



Tertiary Education
Commission
Te Amorangi Mātauranga Matua



Plan Guidance

For providers submitting Plans for funding
from 1 January 2024

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Every effort is made to provide accurate and factual content. The TEC, however, cannot accept responsibility for any inadvertent errors or omissions that may occur.



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Chief Executive's foreword

Education is key to ensuring the economic and social wellbeing of all New Zealanders. If we are to continue to deliver an effective tertiary sector - one that provides study and career pathways for all New Zealanders, while also meeting the future skills needs of our country – then it is vital that all of us in the sector work together.

The Plan Guidance sets out our requirements and expectations for the investment round. It is to guide the content of your Plans and explains how we assess them. The information on our priorities for investment will help you plan and design your programmes and are relevant to all tertiary education organisations (TEOs).

Our top priority for investment is to achieve system-level equity by supporting providers to take a whole-of-organisation approach to learner success. Every provider should have a plan in place to achieve equity for all their learners. For larger providers, when you submit your Learner Success Plans and Disability Action Plans these give you an opportunity to share your progress in this area.

We want to understand how you are honouring Te Tiriti through your partnerships and provision. Our funding will be strategically prioritised to deliver for learners, employers, industry and communities. Priorities for these stakeholders are informed by the Tertiary Education Strategy, wider government goals, and advice from industry and regional partners such as Ohu Ahumahi Workforce Development Councils and Regional Skills Leadership Groups.

Please continue to engage with your Tertiary Education Commission (TEC) Relationship Managers and Advisors – we look forward to working with you to deliver lifelong learning that equips learners, communities and employers for success.

Tim Fowler

Chief Executive

This Plan Guidance supports your planning for 2024

The purpose of Plan Guidance (this document) is to describe the information we at the Tertiary Education Commission (TEC) need to see in your Investment Plans (Plans) and outlines how we will assess this information.

Your Plan explains your mission and role, strategic intentions, the activities, and programmes you will carry out, and how your performance will be measured. These are critical public accountability documents for providers, and by extension for us.

All Plans should have a three-year planning horizon. We will approve Plans for one, two or three years depending on a range of factors, including the quality of your Plan and our assessment of your organisational capability.

Responding to Plan Guidance is important for all TEC-funded providers

Plan Guidance is relevant to all providers we fund. We encourage you all to engage with the content that explains the investment environment for 2024 and our investment priorities. Providers need to align with the content of Plan Guidance.

Plan Guidance provides a picture of the investment round ahead. It tells you what the tertiary funding environment will be like and how we will prioritise our investment. These signals are important for your planning as a provider funded by us, regardless of whether you are submitting a Plan.

Our investment supports all in tertiary education, across higher education, vocational education, and foundation education, to gain the knowledge and skills they need for lifelong success. All Plans need to show how your organisation is contributing to the Tertiary Education Strategy. However, your overall response to Plan Guidance will depend on your mandate, capability, and size.

For universities, we expect Plans and associated activities to maintain international standards of teaching and learning, research, a focus on advanced learning, and the generation and application of knowledge for national and international benefit.

For Te Pūkenga, your Plan should reflect your functions and charter. These include delivering a diverse range of education and training that meets the needs of regions, a focus on applied and technological research, and improving outcomes for Māori learners and Māori communities in collaboration with Māori and iwi partners.

For wānanga, your Plans should reflect the unique role of wānanga in teaching and research that maintains, advances and disseminates mātauranga Māori (Māori knowledge) and assists the application of knowledge regarding āhuatanga Māori (Māori tradition) according to tikanga Māori (Māori custom).

For other providers, your Plan should articulate your mission and the role you play in the network of tertiary provision, including how you are responding to industry, community and learner need.

If you are a smaller provider,¹ you may not need to submit a Strategic Intent as part of your Plan. However, we will look for an understanding of our priorities and approach in:

- › the Mix(es) of Provision you submit
- › the Educational Performance Indicator Commitments (EPICs) you set
- › your justification for all additional funding requests.

Regardless of the nature of your organisation, when we consider allocating additional funding, we will specifically look for evidence that the provision you seek funding for:

- › aligns with our investment priorities
- › responds to learner feedback
- › meets the needs of stakeholders
- › supports the success of underserved learners.

We provide a range of resources that support the development of your Plan

Plan Guidance is a key source of information that supports your Plan development.

When you develop your Plan, we encourage you to use all these information sources:

- › Plan Guidance (this document) contains the core information for Plan development.
- › Supplementary Plan Guidance, to be released in June 2023, will provide targeted priorities from Workforce Development Councils (WDCs) and Regional Skills Leadership Groups (RSLGs), relevant Budget initiatives, and any other updates that impact the round.
- › Our investment briefs highlight some key education performance indicators we will consider your Plan against. They are separated into foundation, vocational and higher education.
- › Ngā Kete provides you with access to performance and delivery data. Understanding your own data and how it compares with the expectations in the investment briefs is critical.
- › Our Strategic Intent and Learner Success Plan template provides you with headings for all the elements you should include in your Plan. If you choose to provide a Plan without using the template, please capture all the relevant sections in your document.
- › Our Disability Action Plan guidance advises you on the creation of your Disability Action Plan.

