



# THERMAL EXPLORER

## Regional Events Fund

Waikato + Rotorua + Taupō + Ruapehu

# Funding Application Guidelines 2021



**The Mighty  
Waikato**  
Where magic runs deep

ROTORUA



**RUAPEHU**  
OUR GREATER OUTDOORS



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## Regional Events Fund

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### 1 Definitions

The below outlines important acronyms and terms used throughout this document.

Name	Definition
DEF	Domestic Events Fund
EIP	Event Investment Panel
EOI	Expression of Interest
IMA	International Marketing Alliance
Inter-regional visitation	From one region to another
Intra-regional visitation	Within the same region, 50km from home
KPI's	Key Performance Indicators
Lead Entity	The entity agreed by Regional Tourism Organisations (RTOs) within an International Marketing Alliance (IMA) to coordinate the Event Investment Panel (EIP), support the development of a Regional Investment Plan and to manage the relationship between the IMA grouping and MBIE.
MEF	Major Events Fund
MBIE	Ministry of Business, Innovation and Employment
MOU	Memorandum of Understanding
REF	Regional Events Fund
RTO	Regional Tourism Organisation
STAPP	Strategic Tourism Assets Protection Programme
The Panel	Thermal Explorer Highway Event Investment Panel



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## 2 Background

In September 2020, as a result of COVID-19 and part of the New Zealand Government’s Tourism Recovery Package, a \$50 million Regional Events Fund (REF) was announced. The purpose of the fund is to stimulate domestic tourism and travel between regions through hosting of events, which is intended to replace expenditure from international tourists. Regional Tourism Organisations (RTOs) across the country have been appointed as the facilitators of the fund. The RTOs have been clustered into Event Investment Panel (EIP) groups with neighbouring regions, and the fund is split across the groups based on their share of international visitor spending prior to COVID-19. Please visit [www.mbie.govt.nz](http://www.mbie.govt.nz) for more background on the Regional Events Fund.

### 2.1 Thermal Explorer Highway Regional Investment Plan

The Thermal Explorer Highway Event Investment Panel (the Panel) with two representatives (one from RTO and one from local council) from each of the four regions (Waikato, Rotorua, Taupō and Ruapehu) has been established. Their responsibilities include the planning and delivery of the Regional Investment Plan; and to collaborate and make decisions on funding distribution. Hamilton & Waikato Tourism is the Lead Entity on behalf of the Panel and is responsible for the coordination of the Panel; the development and management of the Regional Investment Plan; managing the relationship between the four regions and the Ministry of Business, Innovation and Employment (MBIE); and to provide administrative duties to facilitate the management of the Thermal Explorer Highway Regional Events Fund (REF).

Thermal Explorer Highway Regional Investment Plan Overview	
<b>Funding approved</b>	\$3.75 million (GST excl.) to be used over the next 2 – 4 years
<b>Regions represented</b>	Waikato, Rotorua, Taupō and Ruapehu
<b>Executive Summary</b>	<p><b>Our purpose</b> for the Thermal Explorer Highway Regional Events Fund (REF) is to create a contestable fund that will be utilised to focus on developing, securing or enhancing new and existing events to become long term sustainable “iconic” or “anchor” events for the regions; and to support capability development of the event ecosystem in the regions of the Thermal Explorer area.</p> <p><b>Our overall goal and key focus areas include:</b></p> <ul style="list-style-type: none"> <li>work with a select number of events that achieve high impact, relative to the host region, with seed funding for development and then one-two years of decreasing financial support enabling events to become self-sustainable after the duration of REF support.</li> <li>prioritise events that are likely to have an impact on more than one region of the wider Thermal Explorer region, i.e. an event hosted across 2, 3 or all 4 of our regions.</li> <li>support and pursue common themes including water related events, cultural/heritage, culinary/food/ brews, agriculture/equine, adventure, conservation, music, age-group related sport events, and high-performance sport. This will be across a range of event types, including events that are ticketed, exhibitions or business events.</li> <li>build capability of existing event venues, organisers, and support services within the regions.</li> </ul> <p><b>Our success</b> will be measured by viable event sector/suppliers/providers in our regions; and the delivery of events that:</p> <ul style="list-style-type: none"> <li>strive to be sustainable</li> <li>increase regional visitation (preferably during shoulder seasons)</li> <li>support iwi and community engagement</li> <li>create a positive economic impact</li> <li>improve social wellbeing and pride-of-place for residents</li> <li>provide “good news stories”</li> </ul>



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### Fund Management Process

**The Event Investment Panel (the Panel) have agreed to utilise the funds that best support the regions.** It has been agreed that expenditure and number of events will be proportionately weighted across the four regions, and that we need to remain flexible enough to grasp an opportunity if there is an event that will benefit the four regions collectively, regardless of the host region.

