicant is a party other than the Artist. When the Applicant is the Artist, FACTOR will recognize Donated Services for Artist Members to a maximum of \$150 per Artist member per day. Donated services may no longer be claimed for Hired Musicians and Eligible Crew. Donated Services in total cannot exceed 25% of Total Eligible Costs. Please see [Business Policies: Donated Services](#).
36. In-House costs are allowed in this component. Generally, and unless otherwise explicitly allowed by FACTOR, In-house and/or Related Party Transactions are capped at a maximum of 25% of the total Eligible Costs. In any event, Artist Member performance fees will not count towards the In-House cap.
37. FACTOR will recognize third-party Booking Agency Fees and Commissions up to 20% of negotiated and verified Performance Income. A statement, invoice or settlement sheet showing commission payable must be provided at completion to claim this cost.
38. FACTOR will recognize third-party Artist Management Fees and Commissions up to 20% of verified Performance Income. A statement, invoice or settlement sheet showing commission payable must be provided at completion to claim this cost.
39. Local ground transportation (such as taxis and public transit costs) and parking costs are eligible up to a maximum of \$100 per day.

40. Ineligible costs for Showcases include but are not limited to:

- a. Vehicle repairs to a privately-owned or rental vehicle that would ordinarily be covered by a comprehensive insurance policy.
- b. Showcase and awards application expenses and award show ticket purchases.
- c. “Buy-on” fees for a private showcase or no-case.
- d. Office rent, office staff wages, and the rental and purchase of office equipment, and any other kind of company overhead charge.
- e. Any costs related to a person who is receiving funding to attend the Showcase under the Business Travel Program. Such persons cannot be claimed as Eligible Travelers for the purposes of the subsidy calculation.
- f. Vehicle rental expenses for a privately owned vehicle.
- g. Traffic tickets.
- h. Make-up, costume and wardrobe expenses.
- i. AFM/CFM dues.
- j. Funding to attend songwriting circles or music reviews panels (otherwise known as “date with a tape” events) at music industry conferences.
- k. Booth fees.
- l. Donated Services when the Applicant is a party other than the Artist.
- m. Booking and/or management fees where the Applicant is self-booking and/or self-managing

41. Administration Fees for the Showcase Component are automatically calculated in the online system as follows: 15% of total Eligible Costs, or 15% of Total Subsidy, whichever is less, to a maximum of \$300.

Component Completion

Please review the [Completion Guide](#) for detailed instructions.

42. For every component of the project, Applicants must compile and organize all invoices, receipts and Proofs of Payment, then enter the amounts being claimed into the FACTOR Cost Report which can be downloaded from the Budget page of the Completion component. Applicants must then upload the Cost Report and all related expense documentation, then complete and submit all other sections of the online Completion (including Budget, Goals and Results, Component Information, Public Funding). Please be aware that if there is a discrepancy between amounts in the Cost Report and the online Budget, FACTOR will defer to the Cost Report.

43. To complete the Component and receive the final payment (if any), Applicants must:

- a. Submit Proof of Performance that the Showcase performance took place. As Proof of Performance, FACTOR will accept samples of any of the following: flyers, posters, programs, print-ads, photographs, ticket samples, videos (physical or online), web-links, live show reviews from external publications, confirmations from publicists/promoters/radio promoters etc.
- b. If there is a change of personnel, you must indicate those changes in the Component Information section of your online Completion, and provide an explanation of the changes in the “variance” box within that section. You must also submit corresponding Deal Memos for any new Eligible Travelers.
- c. Submit [Letters of Direction to Pay](#) (maximum three per Project). These Letters are voluntary on the part of the Applicant, who may prefer to have FACTOR pay certain suppliers directly.