[Investment briefs](#)

[Strategic Intent and Learner Success Plan template](#)

[Disability Action Plan guidance](#)

Further information relating to the Plan round will be released in upcoming months. Please keep an eye on our website for new information.

¹ Smaller providers are those receiving less than \$5 million in on-Plan funding.

This Plan Guidance contains important messages for 2024

We want to draw your attention to a number of key messages in this Plan Guidance. We encourage you to read the in-depth information in this document and other published TEC documents to develop a full understanding of these messages.

For 2024 you need to understand:

- › our continued and strengthened approach to learner success to support the achievement of system-wide equity across tertiary education (see the system-wide equity section on pp. 9-12)
- › our investment priorities that support our commitment to honouring Te Tiriti o Waitangi (see the broader priorities on pp. 16-20)
- › how we will be investing strategically to ensure our investment aligns with our priorities
- › our expectations of providers to support successful transitions, including:
 - getting young people into tertiary study,
 - ensuring all learners are supported to understand study and employment pathways,
 - ensuring effective transitions from study to work, and
 - creating learning opportunities that target career changers, including those in the workforce.

The Plan round timeline

It is important to meet the Plan submission deadlines. Any delays in submitting the required elements of your Plan may lead to delayed funding decisions.

Activity	Timing
TEC releases Plan Guidance and Plan engagement begins	By March 2023
TEC publishes notices in the <i>New Zealand Gazette</i> setting out requirements for Plan content, timetable, assessment, and Plan summaries	By March 2023
Government announces Budget	May 2023
TEC provides indicative allocations	By 1 June 2023
TEC releases Mix of Provision (MoP) and Educational Performance Indicator Commitment (EPIC) templates	By 8 June 2023
TEC releases Supplementary Plan Guidance to reflect any policy or Budget changes (as required)	June 2023
Providers submit proposed Plans, including MoPs, EPICs, Learner Success Plans (LSPs) and Disability Action Plans (DAPs)	By 7 July 2023
TEC reviews proposed Plans and has further discussion with providers as needed	July–October 2023
Providers are notified of decisions in writing	From November 2023
First payments made against Plans; Plan delivery begins	January 2024



Achieving system-wide equity is at the heart of our investment approach

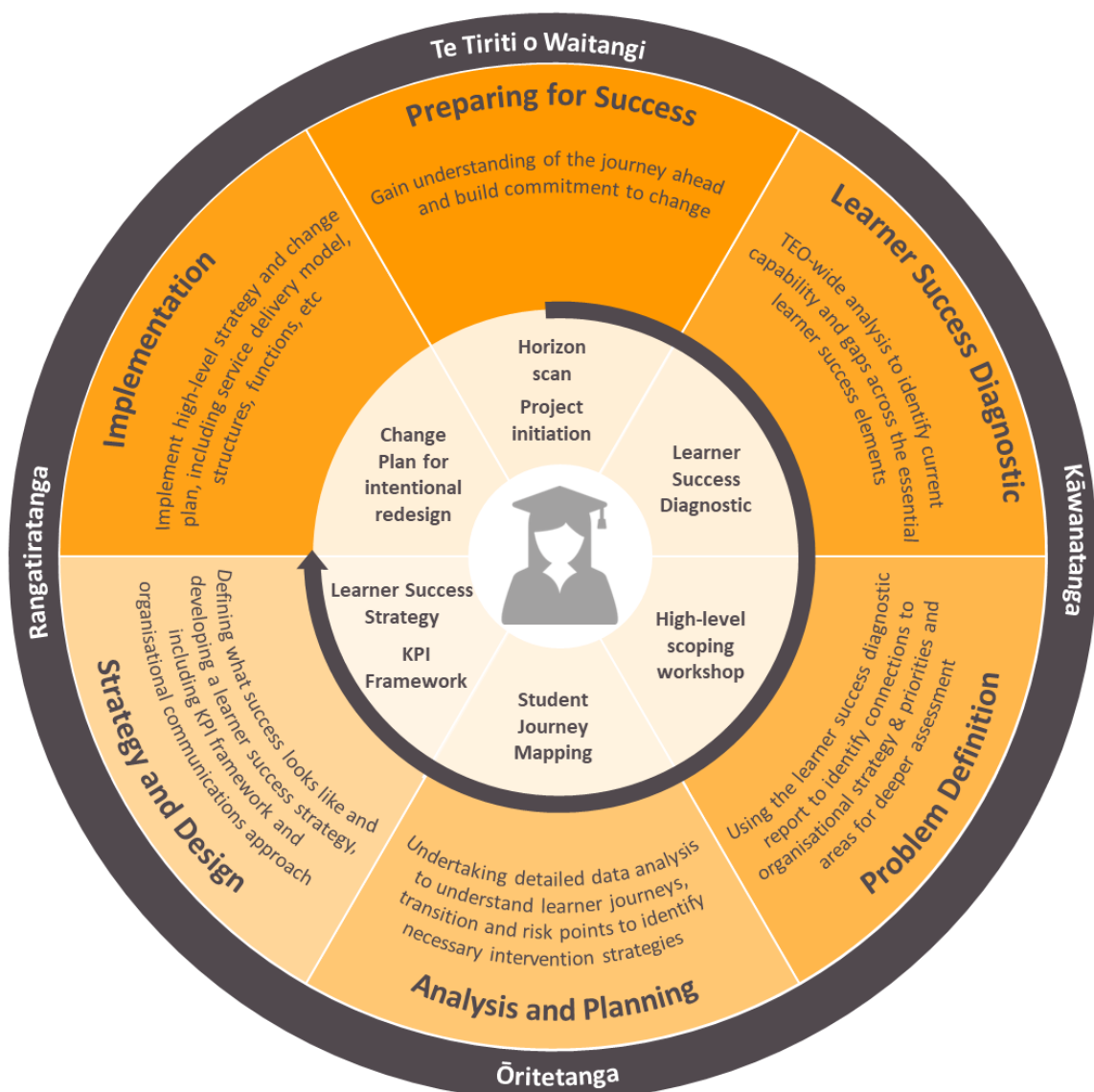
Achieving system-wide equity is at the heart of our investment approach

