Expressions of Interest (EOI) Application Form

# Instructions for Applicants

1. Check that you have all the relevant documents, including:

* The Call for Expressions of Interest (EOI) which outlines the Grant Proposal.
* The Application Form (this one) to fill out your application.
* The EOI-Terms. Read these carefully.

1. Before filling out this form, read the EOI carefully, particularly Section 2 (Requirements). This helps you quickly decide if you are the right fit for the grant contract.
2. Please follow the layout of this Application Form:

* Don’t change the section headings and sequence as this needs to be consistent across all Applicants.
* Insert any extra images or graphs either as part of your answer or in a separate attachment (but make it clear in the Application Form that you have done so).
* You can insert links to videos up to 50 MB in size.
* Do not insert links to long documents if possible. They may not be viewed.

1. Everything highlighted in **PURPLE** in this document is information for the Applicant (you). Delete these **PURPLE** parts before sending the Application Form. Everything shaded in BLUE is customisable by you. When you have completed these areas, please un-shade them.

The purple boxes are Provider Tips. Delete these after reading.

Write your application in the blue sections. Un-shade the blue once you have filled these out.

1. Remember to make a note of the Deadline for Questions. The Q & A section is really helpful for all Applicants so feel free to ask us anything if it is unclear.

# Checklist for Applicants

|  |  |
| --- | --- |
| **Before you submit your application…** |  |
| 1. Fill out all sections of the Application Form. |  |
| 1. Remove all the purple ‘Provider Tip’ boxes from this Form. |  |
| 1. Delete the PURPLE instructions from this Form. |  |
| 1. Un-shade the **BLUE** highlighting where you fill out your answer. |  |
| 1. Arrange for the declaration to be signed. If this is a joint or consortium Application make sure all the consortium members sign separate declarations. |  |
| 1. Prepare your Application   We prefer that you submit you send a digital copy of your application by email to [tender@swdc.govt.nz](mailto:tender@swdc.govt.nz) |  |
| 1. Arrange for the Application to be submitted by email before the Deadline for Applications. |  |

[insert your (Applicant’s) name and logo]

# Expressions of Interest (EOI) Application Form

In application to the Call for Expressions of Interest

By: **South Wairarapa District Council**

For: **Grant Proposal - South Wairarapa Sports and Recreation Delivery: Service Provider**

Date of this Application: [insert date of this document]

## About the Applicant

### Our profile

**Choose one of these statements to complete, and delete the others [**

This is an Application by [insert the name of your organisation] (the Applicant) to supply the Requirements.**]**

**OR [**This is a [joint/consortium] Application, by [insert the name of your organisation] and [insert the name of the other organisation/s] (together the Applicants) to supply the Requirements. **]**

|  |  |
| --- | --- |
| **Item** | **Detail** |
| **Full legal name:** | [insert the name that you do business under] |
| **Trading name (if different):** | [if applicable] |
| **Physical address:** | [put the address of your head office] |
| **Postal address:** | [e.g. P.O Box address] |
| **Registered office:** | [if you have a registered office insert the address here] |
| **Business website:** | [url address] |
| **Type of entity (legal status):** | [sole trader / partnership / limited liability company / registered charity / other please specify] |
| **NZBN/Charities or Incorporated Societies #:** | [if your organisation has charitable status, or a NZBN application number insert it here] |
| **Country of residence:** | [insert country where you (if you are a sole trader) or your organisation is resident for tax purposes] |
| **GST application number:** | [NZ GST number / if overseas please state] |

### Our Point of Contact

|  |  |
| --- | --- |
| **Item** | **Detail** |
| **Contact person:** | [name of the person representing the Applicant and responsible for communicating with the Funder] |
| **Position:** | [job title or position] |
| **Phone number:** | [landline] |
| **Mobile number:** | [mobile] |
| **Email address:** | [work email] |

## Application to the Requirements

|  |  |  |
| --- | --- | --- |
|  | **APPLICANT TIP**  **i**   * Carefully read EOI Section 2 (Application to the Requirements) and Section 3 (Evaluation Criteria). Then provide your application by demonstrating your organisation's ability to meet the criteria. * Please mark any information that is 'commercially sensitive' or 'Confidential Information' to your business so that the Funder knows. You cannot make the whole document confidential unless this is truly the case. Refer to the EOI-Terms for more information. * Keep it simple. If an answer is in another document e.g. a marketing brochure, just cut and paste the relevant part into this form. Do not show the whole document unless necessary - the Funder may not read it all. * Any video or separate document should be uploaded and the link inserted into this form. * You may include extra information in your Application but only if it adds value and is relevant. |  |

