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| These guidelines are intended to help you prepare your application for an R&D Experience Grant ready. You can determine your eligibility and understand what information you will be required to provide in the online application portal. **When you are ready to apply, if you have used this word template, cut and paste the information into the online application portal under the relevant sections – please do not submit or upload this form.** |

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| **GENERAL INFORMATION** |
| Application Checklist |

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| **Purpose of R&D Student Grants**The objective of the Student Grants Programme is to support New Zealand students who are studying at NZQA Levels 6-10, to gain and develop their technical and commercial skills in a New Zealand R&D business that has an active research and development (R&D) programme. The [Ministerial Direction](https://gazette.govt.nz/notice/id/2023-go2644) [for Business R&D Grants](https://gazette.govt.nz/notice/id/2018-go4864) sets out the government policy and criteria (the ‘rules’) of the grants programme and is available on our [website](http://www.callaghaninnovation.govt.nz/grants/student-grants). The Experience Grant is designed to help students gain commercial work experience in New Zealand R&D businesses by funding a 10-week internship over the student summer break. The internships are a valuable experience for students to understand how a business works and potentially see a career pathway in R&D. It is, therefore, important the student works within the business’s R&D team and the business actively supports the student, so they get the best out of their time in the business. In turn, the business benefits from the student’s enthusiasm and fresh thinking. The funded internship is for a period between 14 August 2023 and 31 March 2024. (Your start date will depend upon the approval date of your application).**Funding for R&D Student Experience Grants is limited. Given their popularity we encourage you to submit your full application as soon as you are happy with the quality of your application and supporting information**.**Application Checklist** Before you begin your application, please complete the checklist below to ensure you are informed and prepared. It’s important you provide all the relevant information requested in the online application so we can process your application promptly.

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| 🗹 | Your business is actively doing R&D and has at least one R&D full-time equivalent (FTE) and the student will be onsite within your business (refer to subsection 2.4 R&D Activity or see our Experience Grant Guidelines for a definition of R&D). |
| 🗹 | You are an eligible business entity (refer to Sub-section 1.5 Business Eligibility).  |
| 🗹 | You are not exceeding your company’s Student Grant quota for the year. Please refer to [Number of Student Grants per Business Guideline](https://www.callaghaninnovation.govt.nz/sites/all/files/experience-grant-annual-quota-guide.pdf) to determine how many students you are eligible to apply for. |
| 🗹 | You have considered the time and resources that will be required to mentor/support the student who undertakes this internship. |
| 🗹 | You acknowledge that you are required to **employ the student** (**the student must be on your payroll** and not a contractor), you must pay a minimum of **$26.00** an hour (gross/before deductions) and you **will be required to provide payslips** that display hours and hourly rate when claiming. |
| 🗹 | If you have identified a student(s) you have all the necessary documentation to ensure that they are eligible, as detailed in Section 3: Student Eligibility. (**Please note the documentation will be required to be provided at the time of claiming)**. |
| 🗹 | You have read the [Funding Agreement](https://www.callaghaninnovation.govt.nz/sites/all/files/EXAMPLE_2023_24_RDEXP_Funding_Agreement.pdf) example on our website to ensure that you understand and can comply with the terms of the agreement. Your application will form part of your Funding Agreement with Callaghan Innovation. |

Document Links:* The [Ministerial Direction](https://gazette.govt.nz/notice/id/2023-go2644) sets out the rules for Business R&D Grants
* Example of the [Funding Agreement](https://www.callaghaninnovation.govt.nz/sites/all/files/EXAMPLE_2023_24_RDEXP_Funding_Agreement.pdf) for R&D Experience Grants
* [Number of Students per Business Guide](https://www.callaghaninnovation.govt.nz/sites/all/files/experience-grant-annual-quota-guide.pdf)
* [A Guide to help define Research and Development (R&D) in your grant application](https://www.callaghaninnovation.govt.nz/sites/all/files/grants-describing-your-rd-in-your-grant-application_0.pdf)
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| **Section 1: Applicant Information** |
| 1.1 Application Summary |
| **Funding for R&D Student Experience Grants is limited. Given their popularity we encourage you to submit your full application as soon as you are happy with the quality of your application and supporting information.**Your application will form part of your funding agreement with Callaghan Innovation. Please read the [Funding Agreement](https://www.callaghaninnovation.govt.nz/sites/all/files/EXAMPLE_2023_24_RDEXP_Funding_Agreement.pdf) on our website before you submit your application, to ensure that you understand, and can comply with the terms of the agreement.**Summary of your obligations:*** You must employ the student (the student must be on your business's payroll and not a contractor).
* You must pay the student a minimum of $26.00 an hour (gross/before deductions)
* You must ensure that the student meets the eligibility criteria
* You are responsible for all taxation liabilities, payment for annual holidays*,* kiwi saver employer contributions, ACC, recruitment fees and other levies payable in relation to the funding or employment of the student.
* The student must be on site with your business in New Zealand (not at a university lab).
* You **must provide copies of payslips** which displays hours and hourly rate at the time of claiming.

