Low Emission Transport Fund Response Form

Demonstration of Vehicles & Technology

Round 3, April 2022

If you need any assistance with completing this form, please contact the LETF point of contact: Name: Camilla Cochrane

Email: LETFund@eeca.govt.nz

Phone: 027 456 0205.

# Proposal Checklist

**Before you apply, be sure to complete the following:**

|  |  |
| --- | --- |
| ☐ | Read the RFP document and any supporting information to ensure you have understood the LETFprocess and criteria against which Proposals will be assessed. |
| ☐ | Check EECA Website for any updates relating to this RFP. |

**When filling out this form, please ensure:**

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| --- | --- |
| ☐ | All answers are typed into the space provided for each section in Calibri or Arial font no smaller than size 10. |
| ☐ | You meet the requirements of each question. These are outlined underneath each question within [ ] brackets. This includes any guidance on word limits that are specified. Word limits do not reflect any specific weightings or importance. |
| ☐ | You have read and understood the declaration details outlined in Section 6 and have signed the declaration (if you are applying as part of a consortium, only the lead Applicant needs to sign the declaration). |
| ☐ | You have completed the form in full. |

**Once you have completed this form:**

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| ☐ | Email a copy of the completed form to EECA’s point of contact LETFund@eeca.govt.nz and ensure that you attach any supporting information you wish to provide. Please provide a Word version of the Proposal in addition to any PDF copies. |
| ☐ | Do not include a zipped (.zip) or an executable (.exe) file with your Proposal. |
| ☐ | If you do not receive EECA’s emailed confirmation of receipt of your Proposal within 2 working days please contact EECA’s point of contact. |

Please note: EECA will not accept Response Forms received by post, fax or hand delivery.

**1. Key Details**

Please enter answers in the right-hand column, and make sure the costs in this table match your calculations in Section 5 of this document.

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| **A. Proposal key details** |
| **Lead applicant organisation name** |  |
| **Title**[A short title for your project, of no more than 10 words] |  |
| **Brief summary of your project**[Maximum of 40 words. Note this may be used in media releases or other communications] |  |
| **Project key success factors**[Maximum of 50 words. Describe what success looks like for this Project.In addition, list the factors that, if met, will count your Project a success. These may be key performance indicators, proven benefits, or other critical success factors] |  |
| **Estimated total cost of project (excl. GST)**[Do not include in-kind contributions, existing expenses such as current staff, or costs already incurred] |  |
| **Total amount of co-funding to be provided by you, any co-applicants and others (excl. GST)**[Must be at least 50 per cent of estimated total cost of project - cannot include in-kind contributions, existing expenses such as current staff, or costs already incurred] |  |
| **Amount of LETF funding sought (excl. GST)**[This is the difference between the two figures above. This cannot be more than 50 per cent of the estimated total cost of project, unless the project meets the conditions in Section 1.6 of the RFP document] |  |
| **Incremental cost (excl. GST)** |  |

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| **A. Proposal key details** |
| [This is the difference between the business-as- usual cost of undertaking your project and the cost to purchase, create or implement a low emission solution. Refer to Section 1.7 of the RFP document for guidance. |  |

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| **B. Lead Applicant key details**[Fill out all fields unless otherwise indicated] |
| **Legal name** |  |
| **Trading as (if different)** |  |
| **Type of organisation** | Limited liability company / Incorporated society / Trust / Other (please specify) |
| **NZ Company Number (if a company)** |  |
| **NZ Business Number (NZBN)** |  |
| **Charitable Trust or Incorporated Society number****(if applicable)** |  |
| **Street address**[Include postcode] |  |

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| **C. Contact person details**[This will be the only person who receives all the correspondence relating to the Proposal. Fill out all fields unless otherwise indicated] |
| **Name**[Title, First and Last name] |  |
| **Job title or role**[For example, Director, Manager, etc.] |  |
| **Contact phone number** |  |
| **Contact email address** |  |

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| **D. Co-Applicant key details**[Fill out all fields for each Co-Applicant unless otherwise indicated.Use the copy and paste function to add additional Co-Applicants if required] |
| **Legal name** |  |
| **Trading as (if different)** |  |
| **Type of organisation** | Limited liability company / Incorporated society / Trust / Other (please specify) |
| **NZ Company Number (if a company)** |  |
| **NZ Business Number (NZBN) (if applicable)** |  |
| **Charitable Trust or Incorporated Society number****(if applicable)** |  |
| **Website address (if applicable)** |  |

# Section 2 Proposal Description

In order for the Panel to assess your Proposal, it needs to understand what it is you are trying to do and achieve. Use this Section to describe your project and what you are seeking funding for.

