

IST Establishment

New Zealand Institute of Technology and Skills Establishment Board

Mobilising the New World

Interim Report Executive Summaries

13 February 2020

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Background

On 1 August 2019, Education Minister Chris Hipkins announced the Government's decisions on the Reform of Vocational Education (RoVE) proposals.

One of the seven key changes is to create a new kind of organisation that will provide both work-based and off-the-job vocational learning and training right across the country.

With a working title of the New Zealand Institute of Skills & Technology, the Institute will be a unified, sustainable, public network of regionally accessible vocational education, bringing together the existing 16 Institutes of Technology and Polytechnics.

If [the legislation](#) is passed as described, the Institute will be New Zealand's largest tertiary education provider. It will have the national and regional reach required to become a long-term skills training partner for firms and industries, enabling learners and employers to move between workplaces and other educational offerings and between locations as their needs change.

The Institute will be equipped to do this best when its work reflects partnership with iwi and Māori organisations and Te Taumata Aronui; close relationships with learners, employers, communities and staff; and engagement with Regional Skills Leadership Groups, schools and tertiary education providers, Workforce Development Councils and transitional Industry Training Organisations.

Ten workstreams are focussed on laying [the foundation](#) for the Institute to operate as a legal entity on day one (intended to be 1 April 2020).

For current information on the wider RoVE programme, visit [the Tertiary Education Commission website](#).

For background information on RoVE, visit [the conversation on Kōrero Mātauranga](#).

Purpose

This document outlines the future-based thinking and recommendations around vocational education in Aotearoa.

One of these workstreams, [Mobilising the New World](#), comprises seven working groups engaged in future-based thinking and activities which are intended to continue after the Institute comes into existence.

The timeline above indicates the phases involved in creating a fully functional institute by the end of the transition and integration period in December 2022.

The Establishment Board and Unit, and subsequently the new Institute's Council, and its staff, will take the time needed to ensure a smooth transition for learners, providers, and employers.

Common themes



NZIST needed to convene the workstreams in early February to enable the exploration of some key intersecting ideas and themes that have the potential to underpin early innovation in NZIST. Recognising this need for collaboration, a workshop was designed to help workstreams identify, develop and prioritise common themes and key focus areas.

Representatives from each workstream came together, making a working group of 48, to share what they have learnt and what they recommend. After listening to each other, the group identified common themes that were running through all their work. Additionally, they developed new themes based on the conversation during the day. They clustered and prioritised each theme, producing an output of 17 common themes and focus areas.

Post workshop the themes were further refined into the following categories;

- Relationships and partnerships
- Evidence-based decision making
- An inclusive and flexible learner journey
- Consistent technology enablement and enhancement
- Moving forward together

Relationships and partnerships

1. Meaningful relationships

- Support for employers, learners, and other Facilitators
- Strength based
- Effective channels to subject matter experts
- International connectivity
- Mentorship; peer to peer, employer, leaders/facilitators.

2. Role of iwi, hapu, and community

- Cultural/trust of new NZIST, digital, induction/set up to succeed/understand
- Links to community through associations eg. sports clubs, schools, whanau, iwi, hapu, pasifika.
- Training for volunteers.

3. Employers as equal agents

- Employers are a key ingredient; as teachers, mentors, supporters and motivators, career advisors
- Positive business impacts
- Appropriate support that is customised to their industry.

Evidence-based decision making

4. Agree on skill gaps in workforce and development of plans/strategies

- Learn about people, learners, employers, iwi, international - use stories and narratives to guide us
- Capabilities already available
- Analytics and global trends
- Gaps between perceptions and reality; technology, transport, expectations of employers, definition of employers

5. Financial uncertainty

- Incentives for employers
- Commercial costs and acknowledgement

An inclusive, flexible, and successful learner journey

6. An inclusive definition of success

- Maori succeeding as Maori; success inclusive of whanau, iwi, hapu
- Beneficial to businesses
- Employability
- Equity

7. Independence and flexibility

- Proactive
- Creating the conscious learner – resilient, independent, critical, exercising choice not dependence
- Holistic learning journey

8. Agile learning ecosystem

- Ecosystem rather than hierarchy
- Agile and responsive; minimum viable products
- Seamless
- Geography – Campus based and portable models
- Global mindset
- Motivated people

9. People centred learning

- Connections
- People at the centre of everything, including iwi, hapu, Māori. Learning follows learner
- Access
- Cultural safety and inclusiveness
- Employers
- Relationships and connections to campus

Moving forward together

10. Building on the existing

- Recognise and expand on current success

- Don't focus on failures/deficit model
- Relationships - iwi, hapu, Maori
- Vet system that fits New Zealand but also allows graduates to flourish internationally; What do international employers want?
- Draw on experts to build digital curriculum and courses
- Cultural diversity and competence

11. Information

- Access
- Consistency

12. Staff and Leadership

- Culture shift in teaching - employers and teachers
- Staff persona
- Thriving through change
- Increasing capability of all involved
- Empathy, understanding of staff and employers
- Cultural competency

13. Acknowledging tensions and dependencies

- Autonomy vs control
- Motivations of employers and learners

Consistent technology enablement and enhancement

14. Technology enhancement and enablement

- Centralised system design
- Educational products
- Building off the skills and capabilities that already exist and moving forward together

1. Learner Journey Mapping

Executive Summary

Working group approach

In order to understand what a system that works for the traditionally under-served could look like, one that is inclusive, providing barrier free access, greater opportunities and outcomes and seamless shifts between modes of learning, the learner journey map working group put the learner and their community and whānau at the centre of their discovery.

Taking a learner centred design approach, a deep understanding was gained: understanding learner needs, their aspirations, their motivations, the challenges and barriers they have faced and see ahead, as well as the enablers of success throughout their journey and across the different modes of learning. Analysis of 75 learner stories resulted in 45 common enablers and barriers identified, with six examples of deep segmented persona being developed which focus on under-served. Based on the needs of the six example persona, six high level areas of prioritisation are provided for the future NZIST.

Summary of recommendations and Options

Based on the needs of the six example persona (visual/audio examples can be found at <https://prezi.com/view/ovSuCRT0sYrigajBfLhu/>) who have been traditionally under-served and held back from reaching their potential, the following priorities are made by the learner journey mapping group:

1. Proactive alert and case management system for holistic support
2. Tuakana, mentor or role models
3. Access to learning environments
4. Meaningful relationships
5. An inclusive system that adapts and flexes around learner needs
6. Cultural safety and inclusiveness

Additionally, it is recommended that learner journey mapping is continued after 1 April, with focus on learner journeys not yet mapped (i.e., NEET population, change of career, mental health, learning disability, older professional, refugees and migrants, successful in system, further international learners).

Recommendations in detail

The different needs identified from the learner stories can be summarised as follows:

1. Holistic and proactive support, this could be around basic needs (i.e., financial, food and housing security, physical access, childcare access or access to technology or health services), or personal needs such as early experiences of success to build confidence and self-belief
2. Positive role models, mentors and tuakana to connect with and help them stay on track.
3. Meaningful relationships, so they feel understood, believed in, valued, culturally safe and secure
4. Opportunities to understand their strengths and goals and have support to achieve them, with a line of sight to help guide decisions around subject choices
5. Some learners need a quick pathway to earn income, to be financially secure and not incur debt; while others need flexible learning to juggle work, family and life commitments

6. Clear pathways to completion and employment, practice the learning in the real world and build connections to potential employers
7. International learners want to understand the New Zealand way of living, being and learning, with opportunities to socialize with New Zealand students

To better meet these needs, the following provides details around each of the priorities identified by the learner journey mapping group:

Proactive alert and case management system for holistic support¹	
A risk and issue alert system identifying learners who could benefit from holistic support, throughout the learning journey, with navigators assigned to build meaningful relationships and to provide access and links to resources and programmes	
Outcome	Measure of success
Early identification of barriers and challenges with holistic support, resulting in increased access, inclusiveness, participation, retention and successful outcomes, especially first in family or those with high and complex needs	<ul style="list-style-type: none"> • Self-efficacy and growth mindset • Increased retention through each stage of the learning journey • Wider whānau and community impact • Increased participation of learners traditionally under-served • Increased retention
Tuakana teina² (mentor or role model)	
The identification of tuakana, who are trained and resourced to provide support to teina, throughout the learning journey, building meaningful relationships and support to stay on track	
Outcome	Measure of success
Empowerment to navigate unfamiliar systems, processes and learning so learners can feel confident and gain a sense of belonging resulting in retention and successful outcomes	<ul style="list-style-type: none"> • Self-efficacy, growth mindset and confidence built in self • Trust built in systems • Teina becoming tuakana • Increased participation of learners traditionally under-served • Increased retention

¹ Recommended pilots across campus, online and work-based learning. Investment required for collaborative design with learners, staff, employers and community, to pilot Missing Vulnerable Person (MVP) systems, navigators, capability development, holistic resources, programmes and processes. Links to data analytics for 24/7 support in Educational Products and Services working group and proactive support in Work-Based Learning working group. Dependant on unified funding/StudyLink improvements to provide greater financial security.

² Recommended review of existing best practice with extension across campus, online and work-based learning. Tuakana teina: investment required for collaborative design with learners, community, iwi and staff and tuakana resource and capability development. Meaningful relationships, cultural safety and inclusiveness. Investment required for collaborative design with learners, community, iwi and staff; resources for activities, peer support communities and staff capability. Links to values work in Name and Brand working group.

Access to learning environments¹	
Proactive and holistic support for learners with physical disabilities, to ensure access and support in learning environments	
Outcome	Measure of success
Early identification of learners with physical disabilities, providing proactive information, resources, holistic support and navigation support resulting in increased access and inclusiveness for learners with physical disabilities	<ul style="list-style-type: none"> • Increased sense of belonging • Feels valued • Increased participation and retention of learners with physical disabilities
Meaningful relationships²	
A values-based framework to embed the practice of whakawhānaungatanga and establish the building of meaningful relationships	
Outcome	Measure of success
Systems, processes, activities and behaviours that enable learners to feel understood, valued and culturally safe; and to develop a sense of belonging resulting in increased inclusiveness, participation and retention.	<ul style="list-style-type: none"> • Learners and staff feel culturally safe • Increased sense of belonging for staff and learners • Increased participation of learners • Increased retention of learners • Increased engagement of staff, stakeholders and partners
An inclusive system that adapts and flexes around learner needs³	
Product development and proactive support to provide flexible and blended learning options that align with learners' goals, enabling seamless transitions between learning modes	
Outcome	Measure of success
Flexible, responsive and adaptive learning experiences designed to meet learner goals and life circumstances; enabling easy transition between modes of learning resulting in increased access, inclusiveness, participation, retention and successful outcomes, especially for learners juggling responsibilities and complexities	<ul style="list-style-type: none"> • Speed to gain competency in skills and paid employment • Increased earnings capacity • Increased participation • Increased recognition of skills attained • Increased retention through changes in circumstances

³ Recommended pilot of programme and product development to include multiple options to transition between campus, online and work-based learning. Investment required for collaborative design with learners, staff, employers and communities; to pilot MVP systems, capability development, holistic resources, programmes and processes. Investment required for brokers. Dependant on proactive holistic support (¹) and collaboration with Workforce Development Councils and Regional Skills Leadership Groups. Dependant on unified funding to follow the learner (not provider) and currently restricted by TEC, NZQA and StudyLink requirements

Cultural safety and inclusiveness ²	
A values-based framework to increase staff capability and embed practices of ako, whakawhanaungatanga and manaakitanga	
Outcome	Measure of success
Capability development of staff behaviours that enable learners, employers, staff and communities to feel valued, cared for and culturally safe; resulting in increased inclusiveness, and increased participation and retention of learners	<ul style="list-style-type: none"> • Increased sense of belonging • Feels culturally safe • Feels valued as a learner, staff, an employer or community • Increased participation of learners traditionally under-served • Increased retention

Proposal

The future NZIST will play a central role in producing a more skilled and educated workforce, promoting social mobility and closing the income gap for Māori, Pacific peoples and their communities. The new system needs to provide greater opportunities and outcomes, especially for those who have been traditionally under-served and held back from reaching their potential, providing greater access and seamless shifts between modes of learning and regions.

