



**SOUTH WAIRARAPA
DISTRICT COUNCIL**

Kia Reretahi Tātau

AGENDA

Public Excluded Strategy Working Committee Meeting Wednesday, 10 September 2025

**I hereby give notice that a Public Excluded Strategy Working Committee Meeting
will be held on:**

Date: Wednesday, 10 September 2025

Time: 10:00am

**Location: Supper Room, Waihinga Centre, Texas Street
Martinborough**

**Janice Smith
Chief Executive Officer**

Released

Order Of Business

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Released

13 PUBLIC EXCLUDED BUSINESS

13.1 SOUTH WAIRARAPA SPORTS AND RECREATION SERVICE

Author: Matt Vins, Manager, Corporate Support

Authoriser: Stefan Corbett, Group Manager, Corporate Services

File Number:

The Council is satisfied that, pursuant to s48(1)(a)(i) of the *Local Government Official Information and Meetings Act 1987*, the information to be received, discussed or considered in relation to this agenda item is:

s7(2)(h) the withholding of the information is necessary to enable Council to carry out, without prejudice or disadvantage, commercial activities.

PURPOSE

To inform *councillors/members* of progress to establish a Sports and Recreation Service for South Wairarapa following the conclusion of the expressions of interest (EOI) stage.

EXECUTIVE SUMMARY

- This report highlights the progress made to establish a sports and recreation service in South Wairarapa, to be delivered by an external partner and supported by Council grant funding for two years, totalling \$161,200 pro-rata from 1 July 2025 until 30 June 2027.
- It summarises the process of seeking expressions of interest from interested organisations to deliver the service, the evaluation of these submissions and subsequent recommendations.

RECOMMENDATIONS

That the Strategy Working Committee:

1. That the Strategy Working Committee receive the *South Wairarapa Sports and Recreation Service report*
2. That the Strategy Working Committee approve that Kia Hākinakina be provided \$80,600 grant funding per year, pro-rata, for the period 1 July 2025 to 30 June 2027 to deliver a sports and recreation service for South Wairarapa.
3. That the Strategy Working Committee agree to the partial release of the South Wairarapa Sports and Recreation Service report, including the report in full and Appendices 2 and 3, following decision at Strategy Working Committee to provide the grant as outlined at recommendation 2.
4. That the Strategy Working Committee agree to withholding Appendix 1 under section 7 (2)(b ii) would be likely unreasonably to prejudice the commercial position of the person who supplied or who is the subject of the information.

BACKGROUND

In November 2023, Councillors directed Officers to devise options for a shared South Wairarapa Sports and Recreation service.

In November 2024, the community was surveyed to understand the needs, challenges and opportunities for South Wairarapa sports clubs and recreation groups. Subsequently, a Sports and Recreation Advisory Group was established to provide sector-specific guidance, and a further survey was conducted to inform options.

Options were presented to Councillors in March 2025, with the recommended option of a shared South Wairarapa Sports and Recreation Service being approved and adopted through the Long-Term Plan process. This approved funding of \$161,200 pro-rata over two years from 1 July 2025 for an external organisation/individual to deliver the proposed service.

To maintain existing service levels whilst the service is established, Councillors also approved to maintain funding for Greytown Sports and Leisure (GSL) for three months (July-September 2025) or until the South Wairarapa Sports and Recreation Service is established.

Following adoption of the LTP, officers developed an expression of interest (EOI) process, including priorities, timeline, and scoring and evaluation methodology to deliver the approved sports and recreation shared service. The EOI was developed using MBIE templates and was a fixed price, single step, open and competitive process. Respondents responded to the EOI with a proposal for how they will meet outcomes to create, sustain and deliver high quality and accessible district participation in grassroots programmes and activities now and into the future.

The core delivery areas included:

- increased confidence in fundraising and capability meeting funding targets
- clubs are governance ready (e.g. meeting legislative requirements in alignment with Charities Amendment Act 2023 and Incorporated Societies Act 2022) and compliant in child safeguarding, information sharing, privacy, code of conduct, and safer recruitment
- increased confidence in participation/membership and in retention and recruitment of volunteering
- sector advocacy and reporting.

The EOI set out a recommendation that respondents have commitment to Te Tiriti of Waitangi and working in genuine partnership with tangata whenua to achieve mutually beneficial outcomes.

The evaluation model was **simple score**. Price was not a weighted criterion, but any successful bidder was required to be within the \$161,200 funding envelope, pro-rata from the start of the contract until July 2027.

To express interest, respondents were required to meet the following pre-conditions:

- Have the required level of public liability insurance.
- Hold active charitable or incorporated societies status, or have first hand knowledge of the legislative requirements of the Charitable Trusts and Incorporated Societies.
- Sound knowledge of Child Safety Act

Alongside the pre-conditions, EOI submissions were considered along four delivery criteria, and four community criteria, these being:

Proposed Delivery Criteria	Weighting
Capability of the Respondent to deliver Governance and Compliance	18.75%
Capability of the Respondent to deliver Sport and Recreation Management	18.75%
Capacity of the Respondent to deliver fundraising and sponsorship strategies	18.75%
Capacity of the Respondent to deliver bespoke communications and engagement with local clubs, and recreation groups in the South Wairarapa	18.75%
Proposed Delivery criteria total	75%
Community Criteria	Weighting
Your location (proposed base of operations)	6.25%
The audience you will support and deliver outcomes for	6.25%
Your overall ability to deliver the suggested outcomes (proven experience/examples)	6.25%
Commitment to Te Titiriti O Waitangi through Kaupapa tuku iho	6.25%
Community criteria total	25%
Total weightings	100%

To ensure a fair and transparent process, all submissions were reviewed by a group of officers in two stages – independent scoring, followed by a panel review to ensure scoring was robust and consistent. A scoring sequence was developed from 0 to 5, which was then weighted appropriately on the criteria above.

Rating	Definition	Score
Excellent	Respondent demonstrates exceptional ability, understanding, experience and skills. The Registration identifies factors that will offer potential added value, with supporting evidence.	5
Good	Respondent demonstrates above average ability, understanding, experience and skills. The Registration identifies minor additional benefits, with supporting evidence.	4
Acceptable	Respondent demonstrates the ability to meet the criteria, with supporting evidence.	3
Minor reservations	Satisfies only a minimum of the criteria but not all. Reservations about the Respondent to adequately meet the criteria. Little supporting evidence.	2

Serious reservations	Extremely limited or no supporting evidence to meet the criteria. Minimum effort made to meet the criteria.	1
Unacceptable	Does not comply or meet the criteria at all. Insufficient information to demonstrate the criteria.	0

DISCUSSION

The EOI process went live on 14 July 2025 and closed on 18 August 2025. To raise awareness of the opportunity, SWDC launched a media release and contacted the wider sports and recreation network on 11 July, and followed this up with ongoing messaging in local newsletters and via social media.