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| **A. Proposal summary** |
| **Provide a summary of the project** |
| [Please limit answer to a maximum of 200 words] |
| **Outline what specifically you would apply LETF funding towards (e.g. vehicles, charging infrastructure, operational costs, project personnel costs etc.)** |
| [Please limit answer to a maximum of 200 words] |

# Section 3 Minimum Eligibility Conditions

Note: Any Proposals that do not meet all of the minimum eligibility conditions will not be progressed to a full assessment.

To see the eligibility conditions please refer to Section 3 of the RFP document.

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| **A. Eligible entity and project** |
| **Is the lead organisation associated with this project an eligible entity?**[Refer to Sections 1.4 and 3.3 of the RFP document to find about which entities are eligible for funding. If your lead organisation is not a NZ-based entity, you are not eligible] | * Yes ☐ No
 |
| **Will the project be delivered in New Zealand?**[Projects that would be delivered in another country are not eligible to receive LETF funding] | * Yes ☐ No
 |
| **Does the project involve eligible vehicles, technologies or activities?**[Refer to Section 1.3 of the RFP document to find out about eligible and ineligible vehicle types, technologies and activities] | * Yes ☐ No
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| **B. Identified co-investment of at least 50 per cent** |
| **Do you (and your co-applicants, if applicable) have the ability to co-invest at least 50 per cent of the estimated total project cost (excl. GST)?** | * Yes ☐ No
 |
| **Identify the source of your co-investment (including amounts if multiple sources)**[If there is funding which is not yet fully committed to the project, state this, and identify what conditions must be met (e.g. board approval, bank loan approval) for funding to be fully committed] |  |
| **Are you (and your co-applicants, if applicable) requesting co-funding of more than 50% of total project costs?** | * Yes ☐ No

[If yes, please provide details below] |
| **Please provide justification for why your funding request is for more than 50% of total project costs**[Funding requests exceeding 50% will only be considered in exceptional circumstances, as identified in Section 1.6 of the RFP document] |
|  |

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| **B. Identified co-investment of at least 50 per cent** |
| **Will the project result in any new assets (either tangible or intangible)?** | * Yes ☐ No

[If yes, please provide details below] |
| **Please provide details of all asset(s) created, their location(s) and who will own each asset at the conclusion of the project** |
| **Asset** | **Location** | **Owner** |
|  |  |  |
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| **Describe how any change of asset ownership will impact on the Successful Applicant (Recipient in Agreement) in terms of the insurance, asset availability and maintenance requirements in Schedule 2 of the Proposed Funding Agreement** |
|  |

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| **C. Project size** |
| **The project funding request is at or below $500,000 (excl. GST).**[Funding requests exceeding $500,000 will only be considered in exceptional circumstances, as identified in Section 1.6 of the RFP document] | * Yes ☐ No

[If no, please provide reasoning below] |
| **Please provide justification for why your funding request is for an amount exceeding $500,000** |
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| **D. Other central government funding** |
| **Have you received any other central government funding for the proposed project?**[Total central government funding, including LETF funding, cannot exceed 50 per cent of estimated total cost of project] | * Yes ☐ No
 |
| **If yes, please identify the amount of other government funding, and the source** | $ |

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| **D. Other central government funding** |
| [All amounts should be in $NZD and exclude GST] |  |
| **Have you applied for, or do you have an agreement for funding from central government for parts of, or all of, the proposed project?** | * Yes ☐ No
 |
| **If yes, please identify the amount of funding, the source and stage of application process**[All amounts should be in $NZD and exclude GST] | $ |

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| **E. Health, safety, reputation** |
| **Are you committed to working safely, and ensuring the health and safety of workers and others affected by the proposed project work, and do you have appropriate systems and processes to undertake the work safely?** | * Yes ☐ No
 |
| **If your proposal is successful, do you agree to provide EECA with more detail relating to your health and safety policies, plans and procedures if required?** | * Yes ☐ No
 |
| **Are you committed to working in a manner that will not damage EECA’s reputation?** | * Yes ☐ No
 |

# Section 4 Assessment Criteria

The following sections include details of the assessment criteria that will be used by the Assessment Panel when assessing Proposals to the LETF.

Your Proposal will be scored against your answers to these criteria. Aim to give answers that are relevant, concise and comprehensive.

If you have made any assumptions about the delivery of the project, clearly state these assumptions.

EECA’s intention is to gain sufficient information from each Applicant to fully inform the assessment and decision-making process. Please attach any further information or supporting documentation that will support or verify any statements made in response to these questions.