Our investment round supports achieving system-wide equity through learner success

Learner success is integral to the Tertiary Education Strategy (TES) and our investment cycle. The TEC has communicated the importance of this for several years. Each year we have provided additional clarity on our expectations of providers in meeting our goal of an equitable tertiary education system that delivers for all. We want to keep working with you to see year-on-year improvements. However, where organisational shifts are not occurring at the rate or scale we expect, this can have implications for future investment decisions.

Our goal of achieving system-wide equity of participation and achievement has impacts beyond education. We know that achieving better equity in the tertiary education system has benefits for the economic and wellbeing outcomes of learners, as well as for productivity and employers.

Where we can see providers making progress with their learner success approaches, we are likely to support provision growth.



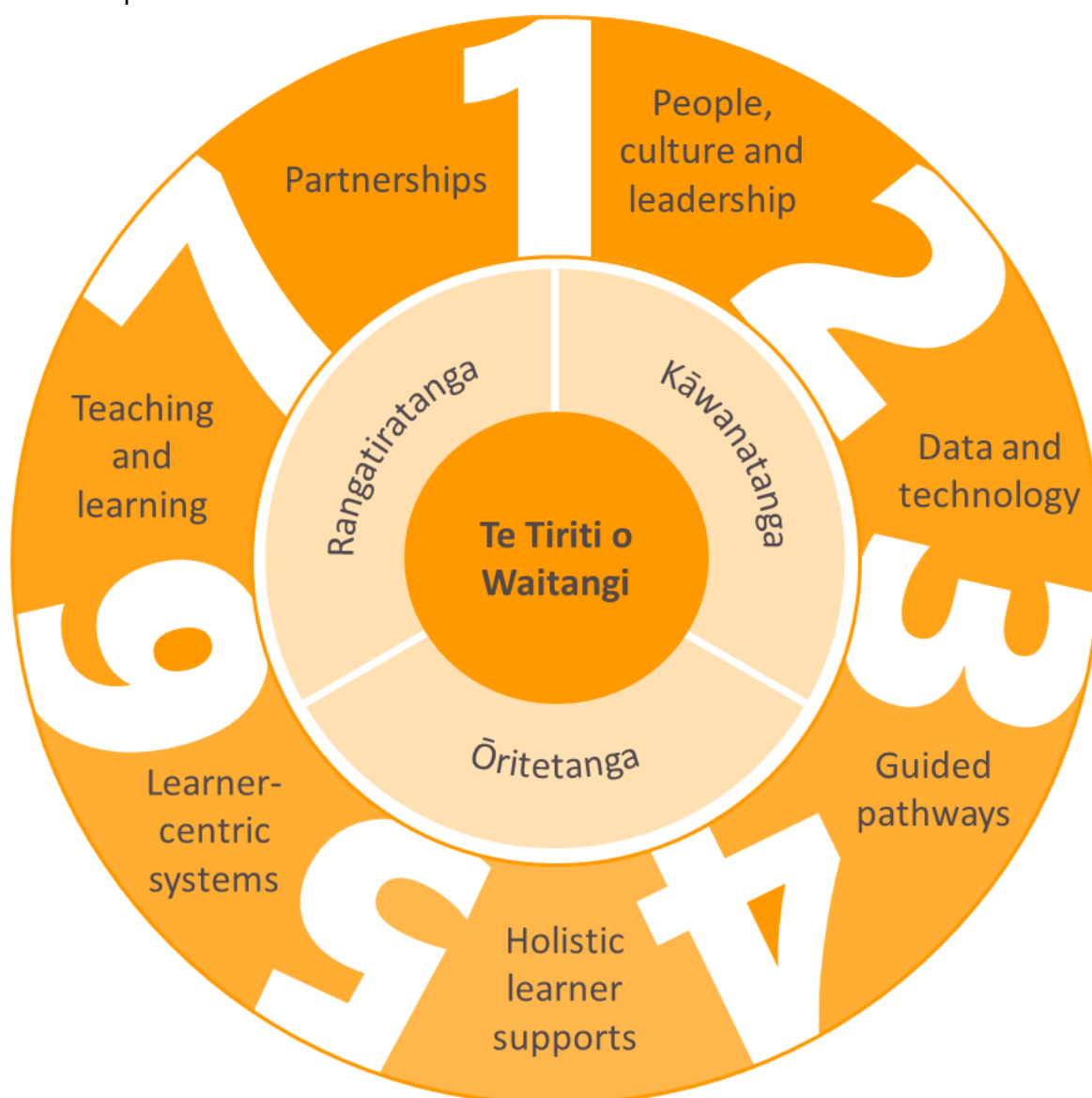
The Learner Success Framework supports you to address equity issues

