

**Management Capability Development Fund
Service Provider Information**
as at 19 November 2021

CONTENTS

- Eligible Businesses Criteria **Pg.2**
- Service Provider Criteria, The Process & Responsibilities **Pg.3**
- Service Eligibility **Pg.5**
- Training Topics Definition **Pg.8**
- Creating a Service **Pg.14**
- Communication Guidelines **Pg.15**

Management Capability Development Fund

The Management Capability Development Fund is administered by the Regional Business Partner Network (RBPN) and is available to RBPN Customers who have been through a Discovery session with a Growth Advisor, have had management capability areas identified as a barrier to the growth of the business **and** the business meets the following eligibility criteria

- be operating with 50 or fewer FTEs
- be GST registered in New Zealand
- have a New Zealand Business Number (NZBN)
- be operating in a commercial environment – i.e. currently trading
- be a privately owned business or a Māori Trust or Incorporation under the Te Ture Whenua Maori Act 1993 or similar organisation managing Māori assets under multiple ownership
- have undergone a Discovery Session with a Growth Advisor

Businesses should also:

- have the potential and desire to grow
- demonstrate commitment to improving management capability: indicators of commitment include seeking advice, working through the assessment process, and a willingness to co-fund and commit time to capability-building activities
- have an identified gap in its capability that can be addressed through management capability building and training

Service Provider Criteria

Before you apply, please check you meet all of the following criteria:

- you must have an NZBN number
- your business is based in New Zealand (i.e. physically located here)
- you have Professional Indemnity Insurance cover of \$1 million or more*
- you can demonstrate a track record of delivering quality coaching and training

*This insurance must currently be in place and be renewed each year. There are no exceptions to this requirement.

The Process

Growth Advisors will be able to book eligible businesses on to registered services that meet the business needs as identified during the Discovery Session. The level of funding will depend on the needs and is decided by the Growth Advisors. All bookings are processed through the RBPN Portal which is accessed by Service Providers from www.regionalbusinesspartners.co.nz

Funding Value

- The Growth Advisors decide the value of the funding based on the needs identified during the Discovery session, eligible businesses may receive up to \$5000 + GST.
- Funding can be used to cover up to 50% of the training costs (excluding travel and disbursements), capped at \$5,000+ GST per annum.

Example:

If the Customer chooses to attend a service where the “Event Price” is \$2,000+GST, the maximum Booking amount the Growth advisor can provide is up to \$1000 +GST.

Event Length

Events can be no longer than 6 months maximum

Expiry Dates

Funding will expire 2 months from the Event end date created for the booking, claims must be made prior to the funding expiring

Fraudulent use of funding

If a Service Provider is found to be acting fraudulently, they will have their contracts cancelled. Fraudulent behaviour includes:

- delivering services that are not registered under the pretence of a registered service;
- claiming for services delivered that were not delivered.
- claiming for services where the attendee did not attend.

Conflict of Interest

Service providers must declare any conflict or possible perceived conflicts with the MBIE RBP Team prior to any training being started. These include potential relationship and financial conflicts between Service Providers and potential RBP Customers. If you have a conflict or perceived conflict, or you are unsure if there is a potential conflict, please contact us at info@regionalbusinesspartners.co.nz

Service Provider Responsibilities

Please refer to the copy of the Terms & Conditions available from the Service Provider section of the RBP website www.regionalbusinesspartners.co.nz

SERVICE ELIGIBILITY

Services that are Eligible for registration are Management training services that are delivered to Business Owners and / or managers that will improve the management capability within the business. Funding may be provided to business owners to enable them to access eligible services that can fulfil a management skill gap identified by the RBP Growth Advisor.

Service types that are **NOT eligible** for the funding are:

- Catering, travel & accommodation expenses
- Compliance training eg: audits for compliance, training for government & industry body compliance services e.g: Worksafety (Workplace certification and Audits)
- Conferences, Seminars, Networking events, retreats, team building days/event
- Consultancy Services ('doing' or implementing the work for the business owner rather than training or coaching the business owner / senior manager to do it themselves)
- Diagnostic and Assessment Services including audits (e.g. digital systems audits and financial audits); Strengths and or psychometric assessments (eg: Clifton Strengths, Myers Briggs, Thomas DISC; Ergonomic assessments)
- Examination fees / costs
- Mentoring services (connect with NZ Business Mentors for these services)
- Personal & Professional development (personal and career development services) with the exception of 'Leadership development' (*refer to eligible services list below*).
- Personal physical and / or mental health consultations (medical or alternative) are not eligible for funding. E.g. Private or group Yoga, massage, Somatic experience therapy, Talk therapy, physiotherapy, osteopathy, personal training, life coaching.
- Services delivered by a related party, this could include personal relationships and financial.
- Services offered outside New Zealand
- Services to help business to access government funding. (Understanding government R&D incentive tax process)
- Subscription & membership services
- Team &/or individual employee training
- Technical and product training eg:, MS Office Products, Xero and MYOB accounting software and payroll software
- Vocational training courses e.g. First Aid courses
- Website design, develop & build implementation/consulting