#### A) Contestable Fund Application Process

A large portion of the REF for our regions, is being utilised to create a **contestable fund**. The Panel have developed an application and evaluation process that will encourage applicants to outline and demonstrate how their event will drive inter (from one region to another) and intra-regional visitation (within the same region, 50km from home).

- There will be two application periods (2021 and 2022) for events to apply for a maximum of THREE years funding. If not over-subscribed, or funds remain available into the third/fourth years, additional application period may be required.
- Funding can be offered as 1 – 3 years (one-off grant or diminishing seed funding) with focus on development of events. There is a strong expectation that events will be self-sustainable after REF funding.
- There will be a two-staged application process:
  - **Step One: Expression of Interest (EOI) application** – we will invite applications for an Expression of Interest, then use evaluation criteria to shortlist events to progress to the next stage.
  - **Step Two: Presentations** – shortlisted applicants will be invited to present to the Event Investment Panel – providing time for the applicants to present their event, time for the Panel to ask questions or make suggestions to strengthen the event offering.
- We are seeking expressions of interest for events that are of larger scale (relative to the host region), have greater impact on visitation and have potential to grow to be one of our ‘anchor’ or ‘iconic’ events.
- Applications will be invited for both new events and expansion of existing events across all event types.
- Preference will be events that can show their domestic visitors are more likely/able to stay longer and spend more in our regions.
- **Funding Agreements** – once funding decisions are finalised, funding agreements will be established. Funding may be divided between pre- and post-delivery of the event, dependent on the event meeting their contracted KPIs.
- **Event Measurement & Reporting** – event measurement will be in line with MBIE methodology and reporting requirements. All funded events will have an event measurement KPI included in their funding agreement which outlines the key information they are required to collect, measure and report on. The Panel will then collate and prepare reports from all funded events and present to MBIE as per reporting requirements.

#### Evaluation Process

The evaluation of applications at each stage of the process will be based on an evaluation criteria:

- an initial assessment upon receipt of Expression of Interest application followed by;
- review and recommendations from the Panel; and
- a final evaluation for shortlisted applications during and following their presentation.

In conjunction with the overall evaluation criteria, events will need to:

- comply with all legislative requirements surrounding the events industry, including the current [Event Sector Voluntary Code](#).
- provide robust evidence of their visitation predictions and how they will achieve such predictions – this may include appropriately prepared feasibility reports for new events.



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### B) Capability Building

A portion of the REF funding will be utilised for **capability building** in the Thermal Explorer regions:

- Develop, update, and extend Event Strategies for all four regions.
- Industry Capability building – workshops/events will be hosted within each of the regions (one to two events per year with alternate location each event) with the aim to invite all event professionals from throughout the four regions.

### C) Administration

An **Event Secretariat** has been employed to facilitate the administrative functions.

## 3 Regional Events Fund Objectives

The REF for the Thermal Explorer Highway is being utilised for the following activities:

- event funding for new and existing events that drive inter (from one region to another) and intra-regional visitation (within the same region, 50km from home);
- capability or capacity building for event management;
- fund management;
- event strategy development.

### 3.1 Event Funding

This document sets out the guidelines for the 2021 event funding application round of the Regional Events Fund (REF) for the Thermal Explorer Highway regions (Waikato, Rotorua, Taupō and Ruapehu). It is designed to assist prospective applicants in:

- determining if your event fits the criteria to apply for funding;
- outlining the process for submitting an Expression of Interest (EOI);
- understanding the criteria that will be used to assess applications for funding.

A wide range of events can be considered for **event funding**. This includes new, one-off, or existing events and across a broad range of event types such as business events, sport, arts, and cultural events. However, it is at the discretion of the Panel to make decisions on what events will be allocated funding based on how the events best align with the Thermal Explorer Highway REF criteria.

Strong consideration for event funding through the Thermal Explorer Highway REF will be given to applicants that can demonstrate the following:

- events ability to drive significant inter and intra-regional visitation:
  - If new or one-off event, the applicant will need to highlight marketing and event strategies to support this (examples: *business plan, robust feasibility study*).
  - If existing event, the applicant will need to highlight how funding will be utilised to stimulate additional domestic visitation i.e. additional event day or event component; or marketing strategies that support this objective.
- high impact event, relative to the host region;
- estimated economic impact to the region;
- event feasibility and viability – capability of the region to host the event;
- event sustainability and management capacity – potential to develop into ‘anchor’ or ‘iconic’ event for the region;
- event likely to have an impact on more than one region of the Thermal Explorer Highway i.e. an event hosted across 2, 3 or all 4 of our regions;
- support common themes including water related events, cultural/heritage, culinary/food/brews, agriculture/equine, adventure, conservation, music, age-group related sport events, and high-performance sport;
- event alignment with regional brand and/or strategies of the host region;
- procurement of local suppliers / resources (where possible).



