

Application for Funding Projects



About this form

This form enables you to make an application for funding over \$100,000 from the Provincial Growth Fund for applications relating to the delivery of projects.

You will need to use the Express Form if your application is for an activity under \$100,000 or the Development Phase Form if your application is within the Development phase of a Project (i.e. feasibility / business case). These forms are available on the [Provincial Growth Fund website](#)

Purpose of the Provincial Growth Fund

The Provincial Growth Fund aims to lift productivity potential in the provinces. Its priorities are to enhance economic development opportunities, create sustainable jobs, enable Māori to reach their full potential, boost social inclusion and participation, build resilient communities, and help meet New Zealand's climate change targets.

Completing this form

Please complete all sections fully and accurately. Square brackets and italics indicate guides.

Please see the PGF website, or contact your regional relationship manager, for further support. If you are applying on behalf of a number of parties, you need their consent to submit this application. You can add other applicants during the application process. You will be the point of contact for this application, but you must give us all information about all applicants.

Submitting your application

All completed forms must be emailed to PGF@mbie.govt.nz with a clear subject included.

If you are a Trust (or applying on behalf of a Trust), then you must provide a copy of your Trust Deed.

Next Steps

Applications will be assessed for eligibility, as well as how well they will deliver on the aims of the Provincial Growth Fund. One of our team will be in contact regarding your application.

Funding Agreement

The template funding agreements can be found on the [Provincial Growth Fund website](#)

Public disclosure

The Provincial Development Unit is responsible for leading the Provincial Growth Fund's design, administration and monitoring its operation in consultation with other government agencies. In the interests of public transparency, successful applications may be published by the Provincial Development Unit. Commercially sensitive and personal information will be redacted by reference to the provisions of the Official Information Act 1982. Please identify by highlighting any information in your application that you regard as commercially sensitive or as personal information for the purposes of the Privacy Act 1993.

Part A: Key Details

Please note that if the funding agreement will not be held with the applicant (i.e. applying on behalf of another organisation), then we require the details of that organisation.

1. Proposal Title:

2. Please provide a very brief description of the project/activity:

Sustainable Māori eco-tourism packages situated within Puhikoko and Ngākauroa reserves, offering a range of unique visitor experiences around existing Kiwi conservation, ecological, Mātauranga Māori knowledge and education. The proposal provides a market ready and authentic cultural experience built off the successes of more than ten years of environmental and biodiversity efforts by the Omataroa Trust. These packages will generate ongoing commercial returns on multiple levels to support employment, up-skilling and education for Omataroa members leading to social, cultural and economic wellbeing.

Omataroa Eco Tours will offer a range of experiences within Puhikoko and Ngākauroa Reserves including;

- **Te Tangi o Ngā Kiwi - Two-hour Kiwi Listening Experience at dusk;**
- **Te Pātaka o Ngā Tūpuna - Half day eco-tour exploring Ngākauroa Wetland and Puhikōkō reserve;**
- **Ko Tēnei Mātou - Full day hands-on Kiwi discovery and eco tour;**
- **Kura Mātauranga - Full day educational experience for school groups and rangatahi; and**
- **Kaitiaki Kiwi - Corporate sponsorship packages.**

This project will actively collaborate and leverage off existing Eastern Bay of Plenty tourism offerings providing a valuable land-based alternative to current visitor experiences. Commercial Information Omataroa Eco Tours will provide an authentic cultural and nature-based experience delivered by Omataroa members who are tangata whenua and kaitiaki for the area. This project is part of a wider Ngāti Awa Tourist Strategy for the Eastern Bay of Plenty.

3. Please provide the details of the applicant organisation/entity for which funding is being requested:

Legal Name:	Omataroa Rangitaiki No2 Charitable Trust
Entity Type:	Trust (please provide your Trust Deed)
Registered Offices / Place of Business:	Ngāti Awa House, Louvain Street, Whakatane.
Identifying Number:	49 WAR 224-227 (minute book reference)
Organisation's Website:	https://www.omataroatrust.com/

4. Please provide the contact details for a person as a key point of contact):

Contact Name and Role:	Jane Waldon (Project Manager)		
Email Address:	Privacy of natural persons	Telephone:	Privacy of natural persons

5. Please describe the principal role or activity of the applicant organisation.

Omataroa Rangitaiki No2 Trust was established in 1970 and its principle role being to administer the assets of the Trust on behalf of the owners (approx. 12,000 Ngāti Awa descendants).

“Kia tipu, kia hāpaitia, kia tiakina, ā tātou rawa hei manaaki i ngā āhuatanga umanga, oranga taonga tuku iho me te taiao, e ora rawa atu ai ngā hunga katoa nā rātou nei ēnei whenua.”

“To grow, uphold and to care for our resources to sustain our cultural heritage, our environment and our Business Enterprises, so that the prosperity of all persons who own these lands is firmly assured.”

6. This project will be based in the region of:

7. What type of funding is this application for:

[Note: the most appropriate funding type will be determined by the PDU in consultation with the applicant]

8. What is the activity / funding start and end date?

Part B: Project Description

13. This application is: “a stand-alone activity” or “in support of a wider project/programme”

14. Will additional funding be required in the future? Yes: No:

If Yes, please describe at a high level, what this may include, and when this is likely to be applied for.

[Insert your commentary here]

15. Has a feasibility study, or equivalent, been conducted prior to this application? Yes: No:

- If Yes, please provide a copy, including an overview of the feasibility study and any outcomes.
- If No, please explain why not; and how feasibility/viability of the project has been assured.

Omataroa Rangitaiki No2 Trust has undertaken significant due diligence for this project. As an established entity, our senior operations and management team have developed a detailed Commercial Information business plan for the Omataroa Eco Tours project, including SWOT, Risk Matrix, Full financial forecast, Market Analysis and more. This is attached within the appendix for this application. Withheld - Commercial Information

Furthermore; Omataroa Rangitaiki No2 Trust has formally engaged the services of Commercial Information as advisors and consultants to work on the project application, market analysis, product creation, infrastructure planning and costings.

16. Please provide a detailed description of this project for which funding is being applied, including the benefits arising from the project:

[Note: please describe what the funding is for, why it is required, what the project will do, how it links to other projects or activities and the benefits which will be attributed to it – for more information on benefits management, see this [guide](#).]

The Omataroa Eco Tours project will establish a commercial eco-tourism venture on Māori whenua that will generate income, employment and benefits for Omataroa owners and the wider Eastern Bay of Plenty community and economy. Omataroa Rangitaiki No2 Trust has committed significant staff resources in the development of this proposal. In addition Omataroa has engaged Commercial Information to provide professional assistance and support totaling \$Commercial Inform. This commitment has seen the development of a detailed business case and action plan to ensure the project can be implemented as soon as funding is made available.

Māori Eco-tourism products will be built on the existing success of the Omataroa Kiwi Project. This project has received national recognition and is a shining example of taonga species management and biodiversity / biosecurity employment outcomes.

Omataroa have identified the following products which can be successfully delivered:

- Two-hour kiwi listening experience at dusk.
- Half day eco-tour exploring Ngakauroa wetland and Puhikoko reserve.
- Full day hands-on Kiwi discovery tour including learning about rongoā, Mātauranga, history and plant/species identification.
- Full day educational experience for school groups and rangatahi.
- Develop package deals alongside other tourism offerings.

The project will also provide opportunities for corporate and high-level outcomes:

- Corporate sponsorship packages - both New Zealand and International businesses and organisations.
- Full day and half day corporate tourism and educational offerings.
- Kiwi release and education events.