Services covering the following subjects may qualify for the Funding.

<p>MARKETING STRATEGIES Marketing planning Market research Competitive advantage Market targeting/segmentation Promotion/lead generation techniques Sales strategies Branding Client management Pricing for market Consumer rights E-commerce</p>	<p>BUSINESS PLANNING Goals Vision/Mission Growth strategies SWOT analysis Competitive advantage/opportunity Targets Operational and action plans</p>
<p>BUSINESS SYSTEMS Information and financial systems Record keeping Organisational efficiency Operational systems and procedures E-commerce Benchmarking Distribution</p>	<p>CAPITAL RAISING Introduction to Capital Raising Getting Business Investor Ready Pitching to Potential Investors Completing the Deal</p>
<p>BUSINESS SUSTAINABILITY What is sustainability? Factors in creating a sustainable business Understanding the implications of your business choices Benefits of sustainability Customer expectations Financial cost-benefits Reduction strategies Procurement selection Business culture</p>	<p>FINANCE Financial reports & ratios Costing and pricing Budgeting and cash flow planning Taxation Credit/debt management</p>
<p>GOVERNANCE Obligation under the Companies Act Roles and Responsibilities Governance Documents Legal Structure</p>	<p>LEADERSHIP Managing people</p> <hr/> <p>MANAGING RESOURCES HR planning Recruitment Motivation Performance appraisals Conflict resolution Employment compliance Health and safety Health and Wellness Time management Intellectual Property protection Leveraging stakeholders/relationships Business excellence Benchmarking Business resource planning E-commerce Project management</p>

**LEAN MANUFACTURING /
BUSINESS OPERATIONS**

Introduction to lean manufacturing
Principles
Benefits and pitfalls of lean
manufacturing
Lean manufacturing process
Lean tools and methods
Measurement
Implementation of lean
Supporting systems and activities for
lean

EXPORT

Are you ready for exporting?
Getting started in exporting
Planning for export success
Market entry strategies
Market research
International sales and negotiation
Exporting online
Tender and proposal writing
Trade fairs

TRAINING TOPICS DEFINITIONS

Eligible training topics definitions – all definitions are in relation to delivering capability training and building knowledge on the defined areas.

BUSINESS PLANNING

- **Goals** - goal setting, planning personal growth and business development.
- **Vision/Mission**
- **Growth Strategies and Strategic Planning**
- **SWOT Analysis**
- **Competitive Advantage/Opportunity** - competitor analysis, identifying key selling proposition and competitive advantage.
- **Targets** - setting realistic and measurable targets, ratios and benchmarking.
- **Action/Operational Plans** - developing action plans (human resources, marketing, production, finance, innovation plans) to achieve targets.

MARKETING STRATEGIES

- **Marketing Planning** - developing a marketing plan, setting marketing budgets, measuring results.
- **Digital marketing strategy and social media planning** – developing a digital marketing strategy including social media plan.
- **Market Research and Planning** - benefits and methods of market research, analysis of results, product/service development and innovation.
- **Competitive Advantage** - identifying, developing, leveraging, and sustaining competitive advantage.
- **Market Targeting/Segmentation** - selection of target markets, customer profiling, developing specific marketing tactics for target markets.
- **Promotion/Lead Generation Techniques** - Promotional planning, setting promotional budgets, promotional strategies include personal selling, direct mail, email, website promotions, publicity, public relations, sales promotions, word-of-mouth, advertising etc.
- **Sales Strategies** - selling skills and techniques.
- **Branding** - developing and maintaining a strong brand, using branding to add value to a business.
- **Client Management** - Creating, maintaining and enhancing strong relationships with customers and other stakeholders.
- **Pricing for Market** - pricing strategies, discussion of external factors that impact on pricing decisions e.g. the nature of the market, demand, competition, and other environmental considerations.
- **Consumer Rights** - relevant legislation e.g. The Fair-Trading Act, The Consumer Guarantees Act, Standards.