The Council received three submissions through the EOI process – Greytown Sports and Leisure Society (GSL), Kia Hākinakina and Nuku Ora. All applicants met the required pre-conditions and provided the following documentation:

- Proof of Insurance
- Child Safeguarding Policy
- Governance Compliance Documentation

Nuku Ora and Kia Hākinakina provided trust deeds and confirmation of registration under the Charities Act 2005. GSL has confirmed its intention to update its constitution to comply with the Incorporated Societies Act 2022. In its current form, the constitution has a number of areas that require update to meet the Act's requirements and/or to enable broader delivery of service to meet the EOI's expectations.

All submissions were scored by three reviewers in line with the criteria set out in the EOI, and subsequently reviewed and discussed to ensure consistency of scoring. The outcome of the scores can be seen below:

Submitter	Delivery Criteria (75%)				Community Criteria (25%)				Score Total	Weighted Percent Total
	Governance	Management	Fundraising	Comms	Location	Audience	Ability	Kaupapa Māori	/40	/100
Greytown Sports and Leisure (GSL)	3	4	2	4	5	3	4	2	27	66.3%
Kia Hākinakina	4	4	2	5	4	4	4	5	32	77.5%
Nuku Ora	5	1	1	0	4	5	3	4	23	46.3%

Of these submissions, GSL and Kia Hākinakina sought to lead delivery of the full requirements, whilst Nuku Ora submitted its EOI focusing on delivery of the Governance capability – and instead would opt to support another lead agency to deliver other aspects. This is reflected in the lower scores for Nuku Ora in areas it would not take the lead in delivering themselves. Both GSL and Kia Hākinakina recognised the importance of working with Nuku Ora, particularly in the governance space, and this partnership working should be encouraged to maximise the benefit for the district.

Given Nuku Ora's submission, which acknowledged it would not lead work in three of the four delivery criteria areas, it is recommended that Nuku Ora is not appointed the lead agency to deliver the sports and recreation service for South Wairarapa, but should remain an important partner organisation for the lead agency to work with – particularly in the area of governance and compliance.

In summary, both GSL and Kia Hākinakina provided good examples of how they would meet the EOI requirements and deliver a sports and recreation service for South Wairarapa. GSL had particularly strong evidence of already delivering a similar service within a more localised setting, strong representation amongst sports clubs and very positive feedback from the clubs it worked with. Kia Hākinakina demonstrated strong existing relationships with regional and national strategies, initiatives and agencies, and provided information on how it would resource and scale up its operation, whilst reaching and engaging with a broad range of people, clubs and groups from across the district.

Both GSL and Hākinakina recognised the existing funding landscape was challenging, and more work is likely to be required in the fundraising space to support long-term sustainability.

Following the evaluation of the EOI submissions, it is recommended that the Council engage with Kia Hākinakina as the lead agency to deliver a sports and recreation service for South Wairarapa.

Further information on scoring and commentary can be found at Appendix 1.

COMPLIANCE SCHEDULE

Full consideration has been given to the provisions of the Local Government Act 2002 S77 in relation to decision making, in particular:

1. A Local authority must, in the course of the decision-making process,
 - a) Seek to identify all reasonably practicable options for the achievement of the objective of a decision; and
 - b) Assess the options in terms of their advantages and disadvantages; and
 - c) If any of the options identified under paragraph (a) involves a significant decision in relation to land or a body of water, take into account the relationship of Māori and their culture and traditions with their ancestral land, water sites, waahi tapu, valued flora and fauna and other taonga.
2. This section is subject to Section 79 - Compliance with procedures in relation to decisions.

Compliance requirement	Staff assessment
State the level of significance (high or low) of the issue or proposal as determined by the Council's Significance and Engagement Policy	This is a matter of low significance.
State the relevant Council policies (external or internal), legislation, and/or community outcomes (as stated in the	This report complies with n/a.

Long Term Plan) that relate to this decision.	
State the possible implications for Māori and how Māori have been provided with an opportunity to contribute to decision making if this decision is significant and relates to land and/or any body of water.	There are no implications for Māori.
Chief Financial Officer review	The Chief Financial Officer has not reviewed this report.
State the possible implications for health and safety	N/A

APPENDICES

- Appendix 1** Sports and Recreation Scoring Collated - *Public Excluded*
- Appendix 2** Sports and Recreation EOI Guidance Form
- Appendix 3** Sports and Recreation EOI Responder Form - Blank

