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| 2024/25 R&D Experience Grant  Application Guidelines & Template  These guidelines, together with the information available on our [website](https://www.callaghaninnovation.govt.nz/products/fund/r-and-d-career-grants/), are intended to help you determine your eligibility to apply for the 2024/25 R&D Experience Grant and to understand what information you are required to provide in the online application form.  If you are new to Callaghan Innovation, please visit our [website](https://www.callaghaninnovation.govt.nz/products/fund/r-and-d-career-grants/) and contact the [Customer Support](https://www.callaghaninnovation.govt.nz/contact/customer-support/) team to discuss the grant and your eligibility, and to arrange access to the online portal if you are ready to start your application.  **When you are ready to apply, 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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| **2024/25 R&D Experience student grant** |
| Confirmation and declaration of obligations |
| **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 for Business R&D Grants sets out the government policy and criteria (the ‘rules’) of the grants programme and is available on our website.  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 1 July 2024 – 31 March 2025. (The earliest your contract can start is 1 July 2024 and noting that your start date will depend upon your approval date (if approved after 1 July 2024) |
| **Confirmation and Declaration:**  Before you complete your application, you are required to confirm that you understand the obligations under the scheme (and stated within the legal Funding Agreement that you will sign if your application is approved). If you do not adhere to the terms and conditions of the Funding Agreement, Callaghan Innovation is not liable to pay your claim for reimbursement.  You must confirm each of the statements below before moving to the application form. (as indicated by the red asterix \*) |
| **You confirm that you will employ the student on your payroll (they can’t be a self-employed contractor). The student must be a PAYE employee (internal labour). \***  Note: The business that employs the student must the applicant of this application. This business is required to provide the invoice for reimbursement and the payslips as evidence.  Confirmed | |
| **You understand that you are responsible for taxation liabilities (PAYE), payment for annual leave holidays, kiwi saver contributions, ACC, recruitment fees and other levies in relation to the funding of the employment of the student. \***  Note: Public and statutory holidays are included under the funding agreement, the hours associated are expected to be within the 400 hours.  Confirmed | |
| **You confirm that you will pay a minimum of $27.80 an hour (gross/before deductions) \***  Confirmed | |
| **You understand that the student must be working full-time in your business and Callaghan Innovation will support the salary/wages for the student up to a maximum of 400 hours (at the hourly rate of $27.80) \***  Confirmed | |
| **You understand that you are responsible for ensuring the student is eligible for the R&D Experience scheme, and will provide evidence of their eligibility at the time of claiming \***  Confirmed | |
| **You confirm that you will be able to provide payslips that display hours and hourly rate for the entire timeframe of the student’s employment, when claiming for reimbursement from Callaghan Innovation \***  Confirmed | |
| **You understand that if the terms and conditions of the Funding Agreement are not adhered to, Callaghan Innovation is not liable to pay your claim for reimbursement \***  Confirmed | |

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/assets/documents/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 Details | | | | | |
| **We're pleased to see that you have an application for an R&D Experience Grant underway. There is online help available in the portal to assist you with your grant application, and guidelines including FAQ's are provided on our** [website.](https://www.callaghaninnovation.govt.nz/products/fund/r-and-d-experience-grants/)  **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.**  **NOTE: Your application must be at the status of "Submitted to IMS" to be considered for funding, no later than 12pm (noon) Monday 15 July).** Once you have submitted your application, you can expect a decision via email within 15 working days.  Your application will form part of your funding agreement with Callaghan Innovation. Please read the [Funding Agreement](https://www.callaghaninnovation.govt.nz/assets/documents/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. | | | | | |
| **Investment area:** | | **2024/25 R&D Experience Grant** | | | |
| **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.  The address information shown below is not editable by the business. Email [FCMOperations@callaghaninnovation.govt.nz](mailto:FCMOperations@callaghaninnovation.govt.nz) to advise of any changes. | | | | |
|  | | **[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 $11,120 (GST exclusive) per student. (Based on an hourly rate of no less than $27.80 an hour (gross/before deductions) for 400 hours). | | |
| **$ GST exclusive**  **Enter amount here** | **$ GST amount**  **[Pre-populated – Calc]** | **$ GST inclusive**  **[Pre-populated – Calc]** |
| **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** | | | | |
| 1. **How many R&D FTE (Full time equivalent employees) are currently employed in your business?**   This can include contractors and FTE who are doing R&D as part of their role e.g. 3 FTE each doing 33% R&D = 1 FTE. | | | | |
| **Enter text here** | | | | |
| 1. **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.  Ensure you refer 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. | | | | |
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| 1. **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. |
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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:*  *Contact person = Name, business 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 with a registered New Zealand bank and in the name of the applicant.**  The table will automatically fill with the details we hold if you have previously had a R&D grant with us.   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **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. |
| **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](https://www.callaghaninnovation.govt.nz/assets/documents/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.  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 |
| 1. **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) Please confirm that you are not an entity that is:**  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** |
| 1. **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 actual or pending legal action against your business, major shareholders or directors.  Yes  No  **If yes, outline the issues:**  **If no, please state n/a:**  Please keep it brief, bullet points preferred. Your Funding Engagement Specialist will discuss these issues with you. | |
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| 1.6 Financial Information Table | |
| 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.  Confirmed | |
| Financial Information Table This 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.  Update the table so that it includes the last two financial year end information, total R&D spend and staffing levels ($NZD excl. GST).  Do not delete or overwrite any prior year data.  Please ADD a new line for the relevant year as required   |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | **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 |    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: | |
| **Enter text here** | |
| **Section 2: R&D programme eligibility** |
| 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 business 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. |
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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.   1. **Outline your R&D activities over the last 12 months:**   Please keep it brief (under 200 words), bullet points preferred. | |
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| **b) Outline your planned R&D activities for the next 12 months:**  Please keep it brief (under 200 words), bullet points preferred. | |
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| **Section 3: STUDENT eligibility** |
| 3.1 Student Eligibility (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. Ensure you have 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, in order to understand and 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 $27.80** 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 **for the entire timeframe of the student’s employment** when claiming for reimbursement from Callaghan Innovation. * Funding is available for the period of the internship between 1 July 2024 and 31 March 2025 (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 Student Exposure to R&D |
| ASSESSMENT CRITERIA This 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 criterion You 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 criterion The 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? |

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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 criterion Experience 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 four to five skills that your student needs to be successful in your business and include a mix of both technical and soft skills. The plan should 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*   |  |  |  | | --- | --- | --- | | **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 $27.80 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) |