**Please observe the guidance on maximum word count for each question.**

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| **A. Fit with the Investment Activity** | **Weighting 20%** |
| Please describe the extent to which your proposed project contributes to the objectives of the fund. [Refer to Section 1.2 of the RFP document for the objectives of the Fund] |
| [Please limit answer to a maximum of 500 words] |

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| **B. Fit with Investment Principles** | **Weighting 50%** |
| Please describe how your proposed project fits within the Investment Principles. [Refer to Section 1.2 of the RFP document for the investment focus of the Fund] |
| [Please limit answer to a maximum of 500 words] |

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| **C. Ability to deliver** | **Weighting 15%** |
| EECA needs to have confidence that Successful Applicants to the LETF have the track record, skills and core capabilities to carry out the proposed activities. |
| **Resources and relationships**Please describe your expertise, resources, relationships and commitment to deliver the project to the cost and timeframes stated. |

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| **C. Ability to deliver** | **Weighting 15%** |
| [Please limit answer to a maximum of 200 words] |
| **Key personnel**Please provide contact details, role descriptions and brief profiles for each of the key personnel involved in delivering your proposed project (including any personnel to be provided by sub-contracted parties).This should include each person’s role, their relevant qualifications and experience, the extent of their involvement and their experience in providing services that you consider relevant to the objectives of the proposed project. |
| [Please only include key personnel who will materially influence the delivery of the project. Limit responses to a maximum of 100 words per person and copy and paste this cell for each person]Name:Organisation:Contact details:Role:Qualifications or relevant experience: |
| **Track record on comparable projects**Please describe your track record of delivering projects of a comparable scale and complexity. |
| [Please limit answer to a maximum of 200 words] |
| **Risks and barriers to success**Please describe potential project risks and barriers to success and outline how they will be addressed. |
| [Please limit answer to a maximum of 200 words] |

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| **C. Ability to deliver** | **Weighting 15%** |
| **Timeline for delivery**Please describe the delivery timeline for your proposed project.To meet the demonstration objectives of the LETF we require projects to be delivered in a timely manner. Taking into account the scope and complexity of your proposed project please describe how the delivery timeline compares to similar projects. |
| [Please limit answer to a maximum of 200 words] |

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| **D. Value for money** | **Weighting 15%** |
| Applicants must demonstrate that their projects deliver value for money in their own right and also in comparison with other Proposals that EECA may receive.Please address the following three questions in relation to the value for money offered by your project. |
| **Magnitude of public benefits**Describe the public benefits that the project will generate. If possible quantify the size of those benefits and estimate when they will occur. The public benefits should be closely connected to the objectives of the LETF. |
|  |
| **Innovation of the project compared to business-as-usual activities**Is the project an extension of a business-as-usual activity (e.g. you are purchasing an EV in place of an ICE vehicle)? If so please provide a summary of the key additional EV related activities and costs of your project compared to what you have normally done under a business-as-usual scenario.[Refer to Section 1.2 of the RFP document] |
|  |
| **Importance of the Fund in terms of achieving the proposed outcomes**How important is the LETF support to the delivery, scale, or speed of implementation of the proposed project? Why can it not be fully funded privately? What could still be achieved without funding support? If your Project would go ahead even without LETF funding, it would not be eligible. |



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| **D. Value for money** | **Weighting 15%** |

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# Section 5 Project Components

In order for the Panel to assess your Proposal, it needs to understand the different components of the project, their cost, and how performance and delivery would be measured. The milestones you provide here may be used to help inform the milestones in any Funding Agreement with EECA.

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| **Major milestones of project**This table must be completed. Please use the ‘insert row’ function if you wish to add more milestones. Ensure the totals match Section 1A. |
|  | **Project component**[Provide a high-level description of key project components or deliverables including number of hours and charge out rates for all project personnel. Refer to Section 1.3 of the RFP document] | **Key performance indicator(s)** | **Estimated start date** | **Estimated end date** | **Total cost to deliver this milestone (excl. GST)** | **Expected LETF funding** [Cannot be morethan 50 per cent of the individual milestone] | **Your co-funding** [Must be at least 50 per cent of the individual milestone] | **Incremental Cost** [What is the additional cost compared to equivalent business-as-usual activity? See Section 1.7 of the RFP document] |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |  |  |
| **TOTALS (Must equal the equivalent project costs detailed in Section 1)** |  |  |  |  |

# Section 6 Proposed Funding Agreement

Together with the RFP document we have provided you with a Proposed Funding Agreement. We need to know whether or not you are prepared to accept the terms and conditions set out in the Proposed Funding Agreement.

Please note that EECA can make Clause 10.6 of the Proposed Funding Agreement reciprocal for government agencies and insert a reference to the Local Government Official Information and Meetings Act 1987 for local government agencies.