**Note:** Public and statutory holidays are included under the funding agreement – the hours associated are expected to be within the 400 hours. |
| **Investment area:** | ***2023/24 R&D -Experience Grants*** |
| **Contracting** **organisation:** | The contracting organisation (‘business’) employs the student, signs the funding agreement, and invoices for claiming the funding (should this application be successful). Please check the contracting information before completing an application, as it can cause processing delays if applications are received under the wrong business name.  |
|  | **[Read-only field – Pre-populated]** |
| **Postal and Courier addresses:** | **[Read-only field – Pre-populated]** |
| **New Zealand Business Number:** | *NZBNs are unique identifiers allocated to NZ businesses to make it easier for business to interact with government and with each other. Each NZBN is a 13-digit Global Location Number (GLN) provided by GS1 New Zealand.* |
|  | **[Read-only field – Pre-populated]** |
| **Total Funding Requested:** | Please enter the total amount of funding you are applying for. Each grant is 10,400 (GST exclusive) per student. (Based on an hourly rate of no less than $26.00 an hour (gross/before deductions) for 400 hours).  |
|  | **$ Enter amount here** |
| **Application Title:** | Use a brief title that is not commercially sensitive. If your application is approved, application title, project title, business name, funding type and value will become public information. |
|  | **Enter text here** |
| **a) Provide ANZSIC Industry Code that best matches your business:** ANZSIC is the Australian and New Zealand Standard Classification of Industries. These codes are published on the [Statistics New Zealand website](http://aria.stats.govt.nz/aria/#ClassificationView:uri=http://stats.govt.nz/cms/ClassificationVersion/CARS5587). Select ‘Industry - ANZSIC06V1.0’ in the classification code finder. |
| **Enter text here** |
| **b) How many R&D FTE are currently in your business?** This can include contractors and staff who are doing R&D as part of their role eg 3 staff (Full Time Equivalent (FTE) each doing 33% R&D = 1 FTE.  |
| **Enter amount here** |
| **c) How many Experience student grants are you requesting in this application?** A business may receive multiple student grants at any one time, depending on the size and capability of its R&D team. Please see the [Number of Student Grants Per Business Guide](https://www.callaghaninnovation.govt.nz/sites/all/files/experience-grant-annual-quota-guide.pdf) to help you determine the number of students you may be able to apply for.  |
| **Enter amount here** |

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| 1.2 Key People |
| **Provide details for the contact person.**The contact person is the person in your business we can discuss the grant with and who we will send all grant and contract related information to. *Information required: Name, company email address and phone number* |
| **Enter text here** |
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| 1.3 Bank Account |
| **Check or provide your business’s bank account information in the table below. The bank account must be in the name of the applicant (*contracting organisation*. as noted in section 1.1)**The bank account provided must be from a registered New Zealand bank and in the name of the applicant**.**

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| **Bank account name** | **Account** | **Email address** | **Pay to account** | **Bank account name** |
| Enter text here |  |  |  |  |

**If you are providing your bank account details for the first time or have made changes, please provide verification of the bank account information you have entered above:**This may be a scanned bank statement or screenshot from online banking. Check that the bank account name and detail can be clearly seen on the documentation provided. Once you have selected your file to upload, click on SAVE (at the bottom of the screen), which will upload the document. |

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| **Upload document** |

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| 1.4 Compliance |
| **Callaghan Innovation must ensure students funded through our grants programme will be working in a safe environment.** Read our [Health and Safety Guidelines](http://www.callaghaninnovation.govt.nz/sites/all/files/guidelines-health-and-safety-student-grants.docx) to understand your role and responsibilities for engaging a student. By ticking the boxes below, you confirm that you understand and can meet your obligations under the Act.**a) Does your business comply with the Health & Safety at Work Act 2015?**We understand our health and safety obligations, have procedures and systems in place to meet those obligations and will carry out the work safely. Yes |
| **b) We have read the Callaghan Innovation Health and Safety Guidelines and understand our role and responsibilities in relation to engaging a student through this grant.**We understand our health and safety obligations, have procedures and systems in place to meet those obligations and will carry out the work safely. Yes |

