

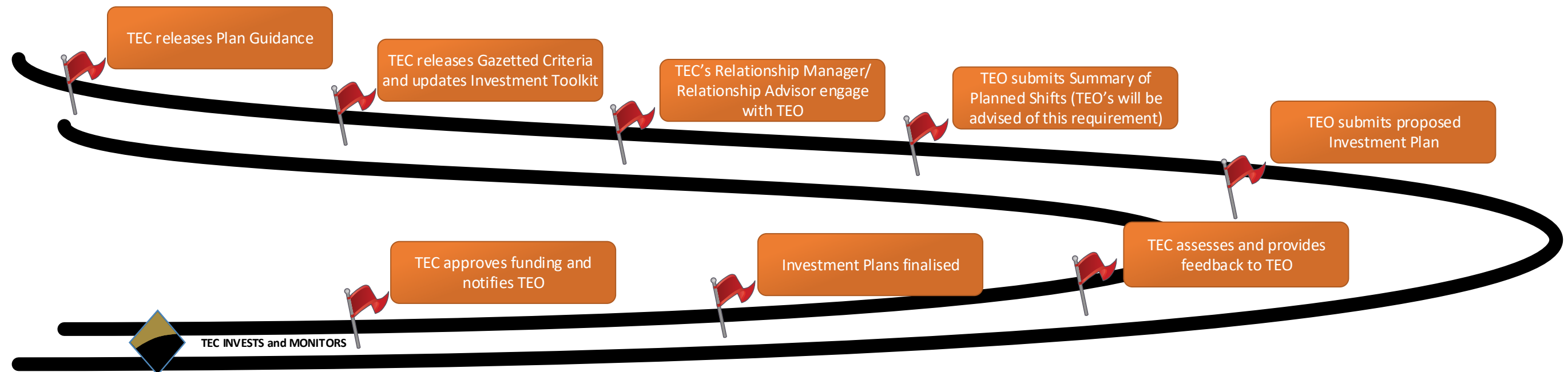
Investment Round Roadmap

What is an Investment Plan?

- Investment plans (Plans) articulate your strategic intentions, the activities and programmes you will undertake to deliver these strategic intentions, and how you will measure your performance.
- Plans are documents owned by tertiary education organisations (TEOs). Plans are the responsibility of your governors (councils and boards).
- The Plan system aims for a network of highly capable, autonomous TEOs, each setting their own outcomes and monitoring their own performance against common performance indicators
- A proposed Plan must have three sections: a narrative **Strategic Intent section**, a **Summary of Activity** (collected via the Mix of Provision template), and **Performance Measures** (collected via the educational performance indicator (EPI) commitments template).

Who needs to submit a Plan?

TEOs whose current Plan expires at the end of 2021 will need to submit a new Plan to receive funding from 2022. You will find the Investment Plan Template and the Investment Round Timeline within the Investment Toolkit.



Inform

We support your planning by providing Plan Guidance and the Investment Toolkit. These resources set clear expectations about what government wants to see from TEOs in the three year Plan period. They also set out processes, templates, and milestones for you. We also provide Ngā Kete information products.

Plan Guidance

Investment Toolkit

Gazetted plan requirements and decision-making criteria

Investment Plan Template

Partner

Our Relationship Managers work with you to develop your proposed Plans. We discuss your performance against past Plans and the opportunities you have to contribute to achieving government priorities.

A key focus for the engagement is to ensure that Plans respond to key stakeholder needs and will contribute to government's priorities.

We ensure that you understand the policy and operating environment, including the Tertiary Education Strategy, Plan Guidance, and the funding system.

Invest

We grow provision that is performing well and reduce our investment in poor performance where we have to.

For most funds, we provide you with an indicative allocation. This allocation reflects the purpose of the fund and elements of past delivery and performance.

Final funding allocations are based on information gathered from direct engagements with you, your performance and delivery against previous Plans, your plans for improving learner success where necessary, and the quality of your Plan.

Any questions?

Contact the Customer Contact Group at customerservice@tec.govt.nz or 0800 601 301. You can also contact your Relationship Manager or Advisor.