

EXPRESSIONS OF INTEREST (EOI) FOR THE EXPORT EDUCATION INNOVATION PROGRAMME

EOI NUMBER EEIP11/10/11
ISSUE DATE 11/12/09
CLOSING DATE 12/02/10

Education New Zealand (ENZ) is seeking expressions of interest from high-quality New Zealand resident educational product and services providers interested in undertaking innovative initiatives in the delivery of export education. Details of the programme are contained at Schedule 1 of this EOI, Terms of Reference.

The purpose of this EOI is to identify Providers who have the capability to provide projects which are innovative in the context of the New Zealand Export Education Industry and fulfil the necessary requirements as assessed by Education New Zealand and the Export Education Innovation Advisory Board.

It is recommended that all applicants download the **EEIP Strategic Overview and Operational Guidelines** from the ENZ website at <http://www.educationnz.org.nz/industry-development-resources/eeip> to understand fully the requirements and criteria of the programme.

Information supplied in the EOI will be used to compile a short list of applicants from whom Requests for Proposals (RFPs) may be sought. A RFP application form will be sent to short-listed applicants to request more detailed information. Accordingly, the EOI should succinctly cover all the matters requested. Applicants who are not included on the short list will be advised of that fact. Education New Zealand also reserves the right to enter into direct negotiations for funding a project/programme based solely on the information provided in an EOI.

Two copies of the completed response is to be enclosed in a sealed envelope marked "Expression of Interest for the Export Education Innovation Fund EEIP11/10/11 and is to reach Kimberley Wynbergen, Industry Development Officer, Education New Zealand, PO Box 10-500, 138 The Terrace, Wellington by NOON on the closing date of the 12th February 2010. EOIs received after the closing time may not be considered.

EOI responses are to include:

- A nominated point of contact with postal, fax, telephone and email contact details.
- A brief profile of the applicant's organisation, including a description of the key activities of the organisation and how this project/programme fits in with your strategic plan. (no more than one page).
- Title of the Project
- A brief description of the project/programme funding is being sought for (no more than two pages)
- A profile of any partner organisation whether local or international, and their role(s) in the project (no more than ½ page)
- A summary on how the proposed project meets the EEIP criteria in accordance with the criteria set out in the attached ANNEX I, and an estimate of the funding being applied for (no more than ½ page)
- Period for which the applicant is seeking funding (i.e. July 2010 to March 2011) and a brief description of the activities to be covered during that period (no more than one page).

Please Note: Successful Round 11 EEIP applicants will have an indicative project start date of **1st July 2010**.

Responses are to be in the English language and are to be signed by your duly authorised representative. Two copies of the EOI are to be provided. As a guide your EOI should not be more than six A4 pages.

Please note that the documents attached to this request for EOI are confidential and are covered by copyright, but may be copied to the extent necessary to prepare a response to this request for EOI. The information contained in your response will be treated similarly.

The issue of and response to this request for EOI does not create any obligation on ENZ to enter into any

commitment to fund any particular goods or services. ENZ also reserves the right at all times to decide not to proceed to a RFP.

Any questions on this EOI are to be in writing and sent to the Industry Development Manager either by facsimile ((04) 471 2828 Attention: Kimberley Wynbergen) or e-mail (Kimberley.Wynbergen@educationnz.org.nz)

Questions of interest and importance will be documented, together with a reply, and advised to all parties who have registered with GETS and received a copy of the EOI from the GETS web-site. Information will also be posted on the ENZ website. This will include notification of any errors and omissions identified and any new information provided.

Kind regards

Kimberley Wynbergen
Industry Development Officer
Education New Zealand

Attachment:

ANNEX 1: Terms of Reference

TERMS OF REFERENCE

1. Funding assistance availability

1.1 Funding is on a **50/50 co-payment** basis for eligible project costs, as defined below – i.e. the fund will contribute on a dollar-for-dollar basis. Funding is subject to a ceiling of \$125,000 (GST incl.) co-funding per project, or total annual support for all projects by an applicant. This includes where the applicant is part of a consortium, though consideration may be given to a high funding limit if an organisation is undertaking a significant project in its own right, as well as being involved in a joint project.

In order to encourage applications from providers with innovative ideas at very early stages of development, a portion of the EEIP annual funding pool can be allocated for up to ten low-compliance grants (each of up to \$10,000), to cover early stage investigative work with potential offshore partners.

1.2 There is no minimum project application size. Applications will be judged solely on their merits and match with funding objectives and criteria, not on the scale or dollar value of their project proposed.

2. Eligible costs

2.1 Applicants are expected to cover all the costs associated with development of their application. Funding is **not** available retrospectively for project work undertaken, but evidence of the previous commitment of resources to a project will be taken into account favourably when assessing applications.

2.2 Funding is for new projects and so will not be provided for projects that are already underway, or approved and budgeted by the applicant. However, funding will be considered for additions to existing projects or to additional stages where there has not already been a commitment to undertake these. Funding may be considered to bring forward the development of a project where there is significant benefit in this and where the applicant could not undertake it out of their own resources.

2.3 Applicants will also be expected to cover the full costs of “business as usual” expenses associated with the project – for example existing staff salaries and overheads such as rent and utilities, which would be incurred regardless of whether the project is undertaken. Again the extent of future organisational commitment of resources to a project will be taken into account when assessing applications. General overheads, contingencies and disbursements are not eligible for funding.