Infrastructure and Asset Development:

- Basic roading upgrades and scrub clearing to allow safe access for visitors and vehicles. Due to the tourist products being located within an active production forestry operation, visitor risk is mitigated by the requirement for transport in a fit for purpose vehicle driven by our experienced guides.
- Roding upgrades include; surface grading, contouring, drainage, spraying of the verges and scrub cutting along the smaller access roads leading to the Kiwi viewing platforms and sites.
- Off grid center of operation: Located within Puhikoko reserve, this asset will provide a place where visitors can engage with staff, information and the tourism products and experiences. This is the first point where visitors will be offloaded and will have the opportunity to purchase merchandise from a visitor shop, shelter from the elements and relax while the consider the various visitor options. There will be information signage and material which will allow visitor interaction with local history and knowledge.
- The center of operation will comprise of two prefabricate buildings (PodLife) joined with a large covered deck area. This allows space for larger school groups and corporate visitors as well as regular tour group sizes. The centre of operation will include off-grid services (Solar energy and natural gas for cooking and hot water) to power the site which will also be used by staff and conservation members in the monitoring and management of Kiwi, pest-control and other biodiversity efforts.
- A composting Eco-Toilet will be located to the rear of the centre of operation buildings.
- Two 6m by 6m observation decks with a connecting track will be constructed on elevated land adjacent to the centre of operations. The observation decks and connecting track are less than 50m to the south of the centre of operations and will make use of expansive view shafts from the highest point in the reserve.
- Another viewing area will be located off a side road just beyond the centre of operations. This viewing area will be a benched and graded platform with rope and bollard fencing, it will include information signage and is located within an area rich in ecology. This will allow for education and value for visitors.
- A third viewing area will be located at the Kiwi Listening area – again this will be a benched and graded platform with a with rope and bollard barriers. This site will provide visitors with a unique Kiwi listening experience.
- Ngakauoa Wetland board-walk infrastructure: This will include a benched and graded track around the wetland, with constructed boardwalk (approx. 100m). Located along the walkway will be information boards relating to the natural history, Mātauranga and Rongoā.
- All built structures including observation decks, tracking, boardwalks, viewing areas and other visitor assets will be constructed to comply with the Standards New Zealand, New Zealand Handbook Tracks and Outdoor Visitor Structures (SNZ HB 8630:2004) and all other relevant regulatory provisions.
- Purchase of a fit for purpose 11-seater vehicle for visitor transport.

Specific Tourism Product Development:

- Engage with contractor to rollout detailed tourism products and strategy for implementation:
- Create individual product schedule and cashflow forecast.
- Write operational policies and procedures, job descriptions, training programmes and employee manual.
- Compile Health and Safety plans
- Identify, train and bring on tour delivery staff as required
- Purchase uniforms and tour resources.
- Engage with kaumatua and kuia to ensure correct tikanga and cultural korero is captured for delivery.
- Enroll staff in Service IQ New Zealand Certificate in Tourism – education and upskilling

Marketing and Branding:

- Design visual brand assets.
- Design and develop social media platforms and presence
- Design and develop website and online sales funnel
- Develop and produce marketing collateral
- Engage with key tourism stakeholders and agencies: Tourism Bay of Plenty, Tourism New Zealand, Tourism

Rotorua, Whakatane District Council.

- Create and deliver compelling content and brand story across online media outlets.
- Engage with key media outlets both locally and nationally.
- Engage with existing tourism and accommodation providers to leverage networks.

Education and Employment Pathways:

- Texas Rangers programme where we provide a unique learning opportunity for 20 Senior Students at Te Kura o Te Teko to experience first-hand the role of kaitiaki in conservation management.
- Opportunities for tour guide training.
- Pest Control training.
- Drone and technology for Kiwi monitoring: Drone pilot courses and tech infrastructure management.
- Sales and Marketing.

Ongoing Sustainable Revenue Generation:

Note: The PGF funding the Trust has applied for will enable building of a financially sustainable eco-tourism operation which will contribute and flow into future, sustainable opportunities.

Ongoing operations of the project are not covered by this funding application with operating expenditure for this to be met by the Trust as part of the Business-as-Usual approach. It is included here for the sake of completeness and to show ongoing sustainability and viability of the project.

- Revenue generation from tourism products to cover operational expenditure: PAYE, marketing, communications, vehicle etc.
- Percentage of profits re-invested into creating new commercially viable opportunities: Industrial Tourism around Production Forestry as an example or on-site eco-accommodation.
- Continually improve and refine products and delivery in response to feedback.
- Upskill and train staff.
- Seek new opportunities to collaborate with local and regional stakeholders.
- Omataroa Rangitaiki No2 Trust has a discretionary budget in the order of \$^{Commercial Inform} spread over the first ^{Commercial Information} of operating to support the project to achieve a sustainable financial position where revenue generated exceeds operating expenditure.

A significant outcome of this project is to enable the Omataroa Eco Tours to become self-sufficient, sustainable and permanent. While tourism has not traditionally been a core business for the Trust, we believe we have a range of products that visitors (both local and international) to the Eastern Bay of Plenty would enjoy; eco-tourism experiences and products with a Maori flavour.

Local iwi Ngati Awa have significant investments and are key tourism operators in Whakatāne. As a Ngāti Awa Maori Land Trust we intend to leverage off our Iwi's tourism businesses by providing alternative land-based activities for visitors to Whakatane when the weather is inclement and sea conditions restrict visits ^{Commercial Information}

^{Commercial Information} The access to Omataroa Forest (within which Puhikoko Reserve and Ngakaurua Wetland are located) is approximately fifteen minutes' drive from Whakatāne. While it is a short drive, the weather conditions are often very different. When bad weather is being driven onshore from the sea, the weather at Puhikoko Reserve and Ngakaurua Wetland may be fine due to being located further inland.

17. How does this project demonstrate additionality within the region?

[Please cover:

- Why the project is not already underway.*
- How the project provides a new asset and is not seeking maintenance funding.*
- The benefit of Central Government funding (i.e. over alternative sources).*
- Why this project will unlock the potential within the region.]*

Omataroa Rangitaiki No2 Trust has been running a highly successful Kiwi breeding programme for over a decade in Puhikoko Reserve. This has been run alongside an intensive pest control management operation within the area to help facilitate this success. The past ten years of operation has given Omataroa considerable knowledge and experience which allows the Trust to establish a significantly unique and new commercial eco-tourism venture that will be a valuable addition to existing offerings in the Eastern Bay of Plenty.

The Omataroa Eco Tours project will create additional and new tourism products in the Eastern Bay of Plenty with the potential to service domestic and international tourism with a particular focus on the Tauranga cruise ship market and the existing Rotorua tourism sector. The Omataroa proposal will be a unique Maori experience that will provide a viable land-based alternative to existing offerings with potential to leverage this value through creating package deals etc.

The main aspirations and outcomes of the Omataroa Eco Tours project are listed below. These aspirations all demonstrate additionality within the region:

- **Commercial – develop and launch five premium eco-tourism experiences founded on a high-yield/low volume model.**
- **Environmental – generate at least \$^{Commercial} profit per annum to reinvest in biodiversity efforts within Puhikoko Reserve and the Ngakauoa Wetland**
- **Social – create at least ^{Commerc} paid FTE for Omataroa Rangitāiki No.2 owners and/or members**
- **Cultural – create opportunities to perpetuate the unique cultural traditions and heritage of Ngāti Awa ki Rangitāiki**

18. How is the project connected to regional (and sector) stakeholders and frameworks?

[Please provide an overview, including any evidence where appropriate of any relevant local and regional support, either via existing regional development mechanisms (i.e. regional plans), or through any other relevant body (i.e. council, iwi, hapū, or other representative group). If you do not have support, please explain why not and how you intend to get it]

We have strong support for our existing Kiwi work through our stakeholder group that includes representatives from:

- **Kiwis for Kiwi**
- **Nga Whenua Rahui**
- **Department of Conservation**
- **Bay of Plenty Regional Council**
- **Rayonier Matariki Forests**
- **Omataroa Hunting Club**

These groups have contributed to the critical expertise and resource required to carry out the conservation work within the context of a production forest. We enjoy strong support from Te Rūnanga o Ngāti Awa and other land trusts within our region.

The Trust has invested in pest control and Kiwi management for over ten years with the above key partnerships. The Omataroa Kiwi Project collaborates with other Kiwi Project around the country, we mentor others working in the kiwi protection space as well. We have strong connections with our Tūhoe whānau from Waikaremoana, and Pare Hauraki whānau in the Coromandel. We also provide pest control for other neighbouring Māori Land blocks and we are well on our way (about 80%) to creating a pest free corridor between our Omataroa Rangitaiki No. 2 lands and Te Urewera. This will enable kiwi and other native birds a much larger area in which to spread out. All of this pest control is done without the use of 1080 which can cause some passionate reactions in the community. We also have strong links with our community, currently running an education programme for Year eight children from Te Teko Primary School. This programme is called the Texas Rangers. It enables the children to connect to their whenua, get hands-on experience with Kiwi handling, learn about trapping, bush skills, rongoā, kaitiakitanga and forestry safety. They also learn about all the different kinds of native birds in the reserve.