The TEC has developed the Learner Success Framework to guide providers' in implementing learner-centric operating models. We strongly encourage providers to use the Framework to achieve equity. See our website for more information about the [Learner Success Framework](#).

For some providers this work has been under way for several years and your responses are becoming increasingly refined.

For others this is a new journey, and you may not have fully developed your approach. We want our message to be clear – we expect all providers to develop organisation wide operating models that address the seven learner success capabilities below.

1. People, culture and leadership
2. Data and technology
3. Guided pathways
4. Holistic learner supports
5. Learner-centric systems
6. Teaching and learning
7. Partnerships



We sometimes hear from providers that learners have not asked for help so must not need it. We encourage you to dig deeper, as often learners fail to achieve or will drop out before they share their struggles. Having effective and safe mechanisms for capturing the learner voice, and utilising your performance data, will inform your approaches.

Every provider needs to continually evaluate learner performance to ensure you are responding to the needs of your current learners.

The Learner Success Framework and seven learner success capabilities provide you with the tools to address why and how your organisational model does not work for some learners. For example, two of the learner success capabilities are Partnerships, and Teaching &. We expect providers to demonstrate how all relevant underserved groups (and their whānau/hapū/iwi, communities, employers, and other entities) are involved in programme design to ensure programmes meet learners' current and future needs.

We have a particular focus on successful transitions in and out of tertiary education and training for youth

Transitions are crucial to learner success. We know that successfully transitioning into tertiary study, and from tertiary study to work, are key points of impact on learners' lives. These transitions can be especially impactful for youth who are also members of underserved groups, including Māori learners, Pacific learners, disabled learners, those who are not currently in education or employment, or learners whose education has been disrupted by the COVID-19 pandemic.

We want to see evidence of:

- › your understanding of successful youth transitions into tertiary education and from tertiary education to employment:
 - what successful transitions look like for your learners
 - what learners need to enable successful transitions
 - how you are meeting these learner needs to enable successful transitions
 - what changes you are making to improve transition outcomes
- › how these are reflected in programme development and design, pastoral care, bridging programmes and support offerings
- › how these are reflected in your engagement with schools, employers, learners, whānau and communities.

Useful resources to help you understand transitions and learner needs include:

- › [the TEC's Transitions from Secondary School research](#)
- › [the TEC's previous work on the Transition to Tertiary Life](#) (PDF 1.68 MB)
- › the Secondary–Tertiary Transitions app on Ngā Kete
- › the Post-Study Outcomes app on Ngā Kete.

LSPs and DAPs describe your organisation's work to achieve equity

Learner Success Plans (LSPs) are part of your Investment Plan. We expect to see significant effort into the development of your LSP and providing updates on previous LSPs.

The Learner Success Plan Information Sheet provides guidance on how each provider can assess itself against the seven key capabilities of the Learner Success Operating Model. This may require a shift in thinking about how your organisation works and where you direct effort.

[Learner Success Plan Information Sheet](#)

LSPs provide a guideline for providers to develop a whole-of-organisation approach to learner success. While not all providers will need to submit a LSP this year, we encourage you to use the template to evaluate and improve your organisation's performance against TEC's learner success expectations.

The content of your LSP, your response to the TES, and your mission and role should tell a cohesive story about your organisation's commitment and actions.

Within the broader learner success work there are many learner groups who may need tailored responses. Some advice for these groups is included later in this section.

The introduction of Disability Action Plans (DAPs) for 2023 responded to the need for a more consistent approach to supporting disabled learners in tertiary education. DAPs are part of our ongoing approach, and we will be working with those who submitted them for 2023 to continually improve and develop content.

WDCs and RSLGs have highlighted specific elements of learner success

Our primary message is that we want you to view learner success holistically and use the framework and capabilities to guide your work. This requires you to take an intentional approach which sees this thinking form part of all your planning.

We discourage piecemeal or short-term initiatives, which have been proven to be ineffective in bringing about sustained change.