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### 4 Eligibility

#### 4.1 Who can apply for event funding?

Events hosted within the Thermal Explorer Highway regions (Waikato, Rotorua, Taupō and Ruapehu) that can demonstrate how they will drive significant inter (from one region to another) and intra-regional visitation (within the same region, 50km from home), are eligible to apply for funding. Refer to **Section 3.1 Event Funding** for event funding considerations.

#### 4.2 Is my event eligible?

##### Eligibility Checklist – please refer to the below:

<input checked="" type="checkbox"/>	The event will attract significant inter and intra-regional visitation to the host region, and is not an event only targeting local community attendees.
<input checked="" type="checkbox"/>	The region has the appropriate facilities to host the event (such as infrastructure, accommodation, waste management and access).
<input checked="" type="checkbox"/>	The event will meet the <a href="#">Event Sector Voluntary Code</a> and comply with applicable laws, regulations, rules and professional codes of conduct or practice.
<input checked="" type="checkbox"/>	The event has sufficient event planning documentation available – business plan, event budget, marketing plan, feasibility study, Health & Safety plan, waste management plan etc.
<input checked="" type="checkbox"/>	Funding will not be used to competitively bid with other regions for the same event.
<input checked="" type="checkbox"/>	Funding will not be used to replace existing committed funding (from Local Government or Trust Funds).

#### 4.3 What will be funded?

The Panel will consider allocating funding to:

- support events that demonstrate how they will stimulate inter and intra-regional visitation:
  - **New or one-off events** – assisting with the costs associated with developing/securing, hosting and marketing the event.
  - **Existing events** – implement innovative strategies to increase visitation.

Prior to event funding being approved and allocated, there will be conditions discussed and implemented within the funding agreement around the event related costs eligible for funding.

It is preferable that events that currently receive funding through an MBIE fund, including the Domestic Events Fund (DEF) or Major Events Fund (MEF), do not also receive funding through the Regional Events Fund until future years outside of the DEF or MEF funding term. This is to minimise duplication with MBIE-funded events, and to ensure that a wide range of events and event subsectors are supported. However, if an event believes that further investment will drive domestic tourism, as is the intent of the Regional Events Fund, then this may be permissible. Please email [ThermExREF@waikatoz.com](mailto:ThermExREF@waikatoz.com) to discuss prior to submitting an application.

#### 4.4 What will not be funded?

##### Thermal Explorer Highway REF cannot be used:

<input checked="" type="checkbox"/>	for events that do not meet the eligibility criteria as detailed in <b>Section 4 Eligibility</b>
<input checked="" type="checkbox"/>	for community focused events, which do not drive out of region visitation e.g. community farmers market
<input checked="" type="checkbox"/>	for destination marketing, as the RTO funding through the Strategic Tourism Assets Protection Programme (STAPP) covers this activity. However, marketing for specific events is permitted
<input checked="" type="checkbox"/>	for events hosted outside of Waikato, Rotorua, Taupō and Ruapehu regions
<input checked="" type="checkbox"/>	for events that will commence prior to Thursday 1 July 2021 ( <i>subject to the discretion of the Panel</i> )
<input checked="" type="checkbox"/>	for events seeking investment to underwrite an event
<input checked="" type="checkbox"/>	for events that will significantly affect an existing event due to timing or other reason
<input checked="" type="checkbox"/>	for events that are not sufficiently supported by an experienced event management team
<input checked="" type="checkbox"/>	for events that are controversial in nature or are not deemed as appropriate for the host region



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- |                                     |  |
|-------------------------------------|--|
| <input checked="" type="checkbox"/> | for events with a primary purpose of furthering religious and/or political ideologies              |
| <input checked="" type="checkbox"/> | for events that have breached previous funding agreements, including post-event reporting criteria |
| <input checked="" type="checkbox"/> | for applications that are incomplete or fail to meet the Regional Events Fund requirements         |

### 4.5 What event funding period and amount can I apply for?

- Event funding can be offered as 1 – 3 years (one-off grant or diminishing seed funding). For example, if three years of funding approved, receive initial seed funding in year 1, then reducing amounts in subsequent years.
- The below is a guideline of maximum funding amounts that events can apply for. Discretionary funding amounts over and above the below guidelines may be considered dependant on the scale and significance of the event.
- Applications seeking significant/maximum event funding from the Thermal Explorer Highway REF are encouraged to contact their RTO to discuss the event prior to submitting a proposal.

### Thermal Explorer Highway REF Funding Guidelines

Funding Period	Maximum Total Funding	Application Process
1 year	Up to \$125,000	1. EOI online application 2. Presentation (if shortlisted)
2 years	Up to \$187,500 (e.g. Year 1: 65%, Year 2: 35%)	
3 years	Up to \$250,000 (e.g. Year 1: 50%, Year 2: 35%, Year: 15%)	
<b>NOTE:</b> All funding allocated to events including the funding period and funding amount will be determined at the discretion of the Panel.		