Tour Support Component Guidelines 2017-2018

Version 5.0 | Published April 1, 2017

Eligible Artists

1. To be eligible for funding under the Tour Support Component across all Programs, the Artist must be Canadian. To be eligible in the Live Performance Program, the Artist must be rated 2 or 3. All other Artists who have a full-length FACTOR-funded sound recording project in progress should apply through the Tour or Showcase component of their sound recording program for live performance funding.
2. Artists eligible for support from the Radio Starmaker Fund (RSF) are eligible for FACTOR Tour Support through the Tour Support Component of any Program. However, FACTOR will not fund the same tour dates nor the same expenses as RSF. Therefore, you may only apply to FACTOR for a different set of tour dates. In addition, in the event of an oversubscription to the Live Performance Program, FACTOR will give priority to applications from those Artists who are ineligible to apply to RSF.

Funding Limits

3. The funding limits for the Tour Support and Showcase Components in 2017-2018 are as follows:
 - Artist 3: **\$37,500** in combined tour and showcase support. The Tour component maximum is \$35,000, of which a max of \$15,000 can be used for domestic tours, and up to the full \$35,000 for international tours. The Showcase component maximum is **\$7,500**, \$5,000 of which can be used for domestic showcases, and up to the full \$7,500 can be used for international showcases.
 - Artist 2: **\$32,500** in combined tour & showcase support. The Tour component maximum is \$30,000, of which a max of \$15,000 can be used for domestic tours, and up to the full \$30,000 for international tours. The Showcase component maximum is **\$7,500**, \$5,000 of which can be used for domestic showcases, and up to the full \$7,500 can be used for International showcases.

*Note: General Artists may not apply for Tour Support in the Live Performance Program; however, the Tour Support Component is available to General Artists through all full-length sound recording and marketing programs.

These limits include the Showcase Component maximums and apply across all Programs. This means that regardless of what Program you apply under, or which Applicant applies, the amount of Tour Support funding available for the Artist will not exceed the above limits in each FACTOR fiscal year.

Eligible Tours

4. A Tour Date is a calendar date on which the Artist is contracted to publicly perform during a Tour. A Tour Date must be contracted and paid in some form of cash consideration, such as a guaranteed fee or a share of revenues, or a combination of both. The Tour Date must be able to be verified with Proof of Performance upon Completion. All performances taking place during one calendar day constitute one Tour Date.

5. For the Tour Component of the Live Performance Program, an eligible Tour consists of a minimum of eight confirmed dates, at least six of which must be paid Tour Dates with a minimum set length of 30 minutes.
6. When the Tour Component is part of a sound recording or marketing program, there is no minimum number of Tour Dates that constitute a Tour, and no limitation in the number of Tour Dates that are home shows, school shows, or return engagements. However, the annual funding limit per Artist will be applied based on funding derived from the Tour Component in all Programs.
7. Applicants must apply at the latest one calendar day in advance of the tour start date and no earlier than six months in advance of the tour start.
8. The Tour should be continuous and scheduled with no extensive breaks between dates. (An “extensive break” generally means more than five days off, depending on the territory being toured, but FACTOR will allow exceptions where the tour is a significant distance from the artist’s home city.) “Residencies” (where the Artist performs in the same venue on more than two consecutive nights, or on the same night in more than two consecutive weeks) are ineligible for Tour Support in all Programs.
9. The Applicant must provide notes on their Goals and Expected Results, including a description of the Tour, the Artist’s commercial history, notable successes, and current opportunities in the Territory being toured, along with confirmation that the Tour Dates have been booked. Such confirmation could include a performance contract, the booking agent’s itinerary, or an email from the venue or promoter that the tour date is confirmed. These confirmations should include the date, city, venue, capacity, set length and contracted performance fee.
10. When a Tour includes a conference showcase date, the corresponding conference registration fees are eligible and the official Showcase Invitation must be included with the Application.
11. You are obligated as a condition of funding to include the appropriate logos and acknowledgment in all materials created in a FACTOR-funded project. Please review the [Logo and Acknowledgment Guide](#) for specific instructions. Remember, the failure to provide appropriate logos and acknowledgment could result in a loss of some or all of your funding.