19. How will your project lift productivity potential in the regions?

[We want to understand how your project will meet the primary objective of the fund: “to lift productivity potential in the regions”. Please provide a description of this and where relevant, please cover how your project contributes to the following outcomes:

PGF Outcome	✓	How will the project positively or negatively impact this outcome in the region(s) identified?
1. Increase economic output	✓	The Omataroa Eco Tours project will offer several authentic commercial eco-tourism packages. These packages will leverage into existing Kiwi conservation efforts, Mātauranga knowledge and environmental outcomes. The economic output from the project will flow into local businesses both directly and indirectly – accommodation, hospitality, transport, 3 rd party tourism ventures, retail and more.
2. Enhance utilisation of and/or returns for Māori assets	✓	The project is based within Omataroa Rangitaiki No2 Trust Māori whenua assets. Puhikoko Reserve and the Ngakaurua Wetland. have been formally gazetted as Nga Whenua Rahui Kawenata (Reserves Act 1977). The project will utilise Omataroa whenua assets, it will revive and share Mātauranga, Rongoā, Tikanga and cultural history relating to Omataroa and Ngāti Awa ki Rangitāiki.
3. Increase productivity and growth	✓	The Omataroa Eco Tours project will deliver eco-tourism products that will generate revenue to be re-directed back into growing the commercial viability of the assets. Omataroa will be empowered with real opportunities to actively participate in authentic Maori eco-tourism as a career. This will provide increased productivity and growth for commercial tourism, stakeholder engagement, environmental and educational aspects of the project.
4. Increase local employment and wages (in general and for Māori)	✓	Direct employment outputs from the Omataroa Eco Tours project include immediate employment of ^{Comme} FTE positions gradually increasing to ^{Com} FTE positions over a ^{Commercial Information} period. These will range from guides and kaitiaki through to marketing, booking and asset management roles. The Omataroa Eco Tours project will provide a commercially viable future as a provider of unique Māori eco-tourism in the Eastern Bay of Plenty. Omataroa anticipate further job creation as future tourism offerings are developed alongside educational opportunities and operational support roles. The project will also increase the requirement for 3 rd party service providers within our region: Catering, information technology, communications etc. A ^{Commercial Information} baseline of \$ ^{Commercial In} p/h will be part of the Trust’s tikanga approach with roles appointed salaries at or above the national equivalent.
5. Increase local employment, education and/or training opportunities for youth (in general and for Māori)	✓	Omataroa Rangitaiki No.2 Trust have developed the Texas Rangers, a rangatahi programme run in Te Teko schools with youth of Ngāti Awa ki Rangitāiki. The Omataroa Eco Tours project will create clear and present pathways for rangatahi employment, training and education.
6. Improve digital communications, within and/or between regions	✓	The Puhikoko Kiwi monitoring programme currently utilises digital technology to track and locate birds. The trust will be partnering with remote technology providers to create premium virtual tour packages which will include the potential for global live-streaming of biodiversity operations within the reserve. This has the potential to generate substantial revenue for the trust and value for

		eco-conscious corporate clients and international visitors who may have limited ability to be present on site.
7. Improve resilience and sustainability of transport infrastructure, within and/or between regions	✓	As operational forester's Omataroa Rangitaiki No2 Trust contribute to the resilience and sustainability of transport infrastructure through use of the Kawerau rail link and State Highway network. Neighboring production forest operations including Te Manawa o Tuhōe utilises the Omataroa Rangitaiki No2 Trust's roading infrastructure to connect them with regional distribution points (Kawerau rail link and Port of Tauranga). The addition of eco-tourism to the Trust's operations will result in additional demand and use of the regions transport network given the market focus of attracting domestic and international visitors from other centers. Any increase in demand for the use of transport infrastructure will aid in justifying ongoing development and maintenance of that network.
8. Contribute to mitigating or adapting to climate change	✓	The Omataroa Rangitaiki No2 Trust land block currently relies on production forestry as the predominant revenue generator for the land block. The Omataroa Eco Tours project will contribute to enhanced biodiversity and will build resilience for future management of Omataroa land assets. Restoration of the Ngakaurua Wetland and continued biodiversity management will enhance the mauri of the whenua provide additional revenue streams and long-term sustainable alternatives through Māori led eco-tourism and education. Asset diversity will be an ongoing focus of the Trust built on the foundations of this project and future value anticipated for generations to come.
9. Increase the sustainable use of and benefit from natural assets	✓	Omataroa Eco Tours products will enhance and build upon the health and wellbeing of natural assets that have been managed throughout more than ten years of the current Kiwi programme. Visitors will be educated about taonga species, the application of Mātauranga Māori principles and the importance of kaitiakitanga. Omataroa Eco Tours will celebrate and communicate the rich culture and history of Ngāti Awa ki Rangitaiki. Eco-tourism provides an opportunity for the Trust to generate long-term revenue and employment through the maintenance, enhancement and regeneration of natural assets in a sustainable manner.
10. Enhance wellbeing, within and/or between regions	✓	Eco-tourism is a new approach for Omataroa Rangitaiki No2 Trust that takes full advantage of our obligations and responsibilities as tangata whenua and kaitiaki. The Omataroa Eco Tours project will enhance Trust members social, cultural and economic wellbeing through Maori led eco-tourism that actively practices and applies our knowledge of Mataranga, tikanga and Manaakitanga. Omataroa will leverage off the wider Ngati Awa Iwi commitment to tourism through collaboration and mutual support of our eco and cultural tourism operations. The Omataroa Eco Tours project will connect with other regions and continue to enhance wellbeing for other Iwi and organisations through the sharing of knowledge and experience.
Total number of outcomes project contributes to	10/10	

20. Has public consultation been conducted?

Yes: No:

- If yes, what were the results?
- If no, is there a plan to do so?

Undertaken:

- Attendance at Whakatāne District Council Tourism Operators Workshop on 19 July 2019.
- Informal discussions with Ngāti Awa Group Holdings, Bay of Plenty Regional Council, Department of Conservation and Ngā Whenua Rāhui over several months.
- Regular updates at operational hui held with Rayonier Matariki Forests.
- Informal Newsletter update to shareholders and beneficiaries.
- Hosted Minister Mahuta on 11 July 2019.
- Regular updates to Trustees.
- Local Newspaper full page article in the Whakatane Beacon. (Attached in the appendix)
- BBC documentary film crew August 2019 (refer YouTube link)

Planned:

- Formal update to shareholders and beneficiaries at AGM to be held at the end of 2019

21. Please provide your customer demand / market analysis for this project, covering the following where possible:

- What is the current market for this project's outcome, and what is your current involvement in the market?
- What opportunities are there to *expand* market activity (i.e. what is the customer demand)?
- What customer market relationships do you have to leverage success of the outcomes of this project?
- Is the project primarily aimed at enhancing the share of a single market? If so, please detail the proposed markets with this intention.

Customer Demand and Market Analysis has been undertaken and has been presented in the attached Omataroa Eco Tours Business Plan. Information has been researched and collated from various industry leading statistical websites and publications, including meetings with established local and regional tourism operators.

- Mauri Ora Marketing Report is attached, providing initial market analysis and statistics. Withheld - Commercial Information
- Omataroa Eco Tours Business Plan is attached, providing detailed market analysis and relevant customer demand for the Omataroa Eco Tours project.

Within our country, many New Zealanders have not seen a Kiwi in the wild and there is a desire to do so. There is also clear indication that both domestic and international visitors are wanting a unique, authentic experience. A recent hui was facilitated by Whakatāne District Council with operators, including Omataroa Rangitaiki No2 Charitable Trust around the Destination Management Plan – Omataroa Eco Tours will deliver on their desired outcomes from their market analysis:

- “Prosumer” experience where visitors pay to have a hands-on experience: Omataroa Eco Tours offers this through tourism packages where visitors can actively be involved in the Kiwi conservation efforts.
- Unique, Cultural Eco-Tourism: Omataroa Eco Tours will provide visitors with a very unique and authentic experience. This will showcase Maori culture, history and ecology.
- Kiwi Experience: Omataroa Eco Tours provides a unique opportunity to learn about the Kiwi, our national bird in an authentic setting within the Eastern Bay of Plenty.
- Brand Story: Omataroa Eco Tours offers a valuable brand story to tell. Showcasing unique offering in the Eastern Bay of Plenty, our rich cultural history and wider economy – tourism, accommodation, retail and business.
- Strong Marketing: Through strong online presence and strategic partnerships with industry stakeholders Omataroa Eco Tours will inform visitors through all phases of their planning:
 - Digital Pre-Trip planning
 - Visitor engagement in surrounding regions during their trip – capturing Free and Independent Travelers (I-Site centres and accommodation providers)
 - Sharing and collaboration during their experience and post-trip provision for value added benefits (newsletters, online re-targeting, social media and sponsorship / donations)

This aligns with the strategies and analysis identified in the below publications:

Wider Bay of Plenty Tourism Strategy:

- Identified significant growth for the region.
- Gaps in the Cultural and Eco Tourism experiences.
- Opportunities to create unique experiences which attract tourists.