Workforce Development Councils (WDCs) and Regional Skills Leadership Groups (RSLGs) provide insights from industries and regions about tertiary education needs. As part of their advice function, they have provided insights into specific learner groups and the barriers to success they face. The following specific topics highlight some areas we have heard could benefit from specific attention; however, these should not be addressed in isolation. We want you to continue to look holistically at learner needs but have provided some detail on specific needs that may support your thinking and planning.

Our tertiary education system needs to deliver better for Māori and Pacific learners

Our tertiary education system has delivered long-standing inequities for Māori and Pacific learners in terms of participation and achievement. Māori and Pacific learner performance data is one source of information you will use when completing your learner success diagnostic.

Our investment briefs show some of the data we look at to see how you are progressing toward achieving equity for Māori and Pacific learners. We look across a range of data to get a view of equity. We want to see that participation levels are proportional for underserved groups at all levels of provision and across all disciplines. This includes (but is not limited to):

- › higher numbers of Māori and Pacific learners engaged in higher-level qualifications (to right the current imbalance, which sees more Māori and Pacific learners in lower-level qualifications and credentials)

- › increased numbers of Māori and Pacific learners in areas of study that have disproportionately low levels of Māori and Pacific participation.

We want to see the tertiary education system as a whole delivering parity of participation and achievement for Māori and Pacific learners. We want you to set targets in these areas and analyse your achievement against those targets.

Government direction about education for Māori and Pacific learners is well documented. You should be familiar with Ka Hikitia, the Māori Education Strategy, Tau Mai Te Reo and the Action Plan for Pacific Education 2020–2030 as well as the Tertiary Education Strategy. These documents will help you shape a strategic approach to improving Māori and Pacific outcomes.

[Ka Hikitia, the Māori Education Strategy](#)

[Tau Mai Te Reo](#)

[Action Plan for Pacific Education 2020–2030](#)

[Tertiary Education Strategy](#)

You will see in our investment priorities that our emphasis on te reo Māori and mātauranga Māori provision is growing. The TEC recognises that te reo Māori provision and mātauranga Māori provision have impacts on the success of individual ākonga in tertiary education, the labour market, and within their whānau and the wider community. Currently many organisations across different industries are recruiting people with skills in te reo and tikanga. Roles that demand these skills are diverse and expanding, including teaching, health care, tourism and media.

Disabled learners currently experience barriers to success in tertiary education

The overall participation and success of disabled people in tertiary education is below that of non-disabled persons. Disabled people are over-represented in negative education-related statistics. We want you to work to specifically address the inequalities these learners experience.

The increased focus on this for providers aligns with work occurring across government, including [Whaikaha – Ministry of Disabled People’s system transformation work](#), and the [Working Matters Disability Employment Action Plan](#).

As with all learner success initiatives, transformational change requires a whole-of-organisation approach. An essential element of providers truly supporting structural and attitudinal change and creating an inclusive environment for disabled people will be ensuring all staff are “disability confident” (as described in the [Kia Ōrite Toolkit](#)).

Holistic student support is critical to learner success

Holistic student support (encompassing pastoral care) is essential to learner success. We want you to outline how your learner success approach supports (or will support) the specific needs of your learners. For example, for Māori learners you might show that the support provided takes into account their broader context, such as their whānau and communities.

Providers need to offer guidance around learning and employment pathways

We see the provision of information about pathways and careers as an important part of your role. This is because learners often need support to identify the best learning choices and then connect these to occupations or employment outcomes. It is reported that many graduates do not stay employed in the role they train for, and we believe that better pathways and careers support will lead to more sustained employment. This support needs to be targeted to the learners that

you serve, and different approaches may be required for different learner groups. For example, you may need to have a specific approach to support neurodivergent learners to navigate career information and learning pathways and we want to see this explained in your Plan.

Supporting women into male-dominated roles and industries is important

Women are under-represented in many industries. We want to hear about your initiatives to support increased enrolments and completions for women in male-dominated industries.

The TEC's COVID response-funded Industry Equity Project aims to support and attract more women into industry trades. While this work provides information to support women in the workplace, the insights and best practice models would be equally useful in campus-based learning settings that have been traditionally male-dominated.

[Industry Equity Project](#)

Missing foundation or core skills can limit good outcomes

Many people are missing important skills that they need to be successful in education and work. We want to hear about how you identify the skills your learners need to succeed and ensure their learning supports them to develop these skills. Language, literacy and numeracy are essential skills, but other soft skills are also important. The following list highlights some examples of important skills that industries and employers require:

- › language, literacy and numeracy
- › problem solving/critical thinking/decision making/innovation
- › basic digital skills
- › teamwork/networking
- › effective communication and interpersonal skills
- › innovation/creative thinking
- › financial literacy
- › personal resilience/managing own wellbeing
- › cultural competency and confidence.

For some learners we know there is a need for employability skills and skills that will help them navigate their future work pathway.

For many roles we see a need for basic skills to be embedded into programmes of learning, including health and safety and basic business skills.