To achieve greater opportunity and outcomes, especially for under-served learners and their communities

It is proposed that at the very start of the tertiary learning journey, across all modes of learning, early identification of learners who would benefit from holistic support is followed by building meaningful relationships and proactive support that links learners to resources, programmes and community partnerships (see page 12).

It is proposed that proactive holistic support is continued, responding to the changing circumstances, so that learners can focus on learning instead of other complexities. Circumstances for learners who would benefit include: no or low NCEA, out of tertiary learning for an extended period of time, first in family to attend tertiary, juggling competing demands of work and learning, raising dependants while learning, financial insecurity, lack of access to technology, remotely located, physical or learning disability, mental illness. It is proposed that a series of pilots across different modes of learning enable design and testing of Missing Vulnerable Person (MVP) systems, processes, capability development and resource requirements.

It is also proposed that a culturally centred framework and approaches, through whakawhanaunagatanga (see page 15), ako and manaakitanga, guide behaviours and policies and the development and use of systems, processes and capability development. This will ensure that learners who have traditionally been under-served, feel they are understood, valued and belong. Additionally, a workforce guided and resourced by these values would also feel valued, resulting in increased engagement.

It is proposed that tuakana teina, a culturally centred approach to the provision of mentors and role models, is established across all modes of learning (see page 16 and 18). As a result, teina who currently lack positive role models, will have access to information, encouragement and skills from more experienced tuakana so that learners feel more confident in their learning journey. It is proposed that best practice and guiding principles are identified from similar programmes offered across all providers with planning around scalability.

It is also proposed that access to learning spaces is enabled through the early identification and removal of barriers for learners with physical disabilities (see page 20), resulting in decreased anxiety around access and increased participation and retention.

To achieve greater access and seamless shifts between modes of learning and regions.

It is proposed that programme and product development include multiple options to transition between campus, online and work-based learning as well as across different regions (see page 19). In addition, holistic support is offered to understand learners’ goals and life circumstances and in turn develop flexible blended learning options along with support and brokerage to transition between modes of learning. Learners who will benefit are those juggling competing demands of work and learning, juggling life responsibilities, raising dependants while learning, requiring financial security through learning, up-skilling while working or transitioning into a new career. It is proposed that a collaborative pilot across different modes of learning enables design and testing of MVP for systems, processes, programme development, capability development and resource requirements. This will enable learners to persist through changing circumstances and responsibilities.

Ideal future state – Vision for the future of NZIST

Māori make up 13% of the current labour force statistics and whilst they work very similar hours to all New Zealanders, only 2/3 have a qualification, meaning they are mostly in low skilled jobs. As a result, we currently have an income gap for Māori of \$2.6 billion. With the Māori labour force estimated to double by 2038, making up 1/5 of the working age population, this gap is also set to increase to \$4.3 billion in 2040 (The change agenda. Income equity for Maori, 2017). For Pacific peoples, it is a very similar story, with population estimated to increase. However, if there are an additional 95,000 Māori achieving level 5 or above between now and 2038, Māori will achieve equal education outcomes (The change agenda. Income equity for Maori, 2017). This increase in participation and successful completion will also see additional skills mobilised to reduce the skills gap in New Zealand.

There is no single innovation or silver bullet to achieve equitable outcomes for all learners, but this proposal shows that if the future NZIST can put the people we are serving at the centre and understand what they need to succeed, we can take some of the first steps, in what will be a journey to achieving greater access and educational parity. Educational parity in New Zealand will be ground-breaking, resulting in the mobility to attain higher skilled employment, further addressing the skills shortage, closing the national income gap and contributing to the financial wellbeing of individuals, their whānau and their communities.

Whilst we may be hesitant to focus on those who have traditionally been under-served , the aphorism “a rising tide lifts all boats” can be considered here. The programme of change at Georgia State University, whilst seeing the greatest percent increase of African American and Hispanic graduation rates, reaching parity in success; this success extended to an increase of graduation rates for learners of all ethnicities. A report by the Education Review Office note in School Evaluation Indicators report that when strategies are used to lift student academic and social outcomes for under-served learners outcomes are improved for all learners (School Evaluation Indicators, 2016)

Risks

Risk	Mitigation
The learner stories heard during the time frame were the more accessible stories (fewer remote and work-based learner journeys were mapped)	Continue to map learner journeys in further phases of the work with a focus on capturing more in work and remote learner stories
Stories were predominately from learners in levels 1-7	Map post-graduate learner journeys
Stories were not a systematic point by point investigation of journeys (co-design principles used not research principles)	Compare and triangulate persona and findings from this work against other learner journey mapping work
Persona are examples of deep segmented persona mapping	Continue to map learner journeys from all learners and to compare findings with other work
Disengaged and NEETS learner journeys were not mapped in the provided timeframe	Map learners who did not engage in their programmes at Day One

Next Steps

How should the NZIST take this work forward? Go beyond themes to concrete content – what should the NZIST Council and CE work programme focus on in the short and medium-term?

Should collaborative participation continue? how? If not, what would serve the work better?

Who should the Council and CE work with to advance the recommendations?

1. Continue to map learner journeys particularly in the following areas
 - Remote learners
 - Work-based learners
 - Learners with low secondary school qualifications who have not engaged in tertiary education
 - Learners with low secondary school qualifications who have made initial inquiries or applications and who have not converted to enrolments
 - Learners with disabilities

2. Short term – Pilot recommendations – begin initial work for set up in 2020
 - Tuakana/mentor/role-model approach
 - Proactive alert and case management system for holistic support

Medium term

- Access to learning environments
- Meaningful relationships
- An inclusive system that adapts and flexes around learner needs
- Cultural safety and inclusiveness

The principles of collaborative design enable diverse ranges of people and teams to move quickly and iteratively together. An immense amount of work and outputs have been achieved by this diverse and effective working group in a short timeframe. This group has become experienced in hearing learner journeys, mapping their needs and developing representative persona; building on this work would be beneficial for NZIST.

The Council and CE should work with;

- Participatory design facilitators to map further journeys, including those of staff and employers
- TEC and providers who have mapped learner journeys and implemented strategies in order to review and build on existing work.

2. Employer and Community Engagement Model

Executive Summary

Workstream approach

The working group was tasked to produce a framework for employer and community engagement that could be used by NZIST and subsidiary boards and be adapted to the requirements of different communities and employer and industry groups. The group was expected to:

- i) Develop an understanding of NZIST's model of engagement in the context of legislation and charter expectations, and fit with Regional Skills Leadership Group (RSLGs) and Workforce Development Councils (WDCs);
- ii) Start to address how NZIST will utilise subsidiary boards;
- iii) Understand what good looks like and success strategies that can adapt locally;
- iv) Include specific information on how to engage with key stakeholders;
- v) Develop the framework and approach for engagement; and
- vi) Discuss and test assumptions, ideas, and risks.

Summary of recommendations and options

It is firstly recommended that existing partner and stakeholder relationships are upheld and preserved – this is critical in maintaining and increasing the confidence of learners, employers and community partners. Further, a Mana Ōrite Te Tiriti Framework is recommended to inform the development of NZIST's governance and operations; while a Strategic Partnership Strategy, including stakeholder mapping and creation of a 'Key Account Relationship' manager model, is commissioned. Further co-design and testing of engagement with key partners and stakeholders is recommended, including engagement success metrics. Further engagement with industry representatives or other aggregators will support new opportunities for NZIST. Finally, a joint communications and engagement approach is recommended, including practical steps that reinforce the message that NZIST represents a national network of education provision.

Recommendations in detail

1. Acknowledging, honouring, and supporting existing partner and stakeholder relationships with subsidiaries and ITOs is critical for NZIST. This will mitigate a potential drop in engagement or participation in vocational education and training (VET) by learners, employers, industry, and communities.
2. Since Te Tiriti o Waitangi is the foundation for power sharing between tāngata whenua and tāngata Tiriti, the Mana Ōrite Te Tiriti Framework will guide NZIST's behaviour and engagement, demonstrating good Tiriti partnership.
3. The Strategic Partnership Strategy describes partner and stakeholder engagement practices that will enable NZIST to fulfil its Charter obligations, its strategy and vision. Stakeholder mapping and the 'Key Account Relationship Manager' initiative will represent a significant leap forward in engagement across the national network of education provision.
4. Commissioned co-design (or engagement using co-design principles as much as possible) with Māori, Pacific and disabled learners, as well as employers and industries represents a new way forward in designing education and training solutions, leading to improved participation, engagement and success for all those involved in VET.
5. Through engagement with industry representatives, or other aggregators; rapid, meaningful connections will continue to be made between NZIST, employers and learners. This early relationship building will be critical for gaining support under the new VET model, building confidence in NZIST.

6. Recognising the need for a joint communications and engagement approach from the beginning is critical to maintain confidence and support the required culture shift in the new model of VET.

Proposal

[Section 5](#) outlines options for the future NZIST. This section focuses on the development of a Strategic Partnership Strategy, which describes partner and stakeholder engagement practices that will enable NZIST to fulfil its Charter obligations and its strategy and vision of engaged employers and empowered communities. The Strategic Partnership Strategy is broken into component parts, including identification of key stakeholder groups and a stakeholder mapping exercise. It then moves into engagement approaches, principles and metrics. Critically, this section discusses the need to identify and agree on local versus national roles and responsibilities, proposing development of a ‘Key Account Relationship Manager’ model across subsidiaries. This leads into the development of an engagement competency framework and acknowledges the need for a kaupapa Māori framework that would be guided by Te Taumata Aronui.

[Section 6](#) of the report includes acknowledging diverse views through three personas – employees, industry and Pacific communities. They show the commonalities and differences in engagement approaches. The group also focused on the unified vocational education system and new emergent groups such as WDCs and RSLGs that have yet to be established. It identified potential relationships with learners, communities and employers, while also suggesting future connections and opportunities to engage with these new entities.

Ideal future state – Vision for NZIST

The ideal future state is an Employer and Community Engagement model that embodies positive Tiriti relations. Through a unified, yet regionally responsive engagement plan, new efficiencies will be gained from improved relationship management practice across the network with more expansive reach than before. The vision is for engagement competencies and cultural competencies, developed over time, which will see NZIST and its subsidiaries providing responsive vocational education experiences that meet regional and national needs and improve participation, access and success for learners, employers and industry, and communities.