Eastern Bay of Plenty Sub-regional Tourism Strategy

- Identifies Enhanced Cultural Experiences as a growth area.
- Identifies Strong Maori Cultural offerings and River / Forest Experiences as a key destination appeal for tourism.

Tourism Bay of Plenty – The Love of Tourism:

- Showcasing our Regional Brand Story.
- Informing and drawing visitors to our region.

Destination Management Plan workshops from Whakatāne District Council

- 19th August 2019.

Collaboration and Additionality with local tourism operators:

As indicated, Omataroa Eco Tours offers a high value land-based alternative to existing tourism currently on offer. Due to restrictive bar conditions, tourists have an alternative which can be accessed all year round. Even in wet or cooler weather, Omataroa Eco Tours offers a unique and authentic eco experience in our rich native forests – enjoyable in all conditions. Omataroa Eco Tours offers also significant additionality to the region’s tourism offerings. By offering a range of packages ranging from all day to 2-hour evening trips, significant opportunities exist to link up with existing tourism offerings. This creates a longer itinerary for visitors where they can opt to do a half day or evening Omataroa Eco Tours trips, surrounding other activities.

Furthermore, this presents opportunities to create value added tourism packages and bundles with other operators. Omataroa Eco Tours is working with other tourism operators in the region to create these packages. Omataroa is in the initial stage of developing collaborative offerings with the main Tourism Businesses in Whakatāne:

- Commercial Information
- Commercial Information

Free and Independent Travellers are more likely to respond to value added offerings and tailored packages which allow flexibility with their schedule.

Tourism booking agents and third-party operators have a range of funnels to promote Omataroa Eco Tours to a wider audience already engaging with the Bay of Plenty. Omataroa Eco Tours will inform visitors in the regions (and online) via social media, digital strategy, information centres, accommodation providers and tourism providers.

Omataroa Eco Tours will provide visitors with both a stand-alone tourism product and one which will add market share to the wider industry.

22. Where the project utilises land, does the land have any other interests associated with it? (i.e. Treaty claims, or iwi/hapū ownership) Yes: No:

The land is owned by Omataroa Rangitaiki No2 Trust. Trust Deed attached. Withheld - Commercial Information

23. Is the land is owned by others, i.e. not solely by the applicant?

- If yes, then please describe the other interests and how will this be managed?

The land is owned and administered by Omataroa Rangitaiki No2 Trust. Trust Deed attached. Withheld - Commercial Information

24. Does the land have appropriate Resource Management Act consents?

Yes:

No:

- If no, how and when will this be addressed?

As part of the agreed Forestry Management contract Rayonier Matariki Forests have responsibility for the construction and maintenance of the roading network within the Omataroa Forest (which includes access networks to Puhikoko and Ngakauroa Wetland) and any necessary resource consents required to manage and operate the forestry assets.

The Omataroa Eco Tours project will require regulatory coverage and this is provided for within the project budget. Current access networks to Puhikoko Reserve and Ngakauroa Wetland a fit for purpose and will not require major works beyond normal ongoing maintenance of surface and water tables.

Omataroa have chosen to use fully contained composting toilets that are designed and approved for use by the Department of Conservation and do not require resource consents under the Regional On-Site Effluent Treatment Plan.

Part C: Project Delivery

[Please note – this section refers to the actual activity associated with this application.]

25. Please provide an overview of the project management approach / plan for this activity.

[We would like you to demonstrate:

- How the activity will be managed from your organisation?
- What involvement is required by the Provincial Development Unit?
- What other partners are required for successful delivery? (demonstrating this with diagrams where possible)
- What project management practices will be in place?
- Who are the key personnel within the organisation relating to this project?
- Please include bio's and provide an organisational/project structure where possible
- Please attach a copy of your health and safety policy that will apply for this project].

Omataroa Rangitaiki No2 Trust head office is located in Ngāti Awa house, Louvain Street Whakatane and includes Commerc full time staff who are responsible for actively managing the various assets and operations of the Trust. This includes the recent appointment of a professional Project Manager who will actively manage implementation of the Omataroa Eco Tours project on behalf of the Trust. The Omataroa Project Manager Jane Waldon is the key point of contact for the project. Existing Kiwi management operations at Puhikoko Reserve including engagement with external groups are delivered Commercial Information

The Trust seeks ongoing advice and support from representatives of the Provincial Development Unit to ensure successful delivery of the project. This ongoing advice and support would ideally include (but not be limited to) introductions and referrals to government department teams active in Maori business, regional economic development, conservation and biodiversity management, as well as tourism industry contacts. The Trust would also appreciate any advice or connections with other Maori led eco-tourism operators across the country.

Omataroa Rangitaiki No2 Trust are proudly independent and are focused on ensuring the Omataroa Eco Tours project is a financially viable and sustainable proposition beyond asset development funding sought in this application to the Provincial Growth Fund.

The Trust will seek to collaborate and partner with their iwi Ngāti Awa who are active operators in the Tourism sector in the Eastern Bay of Plenty. As a Ngāti Awa Maori Land Trust Omataroa will leverage off our Iwi's tourism businesses by providing alternative land-based activities for visitors to Whakatāne. The Trust have strong support for their existing Kiwi efforts through a stakeholder group that includes representatives from Kiwis for Kiwi, Ngā Whenua Rāhui, Department of Conservation, Bay of Plenty Regional Council, Rayonier Matariki Forests and the Omataroa Hunting Club. The Trust also receive strong support from Te Rūnanga o Ngāti Awa and other land trusts within the region.

Omataroa Rangitaiki No2 Trust have developed a detailed Commercial Information Business Plan to oversee implementation of the Omataroa Eco Tours proposal (refer to Appendix 3.1). The Omataroa Project Manager will be assisted through the appointment of three external contractors that specialise in product development and strategic marketing, project management and delivery and development of an operational Health & Safety Plan. A discretionary budget of \$Commercial Information has been included in this funding application to secure appropriate specialist contractors to provide necessary assistance for the Omataroa Project Manager and ensure effective delivery of the Omataroa Eco Tours project. A copy of the current Health and Safety Plan for all Omataroa Rangitaiki No2 Trust operations is included in the attached appendix. Appendix 3.1 and Health and Safety plan withheld - Commercial Information

Following confirmation of Provincial Growth Fund financial support, the Omataroa Project Manager will develop a

phased plan for the effective implementation of the Omataroa Eco Tours project. The phased implementation plan will include key project milestones with timeline requirements and will include regular reporting requirements both internally within the Trust and externally to Provincial Development Unit representatives. (refer Section 27)

The Omataroa Rangitaiki No2 Trust is run by a Trust Manager with the support of a Projects and Relationships Manager, a Trust Administrator and an Office Assistant. [Privacy of natural persons] provides kiwi monitoring, pest control, plant pest management and track maintenance within the Omataroa Land block as a contractor [Privacy of natural persons] who employs up to [Com] staff on a seasonal basis.

Please refer to the attached appendix regarding:

- Omataroa Management structure Diagram Withheld - Commercial Information
- A CV for the Project manager Withheld - Privacy of natural persons
- A Health & Safety Plan for Omataroa Rangitaiki No2 Trust Withheld - Commercial Information

Please refer to the below LinkedIn bio link for the Project Manager

[Privacy of natural persons]

26. Have you had independent verification of the project approach / plan?

Yes:

No:

If yes, who verified the project and when?

[Commercial Information] has provided Independent Verification of this project. This was confirmed by email August 2019.

27. Please provide us with a project plan, where possible please attach a schedule (i.e. Gantt chart):

[Please use the following table to describe the milestones of the project, if preferred, a schedule can be provided]

#	Project Activity	Responsible:	Date / Period:
1	Supply PDU with Final Application for PGF Funding	[Commercial Information]	[Commercial Information]
2	Successful Acceptance of PGF Funding	PGF	[Commercial Information]
3	<p>Phase 1: Pre-Works Engagement</p> <p>Formal Engagement of Geotech Engineering & Project Management and Regulatory support</p> <p>[Commercial Information :</p> <ul style="list-style-type: none"> • Appoint Project Management (for all phases) • Appoint Geo-tech engineering & regulatory compliance <p>[Commercial Information]</p>	<p>Omataroa Rangitaiki No2 Trust & Project Manager</p> <p>[Commercial Information]</p>	[Commercial Information]
4	<p>Phase 2: Centre of Operations (Construction)</p> <p>Formal Engagement with Contractors to begin asset and infrastructure development at Centre of Operations undertaken over the [Commercial Information] period:</p> <ul style="list-style-type: none"> • Buildings (2xPodlife, covered deck area, eco-toilet) 		[Commercial Information]

