

NZ Media Fund:



Assessment process information – Scripted and Factual

Revised May 2018

Purpose

1. This explains how NZ On Air will assess applications to the Scripted and Factual streams of the NZ Media Fund.
2. As there will be more applications than available funding, assessment stages are tiered so that ultimately the most work and resources are spent on the applications with the most likelihood of success.

Overview

3. We will assess proposals using the nine investment principles set out on p11 of [the funding strategy](#).
4. These investment principles allow us to assess the business case for each application alongside the application's cultural case and how it contributes to NZ On Air's three funding goals:
 - **Quality Content:** New Zealand audiences enjoy well-made local content that matters
 - **Diverse Content:** New Zealand audiences value local content made for a range of communities
 - **Discoverable Content:** New Zealand audiences can find and appreciate local content

Preliminary step: Confirm eligibility

5. Only eligible applications will be accepted for assessment. **To be eligible:**
 - Applications must include complete and accurate documentation
 - Where there is a commissioning platform the platform must have verified their support via Eric
6. Applications with significant omissions, inaccuracies or which clearly do not meet funding criteria will be declined. The decision to decline an application at this stage will be made by the Head of Funding.
7. Unsuccessful applicants will be advised with a form letter that states the key reason for decline.

Stage 1 Assessment

8. Applications will be grouped by the Associate Head of Funding (AHoF) into like applications by topic, genre, funding request amount, or any other factors the AHoF considers relevant given the types of applications received. Each group of applications will be assigned to an assessor group.
9. Each assessor group will comprise at least two people: At least one funding team member, and one or two other assessors - either a NZ On Air staff member or an external assessor.
10. This assessment stage requires individual assessors to consider investment principles which weigh the cultural case against the business case, and then like applications against like applications.
11. The NZ On Air assessment team will meet formally to discuss the assessment of all Stage 1 applications, and the quantum of applications compared to available funding.
12. During this meeting, questions assessors had about an application will be drawn to the attention of the assessment team, and the assessment team will make the decision about whether to seek further clarification from the Producer or Platform before completing an application's stage 2 assessment.
13. The assessment team will confirm finalised assessment of all the Stage 1 applications after discussion and further comparison.

14. The assessment team will confirm the finalised aggregated assessment.

Stage 2 Assessment: Head of Funding review

15. A Funding team member will complete a combined funding paper which will generally cover a group of applications. The funding paper may outline assessment discussions, explore the merits of the individual applications, and discuss all other relevant considerations that led to the proposed recommendations, including noting any strongly varying opinions.
16. Taking into account the team discussion and subsequent paper, as well as the range of applications being considered in the round, the Head of Funding will make a final decision on recommendations for Stage 3 and may revise the funding paper.
17. Funding papers being submitted to the
 - Staff Investment Committee (SIC), will be approved by the Head of Funding
 - Board, will be approved by the Chief Executive through the Head of Funding.

Stage 3 Decisions: Staff Investment Committee / Board

18. SIC will
 - *review* a schedule of the Stage 1 assessments and decisions and discuss any high-level process issues or funding trends that are emerging
 - *discuss* the Stage 2 combined funding papers and recommendations, including considering both available investment funds and applications going to the Board.
19. SIC will agree to fund or not fund individual applications, along with any conditions it wishes to impose, by full consensus.
20. In a split decision, applications will be referred to the Board for determination.
21. The Board will
 - consider all applications over \$1m, most development applications, and any applications referred by SIC, and
 - will agree to fund, or not fund, with any conditions it wishes to impose.

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