Risks & mitigation strategies

Risks	Mitigation Strategies
Lack of people and culture shift	<ul style="list-style-type: none"> Develop and present a clear narrative and “why” (vision/purpose) and ensure a communication strategy and plans are in place.
Lack of strong Māori voice/influence	<ul style="list-style-type: none"> Explore the opportunity for NZIST to work together with Te Taumata Aronui to support development of a Mana Ōrite Te Tiriti Framework that informs the development of NZIST’s governance and operations.
Lack of competition may impact the level of innovation and excellence	<ul style="list-style-type: none"> Develop ‘Key Account Relationship Managers’ and develop clusters, nodes or hubs that support effective employer and community engagement along these lines.
Reduction of service and support	<ul style="list-style-type: none"> Track and monitor participation and engagement rates and note feedback from key partners and stakeholders.
Disruption to existing relationships	<ul style="list-style-type: none"> Provide assurances of the ‘protection’ and/or maintenance of existing partnerships and relationships as per formal and informal agreements.

Lack of engagement from Day One	<ul style="list-style-type: none"> • If engagement is not possible from 'Day One', connect with stakeholders and keep them informed of when engagement will occur.
Lack of ongoing engagement	<ul style="list-style-type: none"> • Ensure good communication strategy and plans are in place – develop 'business as usual' messages around education, training and learning opportunities as part of the Reform of Vocational Education (RoVE) process, but share the vision to improve education provision.
Potential disconnect between NZIST and its subsidiaries	<ul style="list-style-type: none"> • The <u>Roles and Responsibilities</u> and Stakeholder mapping exercise is critical to establishing the ways in which NZIST national functions will intersect with subsidiaries and the network of education provision. • Bring cohesion to NZIST and subsidiaries via actions such as holding NZIST monthly Council meetings or other key events on a rotating basis across all campuses. • Develop a comprehensive change management programme.

Next steps

The recommendations from the working group have been prioritised for Day One and from the end of transition period and beyond.

It is clear there are linkages from this workstream to the wider NZIST work programme and further rationalisation and merging of work groups, for example, with the Learner Journey Map work group is recommended.

NZIST can commence or commission many of the key recommendations immediately, noting that other recommendations will be dependent on some of the earlier design work and available resource.

3 & 4. Education Products and Online Delivery Model

Executive Summary

Workstream Approach

This is a combined report for the Education Products and Services and Online Arrangements workstreams. The Education Products and Services and Online Arrangements workstreams took an expansive approach to Minister Hipkins' instructions in his 28 August 2019 letter of expectations. We defined products and services to mean those required to enable the full learning journey and to meet learners' diverse needs as envisaged by the NZIST charter. The Online Arrangements workstream broadened its scope to ask what technology-enablement will be required to support the learning journey.

We took a collaborative design approach. As our discussions progressed, six key principles emerged:

- Think big, think transformative
- Start with what is needed to enable the learning journey
- Technology capability requirements flow from business requirements; specific technology system choices come last
- Focus on the strategy and capabilities required, not on end-state organisational structure
- Do not get held up by dependencies and interdependencies
- Leverage what is good with the current system, and add value to learners, employers and staff.

We sought to develop ideas that, taken together, would deliver on these objectives:

- Enable all learners to succeed and thrive, especially Māori, Pasifika, those with disabilities, and those disengaged from training.
- Reach and connect all learners to the right education and training.
- Deliver the right skills and knowledge, the right way, at the right time.
- Be there for employers.
- Create a culture of collaboration and engagement.
- Spend money wisely.

Summary of Recommendations



Notes: * Products: programmes and micro-credentials; ** Learning resources: also known as materials, courseware, products or content. All information, including assessment, to support the learners' success and reinforce the learning. The technology plan would cover learner management systems (LMS), learning content management systems (LCMS) and any other relevant technology systems.

1. 24/7 Learner Support Service

We propose that the NZIST establish a 24/7 support service, for all learners in all learning modes and contexts, whose support advisors have a 360° view of learners, are able to proactively identify possible learner needs, and to reach out to offer concrete support, particularly to priority learners⁴.

Proposal

The 24/7 Learner Support Service is the game-changing initiative to improve learner success. It would build on existing support services across the ITP and ITO network to support the whole person and remove obstacles to successful learning. It would offer support from pre-enrolment (e.g. study and career pathway choices; financing study) through the learner's study journey (e.g. academic and personal support) to employment (e.g. job search/career advising), and back into study again as graduates seek to upskill or change careers. It would serve enrolled (and potential) NZIST learners of all types, wherever and however they are learning (distance⁵, online, classroom, work-place, and blended modes).

The key to delivering 24/7 personalised and proactive support for learners will be a network-wide technology-enablement strategy including deep learner analytics, and delivered by a dedicated cross-network learning support team.⁶

To deliver 24/7 support, the NZIST will use technology-enabled services such as phone/chat/text/video support and asynchronous services such as chat bots and email. Aggregating demand across New Zealand will enhance the viability of this service. Face-to-face in-person support service should still be an important element and delivered on regional campuses, in workplaces and potentially other face-to-face nodes, e.g. libraries, where regional campus reach is insufficient to serve communities.

To deliver personalised and pro-active support, the NZIST must invest in developing a data warehouse that aggregates learner data from student management, learner management, CRM and other systems. It must also invest in developing an analytics team capable of analysing that data and providing timely reports on individual learners for advisors and learning facilitators. By using deep learner-analytics based on data from multiple sources, the NZIST can prompt an advisor to contact a learner to check-in and offer support. Advisors could, for instance, reach out if learners had not completed a work-place assessment or have been marked absent in class a significant number of times.

By leveraging technology to maximise learner self-service, and analytics to help identify learners potentially in need of support, the NZIST would enable focused advisor time and outreach to the learners who most need help, at the time they need it. For learners identified as needing the most support, the support service would assign a personal advisor, a best-practice that builds learner engagement and sense of community.⁷

⁴ We use the term "priority learners" to refer to learners who face higher barriers to successful VET learning or who have been historically underserved by learning support. These learners include Māori, Pasifika, learners with disabilities, gender diverse learners, learners with mental health issues, learners who are 'first in family' to participate in tertiary education, are changing careers or returning to tertiary study for a 'second chance', those from low socio-economic backgrounds, and those with low or no NCEA credits. We are also thinking of work-based learners as these are a new group to be served by the NZIST and are therefore likely to have higher support needs at least initially.

⁵ Distance learning may be delivered over the internet or using more traditional correspondence methods.

⁶ This team does not necessarily need to be co-located so long as it is linked in to the same technology platform.

⁷ The Phase II design team will need to scope targeting and costing of personal advisors, including taking into account existing personal advisor services in the ITO network.

Future Vision

As the Learner Journey's work found, learners often do not know where to reach out for support, are reluctant to do so, or need support outside of business hours. Making it easy for learners to find the help they need, when they need it is essential to learners' success, confidence and engagement in the NZIST community.

Risks

1. Setting learner expectations that cannot be met. Mitigation: Manage learner service and service level expectations, particularly in the early stages. Communicate staged roll-out as systems and personnel are scaled. Involve learners in system design and implementation.
2. Unsustainable costs. Mitigation: focus on priority learners for pro-active provision of support.
3. Inconsistent or low-quality learner support. Mitigation: training, clear roles/responsibilities/service level timeframes/expectations.

Next Steps

In Phase II the NZIST should establish a co-design team, involving learners and potential learners themselves, to take this work forward. This includes identifying and prioritizing the services to be offered and target learners for piloting proactive support. While it will take time and resources to evolve network-wide learner analytics (for pro-active learner support), there is much that can be leveraged to deliver practical help sooner by using existing enabling technologies. For existing learners, creating a live call/chat support service that has the ability to connect them to immediate IT support outside of business hours and refer them, including by making appointments, to the right resources for them, would be a good start. As for new and potential NZIST learners, data collected from the marketing and enrolment pipeline could be integrated to the data warehouse. This data could be analysed to identify priority learners for referral to the learner support service for pro-active outreach and support.⁸ Another short-term win will be enabling advisors (and learners) to view programme offerings across the NZIST system so that advisors can offer potential enrollees good advice.

2. Learner Digital Home

We propose that existing and potential learners have an easy to navigate, single point-of-access that connects them to everything they need to thrive in their current learning, and also to connect them to the right learning for them as their careers progress.

Proposal

The NZIST learner digital home would aggregate services such as: enrolment; my learning (schedule, course content access); my plan (study and career planning); my finances (including Studylink resources); my network (peer-to-peer and community); my support (including the 24/7 support centre); my profile (academic records, cv), and easy to use digital communications tools.

The Learner Digital Home would be used by learners in all contexts: work-based; on-campus; online; and distance learners in New Zealand and overseas.

Future Vision

Making interaction with the NZIST as learner-centric and simple as possible will remove unnecessary hurdles and make it easier for learners to succeed.

⁸ This data should be captured in a CRM system.

Risks

1. Containing scope. Mitigation: focused research to identify features of a digital home most valued by learners.
2. Poor uptake. Mitigation – ensure core services are excellent (enrolment, timetables, results) and promote them strongly at point of enrolment.
3. Timeframe for development/testing/implementation/training. Mitigation: clear project and communication plan(s).

Next Steps

In Phase II, the NZIST should establish a co-design team, involving both learners and potential learners, to take this work forward. A first step towards creating an NZIST Learner Home would be to establish an NZIST home page with information resources and providing access to the first network-wide services, e.g. the 24/7 learner support service, and an NZIST-wide programme pathways tool enabling learners to identify learning options across the network.

3. Employer Digital Support Service

We propose that the NZIST establish a co-design team to develop an easy to access network-wide NZIST digital service that gives employers the right support at the right time.

Proposal

The NZIST has an opportunity to leverage scale economies to build modular online support services applicable across many employer types and industries, and to deliver them via interfaces tailored to specific industry/employer needs. Modular services could include, for example: the ability to view apprentice and trainee progress online; easy ways to upload evidence of learning such as images and videos; the ability to complete and file training agreements electronically, and to use self-service to arrange training where desired. These core services should be delivered in customised ways for different industries and employer types.

Future Vision

Currently, ITOs provide varying types and levels of online support and engagement to employers. Their efforts have been customized to individual ITO business models and limited by a lack of scale economies.

Risks

Investing in things employers don't really want, leading to poor uptake. Mitigation: thorough research in partnership with employers; pilot highest priority service(s) identified by employers.

Next Steps

In Phase II, the NZIST must work closely with employers across industries and across employer types to develop this service. We therefore recommend that, the NZIST establish a co-design team involving employers from across industries and of different kinds to develop this service. It will be important to involve employers who have so far not engaged in training with ITOs or ITPs as a key goal for the NZIST must be to understand and better serve their needs. The co-design team should engage in a deep investigation of employers' needs and then a series of design and prototyping sprints to develop, test and pilot the NZIST service, building on the many examples of existing good practice across ITOs.

4. Network-Wide Applied Research Coordination Service

We propose that the NZIST establish an Applied Research Coordination Service to bring existing network expertise and resources together to focus on real world problems and development needs, both large and small, in a coordinated way.

Proposal

The Applied Research Coordination Service would provide leadership and facilitate coordination across the NZIST network to leverage existing research and specialist expertise and relationships with employers, communities, iwi groups, facilitators and learners, in ways that differentiate our organization from a university. It would champion applied research from the vocational education sector by promoting the services available throughout the network and promoting the success stories, and also develop best practice systems and processes, e.g. IP management and contracts, and commercialisation.