	<ul style="list-style-type: none"> • Two 6mx6m Viewing Platforms and connecting track • Off grid services (Solar power & Gas) • Rope bollard, info signage • 2 x Formed viewing areas • Develop website and content <p>Commercial Information</p> <p>[Redacted]</p> <p>[Redacted]</p>		
5	<p><u>Phase 3: Ngakauroa Construction</u></p> <p>Formal Engagement with Contractors to begin asset and infrastructure development at Ngakauroa Wetland undertaken over the Commercial Information period:</p> <ul style="list-style-type: none"> • Boardwalk construction (approx. 100m) • Eco-toilet • Site entrance mauri enhancement (Waharoa, seating, info signage and rope and bollard) <p>Commercial Information</p> <p>[Redacted]</p> <p>[Redacted]</p>	<p>Omataroa Rangitaiki No2 Trust & Project Manager</p>	<p>Commercial Information</p>
5	<p><u>Phase 4: Omataroa Eco Tours Delivery</u></p> <ul style="list-style-type: none"> • Obtain Health & Safety Plan • Branding & Website development • Purchase of 11-seater vehicle <p>Commercial Information</p> <p>[Redacted]</p> <p>[Redacted]</p> <p>[Redacted]</p>	<p>Omataroa Rangitaiki No2 Trust & Project Manager</p>	<p>Commercial Information</p>
6	<p><u>Phase 5: Pest Control & Kiwi Protection</u></p> <ul style="list-style-type: none"> • Bait stations, traps and bait • Kiwi protection, transmitters and tech • Continued brand engagement <p>Commercial Information</p> <p>[Redacted]</p> <p>[Redacted]</p>	<p>Omataroa Rangitaiki No2 Trust & Project Manager</p>	<p>Commercial Information</p>

28. Please provide a complete breakdown of the costs of the project to assist us in understanding where the funds will be utilised:

[Note that figures in this table must align with other figures provided in Q11. Please use as many lines as it takes to provide us with the appropriate detail. If more suitable, please attach a budget spreadsheet to this application]

Cost Description:	\$ (excluding GST)
2x PodLife buildings	\$ Commercial Information *
1x Covered deck area	\$ Commercial Information *
1x Eco-toilet	\$ Commercial Information *
Two 6mx6m Viewing Platforms & connecting track	\$ Commercial Information *
Off Grid Solar	\$ Commercial Information *
Gas Hot Water	\$ Commercial Informa *
Health and Safety Plan	\$ Commercial Informa
11-seater Vehicle	\$ Commercial Information
Geo-tech Engineering	\$ Commercial Information
Regulatory Compliance	\$ Commercial Information
100 metres Boardwalk Construction @ \$ Commercial Inform per lineal metre	\$ Commercial Information *
1x Eco-toilet	\$ Commercial Information *
Site Entrance Mauri Enhancement (Waharoa, seating, information boards, rope/bollard)	\$ Commercial Information *
Pest Control – bait stations, traps and bait	\$ Commercial Information
Kiwi Protection – transmitters and tech	\$ Commercial Informa
Branding & Website Development	\$ Commercial Information
Contract Support for Omataroa Project Manager, Project Management and Delivery (0.00% of Asset Development Costs) as indicated by*	\$ Commercial Information
Total Project Cost (Funding): (excluding GST)	\$ Commercial Information

Figures below are direct project contributions funded by The Omataroa Rangitaiki No2 Trust.

Cost Description:	\$ (excluding GST)
Roading Upgrade and Track Clearing	\$ Commercial Information
Signage, Marketing Material and printing/publication	\$ Commercial Information
Professional Services Project Development	\$ Commercial Informa
Omataroa Rangitaiki No2 Trust Commercial Inf Operating Expenditure	\$ Commercial Information
Total Project Cost (Omataroa): (excluding GST)	\$ Commercial Information

29. What are the proposed deliverables if funding is approved?

[Please use the following table, consider what deliverables there will be, when, and whether there are any payments associated with them and against what criteria payment should be made. If it is a single deliverable with single payment, please just use one line]

#	Description	Payment criteria:	Invoice Value \$ (Exc. GST)	%	Invoice Date:
1	Phase 1: Pre-Works Engagement	Supply formal engagement documents with successful contractors	\$ Commercial Information	Commercial %	Commercial Information

31. Please provide an overview of the applicant's relevant skills and experience for delivering a projects of this nature:

Omataroa Rangitaiki No 2 Trust is a Ngāti Awa Ahu Whenua Trust based in the Eastern Bay of Plenty, Aotearoa. The Trust was established by an order of the Māori Land Court on 10 April 1970. The Trust has a total of 2,322,500 shares with approximately 10,950 owners.

- The Trust's commercial activities comprise of forestry leasing, commercial and residential properties and a mixed investment portfolio.
- The Forestry lease generates the majority of Trust income. Operating assets include residential and commercial property and farmland. The Trust's financial assets include long-term investments and a range of listed equities.
- The Trust regularly considers investment opportunities that are aligned to sustainable development and growing the asset base on behalf of the owners.
- Commercial Information. These distributions may be to individuals (e.g. Education Grants) or groups (e.g. Marae grants). The distribution funding is managed via both the Trust and the Omataroa Rangitaiki No 2 Charitable Trust.
- A number of partnerships with Ngāti Awa commercial entities and other businesses provide a diversified portfolio for the Trust across investments in dairying, kiwifruit and Manuka honey.

Key documents are freely available on the Omataroa website, including Annual Reports and Audited Financial Reports: <https://www.omataroatrust.com/reports.aspx>

Please read below a list of key projects Omataroa Rangitaiki No 2 Trust has been involved in:

- The Trustees are committed to protecting Kiwi and their natural habitat. The main focus of the project is the biodiversity rich Puhikoko Reserve (546 ha), which is home to kiwi, kereru, North Island Robin and many other native bird species. For over ten years, the Trust has invested in environmental restoration.
- This includes pest management and active Kiwi management to ensure a sustainable population for generations to come.
- The Trust is supported by a range of project partners including; Ngā Whenua Rāhui, Rayonier Matariki Forests, Bay of Plenty Regional Council and the Kiwis for Kiwi Trust. A Kawenata is in place over Puhikoko Reserve, and intensive predator trapping and poisoning is undertaken to control mustelids, rats, cats and possums. No hunting is allowed in Puhikoko Reserve.
- Regular kiwi aversion training is also held with the local Omataroa Hunting Club. This ensures that if hunting dogs do come across a kiwi in the pine forest, they will have an aversion to it and therefore not attack. Kaitiaki work is also undertaken with forestry contractors to prevent harm to kiwi during forestry operations.
- The objective of the project is to protect the kiwi population and the wider biodiversity values of the forest, while also helping our people reconnect to the whenua and develop their skills as kaitiaki. Privacy of natural per leads the work on the ground and has had a strong interest in engaging whanau in kiwi conservation from a young age. Local Kōhanga reo are regular attendees at kiwi blessings, and each year a new group of Texas Rangers (Year eight students from Te Kura o Te Teko) are taught kaitiakitanga and kiwi protection work as well as participating in kiwi releases and health checks.
- Wild juvenile kiwi can be found in the area, highlighting the benefits of our pest animal control and advocacy work. Each year approximately five eggs are removed and sent to Kiwi Encounter in Rotorua.
- They are returned to the reserve once they have reached a safe weight. This has helped reinvigorate the resident kiwi population with young birds. Kiwi chicks have also been gifted to other local kiwi projects to help ensure a robust gene pool in now isolated populations.

32. Please outline the project team and explain the Governance arrangements for this project

*[We would like to know about the members of your project team (the key personnel/leadership team involved in your application), how your organisation will govern the project/activity, as well as how other organisations may be involved (i.e. the Provincial Development Unit, local council, or iwi/hapū) in the governance procedures. Specifically please name who is on the governance board / leadership team (the **Project Team**)]*

Omataroa Rangitaiki No 2 Trust operates with a high-level governance structure. Audited financial accounts are provided annually and board meetings and stakeholder communications are regularly held as “business as usual”.