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| 1.5 Business Eligibility |
| **a) Identify which eligible entity best describes your business.**To be eligible for R&D Grants, businesses must be one of the entities listed below. Please see the [Ministerial Direction](https://gazette.govt.nz/notice/id/2023-go2644) on our website for more information about eligibility. A Company incorporated and registered in New Zealand under the Companies Act 1993 that is not controlled by the government or one or more government agencies A Limited Partnership registered in New Zealand under the Limited Partnerships Act 2008 that is not controlled by the government or one or more government agencies A Māori Trust or incorporation established under Te Ture Whenua Māori Act 1993, or a similar organisation managing Māori assets under multiple ownership |
| **b) Confirm that you are not an ineligible entity:**Government shareholding may affect your eligibility. Please see the [Ministerial Direction](https://gazette.govt.nz/notice/id/2023-go2644) for more information about eligibility.Ineligible entities include:* Local authorities, Government departments or agencies
* State Owned Enterprises and Public Finance Act 1989 Schedule 4A companies
* Local, national and regional promotional bodies
* Crown entities
* Crown Research Institutes (CRIs)
* Tertiary Education Organisations (TEOs) including foreign-owned TEOs
* Entities that are controlled by any of the above
* Callaghan Innovation
* Sole traders
* Charitable trusts
* Partnerships
* Unincorporated Joint Ventures
* Unincorporated charities
* Incorporated societies
* Trusts (other than a Māori Trust as expressly stated under eligible criteria)
* a company that is incorporated in another country but is registered to do business in New Zealand (registered under the Overseas Register – ASIC or NON-ASIC – not incorporated under the New Zealand Companies Act 1993)

We are not an entity type as listed above. |
| **c) Are you aware of any issues (past, current or potential) relating to your business, its owners and directors (or equivalent), or your products and services that could bring the reputation of the Government, Callaghan Innovation or its R&D Grants Programme into disrepute?**This should include any adverse media commentary and actual or pending legal action against your business, major shareholders or directors. Yes No**If yes, outline the issues:****If no, please write “N/A” as your answer.**Please keep it brief, bullet points preferred. Your Funding Engagement Specialist will discuss these issues with you. |
| **Enter text here** |

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| 1.6 Financial Information |

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| 1. **You declare your business is solvent and can pay its debts as they fall due, and you confirm the business will be in a position to pay the student at the end of the internship.**

Callaghan Innovation has a duty of care to students under this programme to ensure they are placed in companies that will remain in business for the duration of the grant. Businesses must confirm that they will be a going concern for the next 6-12 months.A white square with a black border  Description automatically generated Confirmed |
| b) Financial Information tableThis is standard information we require from all R&D grant applicants so that we can understand the scale of R&D in your business and the impact our grant funding has on businesses. Please note, the table will automatically fill with the most recent data that we hold if you have had prior grants from Callaghan Innovation. **Please update these figures using information from your most recent financial statements.**Financial Information Table Please enter information for the last two financial years, including total R&D spend and staffing levels (NZ$ excl. GST).Do not delete or overwrite any prior year data. Please ADD a new line for relevant year as required.

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| **Financial Year End** | **Total revenue:** | **Earnings before Interest and Taxation (EBIT):** | **Net profit before taxation:** | **Exports revenue:** | **Total R&D spend:** | **Total staff (FTE):** | **R&D staff (FTE):** |
| Enter date here | Enter value | Enter value | Enter value | Enter value  | Enter value | Enter value | Enter value |
| Enter date here | Enter value | Enter value | Enter value | Enter value | Enter value | Enter value | Enter value |

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| **The table above requires two years of information to be entered, if you are not able to provide all of this information, provide comment below:** |

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| **Enter text here** |

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| **Section 2: R&D Programme eligibility** |

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| 2.1 Nature of Business |
| **Summarise your business’s history and outline current product(s) and services.**Provide a snapshot of your business and its operations. * When was your business established?
* Describe what your company produces, or if early stage/pre-revenue what your product will be?
* Describe what your current R&D focus is.

