

Event Fund Application Guidelines

For the Fiordland Event Fund & the Southland Event Fund



GREAT SOUTH 
Southland Regional Development Agency

 **MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT**
HIKINA WHAKATUTUKI

BEYOND BELIEF
FIORDLAND

Southland 
New Zealand

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1. Introduction

As part of the Government’s Tourism Recovery package, in late 2020 a \$47.75 million Regional Events Fund (REF) was established and allocated to the nine International Marketing Alliance (IMA) groupings of the Regional Tourism Organisations (RTOs). Southland has two RTOs and, Destination Fiordland RTO was allocated \$850,000 through the Southern Lakes IMA and Southland RTO was allocated \$442,444 through the Pure Southern Land IMA.

On behalf of both Southland RTOs, Great South has developed the investment plans that set out how the funding allocations for Southland and Fiordland will be spent. These plans align with the recently developed Southland Murihiku Events Strategy and have been approved by the REF’s administrating agency, MBIE. A high-level summary of both investment plans is below:

	Southland RTO	Destination Fiordland RTO
Event Capability, Advice & Workshops	\$202,444	\$240,000
Business Events Development and Promotion	\$60,000	\$60,000
New and Existing Events	\$180,000	\$550,000
TOTAL	\$442,444	\$850,000

As outlined in the investment plans, a component of the funding is to be made available to support eligible new and existing events via two contestable funds:

Southland Regional Event Fund

- \$180,000 to be distributed over a 2-4 year timeframe
- Available for events held in the Southland RTO area

Fiordland Regional Event Fund

- \$550,000 to be distributed over a 2-4 year timeframe
- Available for events held in the Fiordland RTO area

Both funds will be administered by Great South who will be responsible for accountability back to MBIE.

It is the purpose of this document to provide guidelines on the allocation of both Funds.

2. Fund Foundation Principles

The purpose of the REF (and subsequently the Southland and Fiordland Regional Event Funds) is to stimulate inter and intra-regional visitation through funding events that will encourage expenditure missed by international visitor markets.

The Southland and Fiordland Regional Events Funds will support commercial events that maximise economic benefit to the region, optimise the region's assets and venues and drive 'out of region' visitation.

The Foundation Principles of the Fund include prioritising events that:

- Drive 'out of region' visitation
- Bring measurable economic benefit to the region
- Collaborate with, but do not compete with other regional or large national events
- Compliment a regional calendar of events that is well-balanced to create year-round stimulation
- Offer leverage opportunities to local businesses
- Engage the local workforce
- Demonstrate community and social licence
- Utilise current regional infrastructure
- Use 50% local suppliers
- Demonstrate strategies to mitigate, reduce and offset carbon footprints.

3. Application Expectations

All applications will be considered based on:

- Strength of the funding proposition according to the principles and criteria of the Regional Events Fund (and as outlined in these Guidelines)
- Implications and consideration of investment against the pool of funds remaining in the total fund for allocation
- Previous funding and funding from other sources.

4. Fund Criteria

The aim of the Southland and Fiordland Regional Event Funds is to primarily support commercial events that maximise economic benefit to the region, optimise the region's assets and venues and drive 'out of region' visitation.

To be eligible for investment from either Fund, the event must be held within the Southland region. Some events, depending on if the event is new, its size and the expected investment, may be subject to a pre economic and social impact evaluation. All events will be subject to post economic and social impact evaluation (see 6.8). This relates to the ability of an event to drive and stimulate benefits to the region in the form of new expenditure and or future investment to the region. Before applying for investment support from the Southland or Fiordland Regional Events Fund, applicants should fully understand the eligibility and assessment criteria as follows.

5. Eligibility and Assessment Criteria

Foundation Principles and a robust set of criteria have been created to focus the investment of the Southland and Fiordland Event Funds.

Criteria will be updated as required and will apply to all investment decisions made within the 2021 period.

The Foundation Principles of the fund include prioritising events that:

- Drive 'out of region' visitation
- Bring measurable economic benefit to the region
- Collaborate with, but do not compete with other regional or large national events
- Compliment a regional calendar of events that is well-balanced to create year-round stimulation
- Offer leverage opportunities to local businesses
- Engage the local workforce
- Demonstrate community and social licence
- Utilise current regional infrastructure
- Use 50% local suppliers
- Demonstrate strategies to mitigate, reduce and offset carbon footprints.