## 5 Application and Assessment Process

### 5.1 Before Applying

#### Application Checklist – please complete/check the following before applying:

- |                                     |  |
|-------------------------------------|--|
| <input checked="" type="checkbox"/> | Fully read the Thermal Explorer Regional Events Fund – Funding Application Guidelines 2021   |
| <input checked="" type="checkbox"/> | Is my event eligible to apply for funding? (refer to <b>Section 4 Eligibility</b> )  |
| <input checked="" type="checkbox"/> | The event will deliver positive and significant economic impact to the host region   |
| <input checked="" type="checkbox"/> | The applicant organisation is a legal entity, and the applicant has secured all appropriate authorisations to submit an EOI application, to make the statements and to provide the information in the application    |
| <input checked="" type="checkbox"/> | The event has the support of other appropriate agencies and key stakeholders including sponsors. Applicants are encouraged to discuss their event proposal with venues, local council, and other stakeholders.       |
| <input checked="" type="checkbox"/> | Attend the Thermal Explorer Regional Events Fund Workshop in Rotorua on Thursday 25 February 2021 (if possible) – this is an opportunity to discuss your application with the Panel                                  |
| <input checked="" type="checkbox"/> | The event is viable and feasible – i.e. can demonstrate feasibility inclusive of, but not limited to participation, event budget   |
| <input checked="" type="checkbox"/> | Any significant risks to the Waikato, Rotorua, Taupō and/or Ruapehu regions are identified and appropriately managed   |
| <input checked="" type="checkbox"/> | Ensure your event planning documentation is updated and available to provide to the Panel if requested – business plan, event budget, marketing plan, feasibility study, Health & Safety plan, waste management plan |



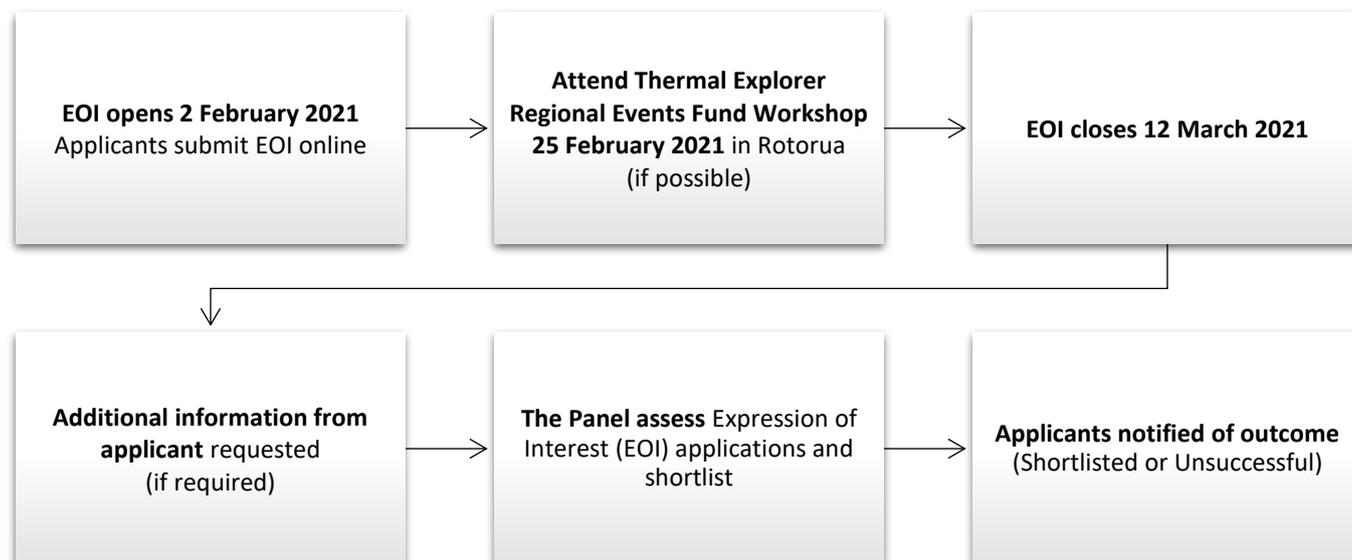
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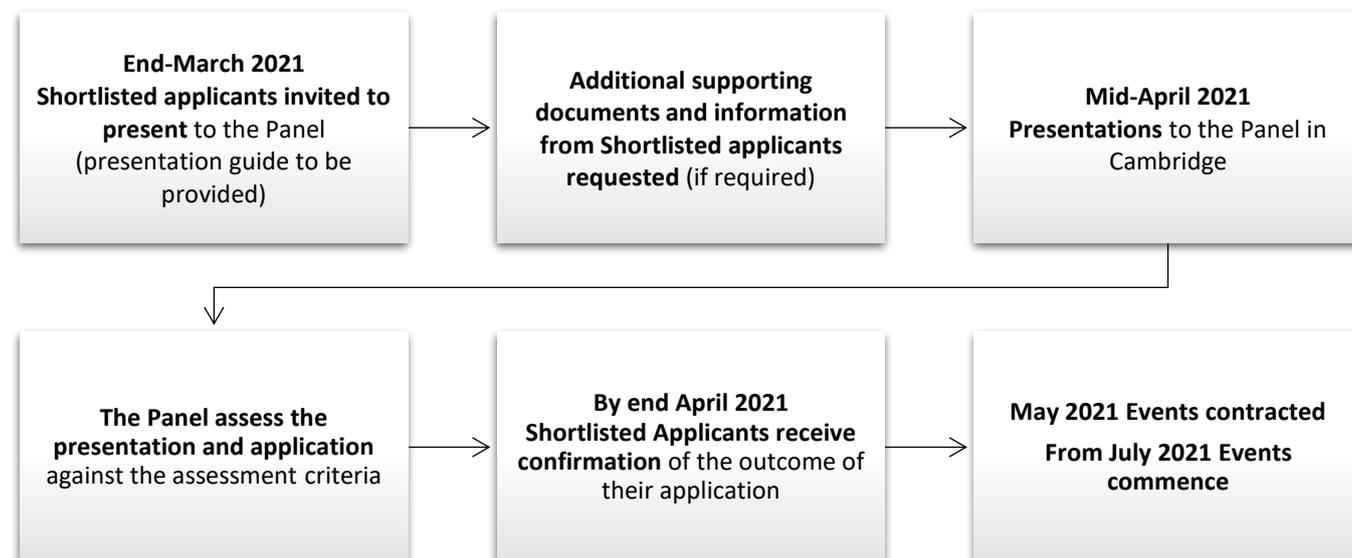
## 5.2 Application Process