The current board (which can be found at www.omataroatrust.com) is made up of:

- **Waaka Vercoe - Waaka Vercoe resigned as Chairman of the Trust in 2017 but still remains a Trustee and is actively involved in iwi economic development with a long-standing track record on a range of Ngāti Awa commercial entities. Waaka has extensive knowledge of Te Ao Māori and is a well-known Kaumātua within Ngāti Awa and beyond.**
- **Charlie Elliot - Charlie Elliott was elected Chairman by the board in 2017. Charlie also serves on Māori Investments Limited and Pūtauaki Trust and has a background in the primary sector, particularly dairy farming and agriculture.**
- **Joe Mason - Joe Mason has been a trustee for many years and is widely renowned as a Ngāti Awa orator and leader. Joe is also the Chairman of Te Rūnanga o Ngāti Awa and brings strong leadership and direction to the Trust.**
- **Jane Waldon - Jane Waldon was appointed as a Deputy Chairperson in 2017 and has been serving as a Trustee since 2014. Jane is currently employed as the Projects and Relationships Manager with the Trust and actively participates in a range of governance roles in and around the Te Teko community. Jane is experienced in Resource Management Act and Maori Land Court processes**
- **Gina O’Brien - Gina O’Brien was appointed as a Trustee in July 2014 having served previously as an Associate Trustee. Gina has a background in Māori economic and social development and is the current Representative for Ngā Maihi on Te Rūnanga o Ngāti Awa and a director of Ngāti Awa Group Holdings Limited.**

Pru Elliot - Pru Elliott is the Trust Manager for Omataroa Rangitaiki No 2 and also serves on a number of Te Teko land trusts and community groups. She has extensive experience of working with Māori Trusts and Incorporations with a background in financial management and operations. Pru is passionate about Māori economic development and is committed to serving the needs of the Trust and its owners.

33. What procurement process has been undertaken (i.e. selection of a provider), or will be undertaken, and how will that be managed? In addition, please provide a description of how greater public value will be achieved through the procurement process, for example by considering one or more of the following:

- How regional businesses (inc. Māori / Pacifica enterprises) will be provided with opportunities
- How skills will be developed in the market (i.e. via construction apprenticeships)
- How worker conditions in the supply chain will be improved / managed
- How waste / emissions are being reduced in this procurement.

For more information, please visit: <https://www.procurement.govt.nz/broader-outcomes/>

[We wish to understand how you will approach the market effectively and ensure value for money / public value is delivered, noting that public money is being utilised. If you have already been to market, then please describe who the supplier(s) are, how/why they were selected, and what the contractual arrangements are]

Where possible, Omataroa have chosen providers located and operating within the Easter Bay of Plenty. It is important to us that we collaborate and support organisations within our region as they have clear and present knowledge, experience and understanding within our geographic and economic environment.

We have worked – where possible – on a “two quote system”. While we have given preference to Māori providers, part of the risk mitigation approach means we have chosen established providers with a proven track record. This reduces the risk of budget over-runs and not meeting deliverables:

- **Delivered in Full**
- **Delivered in Spec**
- **Delivered on Time**

During the quoting phase, several site visits were arranged to bring potential contractors through the reserve. This provided ample opportunity to question and vet potential contractors.

During the infrastructure asset development phase, local rangatahi and willing adult learners will be engaged in the process. At the very least this will provide opportunities to observe processes and be educated on many facets of the infrastructure development.

Waste and Environmental conditions have carefully been considered in this project:

- **All infrastructure asset built within Puhikoko and Ngakauoa will be constructed through environmentally friendly processes. Where practicable, sustainable resources will be used.**
- **Mātauranga will be incorporated where possible – the gravel required for track benching will be sourced from within the Puhikoko and Ngakauoa areas. This not only reduces emissions and logistic costs but ensures appropriate connectedness and tikanga around the mauri of the environment.**
- **The Centre of Operation will be fully off grid – powered by solar with natural gas water heating This reduces the operations carbon footprint and drastically reduced infrastructure costs.**
- **The Centre of Operation will collect rain-water – mitigating the requirement for water to be transported to site.**
- **Composting Eco-toilets will be installed – reducing the waste byproduct, infrastructure costs and maintenance costs.**

All workplace conditions during the asset development phase and for ongoing eco-tourism experiences will be managed by Health & Safety policies applied by successful contractors and through the costed review and implementation of an updated Omataroa Eco Tours - Health and Safety Plan.

34. What risks are associated with the delivery of this activity?

#	Risk	Mitigation approach	Rating
1	Market Demand for the Omataroa Eco Tours visitor experience does not materialise	<ul style="list-style-type: none"> Project due diligence has included assessments of regional tourism strategies Omataroa collaboration with existing Ngāti Awa tourism operations Unique nature of the experiences Omataroa commitment to support initial operating expenses 	Low
2	Lack of practical biodiversity experience and/or support from Kiwi management authorities	<ul style="list-style-type: none"> Omataroa have been successfully delivering biodiversity and Kiwi management for more than 10-years Omataroa involvement in Kiwi Management stakeholder group which includes all relevant management authorities Succession planning involving Texas Ranger programme to identify future staff assets 	Low
3	Lack of capability and/or capacity for Omataroa to provide specialist services may risk effective delivery of the asset developments	<ul style="list-style-type: none"> The Omataroa Project Manager has carefully considered internal capacity and has included provision for contracting of specialist services to support delivery of the project 	Low
4	Competing operational demands within the area constrain asset development and/or ongoing visitor experience operations	<ul style="list-style-type: none"> Omataroa have discussed asset development and ongoing operations with forest managers who have confirmed there are no clear obstructions to either operation. The Ngakauroa Wetland asset development has been planned to take in to account harvest intentions in the area over the <small>Commercial Information</small> period Omataroa have secured forest manager commitments <small>Commercial Information</small> including minor tree removal, road upgrades and maintenance and consideration of replant boundaries post-harvest. 	Low
5	Construction and commissioning of physical asset and specialist services contracts exceed budgeted levels	<ul style="list-style-type: none"> Omataroa have completed a robust and detailed quote of services process to ensure budgeted items are realistic and achievable. Engagement contracts with potential contractors are included in reporting requirement for Phase payments from the PGF. All final contract documentation will reflect Phase payment requirements and criteria in regard to costs and timing. 	Low

35. Will the applicant own the asset on delivery?

Yes: No:

- If no, please describe who will own the asset.

36. When the project is delivered, what is the plan to operationalise the asset (if an asset), and maintain it through life?

[We would like to understand what will happen after the funding has been used, and the project is delivered. Please cover how sustainable the resulting asset will be in terms of funding, skills required, and consumer demands etc.]

The funding applied for under this project will be used as seed funding to construct necessary assets, develop market access and brand and to ensure Maori eco-tourism visitor experiences will be commercially viable and delivered safely and effectively. Going forward the project has clear and present commercial viability and sustainable future.

The commercial eco-tourism products (outcomes from this project) offer a truly unique and accessible Māori experience for local, regional and international visitors. Revenue generated will cover the operational expenditure and further commercial opportunities can be leveraged upon around corporate sponsorship, educational and tailored experiences for businesses and organisations.

The Omataroa Eco Tours proposal has been considered in regard to Regional Economic Growth and in particular the development of a long-term sustainable economy through Māori led tourism. The Trust have identified that while tourism has not previously been their core business, they believe they have a range of experiences and products that international and domestic visitors to the Eastern Bay of Plenty will enjoy, eco-tourism with an authentic Maori flavour.

The Eastern Bay of Plenty Sub-regional Tourism Strategy (31 August 2017) identifies the development of Māori led Tourism as a key opportunity given the high proportion of Māori residents and Māori owned lands in the area. In particular the strategy refers to the untapped potential to increase cultural and nature-based tourism experiences. Proximity of the Tauranga cruise-ship passenger market is a key opportunity for those offering authentic cultural experiences in the Eastern Bay of Plenty.

As a Ngāti Awa Lands Trust Omataroa will leverage off their iwi's tourism focused business platforms providing alternative land-based activities when weather conditions restrict access to offshore islands. Having land-based experience options will also encourage extended stays in the Eastern Bay of Plenty providing subsequent economic gains across the service and hospitality sector.

Future intent relating to the main objectives from this project:

- Develop ^{Commerc} Commercial eco-tourism products to be delivered within the Omataroa whenua asset.
- Develop further iterations of products and build on existing products to leverage greater value.
- Develop new Commercial tourism products (for example Industrial Tourism) which will leverage into existing Omataroa assets.
- Generate at least \$^{Commercial Informa} profit per annum to reinvest in Puhikōkō Reserve conservation efforts.
- Social – create at least ^{Com} paid FTE for Omataroa Rangitaiki No.2 owners and/or members
- Cultural – create opportunities to perpetuate the unique cultural traditions and heritage of Ngāti Awa ki Rangitaiki

A key outcome for the project is the creation of at least ^{Commerc} paid Full Time Employees (FTE's) for Omataroa Rangitaiki No.2 members. Omataroa understands the PGF fund is generally for Capital Expenditure items and will not normally consider funding requests to cover Operating Expenditure. Understandably this is to ensure projects have financial viability beyond any start-up capital that they PGF Fund may grant. Omataroa have carefully considered ongoing operating expenditure to develop an understanding of annual revenue generation targets to ensure the Omataroa Eco Tours proposal has clearly defined targets to achieve long term financial sustainability. To this end Omataroa consider the objective of achieving ^{Commerc} FTE's should be a medium- term goal within a timeframe of ^{Commercial Information} years.