Future Vision

While current ITPs have applied research capabilities, these are currently under-utilised and lack a coordinating mechanism to identify and match stakeholder needs with the right ITP resources. Moreover, New Zealand businesses, industries, iwi and communities frequently often lack awareness of which applied research capabilities are available and how they might utilise them.

By better coordinating and promoting existing applied research capabilities, the Applied Research Coordination Service would increase the NZIST network's impact on, and engagement with communities, iwi, employers and professions and through them increase NZ productivity. It would also expand staff relationships with employers, professions and communities and expand learner engagement in experiential learning in a wide range of problem-solving contexts.

Risks

1. Lack of employer/community/iwi engagement. Mitigation: prioritise outreach, including communication of prior successes.
2. Lack of engagement across network. Mitigation: governance arrangements must engage and empower existing applied research providers across the network.

Next Steps

In Phase II of the design process, the NZIST should establish a cross-network team to develop the 'Applied Research Coordination Service'. This team should be led by the senior NZIST research leader, and include representatives of research leaders from the NZIST network, including expertise in commercialisation. It should also clarify the relationship to CoVEs.

5. Network-Wide Learning Design and Development Service (LDSS)

We propose that the NZIST establish a network-wide Learning Design & Development Service (LDSS) and charge it with delivering on the NZIST's charter expectations of:

- **Raising learning quality** through best-practice specialised learning design that lifts the quality of learning, teaching, and assessment across the system and meets changing learner needs.
- **Increasing learner mobility** so that learners can continue their chosen learning paths even if they change modes of instruction, e.g. from online to classroom to work-based learning, or the location of their learning, e.g. from one region to another.
- **Delivering programme consistency with regional flexibility** so as to support learner mobility and high-quality learning experiences, while allowing for regional variation where needed to meet specific regional learner and employer needs
- Ensuring that learning is designed and delivered in ways that **maximise accessibility for learners**. NZIST learning should be accessible to all learners, regardless of learners' location, time constraints, preferred

delivery modes, and technological constraints. This includes Māori and Pasifika learners, learners with disabilities, and international students.

- **Responding quickly to changes in learner and employer/industry needs**, technological advances, and to changes in best-practice learning design.
- **Reducing the ongoing cost of resource development** by reducing duplication of effort and reusing and repurposing existing educational resources where applicable.

Proposal

The Learning Design and Development Service would have three key elements:

1. NZIST Network-wide Learning Strategy. To deliver on the expectations outlined above, the NZIST needs a network-wide learning strategy, supported by a policy framework, that:

- Identifies network-wide graduate attributes or characteristics, and suitable models of learning and assessment to shape the design of NZIST learning experiences
- Defines the NZIST's product market position through engagement with industry, employers, and learners, and expert knowledge of vocational education best practice and work trends
- Is based on a deep understanding of ITOs' and ITPs' current products and services and how they are delivered nationally and regionally
- Includes multi-year product plans that define the NZIST's product offering at foundational, vocational and degree-level and above level, and its priorities for product development and rationalization to remove unnecessary duplication
- Includes multi-year learning resource plans that set the priorities for establishing high-quality network-wide learning resources, including of "master programmes".

2. A Design and Development Team. This will be a centrally co-ordinated network-wide service. This service will be responsible for developing products required by the product plans, to agreed learning design principles and quality standards. They will also identify and, where necessary, develop quality-assured learning resources in line with the learning resource plans.

Importantly, the service will seek to quickly raise the quality of learning resources across the NZIST network by identifying and sharing the best existing learning resources available within it, from whole programmes and micro-credentials to courses and assessment modules down to individual media items such as digital simulations. This process will be an important part of this service's work, particularly in the transition phase. Generally, the service will adopt a principle of leveraging high-quality learning resources of all kinds from across the NZIST network before designing or purchasing new ones. Taking this approach will ensure that the NZIST identifies and leverages existing capabilities from ITPs, ITOs and industry, especially subject matter experts and leading learning designers.

3. A Quality-assured Learning Library. A digital library could house quality-assured learning resources identified, developed or digitised by the Design and Development team, and make them available for use in network-wide learning delivery. This may be particularly valuable in a transition stage as NZIST identifies its future state design process.

Future Vision

Charter expectations as described above are achieved.

Risks

1. Failure to deliver early results to learners and employers/industry. Mitigation: manage scope tightly. Identify and focus initially on priority qualifications where learner success is poor. Identify and develop highest priority new products to meet employer/industry needs.

2. Academic workforce is alienated. Mitigation – spread revision of existing qualifications around the network.
3. Insufficient learning design staff. Mitigation: train additional staff and leverage existing capability in ITPs and ITOs.
4. High cost to curate/develop resources. Mitigation: clear projects of work with scopes/project plan. Follow a standardised approach.

Next Steps

In Phase II, the Learning Design & Development Service (LDSS) should be established as soon as possible under the governance of the senior NZIST academic executive responsible for learning products. It should include the chair of the new Academic Board and also involve senior academic and learning design and delivery experts from across the NZIST network, from all modes of learning, especially from expected high growth modes such work-based, distance and online learning. In designing the LDSS, the NZIST should take into consideration that staff with the essential learning, instructional and assessment design capabilities are distributed widely throughout the NZIST network and develop a structure that effectively utilises these capabilities. The newly formed LDSS should establish a team drawing on network-wide expertise to begin development of the NZIST learning strategy and associated processes.

As there are multiple learning resource design and development models/ frameworks in place across the existing network of capability, a first priority for the LDSS will be to prepare a report that reviews and evaluates alternative models that might be adopted by the NZIST-network, and propose a recommended approach. This report should pay particular attention to learning design and development models for expected high growth modes of delivery, namely work-based learning, distance and online delivery.

We note two other specific issues that will require further research by the LDSS: where “master programmes” would add the most value in the NZ environment; and, the intellectual property rules for NZIST content. The LDSS should also prioritise establishing productive relationships and role clarity with the WDCs and the NZQA.

6. Collaborative, Capable Staff and Leadership

We propose that the NZIST establish a network-wide staff training and development service for learning facilitators, leaders, and management.

Proposal

New Zealand has not required educators at polytechnics to be certified as capable teachers/learning facilitators, although some ITPs do so. We note that TAFE Queensland requires all instructors⁹ to complete its certificate in training and assessment (TAE) before commencing teaching. We recommend that the NZIST also make possession of an advanced practice-based teaching qualification mandatory for all NZIST learning facilitators.

We also recommend that the NZIST develop a management and leadership training programme focused on building academic leadership and management talent at all levels, including by building people-to-people links and collaboration across the NZIST network.

Future Vision

As well as having the right professional/trades expertise, NZIST learning facilitators are also trained and skilled educators across modes of delivery. The NZIST develops a group of educational leaders and managers of the future, with strong people-to-people links across the network.

Risks

1. Resistance to upskilling teaching qualifications. Mitigation: phased implementation of mandatory training, support package (e.g. decreased workload), and linkage to career progression and remuneration.

⁹ Those staff delivering teaching and learning. Not staff such as training advisors whose role is to arrange learning.

2. Lack of participation in leadership training. Mitigation: link programme to career progression and enable work release.

Next Steps

In Phase II, the NZIST should establish a team to take this work forward, commencing with a stocktake of existing tertiary teaching qualifications and programmes. Early engagement with leaders and managers will be needed to design appropriate leadership development experiences.

7. Technology Transition Plan

We propose that, as a Phase II priority, the NZIST assign a team to design and develop a network-wide technology transition plan to deliver business as usual services to learners, employers, and staff and quickly resolve problems as they arise.

Proposal

Suggested principles for the transition plan are set out in the workstream's full report.

Future Vision

The NZIST maintains learner, employer and staff trust and confidence throughout the transition process.

Risks

Insufficient sustained attention to plan development and implementation. Mitigation: dedicated resources, multi-year planning.

Next Steps

The NZIST technology leader should establish a team to take forward the transition planning, and communicate as soon as possible its commitment, as a first priority, to ensure that learners and employers do not experience disruptions as the NZIST evolves its technology systems.

8. Learner Data Warehouse and Analytics Service

We propose that the NZIST immediately begin design and development of a Learner Data Warehouse and Analytics Service.

Proposal

The plan for this game-changing service that will enable pro-active learner support and targeted improvement of learning design and learning facilitation should encompass a:

1. 360° learner data warehouse. No one system will provide a full picture of a learners' interactions with the NZIST. For example, learner management systems (LMSs) will capture learners' interactions with their courses; student management systems (SMSs) will capture learner demographics and academic records; CRM systems will capture other interactions, e.g. with advisory staff or employers; the NZIST website will capture learner enquiries. A full 360° learner view should include data from external systems, e.g. high school records and records from non-NZIST tertiary institutions. Bringing data from these disparate systems together is the fundamental capability required to deliver pro-active support to learners, more responsive learning design and facilitation and thus to improve learner success.

2. Data collection and management strategy: To bring these information sources together, the NZIST will need a data strategy. It will be important to get this right at the outset so that the NZIST collects, manages, and uses the information it needs, while giving primacy to obtaining and respecting learners' and other users' consent and privacy preferences.

It should include an identity management strategy that enables the NZIST to match learner data entered in different internal and external systems. Without an identity management strategy, we could not know, for example, that learner A who is a carpentry apprentice is also learner B who is doing an on-campus ESOL course and who excelled in math and science at a Māori medium high school but then dropped out of a science programme at Massey University. Current data projects at the TEC, MoE and DIA can mesh with the NZIST's strategy and these conversations should be continued in Phase II of design.

3. Learning analytics and reporting capability: The NZIST will also need to build a team that is capable of analysing this data and producing actionable insights reports for learning advisors, facilitators, learning resource developers, and more, including for learners themselves. We note that several ITPs, ITOs, and their affiliates already have capability in this area as they are leveraging data from their learner management systems. A first step will be to identify these pools of capability.

Future Vision

The NZIST's data-driven, pro-active learner support as envisaged in the learner support service strategic priority succeeds. NZIST learning design, staff training and development, learning facilitators' teaching strategies, and more are informed and improved by the provision of timely actionable insights.

Risks

1. Imposing a solution that does not involve existing sources of expertise and good practice across the network. Mitigation: ensure Phase II team consults widely and communicates decisions clearly justifying the selected solutions and involving the stakeholders in selecting solutions.
2. Under-leveraging learner insights. Mitigation: develop a system-wide insights-to-action plan on enabling better learner outcomes, better learning design, better learning facilitation, and institutional improvement generally.
3. Misalignment TEC/MoE data strategy. Mitigation: include TEC and MoE in the planning process.

Next Steps

The NZIST technology leader should establish a team to take forward this work with input from external resources skilled in best-practice design and implementation of similar systems.

9. Learning Resource Technology Plan

We propose that the NZIST prioritise developing a technology plan to support the design, creation, delivery, and management of the high-quality learning resources, including master programmes, that will be a key NZIST asset. This plan should address all relevant technology systems, including but not limited to learning management systems (LMS) and learning content management systems (LCMS).¹⁰

Proposal

Rather than make specific recommendations about system design and technology choices, we recommend that the NZIST identify and be cognizant of appropriate international technology standards in developing its learning resource technology plan. We recognise that any design process inevitably involves trade-offs amongst conflicting objectives, but an ideal system design would deliver on all five of the objectives identified below.