Eligible Costs – Tour Support

12. The Eligible Costs in this section are specific to the Tour Support Component. Please also review [Eligible Costs – General Terms](#) as well as the [Eligible Costs – This Program](#) in the Program Guidelines for the Program under which you are applying. Applicants are strongly advised to read and understand these sections, and to contact FACTOR prior to submitting an Application to ensure eligibility of the proposed costs.
13. FACTOR funding under the Tour Support Component will equal the lesser of (i) the approved Offer, (ii) the final subsidy calculation plus Administration Fee, or (iii) 75% the Total Eligible Budget; to the Program maximum.
14. Tour Support Component funding is calculated as a flat rate per Eligible Tour Date (the “Total Subsidy”), the base rate of which is based on the number of Eligible Travelers, with additional amounts for the distance traveled and the venue capacity. Venue Capacity must be verifiable.
15. An Eligible Traveler is a person who is:
 - a. a credited, full-time member of the Artist group; or
 - b. a Hired Musician or Eligible Crew member whose paid services have been engaged by the Artist for the duration of the Tour;
 - c. a person who is not receiving funding to attend the Tour or Showcase under the Business Travel Component;
AND
 - d. who has been approved by FACTOR as an Eligible Cost.

16. A Hired Musician is a musician who is hired to provide his or her services on a contracted, project basis, in exchange for wages. If claimed as an Eligible Cost, the Hired Musician must be Canadian unless otherwise approved by FACTOR. A full-time member of the Artist, or an Eligible Crew member, cannot also be claimed as a Hired Musician.
17. An Eligible Crew member is a person hired by the Artist for a Tour to provide only the services of Tour Manager, Driver, Road/Equipment Technician, Lighting Technician, Sound Mixer, Merchandise Seller, nannies hired to care for the Artist's children or a combination of the foregoing, in exchange for wages. If claimed as an Eligible Cost, the Eligible Crew member must be Canadian unless otherwise approved by FACTOR. If claimed in the final Completion Budget, Eligible Crew must travel with the Artist for all or a substantial portion of the Tour. An Eligible Crew member cannot also be claimed as a member of the Artist or as a Hired Musician.
18. A signed agreement or Deal Memo for Hired Musicians and Eligible Crew must be submitted on Application. It should set out at a minimum the names of the contracting parties, a description of the services to be provided, the rate of pay, and the dates for which the person is being hired. [A Sample Deal Memo is available on the FACTOR website.](#)
19. Per diems will be recognized to a maximum of the number of days on the tour (including travel days) plus two days before the first tour date and two days after the last tour date. Per diems are recognized to a maximum of \$50 per person per calendar day.
20. A Subsidy Calculator is embedded in the Tour Support Component in the Online System and will be available when you apply. For reference, see the rates below, which are effective April 1, 2017.

Tour Date	A = Base Rate	B = Territory	C = Venue Capacity	D=Subsidy per Tour Date
First Tour Date	Add up the Eligible Travelers. The result equals A. First Eligible Traveler = \$200 Each additional Eligible Traveler = add \$75 To a max. of 8 Eligible Travelers	Multiply A using these rates. The result equals B. Canada* = n/a US X 50% UK/Europe x 80% Rest of World x 140% * B for Canada will always = 0	Multiply (total of A+B) using these rates. The result equals C. Under 200* = n/a 200-349 = x 25% 350 - 499 = x 40% 500+/Major Festivals =x 50% * for venues under 200 will always = 0	A+B+C=D
For each Tour Date	Do as above	Do as above	Do as above	Do as above
			Then calculate the sum of Column D.	THE SUM OF THIS COLUMN IS THE TOTAL SUBSIDY