- **E-commerce** - e-marketing, strategic use of websites, the Internet and other technology as marketing tools e.g. better communications, improved market research, lower costs, and greater customer convenience.

FINANCE

- **Financial Reports and Ratios** - layman's understanding of financial reports (i.e. balance sheet, profit and loss) and ratios to facilitate decision making and understanding of the key drivers of profitability.
- **Costing and Pricing** - understanding fixed and variable costs, how to calculate product or service costings, understanding and calculating breakeven, determining the most profitable areas, setting prices.
- **Budgeting and Cash Flow Planning** - preparing budgets and cash flow forecasts, setting and managing financial targets.
- **Taxation - types of tax e.g.** Provisional and Terminal, GST, PAYE, and FBT; basis of calculation and payment. Reviewing business structure to minimise tax obligations.
- **Credit/Debt Management** - management of debtors and creditors to maintain liquidity, tips for debt collection. This topic needs to draw attention to the need to monitor, encourage good habits of chasing debts and longer-term planning and matching of cash needs with cash resources.

BUSINESS SYSTEMS

- **Information and Financial Systems** - increasing organisational efficiency, identifying information types, databases, financial systems, storage media, tracking data through processes, managing data, tracking manual and electronic information flows, flow analysis and re-engineering. Note: specific product training eg:, MS Office Products, Xero and MYOB accounting software and payroll software are not eligible.
- **Record Keeping** - processes and procedures for organising, processing and storing business related data relevant to an organisation.
- **Organisational Efficiency** - setting up efficient office systems, reducing businesses costs through effective business systems, improving workflow, information technology.
- **Operational Systems and Procedures** - identifying, documenting organisation procedures, retaining "in head" procedures when key staff exit the organisation.
- **E-commerce** - on-line trading, e-business applications, b-2-b/b-2-c commerce, integration of backroom systems with front-end.
- **Benchmarking** - the systematic and continuous process of identifying, learning and adapting best practices from national and international businesses in the same industry to help a business improve its business performance.
- **Distribution** - best ways to store, handle and move products and services so that they are available to customers at the right time and in the right place.
- **Cyber security strategy**

LEADERSHIP

- **Leadership/Managing People – for business owners** - attributes of good leaders, effective communication, directing, coaching, supporting and delegating to improve the performance of the business.

MANAGING RESOURCES

- **HR Planning** - identifying the human resource requirements e.g. organisational design, capacity and staff contingency, skill planning, current staff skill sets, future staffing needs and recruitment and succession planning.
- **Recruitment** - job analysis to determine type of person and skill level required; methods of recruitment; interviewing techniques; selection testing; reference and background checking; induction programmes and early review for new recruits; employment law relating to recruitment.
- **Motivation** - how different people are motivated, systems for dealing with those differences, co-ordination of performance measurement and motivation levels, how business culture can impact on productivity and staff morale and what can be done to influence this.
- **Leadership/Managing People** - attributes of good leaders, effective communication, directing, coaching, supporting and delegating to improve the performance of the business.
- **Performance appraisals** - systems to measure competency, provide feedback to staff/management, have performance improvement as an outcome, reward performance, facilitate career development and focus the employees on those tasks which are strategically important to the business.
- **Conflict Resolution** - tools and techniques to identify and manage conflict in the workplace.
- **Employment Compliance** - employer obligations when employing people, including PAYE (registration, making payments, completing forms), ACC (registration, earner premium, employee premium, and residual levy), the Human Rights Act and the Employment Relations Act.
- **Health and Safety** - creating a healthy and safe working environment, including discussion of the Health and Safety at Work Act 2015, creating and implementing a health and safety plan.
- **Health and Wellness** – organisational health and wellness strategy - developing, managing and reporting.
- **Time Management** - a framework for delegation, short-term goal setting and prioritising work.
- **Intellectual Property Protection** - Understanding what intellectual property is, what can be legally protected (copyright, trademarks, patents, registered designs, licenses), how to go about it and costs, non-legal forms of intellectual property protection and formulating your intellectual property strategy.
- **Leveraging Stakeholders/Relationships** - recognising key stakeholders (customer; supplier; community; industry); understanding the relationship that exists with each and how that relationship can be strategically leveraged to create win-win partnerships.