2.4 The fund will provide assistance with the *additional* operating expenses needed to undertake an approved project. The funding is to address the additional marginal costs associated with the project, for example:

- 2.4.1 Personnel costs associated specifically with the project: e.g. employment of contractors, or fixed term staff, secondment of existing staff.
- 2.4.2 Cost of specialist and expert advice and assistance.
- 2.4.3 Specific additional operating overheads for the project, at the discretion of the Advisory Board (note that extensive detailing of overhead expenses is recommended in the Revised Strategic Overview and Operational Guidelines Document).
- 2.4.4 Overseas travel, accommodation and expenses – **not to exceed 20% of the overall co-payment funding**. The Management Group may exercise discretion on this limit.

2.5 Applicants are strongly recommended to refer to the Revised Strategic Overview and Operational Guidelines Document for an indication of what areas should be covered in detail in any application.

2.6 Assistance is not available for capital costs or the acquisition of capital assets.

3. Eligible funding

Projects which are innovative in the context of the New Zealand Export Education Industry.

3.1 We are seeking proposals for projects that help enhance New Zealand’s export education industry and that build on what we have already achieved. For the purposes of the EEIP, innovation is broadly defined as activities that are a significant change and development on the previous way of doing things.

3.2 This can encompass:

- 3.2.1 Development of new markets
- 3.2.2 New business models and structures
- 3.2.3 Expansion into new modes of delivery

- 3.2.4 Application of new techniques or technologies
- 3.2.5 Development of new educational programmes and products
- 3.2.6 or qualitative increases in scale of operation (eg moving from pilot phase into full implementation).

Funding for developing services and products

3.3 Funding is directly assisting the development of innovative services and products. It is **not** available for general exploratory work, high-level market research, or academic research.

3.4 Funding is “seed funding” and available to assist the development stages of products and services – It is not available to support the delivery or sale of implemented products and services, ongoing activities or “business as usual”. The sort of activities that could be funded include:

- 3.4.1 Feasibility studies into whether to undertake a potential offshore education activity – e.g. establish a specific joint venture overseas. This would not cover basic strategy and planning for an organisation, or initial feasibility work (ie solid homework would have to be done before an application could be made).
- 3.4.2 Latter stage development of business/marketing plans for the development and distribution of innovative products/programmes. Assistance would be targeted towards finalising plans and assisting in filling gaps in expertise, rather than at the early stages of plan development – which the applicant will need to complete in order to put forward a robust proposal for funding.
- 3.4.3 Accessing expert advice and assistance in the latter stage development of overseas partnerships.
- 3.4.4 Development of pilot projects/prototypes.

3.5 This list is not exhaustive but outlines the type of activities that will be considered for funding.

3.6 It is acknowledged that there will sometimes be a grey area where it is difficult to define where development stops and business as usual begins. Applications that involve some activities in this “grey area” will not be automatically ineligible, but funding may be limited to only part of that sought.

3.7 Funding is only for projects that would not occur but for the assistance provided by the EEIP (or another external, not-commercial source of funding). If a project could reasonably be funded from internal funding sources, or commercial external funding could reasonably be accessed for the project, the project is not eligible for the EEIP. Funding is not available retrospectively or for project already underway.

Proposals for offshore education projects in China, other Asian countries and the Gulf States.

3.8 The initial strategic focus of the EEIP is on assisting the development of New Zealand's involvement in **offshore education**. Therefore proposal that contribute to this goal are strongly encouraged.

3.9 Proposal relating to innovative onshore education projects (ie products and services delivered in New Zealand) can be considered if they are of particularly high merit.

3.10 Within the overall **emphasis on offshore education** there is particular emphasis on projects that will help develop activities in China, other Asian countries and the Gulf States. These are areas where New Zealand already has an export education base to build on, where offshore education activities are already taking place and where high levels of interest are evident. Proposal targeting other areas are by no means excluded.

Applicants' ability to undertake the project and subsequent implementation of product or service

3.11 Applicants must be able to demonstrate that they have the resources and expertise to successfully undertake the project proposal for funding. Furthermore, as funding is intended to assist the development of services and products to be later fully implemented, applicants must be able to demonstrate the capability and capacity, or the ability to acquire such capability and capacity, to implement the subsequent stages of development and deployment of the product of service.

4. Applicants to be considered

High quality organizations with a proven track record should consider applying for funding.

4.1 Quality products and service, and projecting an image of being a high quality provider, is key to the future of New Zealand's export education industry, onshore and offshore, and has wider diplomatic and trade implications.

4.2 Funding applications will only be considered from applicants that can demonstrate that they are in compliance with, and have a history of compliance with, all applicable statutory requirements and Quality Assurance Bodies policies and criteria. They must be compliant with requirements for their type of organization(s) and for the type of project that they propose to deliver (taking into account the stage of development of the proposed project). The applicant must be able to demonstrate that they are financially sound and well-managed. For recently established ventures evidence of quality in previous ventures could be considered.

4.3 If the applicant body is a consortium or special purpose vehicle, for example, a subsidiary and company, the requirements may be covered by the parent organization.

4.4 It should be noted that the above are minimum criteria and that successful applicants will generally be expected to present stronger cases. The EEIP Management Group reserves the right to seek information on applicants from relevant Quality Assurance Bodies and monitoring/regulatory bodies, as it judges appropriate.

4.5 It is expected that applicants will usually already have a proven track record in some aspects of export education or international education more broadly. Applicants without such a track record may be considered if they can demonstrate that they have relevant experience and expertise that is applicable.