Priorities for investment

Priorities for investment

Our priorities for investment support our investment decision making. We use them to ensure the provision we fund supports learners, government priorities, regions, industry and employers.

Investment priorities guide our decisions

Each year we publish our priorities for investment. These help us to decide what provision, delivered by which provider, to invest in. We do this to ensure we have a healthy system to give effect to the TES, to respond to the needs of learners, communities, industries and regions, and to contribute to the social and economic prosperity of New Zealand.

The information in your Plan helps us assess how aligned your proposed provision is with government's priorities.

We consider quality learning with good outcomes above all, and expect all providers to align all provision with our strategic direction, as explained in the broader priorities.

We will consider provision outside targeted priority areas if it meets the broader priorities and there is sufficient evidence of stakeholder demand. We do not consider learner choice on its own, or the support of a single employer, sufficient evidence of stakeholder demand.

We will continue to reduce investment in poor performing provision. We will contact providers directly when their provision falls into this category.

The broader priorities focus on quality provision with good outcomes

These priorities apply across all provision at all levels. We will prioritise investment in programmes that show these characteristics.

The broader priorities for investment in 2024 have been informed by advice from WDCs and RSLGs.

Achieving system-wide equity

Our overarching priority is achieving equity through learner/ākonga¹ success.

Our aim is achieving equity in participation and achievement for all learners/ākonga. Effective investment in ākonga outcomes requires an intentional, sustained, whole-of-organisation commitment to action, and an operating model that puts learners at the centre of everything you do. We expect to see a whole-of-organisation approach that systematically addresses barriers to success for all ākonga, especially underserved learner groups such as the ones below.

Tertiary Education Strategy (TES)

The specific priority areas in this section are taken from the TES. We encourage you to be familiar with the TES and consider it in your everyday planning and actions.

LEARNERS AT THE CENTRE – Learners with their whānau are at the centre of education

- Ensure places of learning are safe, inclusive and free from racism, discrimination and bullying.
- Have high aspirations for every ākonga, and support these by partnering with their whānau and communities to design and deliver education that responds to their needs, and sustains their identities, languages and cultures.

BARRIER FREE ACCESS – Great education opportunities and outcomes are within reach for every learner

- Reduce barriers to education for all, including for Māori and Pacific learners, disabled learners and those with learning support needs.
- Ensure every learner gains sound foundation skills, including language, literacy and numeracy.

Māori learners	Pacific learners	Disabled learners	Youth	Learners from low-income backgrounds	Mature learners, women, former refugees, recent migrants and learners from ethnic communities
<p>We want to see progress towards a tertiary system that achieves parity of participation and achievement for Māori. Achieving system-wide equity will require an all-of-organisation approach. This will be guided by the TEC Learner Success Framework.</p> <p>Within the framework some important elements include:</p> <ul style="list-style-type: none"> • incorporating Te Tiriti o Waitangi into everyday practices • performance commitments that show progress towards achieving parity of achievement • programme content and design that specifically considers the needs of Māori learners. 	<p>We want to see progress towards a tertiary system that achieves parity of participation and achievement for Pacific ākonga. Achieving system-wide equity will require an all of organisation approach. This will be guided by the TEC Learner Success.</p> <p>Within the framework some important elements include:</p> <ul style="list-style-type: none"> • performance commitments that show progress towards achieving parity of achievement • programme content and design that specifically considers the needs of Pacific learners 	<p>We want all disabled learners to have equitable learning opportunities and outcomes.</p> <p>We want to see how you reduce discrimination (intentional or unintentional) against disabled people and are improving outcomes for your disabled ākonga. We expect to see improving outcomes for disabled ākonga.</p> <p>The Kia Orite Toolkit supports you to consider ways to better support disabled learners. We want to see the use of this tool reflected in your plan.</p>	<p>We know that rangatahi sometimes need different kinds of engagement to succeed in education.</p> <p>We want to hear how you are supporting youth, especially those who disengaged from education early or had their secondary education impacted by COVID-19.</p>	<p>We want a system that supports learners from low-income backgrounds to succeed equitably. This relies on your actions to support them to manage the barriers they face, such as:</p> <ul style="list-style-type: none"> • the need to work full- or part-time alongside study • financial challenges such as food and transport costs • housing insecurity • access to technology and the internet. <p>We want to see that you can identify learners who face these challenges and are implementing approaches to help them succeed. This may include working with other agencies to find joined-up solutions.</p>	<p>We want to see targeted approaches that ensure all learner groups succeed equitably.</p> <p>We want to know how you are supporting mature ākonga to upskill or transition to new roles. This may include providing careers information and job application support as well as developing practical skills such as digital competency.</p> <p>We want to learn how your actions are resulting in increased enrolments and completions for women in male-dominated industries.</p> <p>We also want to hear about provision that supports former refugees, recent migrants and learners from other ethnic communities into learning and work. We want to understand how your provision removes the barriers and challenges often faced by these groups, such as discrimination and language. In addition, we are keen to learn how you are assisting these ākonga to harness and build on their existing skills, knowledge and experience.</p>

We want to see how you are supporting learner/ākonga success across all these learner groups in line with the Learner Success Framework and our expectations published in Plan Guidance. This includes holistic student support and pathways information.