Please keep it brief (under 250 words), bullet points preferred.  |
| **Enter text here** |

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| 2.2 R&D Activity |
| To be eligible for an R&D student grant, businesses must be actively doing R&D. We will use the information you provide in this section to confirm that your business has a history of R&D and a plan for future R&D.R&D is distinguished from non-R&D by the presence or absence of an appreciable element of innovation. If the activity departs from routine and breaks new ground it is normally R&D; if it follows an established pattern it is normally not R&D.How do you know if you’re doing R&D? R&D is distinguished from non-R&D by the presence of four criteria. The activity needs to: * be novel
* be creative
* have uncertainty about the final outcome
* be performed systematically

Please refer to our [guidelines](https://www.callaghaninnovation.govt.nz/sites/all/files/grants-describing-your-rd-in-your-grant-application_0.pdf) on how to describe your R&D in your application. |
| **a) Please outline your R&D activities over the last 12 months:** Please keep it brief (under 200 words), bullet points preferred.  |
| **Enter text here** |

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| **b) Please outline your planned R&D activities for the next 12 months:**Please keep it brief (under 200 words), bullet points preferred. |
| **Enter text here** |

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| **Section 3: STUDENT eligibility**  |
| 3.1 Student Eligibility (INFORMATION ONLY) |
| **This section is for information only - Please ensure you have read and understand your obligations.** |
| If your application is approved for funding, you are required to ensure that the student meets the eligibility criteria. You will need to upload the student eligibility documentation at the time you submit your claim.For students to be eligible for an R&D Experience Grant internship, students must:* Have studied or be studying at a New Zealand tertiary education institute (note: students who have completed study overseas are not eligible)
* Be studying at NZQA level 6-10, or if study has been completed, the closing date of the last semester must be less than 12 months ago.
* Be studying science, technology, engineering, design or business
* Be legally permitted to work in New Zealand.
* Not have been previously employed at the business unless part-time or temporary.
* Not have undertaken more than two Experience Grant internships with your business.

**Please refer to the**[**Student Documentation Requirements Guidelines**](https://www.callaghaninnovation.govt.nz/sites/all/files/experience-grant-student-documentation-requirements.pdf)**for further information**.**Funding agreement**Your application will form part of your funding agreement with Callaghan Innovation. Please read the [Funding Agreement](https://www.callaghaninnovation.govt.nz/sites/all/files/EXAMPLE_2023_24_RDEXP_Funding_Agreement.pdf) on our website before you submit your application, to ensure that you understand, and can comply with the terms of the agreement.**Summary of your obligations*** **You must employ the student** (the student must be on your business's payroll and not a contractor)
* You must ensure that the student meets the eligibility criteria.
* You must pay the student a minimum of $26.00 an hour (gross/before deductions)
* You are responsible for all taxation liabilities, payment for annual holidays, kiwi saver employer contributions, ACC, recruitment fees and other levies payable in relation to the funding or employment of the student.
* The student must be on site with your business in New Zealand (not at a university lab).
* You **must provide copies of payslips** which display hours and hourly rate at the time of claiming.
* Funding is available for the period of the internship between 14 August 2023 and 31 March 2024 (your start date will depend upon the application approval date)

**Note:** Public and statutory holidays are included under the funding agreement – the hours associated are expected to be within the 400 hours. |

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| **Section 4: assessment criteria** |
| 4.1 Exposure to R&D and Benefit to Business |
| ASSESSMENT CRITERIAThis section ascertains the business’s ability to meet the three Student Grant assessment criteria: Student’s Exposure to R&D, Student’s Professional Development and Benefit to the Business.Student Exposure to R&D criterionYou will describe the work the student will be involved in, identify their area of specialisation and how the work is relevant to them. We will assess the information you provide against the following key question:* How will the involvement of the student within the business expose them to technical work that is relevant to their degree? This is in the form of a defined R&D project.

Benefit to the Business criterionThe aim is to understand what impact the student will have on your business’s overall skill, knowledge, and ability. We will assess the information you provide against the following key question:* How will the involvement of the student within the business support the business’s internal capability development?
 |
| For each field below, there is a comprehensive help text to assist you in completing the application. |