An event is unlikely to receive investment if it:

- Is a community focused event, that does not appeal to attendees outside of the region
- Is looking to support infrastructure or capital works costs
- Is seeking investment to underwrite an event
- Will adversely affect an existing event due to timing or any other reason
- Does not allow sufficient time to apply for and attain council consent – e.g. resource consent or permits
- Does not procure 50% of local suppliers
- Engages out of region human resource at the expense of local resource
- Is not supported by an experienced event management team or person
- Does not provide a complete and up-to-date health and safety plan that incorporates a risk management plan
- Is generating a large profit or surplus, suggesting that investment is not required
- Does not meet minimum criteria via mandatory economic impact pre event reporting
- Cannot be supported by regional infrastructure
- Fails to prove that the event has the social licence to take place within the region
- Primary purpose is to promote religious, ministry or political objectives.
- Is for rent or accommodation costs
- Is for staff salaries or wages.

Event related costs NOT eligible for investment:

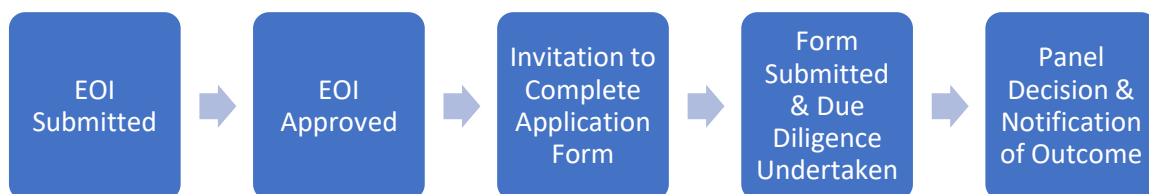
- Capital costs
- For the purchase of alcohol
- Stock or capital market investment
- Payment of fines, court costs, IRD penalties or retrospective tax payment
- Purchase of insurance cover
- Purchase/lease of vehicles and any related ongoing maintenance repair, overhead costs, or road user charges
- Service or maintenance costs including utilities such as power or phone
- Any retrospective costs (unless pre-approved)
- Overseas travel
- Debt servicing or refinancing costs
- Medical expenses
- Prize money or entrance fees
- Payment of any legal expenditure including costs or expenses related to mediation disputes, ACC, employment Tribunal, Small Claims Tribunal, professional or disciplinary body hearings
- Money to be redistributed as grant funding, sponsorship, bequest, donations, to aid funding or aid to other recipients
- Events that have breached previous funding agreements, including post-event reporting criteria.

6. Application Process

The Southland and Fiordland Regional Events Funds are contestable funds with two funding rounds each year held in March and September. There can only be one application per event each year to either Fund, however an event organisation may submit applications in both rounds for different events from both the Southland and Fiordland Regional Events Funds.

6.1 Process

Great South will facilitate the process to allocate both Funds which is as follows:



6.2 Timeframes

The Southland and Fiordland Regional Events Fund are allocated bi-annually. Applications for each round will be open 4-6 weeks prior to allocation of the fund. Applications must complete an Expression of Interest in the first instance.

Expressions of Interest	2021 Application Round 1	2021 Application Round 2
Received all year round Submitted via digital form on greatsouth.nz	<ul style="list-style-type: none">• Closes 07th March 2021• Outcome by 07th April 2021	<ul style="list-style-type: none">• Closes 31st Aug 2021• Outcome by 30th September 2021

Great South reserves the right to alter or amend this timeframe as required.

6.3 Expressions of Interest (EOI)

Applicants MUST complete the Expression of Interest registration form in the first instance.

Expressions of Interest (EOIs) can be digitally submitted year round and applicant support can be sought via the Southland Regional Development Agency Great South office 03 211 1400 or by emailing Karen Witham karen@greatsouth.nz.

The information contained in any application will be treated as confidential. The material submitted will be treated as “commercially sensitive material” and will be held in confidence.

However, Great South, has the right to consult with Gore District Council, Southland District Council, Invercargill City Council, Fiordland Community Board Southland's two IMA (International Marketing Alliances), MBIE (Ministry of Business and Innovations) regarding the application.