- **Business Excellence** - strategy for producing goods or services which meet or exceed the required standards of quality, timing, quantity, consistency and cost, relative to market expectations.
- **Business Resource Planning** - capacity planning, production scheduling, equipment requirements, plant layout, material requirements and suppliers, inventory control and quality control requirements.
- **E-commerce** - harnessing e-commerce tools to build on and/or maintain the sustainable competitive advantage of your business. Understand the different types of e-commerce, the benefits to be achieved using e-commerce and the costs involved.
- **Project Management**

GOVERNANCE

- **Obligations under the Companies Act**
- **Roles and Responsibilities– for Directors, Board Members, Trustees**
- **Governance Documents**
- **Legal Structure**

EXPORTING

- **Are you Ready for Exporting?** - why export, overview of the practical side to exporting: freight, finance, pricing, foreign exchange, documentation, terms of sale; an overview of the strategic side: research, marketing, promotion and market entry strategies.
- **Getting Started in Exporting** - the export process, strategic market selection and research, freight, finance and documentation, determining the best market entry strategy, selecting the right business partner, intellectual property and branding, pricing for export, developing promotional tactics, e-marketing, making the sales pitch, and export planning.
- **Planning for Export Success** - strategic market selection, market research, intellectual property protection, pricing and marketing.
- **Market Entry Strategies** - market entry options: direct marketing, distributors and agents, strategic alliances, joint venture partners, contract manufacture, sale of technology, licensing, franchising, setting up an overseas office, and overlapping models. How to build effective relationships with offshore partners, choosing the right partner, achieving a win/win relationship, agreements and contracts, and measuring your partner's performance.
- **Market Research** - how to develop a brief and framework to undertake market research, reliable and informative sources of information and resources, using research information as part of your export marketing plan.
- **International Sales and Negotiation** - understanding the sales process and buyer motives, developing your sales pitch and point of difference, presenting a strong business case, effective presentation techniques, handling objections, sharpening negotiation skills, closing the deal.
- **Exporting Online** - The reasons for exporting online, defining your target audience/customer, developing an internet strategy, the components of an effective website, key internationalisation issues including tariffs, language and getting paid, marketing your website and system security.

- **Tender and Proposal Writing** - developing tactics for smart tender selection, where to find tender/proposal opportunities, understanding the purchasing process, writing powerful proposals, developing strategies to put the bid with strategic partners, review process to learn from previous tenders.
- **Trade Fairs** - integrating trade fairs into your promotional mix, setting specific objectives, knowing your target market, getting on your target market's "must see list", handling booth traffic, effective lead gathering and follow up.

BUSINESS SUSTAINABILITY

- **What is Sustainability?** - Economic, social and environmental sustainability.
- **Factors in Creating a Sustainable Business** - Making sustainability part of your vision. Leader's commitment to sustainability. Choice and use of resources that ensure the most effective use of resources. Business systems and processes that support the most efficient and effective use of key resources. Consideration of external accreditation to verify business practices and operations.
- **Understanding the Implications of your Business Choices** - Sustainability is incorporated into the design of products or services, their manufacture or delivery, and the business takes responsibility for the whole of the life cycle.
- **Benefits of Sustainability** - cost savings, competitive edge, brand/marketing benefits, environmental, social/community.
- **Customer Expectations** - understanding customer expectations, emerging niches, trends, leveraging your sustainability, accreditation programmes.
- **Financial Cost-Benefits** - analysing the financial impact of sustainability.
- **Reduction Strategies** - waste reduction, reducing or switching resources, cost of waste vs. cost of disposal, reuse and/or recycling,
- **Procurement selection** - supplier sustainability practices and credentials and raw material sustainability.
- **Business culture** - people and communities are invested in and staff behaviours reinforcing sustainability are supported. Regular communication and feedback on progress towards sustainability.

LEAN MANUFACTURING / BUSINESS OPERATIONS

- **Introduction to Lean Manufacturing Principles** - the systematic approach to eliminating waste from processes so that every part of the process adds value to the customer. Identification of activities or work that are: value adding, non-value adding, waste.
- **Benefits and Pitfalls of Lean Manufacturing**
- **Lean Manufacturing Process** - specify value, identify value stream and eliminate waste, create flow, create pull (produce only what is needed when requested), aim for perfection.
- **Lean Tools and Methods** - including value stream mapping, continuous improvement, pull (kanban), flow, total productive maintenance, quality at source, points of use, quick changeover (SMED), standardised work, batch reduction, teams, 5S, visual management, plant layout, poka-yoke.