The process for applying for **event funding** under the Thermal Explorer Highway REF is as follows:

### Step 1: Submit an online Expression of Interest (EOI) application



### Step 2: Full application for Shortlisted Applicants





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### 5.3 Funding Application Round 2021

Expression of Interest (EOI) applications for the 2021 event funding application round of the Thermal Explorer Highway REF are invited from **Tuesday 2 February 2021**. Applicants are encouraged to submit their EOI applications online at the earliest opportunity taking into consideration the following timelines:

Thermal Explorer Highway REF – Funding Application 2021 timeline	
Date	Detail
Tuesday 2 February 2021	Expression of Interest (EOI) applications open
Thursday 25 February 2021	Thermal Explorer REF Workshop & EOI application discussion: <ul style="list-style-type: none"> <li>Location: Rotorua</li> </ul>
Friday 12 March 2021	Expression of Interest (EOI) applications close at 5pm
Early-Mid March 2021	EOI applications initial assessment; additional information requested and collected from applicants (if applicable)
Mid-March 2021	EOI applications assessed by the Panel
End March 2021	Shortlisted applicants and unsuccessful EOI applicants notified
Monday 12 – Wednesday 14 April 2021	Presentations to the Panel – Shortlisted applicants <ul style="list-style-type: none"> <li>Location: Cambridge</li> <li>Timing: you will be allocated a presentation time slot</li> </ul>
End April 2021	Shortlisted applicants informed of outcome
May 2021	Events contracted
From July 2021	Events commence

### 5.4 Expression of Interest (EOI) Application (Step 1)

EOI applications are submitted online within time periods outlined in **Section 5.3**.

- Opens Tuesday 2 February 2021
- Closes 5pm, Friday 12 March 2021

Thermal Explorer Highway REF – Expression of Interest (EOI) Application Form	
EOI application online form	Complete online <a href="#">here</a> <b>Note: The form cannot be saved during the online application therefore please be prepared to complete your application in full. Please click <a href="#">here</a> to download a Word template to assist with your application preparation (if required).</b>
<b>In addition, EOI applications are required to include the following information:</b>	
Applicant Details	Key contact and legal entity information
Event Details	Including name, date(s) and location, brief overview, event type, event regularity, target audience, estimated number of attendees (total and out of region), estimated average stay of attendees, and an Event budget – <u>please note you will be required to upload a copy of your event budget</u> , please download <a href="#">here</a> , complete and save, ready to upload during your online EOI application. <ul style="list-style-type: none"> <li>• If an existing event – background information on the event including previous attendances, and economic viability.</li> <li>• If a new event – summary of business plan including projected attendance.</li> </ul>
Funding Details	Amount applying for, duration of funding, other funds applied for.
Eligibility Checklist	Complete checklist to confirm event meets eligibility criteria.
Questions	Respond to questions as outlined in <b>Section 5.5 Evaluation Criteria</b> .