Organisation	Delivery Criteria (75%)										Community Criteria (25%)										Total		
	Governance and Compliance	Comments	Sports and Rec Management	Comments	Funding/ Sponsorship Capability	Comments	Stakeholder Communications	Comments	Total	Location	Audience	Comments	Ability	Comments	Kaupapa Maori	Comments	Total	140	Percentage				
GSL	3	Applicant has experience in supporting local sports clubs with governance resources from reputable agencies, and has identified some key elements and activities to support clubs and groups towards compliance with the Incorporated Societies Act 2022. Applicant has significant existing local club relationships in Greytown. Applicant has identified the use of resources from sector expertise (Nuku Ora) which it largely uses to provide advice. Whilst the applicant organisation is currently a registered incorporated society, there remains risk with the Applicant's Constitution in its current form. The Constitution delegates Executive Officer as secretary and treasurer, without rights to vote, while Officer is responsible for reconciliations, transactions and banking of all Applicant's monies. Resource allocation for day to day operations and Applicant's own governance needs to balance with the ability to scale governance support to a number of clubs across the region by April 2026. Little supporting evidence that the Applicant has considered resourcing accordingly.	4	Applicant has significant proven experience supporting local grassroots clubs through a range of traditional sports management processes. Applicant has commendable advocacy approach on behalf of the community they have been delivering to. Applicant has established relationships with Greytown clubs and some wider district clubs. Some concerns for Applicant's ability to scale up delivery and meet needs of groups external to immediate locale (eg to two additional towns, rural and coastal), as well as ability to meet needs of priority groups.	2	Applicant has supported local grassroots clubs with traditional fundraising initiatives and references partnering or leading significant fundraising projects for sports and recreation facilities in its locale. Applicant has heavily relied on one component of funding and fundraising; eg grants. Applicant has limited evidence of attracting external funders (outside of district) and outside of district partnerships. Applicant provides no evidence of a funding strategy or district approach to funding. Additional due diligence recommended e.g. strategic plan, current profit and loss statement.	4	Applicant demonstrates significant experience in delivering a wide range of comms and engagement tailored to the sports and recreation community of Greytown locale, including groups of different ages. Applicant provides evidence of positive experiences and satisfaction from membership and member organisation. Evidence of supporting active recreation as well as sport. Some concern for Applicant's ability to scale up engagement and communication to wider district and priority groups.	13	5	3	Applicant provides insights into sports and recreation audiences and needs in current locale, including rangatahi and recreational groups. Applicant has established relationships with regional associations, local schools/colleges and Nuku Ora, which demonstrates commitment to engaging a wide range of ages and demographics. Applicant has provided limited evidence of communication and engagement with wider district, including towns outside its locale, rural and coastal.	4	Applicant has significant experience in sports and recreation management and holds a range of sports relationships in its locale as well as relationships to schools and college and some to wider district. However applicant has limitations on ability to deliver as current constitution is bound to the Greytown location. The constitution would need updating to allow their charitable purpose to cater to the wider South Wairarapa community which could slow delivery. Some concerns that applicant does not have required mechanisms and capacity to scale up delivery.	2	Applicant shows a genuine intention to engage with and build relationships with Maori ropu and kaupapa. Reservations that Applicant does not show examples of existing relationships or kaupapa Maori capability in the organisation.	14	27	66.25%				
Kia Hakinakina	4	Applicant is a charitable trust meeting the new legislative requirements of Charities Amendment Act 2023. Applicant has an active and visible Board and staff providing a range of strategic capability, sport and recreation, and play expertise. Applicant has detailed plans to allocate a specific resource to the delivery of Governance and Compliance to South Wairarapa clubs and groups. Applicant has considered the scope of the task and provides a sustainable approach to delivery and has identified intention to collaborate with sector expertise (Nuku Ora). Trust deed is in alignment with grant opportunity delivery criteria incl location, participation, equity, Te Tiriti o Waitangi.	4	Applicant demonstrates an adaptive approach to a changing landscape of sports and recreation management through niche programme delivery based on engagement and cross-organisational expertise. Applicant has provided a variety of case studies and measurable outcomes which include participant's voice and priority communities. Applicant has considered the scope of the task and provides sustainable and scalable approach of delivery, through a mix of dedicated staff resource, collaboration, and leaning on existing team and capability. Applicant plans to provide targeted programmes with added value to the community and district, incl coaching programmes and events. Some concern Applicant has less established relationships with local and traditional grass roots sports clubs.	2	Applicant provides good insights into the changing fundraising landscape and challenges. Applicant has a wide range of cross sector partnerships including external funders. Applicant demonstrates ability to create a business plan, but has provided no fundraising plan or strategic examples for the fundraising component. The entity was only established as a legal entity within the last three years; and there are therefore limited reports available on Charities Register. As a result there is limited understanding of Applicant's financial sustainability and history of fundraising practices. Additional due diligence is recommended including profit and loss statement or operational budget.	5	Applicant provides a variety of examples of communication and engagement across a number of channels including social media, website and newsletters that are regularly updated. Resources are accessible including case studies, programme development with participant's voice and storytelling with priority communities. Strategic documents, plans, including regional/national strategies and resources are accessible. Applicant shows a wide range of experience and relationship building across communities including schools and priority groups, active recreation and sports.	15	4	4	Applicant shows evidence of developing and delivering a variety of programmes that impact the spectrum of community, and priority groups, including ECE, Senior Citizens, Primary School, Kaiako support and programmes for Rangatahi. Applicant has the capacity to focus on the sport specific, through relationships, existing knowledge and significant resource within organisation.	4	Applicant shows evidence of good governance, adequate staff resource and scalability of services. Applicant has a range of relationships with community groups, schools/college, priority groups and active play and recreation. Applicant has some existing relationships with sports clubs, but will need to develop a number of sports specific relationships from the start.	5	Applicant shows commitment to honouring Te Tiriti o Waitangi and has organisation wide capability in working in partnership with Maori to develop programmes and activities reflecting kaupapa Maori. This is evidenced by the use of te reo Maori in strategic documents, to the application of hau ora kaupapa Maori framework to inform programme delivery and storytelling.	17	32	77.50%				
Nuku Ora	5	Applicant has proven experience and reputation in delivery of Governance and Compliance and has provided key steps to delivery with supporting evidence. As a regional agency the organisation has the capacity and capability to deliver outcomes. Other applicants reference Nuku Ora as expertise that they would work with to deliver Governance and Compliance. It is noted that Applicants' financial resource is predominantly spent in other Wellington towns with recorded underspend in South Wairarapa.	1	Applicant is seeking bid for governance and compliance specifically, and an intention to support (not lead) Sports and Recreation Management. Therefore this component has been scored at a baseline assumption based on potential ability. It is however noted that Applicant does have substantive expertise in working collaboratively across the region and delivering the appropriate support to bolster other applicants and partners' delivery.	1	Applicant is seeking bid for governance and compliance specifically, and an intention to support (not lead) Funding and Sponsorship. Therefore this component has been scored at a baseline assumption based on potential ability. It is however noted that the Applicant has historic and existing relationships with other Councils, Te Whatu Ora and Sport NZ, and substantive expertise in working collaboratively across the region and delivering the appropriate support to bolster other applicants and partners' delivery.	0	Applicant is seeking bid for governance and compliance specifically, and an intention to support (not lead) Stakeholder Communications. Therefore this component has been scored at a baseline assumption based on potential ability. It is however noted that Applicant does have substantive expertise in working collaboratively across the region and delivering the appropriate support to bolster other applicants and partners' delivery.	7	4	5	Applicant has detailed understanding of community needs including priority groups and demographics which is referred to in their documents.	3	Applicant intends to deliver for governance and compliance specifically. Therefore this component has been scored at a baseline assumption based on potential ability to deliver across multiple delivery areas.	4	Applicant shows commitment to honouring Te Tiriti o Waitangi and has proven capability in working in partnership, supporting participation and protecting taonga and values.	16	23	46.25%				



Call for Expressions of Interest (EOI)

by: **South Wairarapa District Council (Funder)**

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

EOI released:	14 July 2025
Deadline for Questions:	5:00 pm 11 August 2025
Deadline for Applications:	5:00 pm 18 August 2025

SWDC

<https://swdc.govt.nz/>

19 Kitchener Street, Martinborough 5711, New Zealand

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Call for Expressions of Interest

The opportunity

This EOI is issued by SWDC, referred to below as “the Funder” or “we” or “us”.

What we need

SWDC is seeking EOI's for a **Grant Proposal - South Wairarapa Sports and Recreation Delivery: Service Provider**. Your delivery proposal should enable sports clubs and recreational groups/rōpu to respond to changes in participation, volunteer and funding trends. The delivery of the shared services function will create, sustain and deliver high quality and accessible district participation in grassroots programmes and activities now and into the future. The opportunity has arisen for a suitable agency, community organisation, business or individual to develop and provide a fit for purpose, adaptive and innovative shared services suite that:

- Leads the delivery of a South Wairarapa Sports and Recreation Strategic Work Plan, focused on membership growth, participation pathways, long term sustainable funding, and governance.
- Develops and maintains close collaboration with a governance/oversight group representing the membership of sports and recreational community in South Wairarapa.
- Enables confidence in day-to-day operations, financial management, and resource planning, providing advice to grassroots clubs and community.
- Acts as the primary contact of Sport and Recreation in South Wairarapa, engaging with relevant regional associations, clubs, Sport New Zealand, government agencies, sponsors, and community partners.
- Drives strategic communications, community engagement and is confident in relationship management.
- Supports the delivery of high-quality governance advice, reports, and documentation, training provided by Nuku Ora.

What we don't want

Proposals from applicants that:

- promotes elite sports and recreation in favour of social active recreation and sport participation.
- centralises provision of service delivery to one town, one code, or single demographic.
- proposes a scope that is not sustainable to maintain for the district, available funding and timeframe.

What's important to us?