Omataroa propose to commence Omataroa Eco Tours visitor experience operations with a staffing level of ^{Comme} FTE's that will include the Primary Operations Manager supported on site with a ^{Comme} FTE Tour Guide. A Business Plan has been developed covering the first ^{Commercial Information} of operations that will provide for a gradual increase in operations

and staffing levels as market and customer access increases (refer Appendix 3.1). The following employee costs are based on data from business.govt.nz Employee Cost Calculator (Market Industry Salary Rates provided by Trade Me Jobs). Pay rates for the Hospitality & Tourism sector: Appendix 3.1 has been withheld - Commercial Information

1. Management; median annual salary \$^{Commer} with a range of \$^{Commer} to \$^{Commer} = Primary Operations Manager @ \$^{Commer} p/a ^{Commercial Information}
2. Tour Guides median annual salary \$^{Commer} with a range of \$^{Commer} to \$^{Commer} = ^{Comme} FTE Tour Guide @ \$^{Commer} p/a

Therefore; using accepted employment multiplier formula of annual salary x ^{Commercial Informatio} (the high end of the range has been adopted) plus an estimated annual vehicle cost of \$^{Commer} = a base operating expenditure for the proposed ^{Comme} FTE model of \$^{Commercia}

Omataroa Rangitaiki No2 Trust has a discretionary budget in the order of \$^{Commercial Inform} over ^{Commercial Information} of operating to support the project to achieve a sustainable financial position where revenue generated exceeds operating expenditure. This results in a very achievable operational revenue target of \$^{Commercia} per annum. Key revenue and market access targets will be included in the Omataroa Eco Tours ^{Commercial Information} Business Plan that will inform the Trust on gradual expansion of operational staffing levels.

The Omataroa Eco Tours proposal provides a market ready and authentic cultural experience built off the successes of more than ten years of environmental and biodiversity efforts by the Omataroa Rangitaiki No2 Trust. Funding is included in the project budget for detailed product development and marketing of the Puhikōkō and Ngakauroa experiences and specialist services that will ensure effective and timely delivery of the project. A key recommendation is to ensure the Puhikōkō and Ngakauroa proposals are marketed as day options in conjunction with Whakatāne and Tauranga based efforts to promote visitor options to ^{Commercial Information}, Te Mānuka Tūtahi – Mātaatua Wharenui and other offerings in the Eastern Bay of Plenty in general.

37. What will the impact be on the applicant's financial accounts?

[Please describe what impact the funding will have on the applicant's financial accounts over the time of the project.]

Annual Reports and Audited Financial Reports for Omataroa Rangitaiki No2 Trust can be found here:

<https://www.omataroatrust.com/reports.aspx>

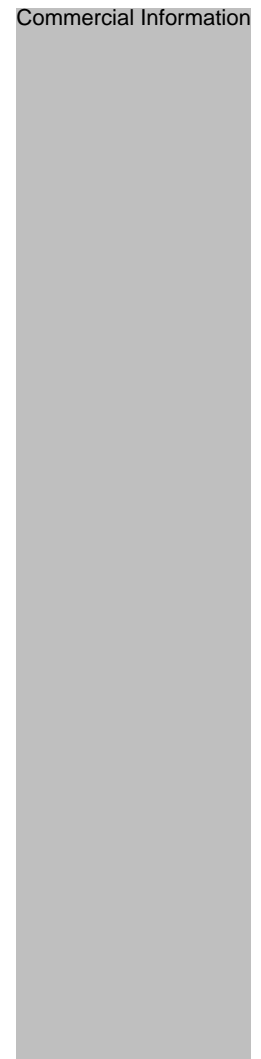
This Funding will greatly enhance the Trust's ability to generate sustained revenue and ability to create future income streams. Aside from the initial key outcomes of employment, education and conservation, commercial viability from this project will enable future investment into growing these outcomes for many years to come, promoting resilience and prosperity for both shareholders and beneficiaries.

Part D: Declarations

- 38. The contracting entity is compliant and will continue to comply with all applicable laws, regulations, rules and professional codes of conduct or practice including but not limited to health and safety and employment practices
- 39. Has this activity ever been declined Crown Funding in the past?
- 40. Has the applicant or the contracting entity ever been insolvent or subject to an insolvency action, administration or other legal proceedings?
- 41. Has any individual in the Project Team (including the Applicant’s Leadership Team, directors, partners, or trustees, or any key members of the project) ever been insolvent or subject to an insolvency action, administration or other legal proceedings, or actively involved in any organisation which has?
- 42. Has any individual in the Project Team (including the Applicant’s Leadership Team, directors, partners, or trustees, or any key members of the project) ever been adjudged bankrupt or is an undischarged bankrupt?
- 43. Has any individual in the Project Team (including the Applicant’s Leadership Team, directors, partners, or trustees, or any key members of the project) ever been under investigation for, or been convicted of, any criminal offence?
- 44. Are there any actual, potential or perceived conflicts of interest that the applicant or any of the key personnel have in relation to this project.

“In a small country like ours, conflicts of interest in our working lives are natural and unavoidable. The existence of a conflict of interest does not necessarily mean that someone has done something wrong, and it need not cause problems. It just needs to be identified and managed carefully...” <https://www.oag.govt.nz/2007/conflicts-public-entities>

If you answered “Yes” to any question from 39 to 44, please provide a description below:



By completing the details below, the applicant makes the following declarations about its application for Provincial Growth Fund funding for the project (“application”):

- I have read, understand and agree to the Terms and Conditions of applying for Provincial Growth Fund funding which are attached as Appendix 1;
- The statements in the application are true and the information provided is complete and correct, and there have been no misleading statements or omissions of any relevant facts nor any misrepresentations made;
- I have secured all appropriate authorisations to submit the application, to make the statements and to provide the information in the application;
- I have obtained the permission of each member of the Project Team to provide the information contained in this application and those individuals are aware of, and agree to, the Terms and Conditions of applying for Provincial Growth Fund funding which are attached as Appendix 1;
- I consent to this application being publicly released if funding is approved. I have identified the commercially sensitive and personal information.
- The applicant warrants that it has no actual, potential or perceived conflict of interest (except any already declared in the application) in submitting the application, or entering into a contract to carry out the project. Where a conflict of interest arises during the application or assessment process, the applicant will report it immediately to the Provincial Development Unit by emailing PGF@mbie.govt.nz; and
- I understand that the falsification of information, supplying misleading information, or the suppression of material information in this application, may result in the application being eliminated from the assessment process and may be grounds for termination of any contract awarded as a result of this application process.
- The applicant consents to the Provincial Growth Fund undertaking due diligence including any third-party checks as may be required to fully assess the application.

Full name:

Jane Privacy of natural persons Waldon

Title / position:

Deputy Chairperson/Projects & Relationships Manager

Signature / eSignature:

Date:

23/8/19

.....

Appendix 1 – Terms and Conditions of this Application

General

The terms and conditions are non-negotiable and do not require a response. Each applicant that submits a request for Provincial Growth Fund (“PGF”) funding (each an “application”) has confirmed by their signature (or e-signature) on the application that these terms and conditions are accepted without reservation or variation.

The Provincial Growth Fund is a government initiative which is administered by the Provincial Development Unit, a unit within the Ministry of Business, Innovation and Employment. Any reference to the Provincial Development Unit in these terms and conditions, is a reference to MBIE on behalf of the Crown.

Reliance by Provincial Development Unit

The Provincial Development Unit may rely upon all statements made by any applicant in an application and in correspondence or negotiations with the Provincial Development Unit or its representatives. If an application is approved for funding, any such statements may be included in the contract.

Each applicant must ensure all information provided to the Provincial Development Unit is complete and accurate. The Provincial Development Unit is under no obligation to check any application for errors, omissions, or inaccuracies. Each applicant will notify the Provincial Development Unit promptly upon becoming aware of any errors, omissions, or inaccuracies in its application or in any additional information provided by the applicant.

Ownership and intellectual property

Ownership of the intellectual property rights in an application does not pass to the Provincial Development Unit. However, in submitting an application, each applicant grants the Provincial Development Unit a non-exclusive, transferable, perpetual licence to use and disclose its application for the purpose of assessing and decision making related to the PGF application process. Any hard copy application or documentation supplied by you to the Provincial Development Unit may not be returned to you.

By submitting an application, each applicant warrants that the provision of that information to the Provincial Development Unit, and the use of it by the Provincial Development Unit for the evaluation of the application and for any resulting negotiation, will not breach any third-party intellectual property rights.