If you have completed the asset ownership table in Section 3 of this form, please ensure you check the insurance, asset availability and maintenance requirements in Schedule 2 of the Proposed Funding Agreement and make any suggestions that are necessary.

Please indicate below your acceptance of the Proposed Funding Agreement.

**Either:**

|  |  |
| --- | --- |
| ☐ | Having read and understood the Proposed Funding Agreement for this round on the EECA website, I confirm that the terms and conditions within the agreement are acceptable. If successful, I agree to sign the Proposed Funding Agreement. |

**Or:**

If there are any clauses that you wish to amend in the Proposed Funding Agreement this is where you tell us, and note below any suggestions or changes you wish to propose, referencing the appropriate clause number. EECA expects few contract amendments to be required.

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| --- | --- |
| ☐ | Having read and understood the Proposed Funding Agreement for this round on the EECA website, I have the following suggestions to make. If successful, I agree to sign a Funding Agreement based on the Proposed Funding Agreement subject to negotiating the following clauses: |

It is important that, if asked, you are able to explain why your changes are important to you.

|  |  |  |
| --- | --- | --- |
| **Clause** | **Concern** | **Proposed solution** |
| [insert number] | [briefly describe your concern about this clause] | [describe your suggested alternative wording for the clause or your solution] |
| [insert number] | [briefly describe your concern about this clause] | [describe your suggested alternative wording for the clause or your solution] |

Please use the ‘insert row’ function if you wish to add more clauses.

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# Declaration

I declare on behalf of the Applicant, including any Co-applicants:

**Please check**

|  |  |
| --- | --- |
| ☐ | that I have read this form and the RFP document and I fully understand the procedures, terms,conditions and criteria. |
| ☐ | that this Response Form (Proposal) and the RFP document together outline the basis on which this Proposal is made and the procedures, terms, conditions and criteria for the Low Emission Transport Fund. |
| ☐ | that the statements in this Proposal are true and the information provided is complete and correct and there have been no misleading statements or omission of any relevant facts nor any misrepresentations made. |
| ☐ | that all named key personnel have agreed to be included in this proposal. |
| ☐ | that EECA and its advisers may disclose to or obtain from any government department or agency, private person or organisation, any information about the Applicant or project (except that marked as “Confidential”) for the purposes of gaining or providing information related to the processing and assessment of this application. |
| ☐ | that the Applicant will, if requested by EECA or its advisers in connection with this funding process, provide any additional information sought and provide access to its records and suitable personnel. |
| ☐ | that if successful, I consent to the public release, including publishing on the internet, of the name of the Applicant, the amount of grant sought, the amount of funding offered, contact details of the Applicant and a description of the activity/project, and undertake to cooperate with EECA on communications relating to this Proposal, which may be in the form of a media release, case study, web content, conference presentation or whitepaper, sharing via social media, or other form as agreed with EECA. |
| ☐ | that I understand EECA’s obligations under the Official Information Act 1982 and that, notwithstanding any relationship of confidence created as a result of this Proposal, the provisions of this Act apply to all of the information provided in this Proposal. |
| ☐ | that all activities in the proposed project are lawful activities that will be carried out lawfully. |
| ☐ | the Applicant is not in receivership or liquidation nor will the project be managed by someone who is undischarged as bankrupt or prohibited from managing a business. |
| ☐ | where external providers are being employed as part of the project/activity, the relevant providers are not employees or directors of the Applicant, and nor do they have any other direct or indirect interest in the Applicant, whether financial or personal unless specifically stated in the Proposal. |
| ☐ | that EECA has sole discretion to determine which Proposals (if any) will receive LETF investment and that I understand that there is no agreement for EECA to provide funding until both parties have signed a Funding Agreement. |
| ☐ | that all necessary internal approvals (CEO, Board etc) and relevant budgets for the project to proceed, subject to successful LETF application, will be in place within a month of the round closure date. |
| ☐ | that I have flagged changes to the contract that I would like to discuss with EECA. |
| ☐ | that the amounts specified as the total project cost, my co-funding, the LETF funding sought and the incremental cost identified in Section 1A equal the corresponding totals specified in Section 5 above |

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| ☐ | that I have considered any possibility for real or perceived conflict of interest as defined in Section 6.4of the RFP document and confirm that:* I have no real or perceived conflict of interest OR
* I may have a real or perceived conflict of interest as detailed below: Insert details here…
 |
| ☐ | that I am authorised to make this Proposal on behalf of the Applicant (including any Co-applicant) identified in Section 1 of this form. |

**Signature**

This declaration must be signed by a person with the legal and financial authority to commit your organisation to a transaction.

|  |  |  |
| --- | --- | --- |
| Print name **TITLE ORGANISATION** |  | Signature |
|  |  | Date |