- You know the South Wairarapa sports and recreation sector and can work with many different codes, groups and club structures.
- You have a proven track record of inclusive, innovative and sustainable service or programme delivery.
- You hold a commitment to Te Tiriti of Waitangi and working in genuine partnership with tangata whenua to achieve mutually beneficial outcomes.
- You are accountable to the outcomes of the contract, providing best value for ratepayers and local community.

To express interest, you must meet the following grants conditions prior to release of funds:

- You have the required level of public liability insurance.
- You hold a Child Safeguarding policy or similar.
- You hold active charitable trust; or incorporated societies status; or hold a sound knowledge of the Acts associated with these.

*Other conditions may be included in your Grants Agreement and Outcome letter

Why should you register your interest?

This is an opportunity to be awarded a multiyear (2 year) grant to grow awareness of sports, recreation activities, outcomes and capability in the South Wairarapa and across the wider Wellington region.

You will want to contribute to your existing strategic objectives and/or expand, enhance or align with your existing services and relationships in the South Wairarapa sports and recreation space.

You will want to enhance the power of sports and recreation as a vehicle for participation, inclusion, opportunity, belonging for all members of community.

You will want to increase capability and confidence in economic development opportunities connected to sports and recreation in South Wairarapa.

A bit about us

Tangata ako ana i te kāenga, te tūrangā ki te marae, tau ana.

A person nurtured in the community contributes strongly to society.

SWDC is a local government authority responsible for the management and development of the South Wairarapa region. We are committed to creating a thriving, sustainable and resilient community through manaakitanga and kaitiakitanga to enhance the quality of life for our residents. Our partnership with mana whenua is important to us, enabling effective participation and shared decision making.

Sports and recreation have a special place in the hearts of the South Wairarapa community, across the three towns of Featherston, Greytown and Martinborough, and our rural and coastal communities. The significant number of sports clubs and groups/rōpu illustrate the community's long history, expertise and shared interest in organising themselves to build relationships, capability and invest in their communities through sports and recreation.

1.Key Information

Context

We are seeking EOI's as an invitation to submit a **Grant Proposal - South Wairarapa Sports and Recreation Delivery: Service Provider**.

This EOI is a single step application process. Following evaluation, the successful Applicant/s will be awarded a multi-year (2 year) Grant Contract. Should no Applicant meet the criteria SWDC reserves the right to not award the Grant.

Our timeline

Here is our timeline for this EOI (all are New Zealand times and dates):

Deadline for Questions from Applicant	5:00pm 11 August 2025
Deadline for Funder to answer questions	5:00pm 14 August 2025
Deadline for Receiving Applications	5:00pm 18 August 2025
Successful Applicant notified	5:00pm 28 August 2025
Unsuccessful Applicant(s) notified	5:00pm 28 August 2025
Expected start date of Grant Contract	September 2025

How to contact us

Name: Siv Fjaerestad

Title/role: Lead Advisor, Community Development

Email address: grants@swdc.govt.nz

Developing and submitting your EOI Application

- a. Take time to read and understand the EOI.
- b. Take time to understand our Requirements. These are in Section 2 of this document.
- c. Take time to understand how your application will be evaluated. See Section 3 of this document.
- d. If you have questions, ask our contact before the deadline for questions see Section 1.
- e. Use the application form to submit your application.
- f. Complete and sign the declaration at the end of the application form.
- g. Check you have provided all the necessary information in the correct format and order.
- h. Submit your application before the deadline for EOI applications by email to grants@swdc.govt.nz

Address for submitting your application

Submit your application to the following address: grants@swdc.govt.nz. We will not accept applications sent by post or delivered to our office.

Our EOI Terms

By submitting an application, the applicant agrees to the EOI Terms described in Section 4.

Later changes to the EOI or EOI process

After publishing the EOI, if we need to change anything or provide additional information, we will let all Applicants know via the email provided.

Defined terms

You can find all definitions at the back of the EOI Terms in Section 4.

2. Our Requirements

Background

SWDC is aware that sports clubs, recreational groups/rōpu and schools in the South Wairarapa Sports and Recreation sector are facing significant and complex challenges. This EOI welcomes proposals from individuals, entities and organisations that enable sports clubs and recreational groups/rōpu to respond to changes in participation, volunteer and funding trends; and to create, sustain and deliver high quality grassroots programmes and activities now and into the future.

Key outcomes

This EOI relates to the proposal of a fit for purpose adaptive and innovative shared services suite to enable organisations, sports clubs and groups/rōpu to respond to changes in participation, volunteer and funding trends. More specifically the applicant would meet and deliver solutions and services that provide clubs, groups and participants with the below client and sector specific outcomes as listed below:

- Increased participation/membership in sports clubs and recreational groups;

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- Clubs and groups/rōpu are governance ready/meeting legislative requirements by March 2026;
- Increased confidence in meeting funding targets, sponsorship opportunities and are financially sustainable;
- Increased diversity and community representation in clubs and groups/rōpu;
- Clubs have higher level of confidence in their volunteer numbers (increase of volunteers).

Broader Outcomes include:

- equitable district wide participation in sports and recreation;
- Increased community connection and social cohesion;
- Clubs and groups/rōpu are reflective of the Local Government Area; and
- Increased understanding of clubs, groups/rōpu and community needs, including rangatahi/youth and older people, Māori and Pasifika and whaikaha/living with disability, relative to mandates from funders, access, usage and income generation and economies of scale.

These relate to SWDC's four community outcomes:

- Social Wellbeing – Residents are active, healthy, safe, resilient, optimistic and connected
- Cultural Wellbeing – Strong relationships with whānau, hāpu and marae, celebrating diverse cultural identity, arts and heritage
- Economic Wellbeing – A place of destination, new business and diverse employment that gives people independence and opportunity
- Environmental Wellbeing – Sustainable living, safe and secure water and soils, waste minimisation, biodiversity enhanced

Grant term

We expect the grants agreement to commence between September to October 2025. The anticipated term and options to extend are:

Grant term	Duration
Initial Term	2 years, from 1 July 2025
Options for extending and/or additional funding	Review at 2027-37 LTP

Grant value

We estimate the value of this Grant Contract to be \$80,600 per annum plus GST for the initial term of 2 years, July 2025-June 2027, with a total value of up to \$161,200. This amount will be pro-rata in relation to the formal commencement of the grant contract.