Confidentiality

The Provincial Development Unit is bound by the Official Information Act 1982 (“OIA”), the Privacy Act 1993, parliamentary and constitutional convention and any other obligations imposed by law. While the Provincial Development Unit intends to treat information in applications as confidential to ensure fairness for applicants during the assessment and decision making process, the information can be requested by third parties and the Provincial Development Unit must provide that information if required by law. If the Provincial Development Unit receives an OIA request that relates to information in this application, where possible, the Provincial Development Unit will consult with you and may ask you to confirm whether the information is considered by you to be confidential or still commercially sensitive, and if so, to explain why.

Use and disclosure of information

The Provincial Development Unit will require you to provide certain information, including personal information, on application forms if you wish to apply for funding. If you do not provide all of the information that is required on an application form, the Provincial Development Unit may be unable to process or otherwise progress your application.

MBIE will generally only use personal information provided in the application process for the purpose of administering the PGF which includes assessing an application you have submitted, contracting, monitoring compliance and reporting.

We may use personal information provided to us through the application for other reasons permitted under the Privacy Act (e.g. with your consent, for a directly related purpose, or where the law permits or requires it).

The Provincial Development Unit may disclose any application and any related documents or information provided by the applicant, to any person who is directly involved in the PGF application and assessment process on its behalf including the Independent Advisory Panel (“IAP”), officers, employees, consultants, contractors and professional advisors of the Provincial Development Unit or of any government agency. The disclosed information will only be used for the purpose of participating in the PGF application and assessment process, including assessment and ongoing monitoring, which will include carrying out due diligence. Due diligence may involve MBIE disclosing information to another MBIE business unit or relevant agency in order to assess the application and verify the information contained in the application and accompanying documents.

MBIE will generally not otherwise disclose personal information provided or collected through this application unless required or otherwise permitted by law. For example, we may seek your consent to undertake additional due diligence checks and request information from other relevant third parties. If an application is approved for funding, information provided in the application and any related documents may be used for the purpose of contracting.

In the interests of public transparency, if an application is approved for funding, the application (and any related documents) may be published by the Provincial Development Unit. Commercially sensitive and personal information will be redacted by reference to the provisions of the Official Information Act 1982.

Limitation of Advice

Any advice given by the Provincial Development Unit, any other government agency, their officers, employees, advisers, other representatives, or the IAP about the content of your application does not commit the decision maker (it may be Senior Regional Officials, Ministers or Cabinet depending on the level of funding requested and the nature of the project) to make a decision about your application.

This limitation includes individual members of the IAP. The IAP's recommendations and advice are made by the IAP in its formal sessions and any views expressed by individual members of the IAP outside of these do not commit the IAP to make any recommendation.

No contractual obligations created

No contract or other legal obligations arise between the Provincial Development Unit and any applicant out of, or in relation to, the application and assessment process, until a formal written contract (if any) is signed by both the Provincial Development Unit and a successful applicant.

No process contract

The PGF application and assessment process does not legally oblige or otherwise commit the Provincial Development Unit to proceed with that process or to assess any particular applicant's application or enter into any negotiations or contractual arrangements with any applicant. For the avoidance of doubt, this application and assessment process does not give rise to a process contract.

Costs and expenses

The Provincial Development Unit is not responsible for any costs or expenses incurred by you in the preparation of an application.

Exclusion of liability

Neither the Provincial Development Unit or any other government agency, nor their officers, employees, advisers or other representatives, nor the IAP or its members will be liable (in contract or tort, including negligence, or otherwise) for any direct or indirect damage, expense, loss or cost (including legal costs) incurred or suffered by any applicant, its affiliates or other person in connection with this application and assessment process, including without limitation:

- a) the assessment process
- b) the preparation of any application
- c) any investigations of or by any applicant
- d) concluding any contract
- e) the acceptance or rejection of any application, or
- f) any information given or not given to any applicant(s).

By participating in this application and assessment process, each applicant waives any rights that it may have to make any claim against the Provincial Development Unit. To the extent that legal relations between the Provincial Development Unit and any applicant cannot be excluded as a matter of law, the liability of the Provincial Development Unit is limited to \$1.

Nothing contained or implied in or arising out of the PGF documentation or any other communications to any applicant shall be construed as legal, financial, or other advice of any kind.

Inducements

You must not directly or indirectly provide any form of inducement or reward to any IAP member, officer, employee, advisor, or other representative of the Provincial Development Unit or any other government agency in connection with this application and assessment process.

Governing law and jurisdiction

The PGF application and assessment process will be construed according to, and governed by, New Zealand law and you agree to submit to the exclusive jurisdiction of New Zealand courts in any dispute concerning your application.

Public statements

The Provincial Development Unit and any other government agency, or any relevant Minister, may make public in whole or in part this application form including the following information:

- the name of the applicant(s)
- the application title
- a high-level description of the proposed project/activity
- the total amount of funding and the period of time for which funding has been approved
- the region and/or sector to which the project relates

The Provincial Development Unit asks applicants not to release any media statement or other information relating to the submission or approval of any application to any public medium without prior agreement of the Provincial Development Unit.

Electronic signature

You can only file documents and information with us using an electronic signature if you're the signatory, or have authority to act on behalf of the signatory, and are using software that complies with our standards, in particular keeping records of transactions where an electronic signature has been used. Once a document with your electronic signature has been filed with us, we consider the information:

- has been provided with your full knowledge and agreement
- is authentic and accurate
- wasn't amended after your electronic signature was added to the document, unless a change has been clearly marked on the document.

You're responsible for:

- safeguarding how and when your electronic signature and credentials are used on documents and information
- managing who has authority to use your electronic signature on your behalf, for example, a chartered accountant.

If your electronic signature on a document or information is filed with us, you won't be able to dispute having signed and approved the document or information. If we question the authenticity of an electronic signature or online transaction, you must be able to demonstrate on request the validity of the software used to apply your electronic signature to the document.

You must use electronic signature software that captures authentication, time and source details for any online transaction where a document with your electronic signature has been filed. These details must be held within the software itself, in the form of a file that:

- is maintained in its original form with no amendments, and
- can be provided to us, if requested, within a specified time.

The file must be treated as a record, as defined by the Companies Act 1993, and a business record as defined by the Evidence Act 2006.

Appendix 2 - Operational criteria for all tiers of the Fund

Link to Fund and government outcomes

- Demonstrate the ways in which the project will contribute to lifting the productivity potential of the region
- Demonstrate how the project contributes to the Fund's objectives of:
 - more permanent jobs
 - benefits to the community and different groups in the community
 - increased utilisation and returns for Māori from their asset base (where applicable)
 - sustainability of natural assets (e.g. water, soil integrity, the health and ecological functioning of natural habitats)
 - mitigating or adapting to climate change effects, including transitioning to a low emissions economy
- Clear evidence of public benefits (i.e. benefits other than increased profitability for the applicant)
- Are in a Government priority region or sector

Additionality

- Project is not already underway, does not involve maintenance of core infrastructure or assets (except for rail and transport resilience initiatives), and does not cover activities the applicant is already funded for (funding could be considered to increase the scale of existing projects or re-start stalled projects)
- Demonstrated benefit of central Government investment or support
- Detail of any supporting third party funding (and any funding sought unsuccessfully)
- Acts as a catalyst to unlock a region's productivity potential
- Demonstrated links to other tiers of the Fund and related projects, to maximise value of Government investment

Connected to regional stakeholders and frameworks

- Evidence of relevant regional and local support, either through existing regional development mechanisms, or through another relevant body such as a council, iwi or other representative group (or reasons for any lack of local support)
- Has been raised and discussed with the region's economic development governance group
- Alignment with, or support for the outcomes of, any relevant regional development plan, Māori development strategy or similar document (whether regional or national)
- Demonstrated improvement in regional connectedness (within and between regions)
- Leverage credible local and community input, funding, commercial and non-commercial partners
- Utilise existing local, regional or iwi/Māori governance mechanisms

Governance, risk management and project execution

- Evidence of robust project governance, risk identification/management and decision-making systems and an implementation plan appropriate to the size, scale and nature of the project
- Future ownership options for capital projects, including responsibility for maintenance, further development, and other relevant matters
- Benefits and risks clearly identified and quantified, depending on the scale of the initiative
- Evidence of potential exit gates and stop/go points, and a clear exit strategy
- Clearly identifies whole of life costs (capital and operating)
- Dependencies with other related projects are identified
- Evidence of sustainability after conclusion of PGF funding
- Adequacy of asset management capability (for capital projects)
- Compliance with international obligations (where relevant)