1. Accessibility. The NZIST must deliver great education opportunities and outcomes for every learner, including those with vision, hearing or other disabilities such as dyslexia. Learning must be accessible in te reo Māori and

¹⁰ Learner management system (LMS): A software application for the administration, documentation, tracking, reporting, and delivery of educational courses, training programs, or learning and development programs. Note that some LMSs also have LCMS capabilities. Learning Content Management System (LCMS): The platform for creating, managing and hosting/storing digital learning resources.

other languages. Access for remote New Zealanders and lifelong learners is also critical, for example, offline access capability.

2. Portability. We recommend that the NZIST prioritise portability of all learning resources. Adhering to portability standards ensures that NZIST learning resource assets are easily transferred from one system to another. Learning resource portability supports flexibility in how learning is delivered, and in how the NZIST's systems evolve as educational technology changes.

3. Collaborative Authoring and Teaching Environment. The NZIST should ensure that learning resources content can be easily developed by staff, subject matter experts, learning designers and industry experts; simultaneously and collaboratively. The learning environment should enable a team model for learning facilitators that fosters professional practice communities.

4. Learner Experience Optimisation. The NZIST should ensure that the digital solutions prioritise the learning experience, and are able to adapt and evolve in response to insight on learner needs and changing educational technology best practices.

5. Interoperability. The NZIST should ensure that key systems meet appropriate interoperability standards, as integration with other software is essential to gathering and analysing data about the learners' progress, and enabling processes such as automatically enrolling a learner into a module and securely transferring data about the learner.

Future Vision

The technology plan to support NZIST's learning resources maximises the impact of those assets by ensuring they are accessible, portable, presented in an optimal way for learners, developed collaboratively, and integrate to other NZIST systems.

Risks

Implementation fails due to lack of buy in across network. Mitigation: communicate commitment to leveraging existing network people capabilities regardless of technology choices; have a plan for developing people-to-people links and new system-wide cultural norms.

Next Steps

The Chief Executive should ensure that the technology planning process for the NZIST is informed by the objectives above. In evaluating technology options, the team should report on the extent to which alternative technology design and system choices would support these objectives.

5. Work-based learning

The table below outlines the key recommendations from the Working Group including the risks associated with implementing the recommendations. The Working Group has prioritised the recommendations by assigning an indicative timeline across the next three years of transition.

Recommendation	Details	Risks
2020 and 2021		
<p>1. <i>Build capability and capacity for WBL into NZIST by bringing a first tranche of the current ITO capability and provision of WBL into NZIST.</i></p>	<ul style="list-style-type: none"> • <i>There is limited and variable capability and capacity for the delivery of work-based learning (both apprenticeships and trainees) within the ITPs.</i> • <i>It will be important that the range of delivery options outlined in Section 3 are accommodated in the transition. The high and low touch delivery models of WBL are all key to the continuing success of the learners.</i> • <i>There are multiple ways the transition of ITOs trainees and staff into NZIST can be managed and this is a matter to be resolved between ITOs and NZIST. One model considered by the Working Group was to develop TITOs as subsidiaries of NZIST.</i> • <i>It will be important that NZIST works with the Transitional ITOs and TEC as the Transition Plans are developed.</i> • <i>The sooner this transition occurs the sooner NZIST can start to gain greater understanding of WBL models, look at integration opportunities and build a unified culture.</i> • <i>It will be important to include employers during this phase. Their inclusion is key to successful WBL.</i> 	<ul style="list-style-type: none"> • <i>That necessary regional and national differences across industries (i.e. nationally distributed businesses vs local) are not well managed .</i>

<p>2. <i>Ensure the ITO Training Adviser capabilities of, business development, product knowledge, WBL assessment support systems pastoral care and learning support are retained to ensure apprentice, trainee and employer progression, trust and confidence.</i></p>	<ul style="list-style-type: none"> • <i>An important aspect in building trust and confidence necessitates a clear communication strategy to be outlined noting all stakeholders and the various touch points involved. Training Advisors will be crucial in this communication to both existing work based learners and employers and will require training. The consistency of message is crucial for success of NZIST.</i> • <i>There will be expansion of existing product/assessment support systems from ITOs which need to transition and be fully integrated into NZIST functions and systems.</i> • <i>Retain capability within ITO/ITP structures .</i> • <i>Look to expand roles to include greater learner support, mentoring and potentially training in the workplace along with employer advice and support.</i> 	<ul style="list-style-type: none"> • <i>Critical risk around capability of Training Advisors, etc., being lost if an effective transition within a short timeframe is not well managed;</i> • <i>ITPs may attempt to unnecessarily duplicate TA roles/existing ITO function.</i>
<p>3. <i>Develop the personas for employers as a key customer for NZIST.</i></p>	<ul style="list-style-type: none"> • <i>Ensuring there is a deep understanding of the diversity of employers in as much depth as the diversity of learners.</i> • <i>Understanding that to increase the numbers of employers, NZIST will need to understand the drivers of performance.</i> • <i>Understand the extent of the self-employed – close to 400,000 of the 566,000 of enterprises have no employees.</i> • <i>Small enterprises (less than 5 employees) make up the next biggest group.</i> • <i>Just 2760 have more than 100 employees.</i> 	<ul style="list-style-type: none"> • <i>Personas developed so far may not reflect the broad range of learners and employer scenarios needed to design solutions to address the issues – for example, small-to-medium enterprises, sole traders, those not currently engaged or those employers who are engaged but the current system does not support them wells.</i>

	<ul style="list-style-type: none"> • <i>Participation by size of enterprise, drivers for this and support models needed.</i> • <i>Identify and understand needs of those employers/industries that are not currently engaged in WBL.</i> 	
<p>4. <i>Design a WBL component into all/most NZIST programmes that can be delivered through the high and low touch options outlined in Section 3.</i></p>	<ul style="list-style-type: none"> • <i>Broadening the definition and understanding of WBL beyond current arrangements is needed for WBL type arrangements to be used widely across the NZIST programmes.</i> • <i>Having a range of options for WBL will be important for employers and learners to access arrangements that best suit their needs.</i> • <i>Positively leveraging employer and industry links to qualifications and programmes to explore wider WBL opportunities for other disciplines, e.g. access to the construction industry may permit access to the other components that support the sector, e.g. finance, logistics, etc.</i> • <i>Formal WBL arrangements are currently focused at Level 3-5. There is a need to shift the positive aspects into level 5-6 and up to level 9, as well as recognising foundation level learning as a critical pathway into level 3-4.</i> • <i>Leverage WBL models such as school-based apprenticeships, internships, work experience, apprenticeships, cadetships and advanced apprenticeships and traineeships.</i> 	<ul style="list-style-type: none"> • <i>Maintaining the current level of WBL activities does not make a significant improvement to accessing work-based or work-integrated learning opportunities for NZIST, its learners and employers and industry and will not lead to an improved return on investment</i>
<p>5. <i>Consolidate the organisational</i></p>	<ul style="list-style-type: none"> • <i>An aligned structure gives the opportunity to build stronger collaboration and connections</i> 	<ul style="list-style-type: none"> • <i>Lack of clarity around brokerage and work-based learning functions between</i>

<p><i>structure for WBL of NZIST (and subsidiaries) in line with WDC Groupings.</i></p>	<p><i>between the two parts of the system.</i></p> <ul style="list-style-type: none"> <i>• Clear alignment with WDC's, clear communication required of what industry belongs where and effective management of small, niche industries.</i> <i>• Some form of infrastructure is required to facilitate clear communication and relationships between NZIST and WDC's and employers.</i> <i>• Improve clarity around employer engagement with WDC and via WBL feedback .</i> <i>• Benefits for some of other recommendations, e.g. Master Programme development.</i> 	<p><i>WDCs and NZIST and how the relationships and transfer of information between the two can best be developed may jeopardise positive outcomes for learners and employers.</i></p>
<p><i>6. Develop a National organisational structure of provision, supporting work-based, provider-based and online learning</i></p>	<ul style="list-style-type: none"> <i>• Current ITO field teams (Training Advisors) deliver to sectors nationally, giving consistency of delivery and support, ability for industries to influence programme outcomes to meet their needs</i> <i>• Create specialist employability and industry centres that capture current examples of good practice to ensure the student and employer experience across NZIST is strengthened across the network of education provision e.g. AUT's Employability & Career Centre, Wintec industry and community partnership work various ITO employment/placement services and school connection teams</i> <i>• Effectively utilise and develop capabilities of existing community/industry networks e.g. Ara @Auckland Airport (extending Skills and Training elements of these hubs); leveraging the role of Trades Academies (e.g. as a</i> 	<ul style="list-style-type: none"> <i>• Potential disruption (perceived or real) of positive relationships with subsidiaries and local MoU or partnership agreements and/or relationship or account manager relationships.</i>

	<p><i>potential point of contact or pathway for students into apprenticeships).</i></p> <ul style="list-style-type: none"> • <i>Transfer of existing IP (learning and assessment content, programmes of training) and capability to develop and maintain this.</i> • 	
<p>2022 for 2023 operation</p>		
<p>7. <i>If required, complete the transfer of TITO capability and provision.</i></p>	<ul style="list-style-type: none"> • <i>Transition arrangements will differ for each of the TITO but must be completed by the end of 2021.</i> 	
<p>8. <i>Provide clarity on transitional funding arrangements as soon as possible while the unified funding system is under development.</i></p>	<ul style="list-style-type: none"> • <i>A unified funding system is a key enabler to WBL with this development on a timeline for implementation in 2023.</i> • <i>The new system needs to be implemented with urgency to avoid unnecessary competition and confusion. A consistent transparent approach required. Interim changes to support employers and priority learners will need to be in place prior to 2023</i> • <i>A plan is needed for transition of ITP managed apprenticeships as well as ITO trainees and apprentices into NZIST that removes current competition between ITOs and ITPs.</i> • <i>This will enable expansion of existing delivery of WBL to better reflect learner and employer needs (i.e. block & night courses for learners to ensure they can successfully have access to and acquire all learning outcomes in a programme of study; establishment of learning communities (to support priority groups etc)</i> 	<ul style="list-style-type: none"> • <i>Inability to deliver new models of flexible WBL, reduces NZIST's ability to meet employer and learner need</i> • <i>Ability to meet priority learner need is reduced due to funding restrictions and expectations around learner success – and associated education performance indicators</i>

	<ul style="list-style-type: none"> • <i>An added benefit is that pre employment programmes should be able to meet market: short duration, work hours etc, transfer of credits to apprenticeships etc as appropriate.</i> • <i>Learner interventions needed to ensure learner success must be funded appropriately</i> • <i>Appropriate funding to support greater engagement from employers, particularly SME's needs to be considered in the unified system.</i> 	
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Recommendations linked to WDC and IT Infrastructure development