Key deliverables and milestones

Description	Indicative date for delivery
Stand up of shared services function, incl place of work, equipment required, processes, communication, resources and budget.	31 October 2025
Communication with clubs and groups / rōpu, schools and college, sector stakeholders to socialise the purpose of the shared services, capability and resources on offer, a timeline of delivery, terms for registering and benefiting from the services, terms of reference for membership	3 November 2025
Needs assessment identify what clubs/groups/rōpu have highest need for support	15 November 2025

Description	Indicative date for delivery
Oversight/Governance is established and stood up	1 December 2025
Governance ready resources / training delivered to x number of clubs and groups/rōpu	8 December 2025 – 31 March 2026
X number of Featherston clubs and groups / Greytown clubs and groups / Martinborough clubs and groups / rural clubs and groups are registered	1 January - 31 June 2026
X number of Featherston clubs and groups / Greytown clubs and groups / Martinborough clubs and groups / rural clubs and groups are supported to build financial capability	1 April – 30 September 2026
Needs assessment / annual survey to clubs and groups to identify needs and opportunities and track progress/targets. Alignment with Voices of Rangatahi	1 April – 15 May 2026
First year impact report with baseline metrics; review and any adjustments to 2026-27 outcomes	1 July 2026
X number of Featherston clubs and groups / Greytown clubs and groups / Martinborough clubs and groups / rural clubs and groups are accessing volunteer capability resources (examples: H&S, Child Protection Policy, Volunteering Policy)	1 July 2026 – 31 December 2026
Phase 2: X number of Featherston clubs and groups / Greytown clubs and groups / Martinborough clubs and groups / rural clubs and groups are supported to build financial capability	1 November 2026 - 31 March 2027
Needs assessment / annual survey to clubs and groups to identify needs and opportunities and track progress/targets. Alignment with Voices of Rangatahi	1 April – 15 May 2027
Second year impact report with baseline metrics; review and any adjustments to 27-28 outcomes	1 July 2026
Quarterly Reporting to SWDC (incl baseline metrics)	Quarterly from 1 December 2025 onwards
6 weekly meetings with Oversight / Governance Group	6 weekly from 1 December 2025
Quarterly Club Forums in each ward	Quarterly

Delivery locations

We anticipate the applicant will need to deliver for these communities:

Location	What is being delivered here?
South Wairarapa district sports clubs and recreational groups/rōpu operating in respective sports grounds; including	Activities across a number of codes supporting accessible and inclusive sports and recreation participation. Clubs and groups/rōpu have access to building capability and capacity to deliver effective grass roots programmes.

Location	What is being delivered here?
Clubs, groups and activities taking place in Featherston	
Clubs, groups and activities taking place in Greytown	
Clubs, groups and activities taking place in Martinborough	
Clubs, groups and activities taking place in rural / coastal communities	
Activities taking places at South Wairarapa schools and colleges	

3. Our Evaluation Approach

Simple score, price not weighted: SWDC Scoring Matrix

The evaluation model is a simple score. Price is not a weighted criterion – but must not exceed the total value of the contract. Applicants that are capable of full delivery on time will be ranked based on an overall assessment of best value-for-money over the whole life of the Grant Contract.

Overall assessment:

- All applicants that meet the pre-conditions are evaluated using the evaluation model. Scores will assist in deciding the successful applicant(s), but ultimately the decision will be based on which applicant(s) we consider will provide the best overall public value.

A scoring matrix will be utilised to support the assessment of individuals and/or organisations expressing their interest in being the Service Provider - South Wairarapa Sports and Recreation Shared Services.

Our thematic priorities for assessment that align with one or more of the deliverables on pages 8 and 9 are:

- Governance, Compliance and Capability
- Sports and Recreation Management
- Funding and Sponsorships Experience
- Communication and Engagement Experience

It is important that you meet or can prove you will meet our pre-conditions, you can include supporting documents as evidence. As part of the EOI process, SWDC will contact you and ask questions as necessary on the pre-conditions to ensure they are met.

Evaluation criteria

We will evaluate Applicants on the following criteria and weightings below.

Proposed Delivery Criteria	Weighting
Capability of the Applicant to deliver Governance and Compliance	18.75%
Capability of the Applicant to deliver Sport and Recreation Management	18.75%
Capacity of the Applicant to deliver fundraising and sponsorship strategies	18.75%
Capacity of the Applicant to deliver bespoke communications and engagement with local clubs, and recreation groups in the South Wairarapa	18.75%
Proposed Delivery criteria total	75%
Community Criteria	Weighting
Your location (proposed base of operations)	6.25%
The audience you will support and deliver outcomes for	6.25%
Your overall ability to deliver the suggested outcomes (proven experience/examples)	6.25%
Commitment to Te Titiriti O Waitangi through Kaupapa tuku iho	6.25%
Community criteria total	25%
Total weightings	100%

Scoring

Criteria Scoring:

For the Proposed Delivery Criteria, submissions will be evaluated using the below scoring 0-5 table.

Evaluation model

Rating	Definition	Score
Excellent	Applicant demonstrates exceptional ability, understanding, experience and skills. The Application identifies factors that will offer potential added value, with supporting evidence.	5
Good	Applicant demonstrates above average ability, understanding, experience and skills. The Application identifies minor additional benefits, with supporting evidence.	4
Acceptable	Applicant demonstrates the ability to meet the criteria, with supporting evidence.	3

Minor reservations	Satisfies only a minimum of the criteria but not all. Reservations about the Applicant to adequately meet the criteria. Little supporting evidence.	2
Serious reservations	Extremely limited or no supporting evidence to meet the criteria. Minimum effort made to meet the criteria.	1
Unacceptable	Does not comply or meet the criteria at all. Insufficient information to demonstrate the criteria.	0

To meet the needs addressed by our communities, the Community Criteria seeks alignment with what is important to us on page 4. These will also be scored on a 0-5 basis, with details of the scale for each criteria shown below:

- Your location (proposed base of operations)
- The audience you will support and deliver outcomes for
- Your overall ability to deliver the suggested outcomes
- and your commitment to Te Titiriri O Waitangi through Kaupapa tuku iho

Examples of these values may include:

- Whanaungatanga: Building and maintaining relationships.
- Manaakitanga: Sharing, hosting and being generous.
- Aroha: Love and respect.
- Mana: Power, dignity and respect.

Locale:

0	Overseas
1	New Zealand
2	North Island
3	Greater Wellington Region/Tararua
4	Masterton and Carterton
5	South Wairarapa District

Audience:

0	Undefined
1	One age group or one ethnicity
2	More than one age group, more than one ethnicity
3	Multiple age groups, multiple ethnicities
4	Priority communities (accessible, female, Māori)
5	Multiple age groups, ethnicities and priority communities

Ability (proven/examples of delivery):

0	No confidence in ability to deliver
----------	-------------------------------------

1	Unlikely to deliver
2	Likely to deliver a component of project with additional support
3	Highly like to deliver a component of project
4	Confident will deliver multiple components
5	Confident will deliver multiple components, value for money

Kaupapa Māori:

0	No Kaupapa Māori value considerations
1	No Kaupapa Māori value considerations but open to incorporating
2	Limited Kaupapa tuku iho
3	Is collaborating with someone who can share Kaupapa tuku iho
4	Does have Kaupapa tuku iho as an organisation
5	Kaupapa Māori values are clearly interwoven in organisation and work

4. Definitions

In relation to the EOI the following words and expressions have the meanings described below.

Service Provider	The purpose of many funding arrangements is to deliver a service, the Service Provider will apply as an applicant to deliver the Requirements set in the EOI
Business Day	Any weekday in New Zealand, excluding Saturdays, Sundays, New Zealand (national) public holidays and all days from Boxing Day up to and including the day after New Year's Day.
Funder	The government agency (SWDC) that has issued the EOI with the intent of funding an organisation and/or individual proposing to deliver the services described in the Requirements.
Competitors	Any other business that is in competition with a Applicant either in relation to the goods or services sought under the EOI or in general.
Confidential Information	Confidential Information of a party (Provider) means information acquired by the other party (Recipient) from the Provider in connection with the EOI process, where that information: <ul style="list-style-type: none"> a) is by its nature confidential b) is marked at the time of disclosure to the Recipient as 'confidential', 'in confidence', 'restricted', 'sensitive', 'secret' or 'top secret', and/or c) the Recipient knows, or ought to know, is confidential to the Provider or a third party who supplied it to the Provider.