21. Although Tour Support funding is calculated as a subsidy, you will have to submit a final Completion Budget on completion. FACTOR will only recognize and reimburse up to 75% of the Eligible Costs in your budget. If you claim costs that are ineligible, FACTOR will remove them from the budget and your subsidy may be reduced accordingly. If you have any questions about the eligibility of a particular cost, please contact FACTOR in advance.
22. Generally, and unless otherwise explicitly allowed by FACTOR, Eligible Costs are those paid to Canadians and Canadian owned and controlled service suppliers, the exception being non-Canadian members of the Artist group. Eligible Crew must be Canadian unless otherwise approved by FACTOR. FACTOR may make an exception if the cost of hiring non-Canadian musicians and tour personnel who are resident in the territory being toured is significantly more cost effective; however, this must be approved in advance by FACTOR.
23. When a privately-owned vehicle is used, the Eligible Cost will be tallied at an all-in gas and mileage rate of \$0.50/km. Applicants will be required to submit odometer readings taken before and after the Tour. If the all-in private vehicle rate is claimed, then gas receipts will not be eligible. [A Vehicle Log is available here.](#)
24. Basic vehicle maintenance costs resulting from tour travel, such as oil changes, are allowable. FACTOR reviews these costs on a case-by-case basis, and the dates of the costs must be consistent with the dates of the tour.
25. Both vehicle costs and airfare are eligible.
26. Pre-tour expenses, such as rehearsal time, will be capped at 15% of Total Eligible Costs.
27. Costs of designing, manufacturing and producing items of non-music merchandise sold on the Tour (e.g. t-shirts, tote bags etc.) will be considered Eligible Costs. For non-Canadian tours, the costs of non-music merchandise items manufactured outside of Canada may be eligible. Manufacturing receipts or account statements from label or distributor showing the per-unit cost must be provided at completion to claim these costs.
28. The costs of not-for-sale promotional CDs, vinyl, and dropcards are eligible to an aggregate maximum of 500 units. Manufacturing receipts or account statements from label or distributor showing the per-unit and total cost must be provided at completion to claim these costs.
29. Merchandise shipping costs within Canada and to destinations outside of Canada will be allowed as Eligible Costs.
30. In the Live Performance Program only, the cost of printed materials, such as handbills, posters, banners etc., will be capped at \$400 per Tour.
31. Musical supplies subject to normal wear and tear, such as guitar strings, drum skins, and batteries may be Eligible Costs; however, capital purchases of musical instruments and equipment, or PA equipment, are considered equipment purchases (not supplies), and are ineligible.
32. Equipment purchases will be recognized up to a maximum of 10% of the total cost of the purchase. Date of the purchase receipt must be consistent with the dates of the tour.
33. Buy-on fees for the tour will be reviewed by FACTOR on a case-by-case basis and may be refused or capped as FACTOR deems reasonable.
34. ***NEW** - For Tour Support, Showcase and Business Travel components, no limit will be applied to payments made in cash, provided that:
 - a) Incidental purchases under \$100 (e.g. gas, small goods) must be supported by a cash register receipt.
 - b) Personnel costs, fees for personal services and per diems paid in cash to individual persons must be supported by a FACTOR-provided [Receipt for Services form](#) signed by the payee.
 - c) Lease or purchase of all other goods and services must be supported by a receipt issued by the payee indicating clearly all of the following:
 - i. The name and address of the organization or individual who provided the goods or services;