<p>9. <i>Bring together the unity, shared vision and values of NZIST and the WDCs through the development of a core suite of 'Master Programmes' that are aligned to a national qualification structure. – and growing programme offerings, aligned with nationally-consistent support models.</i></p>	<ul style="list-style-type: none"> • <i>Clearly define roles and responsibilities: WDC's responsible for consistency, endorsement and consolidation of qualifications; NZIST responsible for development of Master Programmes.</i> • <i>Master Programmes need to align with and recognise regional industry and skill demand differences/needs and be flexible to adapt to individual workplace needs.</i> • <i>Master Programmes need to recognise the importance of Digital Skills in the future of WBL.</i> • <i>Pre-employment programmes should be limited to 12 weeks and focus on employment readiness and building employability skills ('soft' skills).</i> • <i>Delivery of Master Programmes across multiple channels (workplace, online, campus) ensures improved access to best alternative delivery to suit each learner</i> 	<ul style="list-style-type: none"> • <i>Timing of NZQA reviews of the NZ qualifications and programme development may not fit with the WDC developments.</i>
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	<p><i>and employer needs- improves industry trust in benefits of reform</i></p> <p>Central development and repository for learning and assessment content available for all</p> <ul style="list-style-type: none"> • <i>Wherever possible, naturally occurring assessment evidence should be used</i> • <i>Review existing consortiums that undertake national master programme development and updating e.g. EngTech ITP consortia; Diploma of Engineering Board; ITP consortia development of Trade Automotive programmes post TROQ, ITO consortia of programmes in Business, Sales, Competitive Systems and practice and NZBED.</i> • <i>Include micro credentials to</i> <ul style="list-style-type: none"> ○ <i>adapt to changing nature of work and requirements of differing workplaces</i> ○ <i>ability to create stackable credentials that may lead to full qualifications</i> ○ <i>enable certification for disabled persons who may be unable to obtain whole qualification</i> ○ <i>enable volunteers to build to a qualification with available timeframes.</i> 	
<p>10. <i>Ensure there are unified systems to manage, track and monitor apprentices and trainees, provide 27/4 access and support – including learning management</i></p>	<ul style="list-style-type: none"> • <i>IT system required that allows accessibility for all e.g. employers, student, trainees, trainers, lecturers, etc. Clearly records student/trainee work and can be easily transferred between locations e.g. www.Sonia.com.au</i> • <i>Access to existing ITP learning support and programme delivery (as options to suit each learner needs) etc., for workbased learners.</i> 	<ul style="list-style-type: none"> • <i>Systems are not suitable to the New Zealand context – ‘off the shelf’ systems have limitations</i> • <i>Lack of due diligence around Customer Relationship (CRM), Learning Management System (LMS), and Student Management Systems (SMS) may be costly in the medium to long-term, e.g. maintenance, updates, integration between, may not suit users – learners,</i>

<p><i>and student management systems.</i></p>	<ul style="list-style-type: none"> • <i>Flexible training and learning, start at any time, access support 24/7</i> • <i>Increased pastoral/academic support may be required for priority learners.</i> • <i>Some employers may need support on provision of training and learner support</i> • <i>Clear, complete and correct pathway and process information available</i> • <i>Systems to overcome learner isolation where they are not part of a wider community of apprentices or trainees. Systems may need to “talk to” large employer systems.</i> • <i>Transition of existing IT systems until such platforms outlined above are in place</i> 	<p><i>trainers/tutors/lecturers and employers.</i></p> <ul style="list-style-type: none"> • <i>Lack of investment in the most suitable system may lead to compromised function and negatively impact uptake and engagement.</i>
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Recommendations for April 2020 (Day 1)

The Recommendations and Risks matrix provides high-level recommendations from the Working Group that will, if accepted, result in the design of new WBL arrangements inside NZIST over the coming years.

From this comprehensive list a series of related recommendations have been drawn where work can begin immediately. This work will support the nine substantive recommendations.

It is recommended that NZIST:

- a) Explore options to bring the current capability, IP and provision of WBL into NZIST as soon as possible, including the consideration of ITOs becoming subsidiaries of NZIST or similar such arrangements.
- b) Establish a mechanism for NZIST to work alongside TEC and the ITOs as the ITO transition plans are developed to gain greater understanding of WBL models for each industry.
- c) Develop arrangements to ensure the current Training Advisor roles and capabilities within ITOs are retained in transitional arrangements.
- d) Continue working with the Workstream Team to develop persona for employers.
- e) Develop metrics for success and the data collection processes that will enable these to be reported on.

6. New Academic Architecture

Executive Summary

Working group approach

The working group used co-design principles to collaboratively develop a shared understanding of the function and role of an academic board and to propose academic structures for NZIST including subcommittees and the role of subsidiary academic committees. The group considered the new wider context of learners and learning – that of national and regional needs, work-based learning and the charter expectations.

The working group gathered input from ITO representatives within the group, ITO perspectives from those outside of the group, NZQA, and representatives of business in order to understand the requirements of an academic quality system for work-based learning. Common principles and language were developed and current structures and stakeholder needs were analysed. A high level workplan including priorities for initial NZIST academic work, including harmonisation of academic regulations was developed.

Summary of Recommendations/Options

1. A skills-based Academic Board operating with a proposed name of **Poari Akoranga** is implemented
2. The structure indicated on page 7 of the Interim Report is considered the NZIST Academic Architecture for 2020
3. The work-based national sub-committee (National Committee) and Komiti Ōritetanga national sub-committee (National Committee) of Academic Board are established with priority
4. The draft Terms of Reference for Poari Akoranga are considered and approved by the Council
5. A workplan for Poari Akoranga is developed using the high-level timeline on page 14 of the Interim Report to develop a work plan and NZIST academic priorities together with Council and NZIST leadership
6. Harmonisation begins as a project - starting with harmonisation of academic regulations for NZIST
7. Delegations are provided to the Subsidiary academic committees (current ITP Academic Boards) by last week of March and a delegations register provided to Council
8. Engagement of resource to prepare appropriate documentation is in readiness for 1 April and continue to use the working group as a reference group.

Recommendations in detail

1. A skills-based Academic Board operating with a proposed name of Poari Akoranga is implemented

Background

The following steps are proposed to establish the membership:

- a. Nominees sought from the sector (including work-based representation)
- b. Selection of members by an appointment panel. (The working group notes that members will need to be released for Academic Board work. Managers will need to be contacted to discuss management of workload).
- c. Terms of appointment initially one to two years with options for re-appointment.
- d. Induction process is conducted for the Chair and members in late March

Decision required: The Education (Vocational Education and Training Reform) Bill proposed section 222K(2) provides that NZIST's council must establish an academic board consisting of its chief executive and members of the staff and students of NZIST to:

- a. advise it on matters relating to work-based learning, courses of study or training, awards and other academic matters; and
- b. exercise powers delegated to it by the council.

This should be established as a matter of priority by the Council.

This recommendation will ensure that NZIST meets the legislative requirements for Council to establish an Academic Board to oversee the academic quality of NZIST.

2. The structure on page 7 of the Interim Report is considered the NZIST Academic Architecture for 2020

Background

The Academic Board will maintain high-level oversight and will have space in the initial period to set academic strategy of the new NZIST in alignment with the Charter. The focused national sub-committees (National Committees) will be working committees supporting the Academic Board to align strategy. The subsidiary academic committees (existing ITP academic boards and their internal academic infrastructures) will continue to work business as usual (institution-level processes and procedures, programme quality and teaching, and learning and delivery) with required reporting to the Academic Board and national sub-committees (National Committees).

Overtime changes will occur across these structures but this allows for effective Day One operating structures.

Decision required. Current ITP Academic Boards will no longer be Academic Boards but will exist as Subsidiary Academic Committees functioning as sub-committees (with appropriate delegations) of the IST Academic Board (Poari Akoranga).

This recommendation will ensure that communication of proposed structure and delegations will occur prior to 1 April 2020.

3. Work-based National committee and Komiti Ōritetanga National committee (sub-committees of Poari Akoranga) are established with priority

Background

Nominees are called for membership of the work-based National committee as a priority to ensure that NZIST has expertise in work-based learning. It is proposed that this committee will draw on the wide sector expertise and membership (specifically including suitable expertise from the ITO sector). This committee will advise Poari Akoranga and develop and monitor NZIST capabilities and strategies in work-based learning.

Nominees are called for membership of Komiti Ōritetanga as a priority to give effect to Te Tiriti o Waitangi by providing strategic direction, advice and assurance to IST Poari Akoranga that the principles of ōritetanga are embodied in all academic practices of NZIST to meet the relevant outcomes of the IST Charter. Komiti Ōritetanga will assess and monitor the implementation of Māori learner success strategies and outcomes for Māori learners across NZIST.

This recommendation will ensure that priorities for NZIST in work-based learning capabilities and ōritetanga are captured from the outset.

4. The draft Terms of Reference for Poari Akoranga are considered and approved as a working draft for Day One by the Council

Background

The working group presents draft Terms of Reference for the Academic Board (Poari Akoranga) of NZIST (see Interim Report appendix 3). It also presents draft possible National Committee terms of reference (see Interim Report appendix 4).

An initial Terms of Reference will need to be approved in order to provide a working direction and a set of approved delegations for the new Academic Board (Poari Akoranga). The Terms of Reference if approved also allow Poari Akoranga to delegate working activities to working National and Subsidiary Committees.

The working group recommends an initial group of Committees to provide a platform for NZIST activities and additionally that specific work-based and ōritetanga principles become operationalised early.

In order to have effective communication and shared understanding across NZIST a draft glossary of terms associated with the Terms of Reference should be developed and socialised across the network as soon as practically possible.

This recommendation will ensure that the delegated authority for Poari Akoranga is approved by council and a working direction in line with the Charter is in place early.

5. Workplan is developed for Poari Akoranga using the high-level timeline to develop a work plan and priorities together with Council and the NZIST leadership, for 2020

Background

The Academic Board is required to advise Council on matters relating to work-based learning, courses of study or training, awards and other academic matters. The Minister and Establishment Board also tasks the Academic Board with supporting the IST in the development of the academic identity, priorities and reputation. The working group presents a high level time line for Poari Akoranga to develop into a workplan for 2020 and early 2021

This recommendation will ensure that Poari Akoranga drives the priorities and academic identity of NZIST on behalf of Council in a timely fashion.

6. A harmonisation project is implemented

Background

Aligning or harmonising the academic regulations, systems and programmes will need to occur to ensure academic consistency across the delivery network over time. The working group suggests that the project initially focuses on harmonising the academic regulations in 2020. It is also proposed that Poari Akoranga retains the delegation to consider any proposed (significant) Type 2 changes (but may delegate more minor and technical Type 2 changes and all Type 1 changes to working committees). Careful articulation of these delegations will need to be worked up to ensure clarity around expectations.

Type 2 changes (major changes) to any programme will automatically escalate to Poari Akoranga for consideration for programme harmonisation activities across the network.

It is proposed that Poari Akoranga consider as a major project, identification of areas of priority for harmonisation and begin the process of establishing forums of Subject Matter Experts (SMEs) from across the network to consider these matters. This is a long-term project but there is merit in identifying priority areas in order to start the process.

This recommendation will be a major piece of work to drive the consistency, collaborative behavior and culture of NZIST.

7. Delegations are provided to the Subsidiary Academic Committees (current ITP Academic Boards) by last week of March and a delegations register for Council is in place for Day One.

Background

Current Academic Boards of ITPs have delegations from ITP Councils. Once the Councils are dissolved new delegations need to be in place for Subsidiary Academic Committees by NZIST Council. This will need to be in place for Day One. The working group proposes the delegations are to “continue to work business as usual (institution level processes and procedures, programme quality and teaching, and learning and delivery)” with required reporting to Poari Akoranga and National Committees to be clarified soon after Day One.