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Upon submission of your EOI online application, applicants will receive a confirmation email to confirm receipt. Applicants may be required to submit additional material in support of their application as determined by the Panel.

### 5.5 Evaluation Criteria

Eligible EOI applications will be assessed using the information given as answers to each question in the EOI application form. Applicants are required to answer each question. Applications that do not address each question adequately will not be considered.

For shortlisted applications invited to present to the Panel, they will be further assessed based on required supporting documentation and information provided.

#### Thermal Explorer Highway REF Funding Application – Evaluation Criteria

Evaluation Criteria	Detail
<p><b>A. VISITATION</b> <b>How will your event stimulate domestic visitation into the host region?</b></p>	<p>The applicant must demonstrate <u>how</u> the event will attract inter (from one region to another) and intra-regional visitation (within the same region, 50km from home). This can be highlighted by event strategies in place; who and where the target markets are from; what type of event is being hosted; and whether this is a new, one-off or existing event.</p> <p><b>Considerations:</b></p> <ul style="list-style-type: none"> <li>• Size and scale of the event</li> <li>• Marketing strategies - local, regional and national campaigns</li> <li>• Seasonality - event held outside of visitation season</li> <li>• Statutory/school holidays</li> <li>• If an existing event, will need to highlight how funding will be utilised to stimulate additional domestic visitation i.e. additional event day or event component; or marketing strategies that support this objective.</li> <li>• Expected visitors - who are they; what are they likely to spend; how long will they stay?</li> </ul>
<p><b>B. VIABILITY</b> <b>How will your event be viable, feasible and financially sustainable?</b></p>	<p>The applicant must provide information to showcase the viability of the event; outline why this event is a good idea; outline how the region has the appropriate facilities to host the event and how the event will comply with applicable laws, regulations, rules and professional codes of conduct or practice including meeting the <a href="#">Event Sector Voluntary Code</a>; demonstrate how the event has the potential to be financially sustainable and/or become an iconic/anchor event for the region.</p> <p><b>Considerations</b></p> <ul style="list-style-type: none"> <li>• Regions ability to host the event including having the appropriate facilities such as infrastructure, accommodation, waste management, and access.</li> <li>• Feasibility study</li> <li>• Business plan</li> <li>• Income source/s</li> <li>• Risks assessment of the event including funding, other events at same time, weather contingencies</li> <li>• Strategy to grow your event</li> <li>• Competitive analysis - in the region, within New Zealand (same events, like events, similar target market)</li> </ul>
<p><b>C. MANAGEMENT</b> <b>What event management experience do you have?</b></p>	<p>The applicant must outline event management experience and background of the applicant entity and provide evidence of successful and financially sound event delivery and/or suitability of the organisation to successfully manage and deliver the event.</p>



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	<p><b>Considerations:</b></p> <ul style="list-style-type: none"> <li>• Company/organisation profile</li> <li>• CV of management team/coordinator</li> <li>• Event delivery background/experience</li> <li>• Event portfolio</li> <li>• Previous event collateral</li> <li>• Contractors/suppliers involved/intended to utilise</li> <li>• Track record</li> <li>• Relevant skills</li> </ul>
<p><b>D. REGIONAL FIT</b> How does your event align to the regional brand and priorities of the host region?</p>	<p>The applicant must outline the significance of this event for the host region and the alignment to the regional brand. The applicant may provide detail on how the event supports iwi and/or community engagement, improve social wellbeing and pride-of-place for residents.</p> <p><b>Considerations:</b></p> <ul style="list-style-type: none"> <li>• Alignment to regional brand – refer to your RTO for details</li> <li>• Strategic alignment to the host region</li> <li>• Priority will be given to the following event themes: water related events, cultural/heritage, culinary/food/ brews, agriculture/equine, adventure, conservation, music, sport (age-group related, high-performance sport)</li> </ul>
<p><b>E. BENEFITS</b> What benefits does your event provide to the host region?</p>	<p>The applicant must outline the event benefits for the host region.</p> <p><b>Considerations:</b></p> <ul style="list-style-type: none"> <li>• Economic (not visitation or other economic benefits already provided within the application)</li> <li>• Environmental</li> <li>• Social / Community</li> <li>• Cultural</li> <li>• Exposure of the region i.e. TV coverage, promotion</li> </ul>
<p><b>Other Evaluation / Eligibility Considerations</b></p>	
<p><b>Event Profile</b></p>	<p>The applicant must be able to demonstrate the size of the event in terms of (historical information if existing event, or estimates if new or one-off event):</p> <ul style="list-style-type: none"> <li>• Audience</li> <li>• Spectator numbers</li> <li>• Participant numbers, and/or</li> <li>• Media profile</li> </ul>
<p><b>Status of Event Organiser</b></p>	<p>The applicant must be a legal entity – registered organisation, association or industry group (or be in the process of setting up as a legal entity)</p>
<p><b>Event Eligibility</b></p>	<p>Refer to <b>Section 4 Eligibility</b> for eligibility criteria and considerations.</p> <p>Applications for event funding are assessed on their ability to meet the Thermal Explorer Highway REF objectives. If you are unsure whether your event is eligible, or you feel your event should be considered for funding, please contact us on the details provided.</p>
<p><b>Timing of Event</b></p>	<ul style="list-style-type: none"> <li>• Funding will not be granted retrospectively or outside of the 2021 event funding application round.</li> <li>• The event must take place in the timeframe relevant to the 2021 event funding application round (no earlier than Thursday 1 July 2021 - <i>subject to the discretion of the Panel</i>)</li> </ul>