- ii. The name of the individual who purchased the goods or service.
 - iii. The goods or services purchased in detail, such as item description, quantity, unit price, extended price, additional charges and applicable taxes.
 - iv. The transaction date (including the dates of service or delivery if applicable).
35. Receipts in all cases must be sufficiently detailed to show the purchase is connected to the expense claim. Applicants must be able to identify and describe the item(s) or service(s) purchased. FACTOR reserves the right to contact the vendor, and to reject any costs it deems, in its sole opinion, insufficiently supported.
36. Artist and Hired Musician fees will be capped at \$300 per show. Donated Services are ineligible when the Applicant is a party other than the Artist. When the Applicant is the Artist, FACTOR will recognize Donated Services for Artist Members to a maximum of \$150 per Artist member per day. Donated services may no longer be claimed for Hired Musicians and Eligible Crew. Donated Services in total cannot exceed 25% of Total Eligible Costs. Please see [Business Policies: Donated Services](#).
37. In-House costs are allowed in this component. Generally, and unless otherwise explicitly allowed by FACTOR, In-house and/or Related Party Transactions are capped at a maximum of 25% of the total Eligible Costs. In any event, Artist Members performance fees will not count towards the In-House cap.
38. FACTOR will recognize third-party Booking Agency Fees and Commissions up to 20% of negotiated and verified Performance Income. A statement, invoice or settlement sheet showing commission payable must be provided at completion to claim this cost.
39. FACTOR will recognize third-party Artist Management Fees and Commissions up to 20% of verified Performance Income. A statement, invoice or settlement sheet showing commission payable must be provided at completion to claim this cost.
40. Local ground transportation (such as taxis and public transit costs) and parking costs are eligible up to a maximum of \$100 per day.
41. Ineligible costs for Tours include but are not limited to:
- a. Vehicle repairs to a privately-owned or rental vehicle that would ordinarily be covered by a comprehensive insurance policy.
 - b. Showcase and awards application expenses and award show ticket purchases.
 - c. “Buy-on” fees for a private showcase or no-case.
 - d. Office rent, office staff wages, and the rental and purchase of office equipment, and any other kind of company overhead charge.
 - e. Any costs related to a person who is receiving funding to attend any or all of the tour dates under the Business Travel Program. Such persons cannot be claimed as Eligible Travelers for the purposes of the subsidy calculation.
 - f. Vehicle rental expenses for a privately-owned vehicle.
 - g. Traffic tickets.
 - h. Make-up, costume and wardrobe expenses.
 - i. AFM/CFM dues.
 - j. Funding to attend songwriting circles or music reviews panels (otherwise known as “date with a tape” events) at music industry conferences.
 - k. Booth fees.
 - l. Donated Services when the Applicant is a party other than the Artist.
 - m. Booking and/or management fees where the Applicant is self-booking and/or self-managing

- n. Any expenses such as hotel rooms, advertising, equipment and personnel costs paid for by the promoter and then deducted from gross ticket revenue prior to the split point (i.e. the calculation of the artist's revenue share, if any). These are deemed by FACTOR to be promoter's costs, and are not eligible for FACTOR reimbursement.
42. Administration Fees for the Tour Support Component will be calculated in all Programs as follows: either 15% of total Eligible Costs, or 15% of Total Subsidy, whichever is less, to a maximum of \$2,000.

Component Completion

Please review the [Completion Guide](#) for detailed instructions.

43. For every component of the project, Applicants must compile and organize all invoices, receipts and Proofs of Payment, then enter the amounts being claimed into the FACTOR Cost Report which can be downloaded from the Budget page of the Completion. Applicants must then upload the Cost Report and all related expense documentation, then complete and submit all other sections of the online Completion (including Budget, Goals and Results, Component Information, Public Funding). Please be aware that if there is a discrepancy between amounts in the Cost Report and the online Budget, FACTOR will defer to the Cost Report.
44. In addition to the Program completion requirements, to complete the Component and receive the final payment (if any), Applicants must:
 - a. Submit Proof of Performance (uploaded to each Tour Date in your online Completion) that each performance took place and was performed as contracted. As Proof of Performance, FACTOR will accept a copy of the promoter's settlement sheet, or the booking agency's final statement. These must indicate the date, city and venue and indicate the final payment received. Tour itineraries, posters and print ads will not be accepted as Proof of Performance; however, FACTOR may accept ticket stubs or media reviews on a case-by-case basis.
 - b. If there is a change of personnel, you must indicate those changes in the Component Information section of your online Completion, and provide an explanation of the changes in the "variance" box within that section. You must also submit corresponding Deal Memos for any new Eligible Travelers.
 - c. Public Funding: you must review and update this section of the Completion to confirm any public funding that was received for the Tour.
 - d. Submit [Letters of Direction to Pay](#) (maximum three per Project). These Letters are voluntary on the part of the Applicant, who may prefer to have FACTOR pay certain suppliers directly.