- **Measurement** - define lean measures, measure, analyse, improve, control.
- **Implementation of Lean** - determining the scope, project management structure, responsibilities and accountabilities, integrating and aligning the teams, documentation, communication.
- **Supporting Systems and Activities for Lean**

CAPITAL RAISING

- **Introduction to Capital Raising** – provides an overview of the capital raising process, the types and sources of finance, how investors work and what they are looking for, determining if a business is investment ready, sources of assistance.
- **Getting Companies Investor Ready** – preparing the business case, valuing a business, legal implications of raising funds, Securities Act and exemptions.
- **Pitching to Potential Investors** – finding an investor, the deal process and timetable, information investors will require, the importance of the pitch, tools for creating succinct pitches.
- **Completing the Deal** - due diligence, the negotiation process, key legal agreements.

CREATING A SERVICE

Capability fund type services that are eligible for registration are 'training' services that are delivered to Business Owners and / or senior managers that will improve the management capability within the business. Eligible services are for management training where knowledge is transferred and there is a clear learning outcome for business owner to fill an identified gap in their management capability.

NB Any 'coaching' must be for 'follow-up coaching' only and can only be included as part of a specific management training service.

SERVICE OVERVIEW

- Please include a brief outline of what training will be delivered to the business owner during the delivery of the service

SERVICE DESCRIPTION

Please ensure your service description includes all the below required information -

- Who the training is designed for (Business owner and/or senior Managers)?
- What are the Management Capability outcomes for the business?
Please include a clearly defined 'training objective' and relevant 'learning outcomes' for the business owner and / or senior Manager
- What is the time commitment for the business owner? (a minimum - maximum range is acceptable)
- What is the fixed cost of the service **excluding GST**?
Please include the words "**excl GST**" after your total cost (a minimum – maximum range is acceptable)
- Style of training, is it a group workshop, or one-to-one training?
- How is this service delivered (In person or remotely (e.g. Zoom) or hybrid)?

HOURLY RATE

Please check your Hourly rate field

- for **Capability fund type** services this can be your '**fixed**' hourly rate or if you have tiered rates it will be your '**average**' hourly rate

CREATING AN EVENT FOR THE BUSINESS

Once funding has been approved for a customer and you are required to set up an event, it is important to note the difference in the price types you can select -

PRICE TYPE

- Select **Per Business** – if you want to set up Private events (*Fixed cost*) only
- Select **Per Person** - if you want to set up Public events (*Per Person cost*) & Private events (*Fixed cost*)

COMMUNICATIONS GUIDELINES

It is important that you clearly indicate which of your services are registered for the Management Capability Development Fund.

The following are some guidelines around terminology.

Advertising a registered service

When promoting individual registered services. The following text should be used:

“This Workshop / Course / Coaching is registered with the Management Capability Development Fund. Find out more by visiting www.regionalbusinesspartners.co.nz”

Advertising about your organisation

If you are planning to advertise that your organisation delivers services that have been registered with the Management Capability Development Fund the following tag lines can be used,

“[Registered organisation name] offers services that are registered with the Management Capability Development Fund”

If you wish to use other wording, please contact us at info@regionalbusinesspartners.co.nz to seek approval.

Newsletters / Other publications

If you wish to refer to a RBP Funding Scheme in a newsletter or publication, the following approved text may be used:

Management Capability Development Fund

Optional Introduction: Small businesses may qualify for funding to help pay for services such as training workshops, courses and coaching that build the management capabilities of their owners and key managers.

Management Capability Development funding is only available through the Regional Business Partner Network (RBP) Growth Advisors and can be used with service providers registered with the RBP Network.

Funding may be provided to a business where the Growth Advisors have identified a need for management training as part of an action plan to support the business owner to grow and innovate their business. Business owners are then able to select a registered service from a registered Service Provider.

For more information on the Management Capability Development Fund or to find your local Growth Advisor go to www.regionalbusinesspartners.co.nz

Additional

- As per the Promotion and Advertising terms in the contract, the service provider does not have rights to use the RBP logo or any of the government logos, this includes MBIE, Callaghan Innovation and NZTE.

- Always ensure you manage the expectations of a potential customer in regard to whether they might receive funding. The funding is limited, and the Growth Advisors make decisions based on their own meetings with the business owner.
- Under no circumstances should you use words such as Approved / Accredited / Authorised or Endorsed