	However, this does not include information that is publicly available through no fault of the Recipient, or that the Recipient acquired entirely independently of the Provider.
Conflict of Interest	<p>A Conflict of Interest arises if personal or business interests, relationships or obligations of the Applicant or any of its personnel do, could, or could be perceived to:</p> <ul style="list-style-type: none"> a) conflict with the Applicant's obligations to the Funder under the EOI or in the provision of the goods or services, and/or b) call into question the independence, objectivity or impartiality of any person involved in the EOI process on behalf of the Funder. <p>A Conflict of Interest may be:</p> <ul style="list-style-type: none"> c) actual: where the conflict currently exists d) potential: where the conflict is about to happen or could happen, or e) perceived: where other people may reasonably think that a person is compromised.
Grant Contract	Any written Grant Contract entered into by the Funder and a Successful Applicant for the delivery of the Requirements.
Contract Award Notice	A notice which a Funder will publish online.
Deadline for Answers	The deadline for the Funder to respond to questions submitted by a Applicant stated in Section 1.2 of the EOI.
Deadline for Applications	The deadline for delivering or submitting Applications to the Funder as stated in Section 1 of the EOI.
Deadline for Questions	The deadline for submitting questions to the Funder as stated in Section 1 of the EOI.
Evaluation Approach	The approach used by the Funder to evaluate Applications as described in Section 3 of the EOI.
Intellectual Property	All industrial and intellectual property rights whether conferred by statute, at common law or in equity, including (but not limited to) copyright, trademarks, designs and patents.
Local Supplier	Generally defined as a business that is physically located or established within a specific region or community, providing goods or services to that area.
Point of Contact	The Funder and each Applicant are required to appoint a Point of Contact. This is the channel to be used for all communications during the EOI process. The Funder's Point of

	Contact is identified in Section 1 of the EOI. The Applicant's Point of Contact is identified in its Application.
Expression of Interest	A formal request by a Funder asking potential Applicants to register their interest in procurement.
Call for Applications (EOI)	The EOI comprises the Call for Applications of Interest, the EOI document (including the EOI-Terms) and any other schedule, appendix or document attached to the EOI, and any subsequent information provided by the Funder to Applicants through the Funder's Point of Contact.
Requirements	The Funder's requirements for goods and/or services as described in Section 2 of the EOI
Applicant	A person, company or organisation that submits a Application in response to the EOI. The term Applicant includes each member of any consortium.
EOI Response Form	The form and declaration prescribed by the Funder and used by a Applicant to respond to the EOI, duly completed and submitted by a Applicant as part of the Application.
EOI Terms	Means the EOI Terms as set out in Section 4 of the EOI, together with any additions or amendments to those EOI Terms specifically identified in Section 1 of the EOI.
Successful Applicant	Following the evaluation of Applications and successful negotiations, any Applicant who is awarded a Contract to deliver all or part of the Requirements.

5. EOI Terms

Preparing and submitting the Registration

5.1. Preparing an application

- a) The applicant must:
 - i. read the complete EOI and any additional information provided and referred to by the Funder
 - ii. apply using the application form provided and include all information the Funder requests
 - iii. consider the risks and contingencies relating to the delivery of the EOI requirements and outline how it will manage those risks and contingencies
 - iv. include any assumptions, dependencies and/or qualifications in the application, including anything that may limit its obligations or increase its quoted pricing or cost estimates
 - v. Advise if it is GST registered, and if so quote prices in NZ\$, exclusive of GST (if not registered, quote in NZ\$, inclusive of GST).
 - vi. (If necessary) obtain independent advice before applying
 - vii. make sure the application is correct, and the application pricing is sustainable, e.g. covers the whole life of the grant contract, not just the initial term
- b) By applying, completing the application form and signing the declaration, the applicant accepts the EOI Terms.

5.2. Applicant questions

- a) The applicant must make sure they understand the EOI.
- b) If the applicant has any questions or needs clarification, they:
 - i. must submit questions before the Deadline for Questions (Section 1 of the EOI)
 - ii. must clearly indicate any commercially sensitive information in their questions
 - iii. may withdraw their questions at any time.
- c) When the funder receives questions before the Deadline for Questions
 - i. The funder will respond on or before the Deadline for Answers.
 - ii. The funder may provide details of both the questions and the answers to other applicants. In these circumstances the funder will summarise the questions and will not disclose the applicant's identity.
 - iii. Unless stated otherwise in the EOI, the funder will post both the questions and answers by email to the contact.
 - iv. The funder will not publish the applicant's commercially sensitive information. However, if the funder considers the information to be significant for all applicants, the funder may modify the question and publish both this and the answer. In that case the funder will first give the applicant the opportunity to withdraw the question or remove any of their own commercially sensitive information.

5.3. Submitting an application

- a) The applicant must ensure the funder receives the application at the correct address on or before the deadline for applications.
- b) After the deadline, the funder will acknowledge receipt of the application.
- c) The applicant must ensure that all information they provide to the funder:

- i. is true, accurate and complete;
 - ii. is not misleading in any material respect;
 - iii. does not contain material that infringes a third party's intellectual property rights; and
 - iv. is identical, if they supply both hard and soft copy Applications.
- d) The Funder may rely on the Registration and all information provided by the applicant during the EOI process (e.g. correspondence and negotiates).

Assessing Applications

5.4. Evaluation panel

The Funder will nominate a panel to consider the applications. The funder may have different panel members for considering different aspects of the application. The funder may include independent advisors as panel members to consider some or all aspects of the application. Following internal scoring, a recommendation will be put to Councillors for decision and award of contract.

5.5. Third party information

- a) The Funder may request information from a third party where the Funder considers the information may be relevant to the EOI process, excluding commercially sensitive information about pricing or contract terms.
- b) If this occurs, the Applicant:
- i. authorises the Funder to collect that information from the relevant third party (e.g. a referee or client), and authorises the third party to release it to the Funder
 - ii. agrees the Funder may use that information in its evaluation of the Application
 - iii. must ensure that all referees listed in the Application agree to provide a reference.

5.6. Clarification of application

- a) The funder may ask the applicant for more information or clarification on the application at any time during the EOI process, as well as additional information about any aspect of its EOI.
- b) The Funder need not ask all applicants for the same clarification.
- c) The Applicant agrees to provide the information or clarification as soon as possible, in the format requested by the Funder.
- d) If the applicant does not provide adequate information or clarification within a reasonable time (as determined by the Funder), the Funder may remove the application from its evaluation process.