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| **Project title** | **No. of students** | **Tell us about the R&D project the student will be contributing to** | **Tell us about the role the student will play in this R&D project** | **Tell us how your business will benefit from employing the student** | **Mentor name & job title** |
| Provide a short title for each project. For example: *“Tracking use of consumables”.* | Several students may work on the same or related project provided you are eligible to receive multiple students. Please refer to the Number of Student Grants per Business Guide to determine how many students you are eligible for. | Briefly overview the scope of the R&D project. Experience Grants are designed to give student’s experience in commercial R&D. Student’s must work on an R&D project – the activity itself may not be R&D (e.g. project management), but it must be a critical component of an R&D project in your business. For example: *“In the Internet of Things (IoT) R&D project will develop technology to identify when consumable items are used in a maintenance workshop. The technical challenge is to identify sensors that reliably detect when lightweight items and liquids are dispensed and to develop software analytics that give insights into usage patterns leading to more efficient re-stocking.”* | Briefly demonstrate how the student will contribute to the R&D project. Engineering, technology and science students are often directly involved in a company’s R&D project whereas design and business students may not be. An example is a design student using focus groups to identify customers’ unmet needs, and another example is a business student that is analysing the market to determine the value of product attributes to a range of market sectors. In these examples the students are not doing core R&D activities, but they are directly contributing to the company’s R&D project. | Briefly demonstrate these benefits. The aim is to understand what impact the student will have on your business’s overall skill, knowledge and ability. Benefits for each business will be different but may include; builds out your R&D team to get job done quicker, brings new skills into your business, develops a new product, kick starts an R&D project, training of a potential employee. For example: *“This R&D project will have a direct benefit for our satellite maintenance workshops because it will both minimise inventory and ensure that maintenance staff always have the consumable they need. Successful execution of this R&D project will lead our company to develop IoT solutions in other areas of our business.”* | Professional development is enhanced when the student has a mentor. The student's mentor should be an experienced and knowledgeable employee (preferably not their supervisor) that can meet with the student on a frequent and regular basis (e.g. weekly). |
| Enter text here | Enter text here | Enter text here | Enter text here | Enter text here | Enter text here |

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| 4.2 Professional Development  |
| Professional Development criterionExperience grants are designed to give students commercial experience in a business. It is important that the student gains a practical understanding of how a business operates and how they can contribute to its success. These skills will help the student function in an R&D business. In this subsection, you will upload a professional development plan that covers skill development for the student. We will assess the information you provide against the following key question:* Does the business have a credible plan for the professional development of the student, and what resource has the business committed towards this?

We expect the student to gain valuable technical R&D skills as well as “soft skills” such as communication; time management; collaboration etc. When writing the professional development plan, please identify both the technical skills and soft skills that the student will experience. |
| **Prepare and upload a professional development plan for the student.**The plan should identify 3 to 5 soft-skills that your student needs to be successful in your business and explain how the student will acquire these skills. There are two options for preparing your plan:1. using the template provided; OR
2. uploading an existing formal training programme that your business has for new students/employees.

**Professional development plan template:***(This template is only available after you have created your application within the online portal (IMS*

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| **SKILL** | **PLAN** | **RESULT** |
| What is the skill to be developed | How will the student develop this skill in your business? | What will the student be able to do with this skill? |
| e.g., Technical writing | e.g., The student will work with business development managers and customers to develop technical marketing and evidence building of products in multiple markets. | e.g., The student will be able to produce academic publications, develop technical marketing collateral, and collaborate with customers to provide quality evidence that supports their commercialisation plans. |
| e.g., Presentation and Communication | e.g., The student will participate in a presentation to senior management on their project and will create a short 5-minute video on their project at the end of the internship. | e.g., The student will be able to present and communicate confidently and effectively to secure buy in at senior level. |
| e.g., Time management |  |  |
| e.g., Problem solving |  |  |

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| **DECLARATION** |
| **This section is to provide you with the opportunity to read the declaration that you must agree to, upon submission of your Application.**You agree that by submitting this application to Callaghan Innovation, you declare and acknowledge the following:* I am authorised to submit the application on behalf of the applicant business.
* The applicant is a legal entity capable of entering into a contract with Callaghan Innovation and adhering to all obligations as set out in the Funding Agreement.
* The applicant understands they are required to employ the student on the business’s payroll, paying a minimum hourly rate of $26.00 per hour (gross), and will provide confirmation of eligibility and payslips at the time of claiming.
* The applicant must ensure that the student meets the eligibility criteria, and all work is conducted onsite at the business, within New Zealand
* The information in the application is true and correct.
* Information received and generated by Callaghan Innovation in relation to this application may be released by Callaghan Innovation in accordance with Callaghan Innovation’s external reporting requirements or if required by law, including in accordance with the requirements of the Official Information Act 1982 (OIA) or the Privacy Act 2020 (PA). Any release under OIA or PA of confidential or sensitive information will be discussed with you first.
* Consent to the disclosure of this application and all information relating to this application, to New Zealand Trade and Enterprises, Ministry of Business, Innovation and Employment, regional business partners of Callaghan Innovation, and to New Zealand host tertiary education institution(s) (business contact information only) for the purpose of improving the quality of shared customer engagement and service provision.

**To submit your application, click the 'Submit to IMS' button in the 'Print and submit' section.** |
| **Note:  The application must be submitted by your business’s ‘super user’**(If you do not hold this role, you will not see the “Submit to IMS” button) |