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<b>Economic Benefit</b>	If the proposed event is a new event, assessments may be made through comparison of events of a similar nature. If a previously held event, performance data may be used to assess the event.  Other economic benefit considerations include: impacts on the supply chain, events sector and wider economy, and how the event is broadcasted regionally and nationally.
<b>Calendar Fit</b>	The REF supports inter and intra-regional visitation strategies and objectives of each region - events need to demonstrate how the timing of their event meets the key visitation and economic drivers of the region.
<b>Financial Viability</b>	The Panel will assess the event's ability of: <ul style="list-style-type: none"> <li>• <b>Financial Management:</b> deliver demonstrated financial sustainability and management capacity</li> <li>• <b>Financial Support:</b> generate financial support beyond REF funding</li> </ul>
<b>Consultation</b>	The Panel will take into strong consideration the endorsement of the event by RTO and regional stakeholders.
<b>The Panel – Experience and capability</b>	The Panel will utilise their background, skills/experience, events and tourism industry knowledge and contacts to assess and validate the application and information contained within.

### 5.6 Shortlisted Applications (Step 2)

Once the EOI application process (Step 1) is complete and applications have been shortlisted, the shortlisted applicants may be invited to **present** to the Panel. Presentations will be held between Monday 12 to 14 April 2021 in Cambridge and shortlisted applicants will be allocated a presentation time slot.

#### Thermal Explorer Highway REF – Shortlisted Applications

**Shortlisted applicants may be required to provide the following additional supporting documentation and/or information:**

<b>If New event:</b>	Business plan / feasibility report / evidence of due diligence.
<b>If Existing event:</b>	Financial viability information.
<b>Supporting documentation/ information to include:</b>	<ul style="list-style-type: none"> <li>• Business plan – showcasing operational details of how the event will be run; and capability of the event organiser e.g. CV/profile.</li> <li>• Event Budget – full budget including income and expenditure</li> <li>• Feasibility study</li> <li>• Marketing plan – specific details relating to tourism marketing; description of target markets; and all proposed marketing activity and timelines with particular focus on the ability to drive inter and intra-regional visitation</li> <li>• Health &amp; Safety plan / Risk Assessment</li> <li>• Waste management plan</li> <li>• Copy of public liability insurance certificate</li> <li>• List of key suppliers</li> <li>• Evidence that the event/applicant will comply with all regulatory requirements relating to preparation and delivery of the event, including obtaining the necessary permits and consents</li> </ul>
<b>Attendance Summary:</b>	Breakdown of estimate of participants, supporters and spectators.
<b>Funding purpose</b>	Outline what the funding is intended to be used for.

### 5.7 Approval Process

The Panel will assess applications for event funding as per the application and assessment process and successful and unsuccessful applicants will receive an official notification from Hamilton & Waikato Tourism (Lead Entity) before any announcements are made. All funding decisions made by the Panel are full and final.



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### 6 Terms and Conditions of Event Funding