It is recommended that Type 2 changes (major) are required to go through to the Poari Akoranga however Type 1 and Type 2 (technical) changes are delegated to subsidiary academic committees. Clear documentation outlining these delegations and expectations will need to be worked up and communicated prior to Day 1.

Decision required by Council to specify academic delegations to Subsidiaries.

8. Specialist resource is engaged to prepare appropriate documentation in readiness for 1 April and continue to use the working group as a reference group throughout this process.

Background

There is a need for some specialist and technical writing to take place as soon as possible to ensure appropriate technical documentation is in place for day one (such as, delegations, documentation, Committee terms of reference, glossary of terms, initial work of harmonisation of regulations, etc). This requires some specific and technical expertise. It is proposed that appropriate specialist resource is contracted to work up such documentation and that the Academic Architecture working group continue as a reference group to oversee this work prior to it going to the Establishment Board or Council for consideration and approval. Initial work on this has begun.

This recommendation will ensure that appropriate technical documentation is in place for Day One, and that socialisation of this work will be able to occur in advance of Day One, following approval.

Proposal

The establishment of an Academic Board will meet the legislative requirements described above in the recommendations section and the Minister’s expectations. This Board must be in place to advise Council on academic matters and must consist of staff and learners of NZIST (Clause 222K(2)). The Board will be critical to ensuring that the five objectives expressed by the Minister are at the forefront of NZIST. Poari Akoranga will need to develop relationships with Workforce Development Councils (WDCs), subsidiaries, regulatory bodies and stakeholders in a way that promotes outcomes for all learners in the vocational education sector. This is reflected in the proposed academic governance structure and in the terms of reference (Interim Report pages 7-9 and appendix 3 and 4)

The early implementation of a work-based learning National Committee of NZIST will provide oversight, advice and monitoring of the new operating model of NZIST as it prepares to move towards incorporation of new workplace learners and programmes, ensuring seamless transitions between work and learning and that NZIST is giving effect to the Charter. (see Interim Report page 9)

The early implementation of a Komiti Ōritetanga will ensure that NZIST meets Objectives 1 and 5 in particular and to build partnership, inclusivity and equity throughout the structure, strategies and policies (see Interim Report page 9).

It is proposed that the new academic governance structure will allow enough familiarity during the transition phase for staff to continue to concentrate on delivering high quality programmes while the new Poari Akoranga can focus on collaboratively designing a strong academic strategic focus that meets the demands of NZIST, industry, employers and the regions during 2020. It is important to signal a new way of operating for NZIST but equally the academic quality relies on a participatory model to ensure that there is buy-in to policies and procedures as this will be critical for the next periods of work.

The academic governance structure will support the requirements of the Minister’s letter for NZIST to have both national and regional reach to become a long-term skills training partner for firms and industry by maintaining the vision and oversight of a network of vocational education and applied training provision across New Zealand (see Interim Report pages 7-10)

Harmonisation is critical to drive collaborative, learner-centred behaviours across the sector. It is proposed that the first step towards this is to lead the harmonisation of the academic regulations of NZIST and to use major programme changes as the trigger for programme harmonisation considerations (see Interim Report page 12). This will assist in meeting the Minister’s expectations by promoting more seamless shifts between learning organisations and modes of delivery, for learners engaged in work-based, online, blended, distance or on-campus learning. It is also an essential part of creating a cohesive education system for learners, employers, regions and communities.

It is proposed that Poari Akoranga identify priority areas for programme harmonisation and establish forums of Subject Matter Experts from across the network to begin the process of consideration around this. This will help drive the culture change required across the network towards more collaborative and harmonised approaches.

Ideal future state/Vision for the future of NZIST

NZIST will be New Zealand’s largest tertiary education and training provider, extensively engaged in work-based learning, online delivery, blended, distance and on-campus delivery. The ‘academic architecture’ of NZIST must cover, monitor and oversee an extensive range of vocational, applied and professional education provision, including, by way of example: Level 1-10 programmes, foundation, ACE, non-credential and micro-credential activity.

The NZIST’s academic architecture will be key in a partnership model built on understandings of labour force development, economic development (local, national and global) vocational education and training and sector policies to promote successful outcomes. The new academic structure and systems will ensure that education and training decisions are well informed by data, on needs and expectations.

Education is progressively becoming inter- and intra-disciplinary mixed mode and technology based, and work integrated. Academic quality needs to be broadly focused and flexible, taking into account education, market, industry and community aspirations – the needs of which are constantly evolving. The skills-based membership, relationships with stakeholders both internal and external, regional and national engagement, a broad cognisance of all vocational modes of delivery and the principles of Ōritetanga at the forefront will drive a collaborative, responsive and high-quality network of delivery.

Risks

Risk	Mitigation
Academic Board is not in place on 1 April	An interim group could take on the responsibilities of the Academic Board while membership is secured that might involve short term appointments (e.g., one-year appointments). Note: learner voice must be appointed as soon as possible.
Academic Board struggles to build effective quality assurance oversight across network	Use participatory design of policy and procedures to develop and build understanding and shared responsibility Academic Board should consider holding meetings at different subsidiaries each month Establish effective and clear reporting mechanisms Carefully construct and monitor delegations
Lack of cohesion and integration across national committees	Clear delegations and reporting requirements in place Well planned induction programmes for Chairs and also for membership Establish National Committee Chairs and Subsidiary Academic Committee Chair forums to build shared vision and effective communication channels
Membership is not reflective of new wider sector responsibilities – maintains a division between existing competing delivery systems	Terms of reference of Poari Akoranga and the sub-committees both national and subsidiary reflect appropriate expertise of membership.
Harmonisation of regulations and programmes occurs too slowly	Project for harmonisation is put in place early and Poari Akoranga workplan includes harmonisation as a priority. Poari Akoranga reports to Council quarterly on progress Set target milestone dates for key harmonisation targets Identify priority areas for harmonisation activities Establish and utilise Subject Matter Expert forums from across the network. This will shift the conversation and drive desired behaviour

Next Steps

Following the establishment of Poari Akoranga, Council and the CE should focus on:

- Setting the academic priorities and defining the academic identity of NZIST
- Establish key communication channels and forums for Chairs of National Committees and chairs of Subsidiary Academic Committees
- Working up a clear work plan for Poari Akoranga and National Committees

- Establishing a harmonisation project which begins with harmonisation of regulations across the network and then identifies priority areas for program harmonisation across the network

Collaborative participation should continue in the initial phases of harmonisation as it is important that the staff of NZIST build trust together and engage in the process and move the culture from one of competition to collaboration.

- Participatory design facilitators to work on the harmonisation project(s)
- Establishment of forums of Subject Matter Experts from across the network to drive programme harmonisation thinking
- NZQA
- WDCs

7. International Education

Executive Summary

Internationalisation working group

The establishment of the New Zealand Institute of Skills and Technology (NZIST) is a once-in-a-generation opportunity to enact a shift in the way international education is delivered and promoted by Aotearoa New Zealand.

Internationalisation makes a substantive contribution to the New Zealand economy, comprising \$4.9 billion per annum with over 45,040 jobs supported by international learner expenditure. It is a critical component of New Zealand's institutes of technology and polytechnics (ITP) sector, where international learners comprise 15 percent of the total number of learners with a total of 17,240 students, and the business of internationalisation delivers a \$716 million per annum financial contribution¹¹.

Working group approach

The Internationalisation working group was provided direction from the Minister of Education (the Minister) signalling that it should "commence the development of a future operating model for international education for the Institute, including workforce development or capability to deliver, in conjunction with the new brand, utilising the current channels already in place through ITPs and ITOs". Supplementing the Minister's guidance, the Establishment Board provided the following direction: "*Commence the development of a future operating model for international education, to support the goals of the International Education Strategy.*" That direction was accompanied by six potential focus areas.

Informed by the guiding principles provided by the Establishment Board, the internationalisation working group took a collaborative co-design and production approach to the mahi. The working group process followed an approach to empathise, define, ideate, prototype, test and refine before arriving at clear recommendations for the Establishment Board and other users of their work. It included wider engagement with stakeholders, government organisations and departments, and communities; complemented by research carried out by working group members and organisations the working group sought support from. This engagement was invaluable and helped refine and test the thinking of the group to ensure robust, well-considered recommendations and solutions.

Summary of recommendations/Options

The group has answered the requirements of both the Minister in his Letter of Expectation, and the Establishment Board in order to articulate a set of recommendations regarding the beginnings of a future operating model alongside six key priorities to underpin the success of internationalisation for NZIST. This is reflected in the following graphic of the proposed operating model.

¹¹ Source – Education New Zealand, 2018 Enrolment Data (latest available)

NZIST Operating Model pivoting 'International Education' to 'Internationalisation'



For many, “International Education” at tertiary level primarily refers to inbound international learners studying at institutes in New Zealand. However, international education is much more than inbound international ‘export’ education. International education or Internationalisation is *“the process of integrating an international, intellectual, or global dimension into the purpose, functions or delivery of post-secondary education”* (Boston College Centre for International Higher Education).

When pivoted to an internationalisation focus, international education extends to a position where our domestic learners have a global experience component to their education. It includes people learning anywhere, whether domestically or internationally, using products and services that have been developed in New Zealand, as well as New Zealand learners benefitting from learning alongside visiting international learners. For enterprises and employers in

Aotearoa New Zealand (including educational institutions) it means solving their talent shortages with the help of international graduates, as well as growing their export opportunities through greater global connectivity and partnerships.

An operating model and strategy which incorporates internationalisation will result in an opportunity for NZIST to take the lead in creating transformative benefits not only for NZIST and its learners, but also for its staff, employers and New Zealand Inc. By adopting an internationalisation focus, NZIST will continue to be globally competitive and maintain relevance as a leading provider of international education world-wide.

Recommendation Detail

The working group expanded on its recommendation for an internationalisation operating model which is supplemented by six priority themes that determine what success looks like and contain action-oriented recommendations to underpin each priority. Collectively, these recommendations build on the existing 'good' and 'what works' and support a successful transition and transformative outcome for NZIST. The recommendations are summarised below, with specific details of action provided in the main report body.

RECOMMENDATION: The beginnings of an operating model

NZIST implements an operating model that pivots 'International Education' to 'Internationalisation' and internationalisation is embedded into every aspect of the institution.

Ideal future state – What success looks like

NZIST has implemented an operating model that pivots 'International Education' to an 'Internationalisation' focus. Internationalisation is delivering and recognised for its wide-reaching benefits and contribution to NZIST learners – domestic and international, to staff, to employers and to Aotearoa New Zealand Inc, and this is a visible, well-understood story. Internationalisation is embedded across the entire institution and its subsidiaries. The opportunities and voice of internationalisation are heard, and a global mindset encouraged.