5.7. Evaluation Process

- a) The Funder will base its evaluation on the proposals submitted in response to the EOI. The Funder may adjust its evaluation of a Proposal following consideration of any clarification or additional information as described in paragraphs 5.5 and 5.6 and any referee checks.
- b) The Funder will initially evaluate the Application based on the Applicant's submitted EOI Response Form. This will be done in two stages, with individual scoring, followed by a panel review.
- c) The Funder may adjust its evaluation after considering additional information or clarification, as described in Sections 5.5 and 5.6 above. Following internal scoring, a recommendation will be put to Councillors for decision and award of contract.

5.8. Notification of grant outcome

During the 30 Business Days after the Grant Contract has been signed, the Funder:

- a) will let all unsuccessful Applicants know the name of the Successful Applicants, if any;
- b) may make public the name and address of the Successful Applicants (if any) and any unsuccessful Applicants;
- c) will publish a Grant Contract Award Notice on swdc.govt.nz, SWDC social media page or in local newspapers where applicable, available to view by the public. The Applicant may request that the Funder withhold its address from the Grant Contract Award Notice for privacy reasons. The Funder may withhold the Applicant's address from the Grant Contract Award Notice in a manner consistent with the Privacy Act 2020.

5.9. Issues and complaints

- a) The Applicant may, in good faith, raise with the Funder any issue or complaint about the EOI or EOI process at any time.
- b) When this occurs:
 - i. the Funder will consider and respond promptly and impartially to the Applicant's issue or complaint
 - ii. both the Applicant and the Funder must do their best to resolve the issue or complaint
 - iii. the Funder must not allow the issue or complaint to prejudice the Applicant's participation in the EOI process, or limit or affect the Applicant's future grants opportunities.

Standard EOI conditions

5.10. Funder's Point of Contact

- a) The Applicant must direct all EOI enquiries to the Funder's Point of Contact in Section 1 of the EOI.
- b) The Applicant must not approach any other employee or other representative of the Funder, directly or indirectly, for information on any aspect of the EOI.
- c) Only the Point of Contact, or a person authorised by the Funder, may communicate with the Applicant on any aspect of the EOI. The Funder will not be bound by any statement made by any other person.
- d) The Funder may change its Point of Contact at any time. The Funder will notify the Applicant of any change by email.
- e) If the Applicant has an existing contract with the Funder, the Applicant must not use its business-as-usual communications to contact the Funder regarding the EOI.

5.11. Conflict of Interest

- a) The Applicant must complete the conflict of interest declaration in the EOI application form. If a joint Application is being submitted, each party must complete the conflict of interest declaration separately.
- b) If a conflict of interest arises during the EOI process, the Applicant must inform the Funder immediately.
- c) The Funder may exclude an Applicant from the EOI process if a material Conflict of Interest arises.

5.12. Ethics

- a) The Applicant must not attempt to influence, reward or benefit any representative of the Funder, nor offer any form of personal inducement, in relation to the EOI or the EOI process.
- b) The Funder may exclude the Applicant from the EOI process for a breach of paragraph 5.15a.

- c) To maintain a fair and ethical EOI process, the Funder may require additional declarations or other evidence from the Applicant, or any other person, at any time.

5.13. Anti-collusion and bid rigging

- a) By submitting the Application, the Applicant warrants that:
 - i. the Application has not been prepared in collusion with a Competitor
 - ii. it will not engage in deceptive or improper conduct during the EOI process.
- b) The Funder may exclude the Applicant from the EOI process if a breach of these warranties occurs.
- c) The Funder reserves the right to report suspected collusion or anti-competitive behaviour to the appropriate authority, and to give that authority all relevant information, including the Application.

5.14. Confidential Information

- a) Without limiting any other confidentiality agreement between them, the Funder and the Applicant will both take reasonable steps to protect the other party's Confidential Information.
- b) Except as permitted by the other provisions of this Section 5.14, neither party will disclose the other party's Confidential Information to a third party without that other party's prior written consent.
- c) Each party may each disclose the other party's Confidential Information to anyone who is directly involved in the EOI process on that party's behalf, but only for the purpose of participating in the EOI. This could include (but is not limited to) officers, employees, consultants, contractors, professional advisors, evaluation panel members, partners, principals or directors. Where this occurs, the disclosing party must take reasonable steps to ensure the third party does not disclose the information to anyone else, and does not use the information for any purpose other than participating in the EOI process
- d) The Applicant acknowledges that the Funder's confidentiality obligations are subject to requirements imposed by the Official Information Act 1982 (OIA), the Privacy Act 2020, parliamentary and constitutional convention, and any other obligations imposed by law. Where the Funder receives an OIA request that relates to a Applicant's Confidential Information, the Funder will consult with the Applicant and may ask the Applicant to explain why the information is considered by the Applicant to be confidential or commercially sensitive.
- e) The Applicant may disclose the Funder's Confidential Information to the extent strictly necessary to comply with law or the rules of any stock exchange on which the securities of the Applicant or any related entity are currently listed. Unless prohibited by law, the Applicant must consult with the Funder before making such a disclosure.
- f) The Funder will not be in breach of its obligations if it discloses Confidential Information to the appropriate authority because of suspected collusive or anti-competitive tendering behaviour.

5.15. Costs of participating in the EOI process

- a) Except as otherwise stated in the EOI, the Applicant must meet their own costs associated with the preconditions, preparation, presentation and negotiation of the application.

5.16. Limited rights and obligations

- a) Except as stated otherwise in this Section 4.18, nothing in the EOI, these EOI Terms or the EOI process creates a contract or any other legal relationship between the Funder and Applicant, unless and until they enter into a Grant Contract.
- b) The following are binding on the Applicant:
 - i. The Applicant's signed declaration (contained in the EOI Application Form).

- ii. The Applicant's obligations under paragraphs 4.3c and 4.3d. Nothing in this Section 5.16 takes away from any rights or remedies the Funder may have in relation to the Applicant's statements, representations or warranties in the Application or in correspondence or negotiations with the Funder.
- iii. The standard EOI conditions in Sections 5.10 to 5.21.
- a) Section 5.14 are binding on the Funder.
- b) All terms and other obligations that are binding on the Funder.

5.17. Exclusion from the EOI process

- a) The Funder may exclude the Applicant from the EOI process if the Applicant:
 - i. has not provided requested information in the correct format
 - ii. has breached the EOI-Terms and the Funder considers the impact of the breach is more than trivial (this applies whether or not the provision in question is itself legally binding on the Recipient)
 - iii. included a material error, omission or inaccuracy in the Application
 - iv. is in bankruptcy, receivership or liquidation
 - iv. has made a false declaration
 - vi. has a conviction for a serious crime or offence
 - vii. has failed to pay taxes, duties or other levies
 - v. represents a threat to national security or to confidentiality of government information, and/or
 - vi. is a person or organisation designated as a terrorist by New Zealand Police.
- b) The Funder may exclude the Applicant from the EOI process if:
 - i. there was a serious performance issue in a previous, or current, contract delivered by the Applicant
 - ii. the Funder considers the integrity of the Applicant is in doubt due to the Applicant's professional misconduct or an act, and/or
 - iii. the Funder becomes aware of any other matter that materially diminishes the Funder's trust in the Applicant.