Thermal Explorer Highway REF – Terms and Conditions of Event Funding	
<b>Administration</b>	Hamilton & Waikato Tourism as Lead Entity for the Panel will administer the REF.
<b>Funding approved</b>	The Thermal Explorer Highway REF is capped at \$3.75 million (GST excl.). The Panel is not obliged to grant all of the REF in any period.
<b>Funding agreements</b>	<ul style="list-style-type: none"> <li>• Successful applicants will be required to enter into a funding agreement with Hamilton &amp; Waikato Tourism, detailing all funding obligations and conditions.</li> <li>• The funding agreement is a formal contract and will at a minimum detail the amount of funding and term of funding, purpose for which the funding must be used and set out any requirements or conditions, including reporting requirements, that must be met by the funding recipient.</li> <li>• Funding agreements (1 – 3 years) will be available; and the term of agreement will be determined on a case-by-case basis and significant consideration will be given to the presentation of long-term plans for financial sustainability.</li> </ul>
<b>Evaluation and reporting</b>	Successful applicants will be required to undertake event measurement and economic impact assessment of the event. In line with MBIE event measurement methodology and reporting requirements which will be provided within the funding agreement, applicants will be required to complete surveys/assessments and provide reporting within two months of the conclusion of the event.
<b>Payments</b>	<p>Payments are to be made to the funding recipient as per the terms of the funding agreement and as long as:</p> <ul style="list-style-type: none"> <li>• the funding agreement has been signed by both parties;</li> <li>• funding recipients provide reports as required, or otherwise demonstrate that the event is progressing as expected;</li> <li>• other terms and conditions of funding agreement continue to be met (including meeting agreed KPI's); and</li> <li>• a valid tax invoice is received by Hamilton &amp; Waikato Tourism</li> </ul> <p>For all funding, a percentage of total funding is paid on provision and acceptance of a Final Event Report.</p>
<b>RTO support</b>	Successful applicants may liaise with their RTO to coordinate any events or announcements related to the event.
<b>Personal and event information</b>	<p>Any personal information about applicants or a third party in an application will be collected by Hamilton &amp; Waikato Tourism and will be held, managed, used, disclosed or transferred in accordance with the provisions of the Privacy Act 2020 and other applicable laws. This information may be provided to members of the Panel for the purpose of assessing your application. If you intend to include personal information about third parties in your application, please ensure they are aware of the <a href="#">Hamilton &amp; Waikato Tourism Privacy Policy</a>.</p> <p>As the Thermal Explorer Highway Regional Events Fund, is a New Zealand Government fund, details of funded events (including event name, dates, location and funding amount) will be notified to MBIE and may become a public record.</p>
<b>Declaration</b>	<p>All applicants must complete a declaration during the online EOI application including:</p> <ul style="list-style-type: none"> <li>• The statements and information provided in the application are true and accurate, and there have been no misleading statements or omissions of any relevant facts nor any misrepresentations made.</li> <li>• To consent to the Panel undertaking due diligence including any third party checks as may be required to fully assess the application.</li> </ul>



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### 7 Important Information and Links

Please note the event funding portion of the Thermal Explorer Highway REF is a **contestable fund**.

- Applicants must not assume they will be successful or enter into commitments based on that assumption before receiving formal notification of the outcome of their event funding application.
- Applicants should not assume that if they are successful once, they will be successful again in the future.
- All applicants are encouraged to plan for contingencies and consider other funding sources and options should their application be unsuccessful.
- All Expression of Interest applications will be assessed by the complete Panel. The Panel is under no obligation to accept applications which are deemed incomplete or ineligible and/or received after the application deadline.
- The Panel have agreed to a Memorandum of Understanding (MOU) with regards to administering this fund. This MOU requires Panel members maintain privacy and confidentiality of the event information shared during the EOI application process:
  - EOI applications are not to be discussed externally;
  - Information about events is not to be shared (other than as required to be notified to MBIE as per Section 6 Terms and Conditions of Event Funding);
  - The event owner's intellectual property is respected and protected.
- The MOU defines how any Conflicts of Interest be handled – particularly if any of the Panel members have relationships with a funding applicant.
- The Panel reserves the right to:
  - Accept or reject any applications at its absolute discretion
  - Amend or alter these guidelines (including criteria, timeline, application and/or assessment process) from time to time in its absolute discretion and in consultation with MBIE
  - Request additional information from applicants as applicable
  - Suspend or cancel the funding process in whole or in part

Expression of Interest (EOI) Application	
EOI application form	Please click <a href="#">here</a> to complete
EOI application opens	Tuesday 2 February 2021
Thermal Explorer Regional Events Fund Workshop – Rotorua	Thursday 25 February 2021
EOI application closes	Friday 12 March 2021
Word template for EOI application form	Please click <a href="#">here</a> to download a word template to assist with your application preparation.
Event Budget template	Please click <a href="#">here</a> to download an event budget template to complete, save and upload with your EOI application.

Thermal Explorer Highway – Regional Tourism Organisations	
Hamilton & Waikato Tourism	<a href="http://www.waikatoz.com/">www.waikatoz.com/</a>
Destination Rotorua	<a href="http://www.rotoruanz.com/">www.rotoruanz.com/</a>
Destination Great Lake Taupō	<a href="http://www.lovetapu.com/">www.lovetapu.com/</a>
Visit Ruapehu	<a href="http://www.visitruapehu.com/">www.visitruapehu.com/</a>



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### 8 Contact

**For more information on the Thermal Explorer Highway REF, please contact:**

<b>Lead Entity</b>	Hamilton & Waikato Tourism <a href="mailto:ThermExREF@waikatoz.com">ThermExREF@waikatoz.com</a>
<b>Subscribe here</b>	If you would like to register to receive updates and information, please subscribe <a href="#">here</a>