Foundation and core skills²

There are a wide range of skills that learners need to access to succeed in education and work. Traditionally underserved learners have a high need for foundation skills. A lack of foundation skills, especially language, literacy and numeracy, will present barriers to ākonga participation, success in learning and equitable outcomes. We want to know that you have processes in place to identify learner needs and respond to them appropriately. In addition, we want to see core transferable skills built into all provision, especially at lower levels, to ensure ākonga gain the skills to be fully work-ready.

¹ TEC uses the terms ākonga and learner interchangeably.

² This includes skills that are known as soft skills, essential skills, and human centred skills.

Honouring Te Tiriti o Waitangi through tertiary education

For tertiary education institutions evidence of how you are honouring Te Tiriti o Waitangi will be critical to your Plan.

For private training establishments we want to see how, as a government-funded organisation, you are considering Te Tiriti o Waitangi and working to change your approaches and provision as appropriate.

Please note that the content for Māori learners in the system-wide equity section also directly relates to honouring Te Tiriti o Waitangi.

Tertiary Education Strategy (TES)

The specific priority areas in this section are taken from the TES. We encourage you to be familiar with the TES and consider it in your everyday planning and actions.

LEARNERS AT THE CENTRE – Learners with their whānau are at the centre of education

- Ensure places of learning are safe, inclusive and free from racism, discrimination and bullying.
- Have high aspirations for every learner/ākonga, and support these by partnering with their whānau and communities to design and deliver education that responds to their needs, and sustains their identities, languages and cultures.

QUALITY TEACHING AND LEADERSHIP – Quality teaching and leadership make the difference for learners and their whānau

- Meaningfully incorporate te reo Māori and tikanga Māori into the everyday life of the place of learning.

Te reo Māori provision	Kaupapa Māori education	Partnerships with iwi, and with Māori organisations and business	Mātauranga Māori provision	Embedded mātauranga Māori Embedded te reo Māori Embedded cultural capability
<p>We want to see growth in the number of graduates with a high level of proficiency in te reo Māori.</p> <p>We will focus investment that offers immersion/ Māori-medium provision that leads to fluency.</p> <p>Our focus is growth of enrolments at Levels 4 and above.</p>	<p>We are interested in hearing about “by Māori for Māori” approaches. We want to see how your programmes are informed by tikanga Māori, and that you are working with Māori to acknowledge Māori ways of being and perspectives in your provision.</p> <p>We encourage you to consider how your provision delivers success for Māori as defined by Māori, in line with Manu Kōkiri by Taumata Aronui.</p> <p>If you are a kaupapa Māori education organisation we want to hear how your unique characteristics and approach support your ākonga.</p>	<p>We want you to build partnerships with relevant Māori and iwi businesses.</p> <p>We want to see how you have heard and acted on the voices and experiences of Māori to ensure your provision is appropriate and meaningful to meet the present and future needs of Māori, their industries and iwi businesses. We encourage you to engage, partner and co-design programmes with iwi and Māori.</p> <p>To assist with your work in this area we suggest you familiarise yourself with the partnerships capability in the learner success operating model.</p>	<p>We want to support high quality provision that delivers traditional Māori concepts of knowledge and knowing. We expect to see evidence your approaches are supported by iwi experts.</p>	<p>We want to see a wide range of provision embedding mātauranga Māori, te reo Māori and cultural capability (including understanding of Te Tiriti o Waitangi) into your provision.</p> <p>These considerations can apply throughout the learning process, including curriculum design, resource creation, delivery styles, assessment methodologies and pastoral care.</p> <p>Examples include:</p> <ul style="list-style-type: none"> • an urban planning programme that considers mātauranga Māori knowledge and values • health programmes that embed te reo Māori learning and resources.

Education and training that delivers for learners

Tertiary Education Strategy (TES)

The specific priority areas in this section are taken from the TES. We encourage you to be familiar with the TES and consider it in your everyday planning and actions.

QUALITY TEACHING AND LEADERSHIP – Quality teaching and leadership make the difference for learners and their whānau

- Develop staff to strengthen teaching, leadership and learner support capability across the education workforce.

Post-study outcomes

We want the provision we fund to lead to good outcomes for learners. We appreciate that good outcomes can be different for different provision or learners.

Learning that leads to meaningful, sustainable employment in an area linked to the study undertaken is an example of a good outcome. Equally, learning that supports ākongā skill development leading to higher-level education is valued. We also appreciate that some provision has positive outcomes for communities, whānau, and learners' own self-determination.

If you want new or additional funding from us, we need to see your analysis of the programme's outcomes. This will typically involve identifying expected outcomes in your provision design and undertaking regular evaluation of how programmes are performing against those outcomes. We want to see how the learning outcomes for your programmes have been informed by your stakeholders, including employers and industry as well as whānau and communities.