5.18. Funder's additional rights

- a) Changes to the EOI
 - i. The Funder may amend, suspend, cancel or re-issue the EOI, or any part of it, so long as it notifies the Applicant.
 - ii. The Funder may change material aspects of the EOI, such as the timeline, Requirements or Evaluation Approach, provided it gives the Applicant time to respond to update its Application in relation to the changes.
- b) Timeline
 - i. The Funder may accept a late Application if it is the Funder's fault it is late, or if the Funder considers there is no material prejudice to other Applicants in accepting a late Application.
 - ii. The Funder may answer a question submitted after the Deadline for Questions and notify all Applicants about the submission of the question and the answer.
- c) The Application
 - i. The Funder may accept or reject any Application, or part of a Application. This includes any noncompliant, non-conforming or alternative Application.

- ii. The Funder may decide not to accept the lowest price conforming Application, unless stated otherwise in the Evaluation Approach.

d) EOI Process

- i. The Funder may liaise or negotiate with any Applicant without informing, or doing the same, with any other Applicant.
- ii. The Funder may provide Applicants with information arising from questions about the EOI.
- iii. The Funder may withhold information arising from questions about the EOI. This may be the case if the information is unnecessary, is commercially sensitive, is inappropriate to supply at the time of the request or cannot be released for legal reasons.
- iv. The Funder may waive requirements or irregularities around the EOI process if the Funder considers it appropriate or reasonable to do so.
- v. The Funder may decide not to shortlist any Applicant.

e) Consortia and unbundling

The Funder may make its selection conditional on the Applicant agreeing to:

- i. the Funder selecting the Applicant to deliver the Requirements as a joint venture or consortium with another Applicant selected by the Funder, and/or
- ii. the Funder selecting individual elements of the Application that can be delivered separately, unless the Application specifically states that the Application, or the relevant elements, must be taken collectively.

5.19. New Zealand law

- a) The laws of New Zealand govern the EOI. Each Applicant agrees New Zealand courts have non-exclusive jurisdiction to rule in any dispute concerning the EOI or the EOI process. The Applicant agrees that it cannot bring any claim in relation to the EOI except in a New Zealand court.
- b) The parties acknowledge that this Agreement is entered into in accordance with the laws and regulations in effect as of the Effective Date. Should any applicable law or regulation directive be enacted, amended, or repealed after the Effective Date, and such change materially affects the obligations or rights of either party under this Agreement.
- c) The parties agree to amend the Agreement as necessary to ensure compliance with the most current legal requirements. Any such amendment shall be made in good faith and with the intent to preserve the original intent and balance of the Agreement to the extent possible.

5.20. Disclaimer

- a) Nothing contained or implied in the EOI, or EOI process, or any other communication by the Funder to the Applicant is to be construed as legal, financial or other advice.
- b) The Funder will endeavour to provide accurate information in any communication, but the Applicant accepts this information is not independently verified and may not be up-to-date.
- c) The Funder will not be liable in contract, tort, equity, or in any other way for any direct or indirect damage, loss or cost incurred by the Applicant or any other person in respect of the EOI process, whether as a result of the Funder exercising its rights under Section 4.20 the Funder's negligence or breach of these EOI Terms, the Funder failing to select the Applicant as the Successful Applicant, or any other cause.
- d) To the extent that liability cannot be excluded, the maximum aggregate liability of the Funder, its agents and advisors in connection with the EOI process, to all Applicants combined, is NZ\$5,000 or (if

known and greater than \$5,000) 5% of the estimated value of the proposed Contract as determined by the Funder prior to the release of the EOI.

- e) The limitations and exclusions in paragraphs c and above do not apply to any liability the Funder may have for breach of confidentiality or infringement of the Applicant's intellectual property rights.

5.21. Precedence

- a) Any conflict or inconsistency in the EOI shall be resolved by giving precedence in the following descending order:
 - i. Section 1 of the EOI
 - ii. these EOI-Terms
 - iii. all other Sections of the EOI document
 - iv. any additional information or document provided by the Funder to Applicants through the Funder's Point of Contact
- b) If there is any conflict or inconsistency between information or documents having the same level of precedence the more recent information or document will prevail.

Released

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.
2. 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.
3. 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.
4. 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.
5. 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.	<input type="checkbox"/>
2. Remove all the purple 'Provider Tip' boxes from this Form.	<input type="checkbox"/>
3. Delete the PURPLE instructions from this Form.	<input type="checkbox"/>
4. Un-shade the BLUE highlighting where you fill out your answer.	<input type="checkbox"/>
5. Arrange for the declaration to be signed. If this is a joint or consortium Application make sure all the consortium members sign separate declarations.	<input type="checkbox"/>
6. Prepare your Application We prefer that you submit you send a digital copy of your application by email to tender@swdc.govt.nz	<input type="checkbox"/>
7. Arrange for the Application to be submitted by email before the Deadline for Applications.	<input type="checkbox"/>

[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]

SECTION 1: About the Applicant

1.1 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]

1.2 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]

SECTION 2: Application to the Requirements

APPLICANT TIP

- 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.

2.1 Pre-conditions

APPLICANT TIP

- 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

2.2 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

- 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]

2.3 Application to evaluation criteria



APPLICANT TIP

- 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%
<p>[insert answer here - Describe your/your organisations capability for delivery of Governance or Compliance support/services. Give examples if possible.]</p>	
Capability of the Applicant to deliver Sport and Recreation Management	18.75%
<p>[insert answer here - Describe your/your organisations experience and capacity in delivering any similar services. Give examples if possible.]</p>	

Capacity of the Applicant to deliver fundraising and sponsorship strategies	18.75%
<p>[insert answer here – Explain how you will deliver fundraising and sponsorship strategies and where appropriate give examples]</p>	
Capacity of the Applicant to deliver bespoke communications and engagement with local clubs, and recreation groups in the South Wairarapa	18.75%
<p>[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.]</p>	

Expression of Interest Application Form

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 <input type="text" value="insert answer here"/>	

Expression of Interest Application Form

Your overall ability to deliver the suggested outcomes (proven experience/examples)		6.25%
<p>Please detail your ability to deliver your proposed solution/approach with delivery example(s) of similar type services that align with your proposal.</p> <p>[insert answer here]</p>		
Commitment to Te Titiriki O Waitangi through Kaupapa tuku iho		6.25%
<p>Please provide example(s) of how you share a commitment to Te Tiriti o Waitangi through values like manaakitanga and kaitiakitanga.</p> <p>[insert answer here]</p>		
Community criteria total		25%
Total weightings		100%

Expression of Interest Application Form

Released

Expression of Interest Application Form

2.4 Assumptions

Assumptions

Please state any assumptions you have made in relation to the Application.

[insert answer here]



APPLICANT TIP

- 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.

SECTION 3: Applicant's declaration



APPLICANT TIP

- 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.	<input type="text" value="agree / disagree"/>
Collection of further information:	The Applicant authorises the Funder to: <ul style="list-style-type: none"> • 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. 	<input type="text" value="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.	<input type="text" value="agree / disagree"/>
Ethics:	By submitting this Application the Applicant warrants that it: <ul style="list-style-type: none"> • 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. 	<input type="text" value="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.	<input type="text" value="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](#) on our website.