How do we make it happen – Guiding principles

The Internationalisation working group strongly recommends that:

- NZIST adopts an operating model and strategy which sees the focus of international education pivot from a predominately narrow focus on inbound education and revenue to a focus on Internationalisation and global mindset. This encompasses inbound international education, outbound education, commercial opportunities and global citizenship.
- The IES sits alongside the NZIST Charter with a pan-institution focus cutting across all aspects of NZIST from governance and executive to delivery and administration.
- Leaders with the expertise to understand and promote this direction are present at every level of the organisation: from the Council, to subsidiary boards, to national and subsidiary management. The national leadership team needs a 'Director – Internationalisation' with the brief to range across the organisation.
- Local subsidiaries work to retain the intellectual property and talent they have built over the years in their committed international teams, while bringing to life a more effective, nationally co-ordinated approach.
- The incoming NZIST council and executive spend time with subsidiaries to understand what is working well and what can be leveraged.

- NZIST equips all learners for work in a global and multicultural context, and embeds internationalisation in its culture; ensuring colleagues are aware and responsive to means of incorporating an internationalisation focus into the curriculum, as well as the learning and teaching activity.
- NZIST ensures international and domestic learners are consistently being enriched academically and culturally, by their internationalisation experiences with NZIST.
- NZIST enables all learners to gain a sense of belonging from their internationalisation experiences, i.e., with NZIST subsidiaries and institute to institute partners.
- NZIST supports the development of staff and colleagues as learners to ensure internationalisation capability and capacity for improving Aotearoa New Zealand's future social, culture and economic wellbeing.
- NZIST commits to and develops a funding model that supports and encourages the aims of internationalisation to enable reinvestment and growth.
- NZIST leverages internationalisation to develop and deliver high-quality products, services and student wellbeing supports, and enables innovation and agility in internationalisation product and service.
- NZIST leverages the new connectivity between subsidiaries to promote learner mobility and internationalisation as a key contributor to all New Zealand regions.

RECOMMENDATION: Priority 1 - Global mindset and opportunities

- Understand and promote the value of international learners in Aotearoa New Zealand
- Understand and promote the value of outbound learning
- Identify opportunities for growth

Ideal future state - What success looks like

New Zealanders understand and embrace the benefits of internationalisation. International learners can make a positive and visible contribution to regional employers and communities. All learners gain the knowledge, skills and capabilities they need to live, work and learn globally as well as contribute to Aotearoa New Zealand Inc. More New Zealand learners and workers have an international experience that enhances education and career prospects. NZIST's internationalisation model is increasing Aotearoa New Zealand's global connections, business and educational partnerships, and export revenue.

RECOMMENDATION: Priority 2 - Learner wellbeing and experience

- Provide reassurance
- Prioritise learner wellbeing

Ideal future state - What success looks like

All learners exposed to internationalisation, including inbound international learners, are well looked after applying the values of manaakitanga and aroha. Learners are provided with a high level of support and have a positive study experience inclusive of tikanga Māori. Learners become ambassadors and advocates for NZIST and Aotearoa New Zealand. NZIST's international learners consistently experience high levels of pastoral support while in Aotearoa New Zealand, across all subsidiaries and in the workplace. NZIST encourages and enables inbound international learner mobility allowing learners to move between subsidiaries and gain an 'all of New Zealand experience'. Learners are engaged with NZIST and Aotearoa New Zealand as NZIST alumni.

RECOMMENDATION: Priority 3 - Pathways and regional impact

- Understand regional opportunities and skills gaps

Ideal future state - What success looks like

The diversity and number of international learners coming to NZIST have increased with learners and graduates equipped with skills needed to support regional growth. International learners are working alongside domestic learners to enhance NZIST focus on creating global citizens. International learner pathways are clear with NZIST working closely with regional subsidiaries. Careful forecasting and planning with regional networks, e.g., Regional Skills Leadership Groups, enables full understanding of opportunities and skills gaps. Employers have the confidence and ability to readily employ international learners. Regional dispersal is active. Local communities are engaging with NZIST and international learners are, in turn, engaging with communities.

RECOMMENDATION: Priority 4 - Quality and innovation

- Internationalise Products, Services and Delivery

Proposal and ideal future state - What success looks like

NZIST programmes and qualifications are recognised throughout the world for their high-quality and innovative features both onshore and offshore, attracting a diverse range of international learners to Aotearoa New Zealand for genuine reasons to study, live and work. These programmes are replicated (with customisation) and delivered offshore providing home-based learners and travelling New Zealanders the opportunity to gain valued qualification outcomes. Many vocational programmes are 'internationalised', enabling an internationally consistent approach to development, training, assessment and benchmarking as well as learner transportability e.g. World Skills. NZIST is actively researching international exchange opportunities and identifying best practice, maximising benefits for learners and educators - those heading offshore and those coming into Aotearoa New Zealand.

RECOMMENDATION: Priority 5 - Define and deliver value

- Understand the Full "Value" of Internationalisation
- Deliver Value

Ideal future state - What success looks like

NZIST recognises and invests in internationalisation in a holistic sense, pivoting from a predominantly revenue driven model to a comprehensive internationalisation model that brings higher "value" to NZIST and sustainable products and services that benefit the entire internationalisation ecosystem.

RECOMMENDATION: Priority 6: Tell the story

- Brand and Marketing
- Tailor the Message
- Clarify Roles

Ideal future state - What success looks like

A unified, clearly communicated and highly accessible international NZIST brand identity that underpins and enhances a strong domestic and international reputation, and builds on the excellent existing relationships and reputations of its subsidiaries. The value of international education as more than just revenue generation, and its contribution to NZIST, the regions and the New Zealand economy, is a visible and well-understood story.

Risks

The working group identified a series of risks associated with internationalisation at NZIST, including mitigations where relevant. These are outlined below:

Risk	Probability	Impact	Risk Level	Consequence	Mitigation
Drive for revenue growth impacts learner support.	H	M	H	Critical incidents increase and reach global media.	Learner support resourcing and capability benchmarked to international best practice.
Disconnect between Head Office and subsidiaries during transition.	H	M	H	Partners and learners lose confidence in the new entity.	Subsidiaries push for clarity and consistency of message.
Working groups compete for attention and funding at the expense of international.	H	M	H	International relegated as a “nice to have” bringing in supplementary income.	Economic, cultural and social impacts of IE constantly reinforced. Chairs of ITPs, CEs and International Directors consistently advocate for IE.
Ongoing sector uncertainty leads to loss of experienced staff.	H	M	H	Loss of capability and IP at strategic and operational level. Loss of staff and the personalised connections they bring for partners would result in a substantive decline in enrolments and associated financial loss to NZIST for many years.	NZIST recruits key staff from across sectors and globally.
The importance of international education and its contribution remain largely misunderstood.	M	M	M	Decisions are made that have unintended consequences and the opportunity to act globally is lost.	Chairs of ITP CEs and International Directors constantly advocate for IE
Poor transition to new entity and inadequate comms, negatively impact confidence and market share.	M	M	M	Partners disengage from NZIST and learners choose “less risky” destinations.	Confidence is maintained via a managed and staged approach to branding and comms.
Revenue generation drives behaviour at expense of value	M	L	L	A “rack and stack” mentality drives growth in the short term that impacts	NZIST international education strategy clearly defines value and states explicit goals in \$\$\$ and value terms.

Risk	Probability	Impact	Risk Level	Consequence	Mitigation
				capacity and capability.	
Global brand and regional marketing operations do not align	M	L	L	Confusion in the market and declining enrolments as a consequence	Brand, comms and collateral are launched in a staged and integrated manner.
Centralisation of the international function depersonalises the marketing and recruitment process.	L	M	L	Decreasing enrolments and fewer enrolments in the regions.	Central systems and new recruitment structures are rolled out seamlessly with well-defined roles and responsibilities.
Government agencies apply conflicting policy settings and hamstring IE within NZIST.	L	M	L	TVET enrolments, post study work rights and offshore business are stymied due to poor coordination.	New entity has a place at International Education Senior Officials Group (IESOG) and can influence policy, immigration settings and funding models.
Risk	Probability	Impact	Risk Level	Consequence	Mitigation
Drive for revenue growth impacts learner support.	H	M	H	Critical incidents increase and reach global media.	Learner support resourcing and capability benchmarked to international best practice.
Disconnect between Head Office and subsidiaries during transition.	H	M	H	Partners and learners lose confidence in the new entity.	Subsidiaries push for clarity and consistency of message.
Working groups compete for attention and funding at the expense of international.	H	M	H	International relegated as a “nice to have” bringing in supplementary income.	Economic, cultural and social impacts of IE constantly reinforced. Chairs of ITPs, CEs and International Directors consistently advocate for IE.
Ongoing sector uncertainty leads to loss of experienced staff.	H	M	H	Loss of capability and IP at strategic and operational level. Loss of staff and the personalised connections they bring for partners would result in a substantive decline in enrolments and associated financial loss to NZIST for many years.	NZIST recruits key staff from across sectors and globally.
The importance of international education and its contribution remain largely misunderstood.	M	M	M	Decisions are made that have unintended consequences and the opportunity to act globally is lost.	Chairs of ITP CEs and International Directors consistently advocate for IE

Risk	Probability	Impact	Risk Level	Consequence	Mitigation
Poor transition to new entity and inadequate comms, negatively impact confidence and market share.	M	M	M	Partners disengage from NZIST and learners choose “less risky” destinations.	Confidence is maintained via a managed and staged approach to branding and comms.
Revenue generation drives behaviour at expense of value	M	L	L	A “rack and stack” mentality drives growth in the short term that impacts capacity and capability.	NZIST international education strategy clearly defines value and states explicit goals in \$\$\$ and value terms.
Global brand and regional marketing operations do not align	M	L	L	Confusion in the market and declining enrolments as a consequence	Brand, comms and collateral are launched in a staged and integrated manner.
Centralisation of the international function depersonalises the marketing and recruitment process.	L	M	L	Decreasing enrolments and fewer enrolments in the regions.	Central systems and new recruitment structures are rolled out seamlessly with well-defined roles and responsibilities.
Government agencies apply conflicting policy settings and hamstringing IE within NZIST.	L	M	L	TVET enrolments, post study work rights and offshore business are stymied due to poor coordination.	New entity has a place at International Education Senior Officials Group (IESOG) and can influence policy, immigration settings and funding models.

Next Steps - Delivering the Opportunity

The establishment of NZIST presents a rare opportunity for the ITP sector to pivot the focus from international education one of internationalisation, enabling NZIST to take a lead in transforming international education for Aotearoa New Zealand. The working group’s output and recommendations acknowledge that we are in early stage and that there are constraints in the co-design process it has undertaken in the past few months, particularly time. That said, the proposed basis for an internationalisation operating model and the priorities (and their respective recommendations) form a strong foundation or ‘launch-pad’ for next steps. Critical next steps for the incoming NZIST Council are to:

Communicate & engage

- Re-engage with internationalisation community amongst ITPs and partners to further develop and validate the recommendations encompassed in this report.
- Undertake further research on best practice to add to the evidence-base and co-design process delivered through the working group’s activity.

Plan & discuss

- Initiate discussions with incoming CE and executive of NZIST to ensure internationalisation operating model is in the spotlight as NZIST’s broader operating model is developed.

- Consider how best to implement operating model so that internationalisation is embedded throughout the organisation from Day One, including agreeing immediate actions to be undertaken.

Invest & prioritise

- Invest in resources (human and financial) needed to 'build-out' and develop the business case required to underpin the internationalisation operating model proposed by the working group, using the guiding principles as foundation stones alongside the recommendations presented in the report.
- Recruit for executive level internationalisation expertise with this role being part of the Senior Leadership Team.