6.4 Applications

Once an EOI is submitted, Great South will review and assess eligibility. Successful applicants will be invited to complete and submit a full application form which will be considered in one of the two funding rounds in March or September. Please note that being invited to submit an application **does not** guarantee Fund investment. Events will undergo a rigorous due diligence assessment prior to any referral to the relevant Investment Panel, who allocate the Fund at their sole discretion.

Eligible applications will be assessed using the information given in the application form. Applications that do not address each question adequately may not be considered.

Once you have completed the EOI form, please email the following documents to karen@greatsouth.nz

- Events Business Plan and Budget
- Communications Plan
- Health and Safety / Risk Management Plan
- List of key suppliers.

After a submitted application has undergone due diligence, successful applications will be referred to the relevant Investment Panel for consideration and a final decision will be full and final.

The Fiordland Regional Events Fund Investment Panel will consist of the following:

- Southland District Council Ward Councillor – Cr Ebel Kremer
- Fiordland Community Board Chair – Sarah Greaney
- GM Tourism and Events, Great South – Bobbi Brown
- Events and Conference Manager, Great South – Karen Witham

The Southland Regional Events Fund Investment Panel will consist of the following:

- GM Tourism and Events, Great South – Bobbi Brown
- Events and Conference Manager, Great South – Karen Witham
- GM Leisure and Recreation, Invercargill City Council – Steve Gibling
- Community Strategy Manager, Gore District Council - Anne Pullar

6.6 Successful Applicants

Once funding has been approved, all successful applicants will receive a Funding Agreement. This is a formal contract which outlines what is expected of event organisers and the amount of funding being granted from the Southland or Fiordland Regional Events Fund.

The funding agreement will also outline the post-event reporting requirements for event organisers.

6.7 Issuing Funding

Funding will be paid out subject to the terms within the Funding Agreement, but it is expected that this would be no earlier than 3 months before the commencement of an existing event.

6.8 Post Event Requirements

After the event and as per Funding Agreements, all successful applicants will be required to formally report to Great South on the following:

- An overall summary of the event addressing how the conditions outlined in the Funding Agreement have been met including proof of delivery/success of the event for all measures stated in the application form
- A description of the overall success/failure of the event via a post event economic/social impact evaluation
- Copies of receipts showing the expenditure of the funding or verified event P&L Audited attendance figures including an outline of the methodology used and a breakdown of confirmed figures and estimated totals
- An analysis of how the Funding has enabled the applicant to achieve the expected outcomes of investment.

7. Terms and Conditions of Funding

- Great South is not obliged to grant all of the Southland and Fiordland Regional Event Funds in any period
- Great South reserves the right to consult with Councils and other funders on applications without sharing commercially sensitive material, regarding venues, consent, permits and traffic management etc
- All potential or actual conflict of interests which could compromise the decision on the application or bring the process into disrepute must be declared
- All applicants must disclose any other funding sources for the event (either confirmed or in the process), as well as any corporate or commercial sponsorship arrangements.
- Applicants must not directly or indirectly seek to influence the application process or outcomes in any improper or unethical manner (or in any way which might have the appearance of being so), nor attempt to solicit or garner non-public information which might give an unfair advantage in the application process
- Each applicant warrants that all information provided in relation to its application is true and correct and in all material particulars, at all times, and is not misleading, whether by omission or otherwise
- Each applicant must disclose all matters likely to be material to Great South's consideration of its application
- If circumstances or information changes after making an application, or after any funding is allocated, the applicant must immediately notify Great South
- Each applicant consents to having due diligence carried out on its application, including the organisations and personnel involved, and relevant track records.
The applicant consents to Great South making due enquiries from third parties in this regard and shall provide access to referees upon request
- Additional terms and conditions of funding are contained in the Funding Agreement.
- Final investment in an event will come with conditions pertaining to what event relation costs can and cannot be used for.

8. Great South Discretion

Great South reserves the right to:

- Accept or reject any application at its sole discretion
- Change the criteria, parameters, date, timeline or any other aspect of the funding application or decision-making process, and to waive any application requirements at its discretion.
- Require applicants to provide additional information if required
- Suspend or cancel the funding process in whole or in part
- Impose conditions on the approval or payment of funding, such as a requirement to generate a certain number of entries for an event.
- Do any other act that it sees fit in relation to the funding process.