

Assessment process information – Scripted and Non-Fiction

PURPOSE

1. This explains how NZ On Air will assess applications to the Scripted and Non-fiction streams of our Investment Strategy.
2. As there will be more applications than available funding, assessment stages are tiered so the most work and resources are spent on the applications with the best likelihood of success.

Overview

3. We will assess proposals using the nine investment principles set out in the [investment 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:
 - ▶ **Valued Content:** Local audiences watch, listen, and love local content that matters to them
 - ▶ **Diverse Content:** Local audiences connect with a diversity of content made by, for and about their cultures and 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 in our funding portal.
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.

Stage 1 Assessment

7. Applications will be grouped by the Associate Head of Funding (AHO of F) into like applications by topic, genre, funding request amount, or any other factors the AHO of F considers relevant given the types of applications received. Each group of applications will be assigned to an assessor group.
8. Each assessor group will comprise at least two people: At least one funding team member, and one or two other assessors - either an NZ On Air staff member or an external assessor.
9. 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.
10. 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.
11. 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.
12. The assessment team will confirm the finalised assessment of all the Stage 1 applications after discussion and further comparison.

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

Stage 2 Assessment: Head of Funding review

14. 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.
15. Considering the team discussion and subsequent draft 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.
16. 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

17. SIC will
 - *review* a Funding Overview paper for the round 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.
18. SIC will agree to fund or not fund individual applications, along with any conditions it wishes to impose, by full consensus.
19. In a split decision, applications will be referred to the Board for their determination.
20. 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.
21. Applicants will be advised of funding decisions via email, and a funding decision letter within the funding portal.

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