### Pre-conditions

|  |  |  |
| --- | --- | --- |
|  | **APPLICANT TIP**  **i**   * You must be able to answer 'yes' to each of these pre-conditions. Make sure you can verify this. * 'Yes' means you currently meet the pre-condition. If you cannot answer 'yes' to all, your Application will not be evaluated further. |  |

| **#** | **Pre-condition** | **Meets** |
| --- | --- | --- |
|  | You have the required level of public liability insurance. | Yes/No |
|  | You hold active charitable or incorporated societies status or have firsthand knowledge of the legislative requirements of the Charitable Trusts and Incorporated Societies. | Yes/No |
|  | You demonstrate sound knowledge of Child Safeguarding practices | Yes/No |

### Overview of your solution

Please provide an overview of your solution. Describe the technical aspects of the product and/or elements of the service offering.

|  |  |  |
| --- | --- | --- |
|  | **APPLICANT TIP**  **i**   * This should summarise your entire application in a paragraph or two. Keep it simple. * Your competitors may all have similar skills, tools and methods. Know what sets you apart, and clearly communicate it in your application. * Look at the evaluation criteria and cover the important aspects with just a sentence or two - you can expand further at a later stage. * Try to show what extra value you can offer to make you stand out. * If relevant cover off what experience or clients you have as case stories. |  |

#### Write your overview here

|  |
| --- |
| [Insert answer here] |

### Application to evaluation criteria

|  |  |  |
| --- | --- | --- |
|  | **APPLICANT TIP**  **i**   * These are questions relating to the evaluation criteria (see Section 3 of the EOI). Your Application will be scored against your answers to these criteria. Aim to give answers that are relevant, concise and comprehensive. * Consider the % weighting for each criterion. The higher the weighting the more important it is. Take the weightings into account in deciding how much detail to include. * If you have made any assumption about the Requirements or delivery, clearly state the assumption. * There may be several questions that relate to one criterion. If these questions are not individually weighted assume that they are of equal importance. |  |

|  |  |  |
| --- | --- | --- |
| **Proposed Solution** | | **Weighting** |
| Capability of the Applicant to deliver Governance and Compliance | | 18.75% |
| [insert answer here - Describe your/your organisations capability for delivery of Governance or Compliance support/services. Give examples if possible.] | |  |
| Capability of the Applicant to deliver Sport and Recreation Management | | 18.75% |
| [insert answer here - Describe your/your organisations experience and capacity in delivering any similar services. Give examples if possible.] | |  |
| Capacity of the Applicant to deliver fundraising and sponsorship strategies | | 18.75% |
| [insert answer here – Explain how you will deliver fundraising and sponsorship strategies and where appropriate give examples] | |  |
| Capacity of the Applicant to deliver bespoke communications and engagement with local clubs, and recreation groups in the South Wairarapa | | 18.75% |
| [insert answer here - Explain how you will deliver bespoke communications and engagement with local clubs, and recreation groups in the South Wairarapa. Give examples if possible.] | |  |
| **Proposed Delivery criteria total** | | **75%** |
| **Community Criteria** | | **Weighting** |
| Your location (proposed base of operations) – please select which is most appropriate | | 6.25% |
| Overseas |  |  |
| New Zealand |  |
| North Island |  |
| Greater Wellington Region/ Tararua |  |
| Masterton and Carterton |  |
| South Wairarapa District |  |
| The audience you will support and deliver outcomes for | | 6.25% |
| **Please describe the various audiences and demographics you will work to support and engage in sport and recreation in South Wairarapa**  [insert answer here] | |  |
| Your overall ability to deliver the suggested outcomes (proven experience/examples) | | 6.25% |
| **Please detail your ability to deliver your proposed solution/approach with delivery example(s) of similar type services that align with your proposal.**  [insert answer here] | |  |
| Commitment to Te Titiriti O Waitangi through Kaupapa tuku iho | | 6.25% |
| **Please provide example(s) of how you share a commitment to Te Tiriti o Waitangi through values like manaakitanga and kaitiakitanga.**  [insert answer here] | |  |
| **Community criteria total** | | **25%** |
| **Total weightings** | | **100%** |

### Assumptions

|  |  |
| --- | --- |
| **Assumptions** |  |
| Please state any assumptions you have made in relation to the Application. |  |
| [insert answer here] |  |

|  |  |  |
| --- | --- | --- |
|  | **APPLICANT TIP**  **i**   * An assumption is something that is accepted as true or as certain to happen without proof e.g. that the Funder (or a third party) will provide certain information or assistance so that the Applicant can deliver on the Requirements. |  |

## Applicant’s declaration

|  |  |  |
| --- | --- | --- |
|  | **APPLICANT TIP**  **i**   * Here you are asked to make a formal declaration. Select 'agree' or 'disagree' at the end of each row. If you don't, you will be deemed to have agreed. * Have the declaration signed by someone who is authorised to sign and able to verify the declaration, e.g. chief executive or a senior manager. * If you are submitting a joint or consortium Application each party involved in the joint or consortium Application must complete a separate declaration. |  |

|  |  |  |
| --- | --- | --- |
| **Topic** | **Declaration** | **Applicant’s declaration** |
| **EOI-Terms:** | I/we have read and fully understand this EOI, including the EOI-Terms. I/we confirm that the Applicant agrees to be bound by them. | [agree / disagree] |
| **Collection of further information:** | The Applicant authorises the Funder to:   * collect any information about the Applicant, except commercially sensitive pricing information, from any relevant third party, including a referee, or previous or existing client * use such information in the evaluation of this Application. The Applicant agrees that all such information will be confidential to the Funder. | [agree / disagree] |
| **Requirements:** | I/we have read and fully understand the nature and extent of the Funder’s Requirements as described in Section 2. I/we confirm that the Applicant has the necessary capacity and capability to fully meet or exceed the Requirements and will be available to deliver throughout the relevant Contract period. | [agree / disagree] |
| **Ethics:** | By submitting this Application the Applicant warrants that it:   * has not entered into any improper, illegal, collusive or anti-competitive arrangements with any Competitor * has not directly or indirectly approached any representative of the Funder (other than the Point of Contact) to lobby or solicit information in relation to the EOI * has not attempted to influence, or provide any form of personal inducement, reward or benefit to any representative of the Funder. | [agree / disagree] |
| **Conflict of Interest declaration:** | The Applicant warrants that it has no actual, potential or perceived Conflict of Interest in submitting this Application or entering a Contract to deliver the Requirements.  Where a Conflict of Interest arises during the EOI process the Applicant will report it immediately to the Funder’s Point of Contact. | [agree / disagree] |
| **Details of conflict of interest:** | [if you think you may have a conflict of interest briefly describe the conflict and how you propose to manage it or write ‘not applicable’]. | |

#### DECLARATION BY THE APPLICANT

**I/we declare that in submitting the Application and this declaration that:**

* **the information provided is true, accurate and complete and not misleading in any material respect**
* **the application does not contain any material that will infringe a third party’s intellectual property rights**
* **I/we have secured all appropriate authorisations to submit this application, to make the statements and to provide the information on behalf of the organisation**
* **I/we agree to any additional information request in relation to this application as required**
* **I/ we will complete appropriate grant contract reporting, detailed in the grant contract outcome**
* **All expenditure will be accounted for in grant contract reporting**
* **I/we will keep receipts and records of all expenditure for seven years**
* **Any unspent funds will be returned to SWDC**

**I/we understand that the falsification of information, supplying misleading information or the suppression of material information in this declaration and the Application may result in the Application being eliminated from further participation in the EOI process and may be grounds for termination of any Contract awarded as a result of the EOI.**

**By signing this declaration the signatory below represents, warrants and agrees that they have been authorised by the Applicant to make this declaration on its/their behalf.**

**Signature**:

**Full name**:

**Title/position**:

**Name of organisation**:

**Date**:

**Privacy Statement:**

The personal information above is collected and will be held by SWDC for the sole purpose of considering your application. You have the right of access to, and correction of, personal information about you, that we hold. For more information, please review the full SWDC [Privacy Statement](https://swdc.govt.nz/website-information/privacy-statement/) on our website.