Learner outcomes

We want to see overall high performance and best-quality practice. We measure these through course completion, credit achievement and programme or qualification completion.

We know that high quality teaching and pastoral care are critical to achieving these goals. We see the appropriate scaffolding and support of ākongā, and the cultural competency of your staff as important elements.

Delivering learning through the best mode

We want to see opportunities for work-integrated learning considered across all levels of provision, as it can support the work readiness of all learners.

It is important that you actively identify the best modes of delivery for your ākongā and the programmes you offer. We want this to be a conscious, learner-focused choice.

If you offer vocational education, we want more provision through the work-based mode. We want learners to be able to continue their learning as they move between employment and study, and between jobs. This may include "multimode" delivery options where a single programme of learning is delivered in a variety of different ways so a learner is able to change the mode as their programme progresses or their situation changes.

We also want to see online and distance learning options explored where this meets the needs of industry, employers and ākongā. However, we continue to recognise the importance of kanohi-ki-te-kanohi (face-to-face) learning for specific skills and learner groups.

Transitions to work and study for youth

We want to see how your strategy, policies, processes, provision and pastoral care enable young people to transition easily from study into work and/or to higher study.

In particular, we are interested in how you are supporting:

- school leavers into work and/or higher study, especially school leavers from our priority groups
- people transitioning from study to work with a focus on specific targeted pastoral care (pastoral care that targets the specific needs of each learner)
- Pacific learners, especially in South Auckland, West Auckland and Porirua.

We want to hear how your work results in sustained employment transitions.

While not all provision has a direct link to specific employment, we want to see exploration of how your connection to employers and industry supports the outcomes of your ākongā.

If you offer higher education we want to see how learning connects to employment opportunities and work readiness.

Career changers and lifelong learning

We want to see learning opportunities for people of all ages who wish to change careers or upskill in their chosen area. This includes people returning to the workforce after an absence and those who have changed their career path due to disruptions from COVID-19.

Current skill shortages provide opportunities for employers to support on-the-job learning for career changers. We want to see how you are offering work-based learning that supports this need. We are interested in work-based learning that:

- supports existing staff to develop into higher roles (either technical roles or in management)
- supports the move to paid employment for recently displaced, unemployed or underemployed, and volunteers.

We want to see how you are working effectively with employers to design provision with appropriate flexibility to allow learning to occur without interruptions to business.

Rural provision and less served regions

We want to ensure people who live and work in rural communities have the same high quality learning opportunities as those in major centres through the appropriate learning modes.

We want opportunities for people to study and access learning in our regions, including rural areas. Ideally the provision offered in these areas directly relates to the workforce needs of the region.

Responding to changes in work and education

Tertiary Education Strategy (TES)

The specific priority areas in this section are taken from the TES. We encourage you to be familiar with the TES and consider it in your everyday planning and actions.

QUALITY TEACHING AND LEADERSHIP – Quality teaching and leadership make the difference for learners and their whānau

- Collaborate with industries and employers to ensure learners/ākonga have the skills, knowledge and pathways to succeed in work.

Innovative and flexible programmes

Increasingly we see the need for flexible, innovative and efficient delivery models that respond to the needs of learners, employers, industry and community.

Examples of these include:

- micro-credentials that can support the immediate needs of ākonga, employers and industry
- flexible delivery locations such as marae-based training
- different delivery intensities or scheduling of classes outside of work hours to support learners who are working while studying
- flexibility and support that takes into account learners' competing time priorities, such as family and community obligations, as well as work.

Mitigating the impact of COVID-19

COVID-19 has significantly impacted the employment and education of many New Zealanders.

We are conscious of the interruptions to learning that COVID-19 has caused at both the secondary and tertiary levels and want to know how you are supporting impacted learners.

We know that some skills are in short supply in the current environment and we encourage you to be familiar with the Workforce Development Plans (WDPs) published by WDCs and the Regional Workforce Plans published by RSLGs. Ensuring good outcomes for your learners will require you to understand how some employers' needs have changed post-COVID-19.

We also want to see learning opportunities that support people of all ages to transition into new areas of work.

Technology requirements

All roles are increasingly impacted by technical advances and consequently the technical knowledge ākonga require is changing. It is essential that all provision keeps pace with developments in technology to prepare learners for work.

We are also interested in supporting programmes that show clear pathways into higher levels in technology careers.

Carbon-neutral/climate sustainability

We want to invest in provision that best supports the development of knowledge and skills to support New Zealand's environmental sustainability and move towards being carbon-neutral.

We want to ensure that provision offered includes relevant information and experiences for learning to ensure people gain knowledge and skills that will allow them to support changes and new ways of working that are better for the environment.

Employer industry needs

We want all tertiary education to consider both the current and future needs of industries and employers to ensure graduates have the right skills.

We want to see that you are reviewing your provision frequently to ensure it is up to date, uses the relevant tools and methods and is a good match to the skills needed on the job.

To understand specific regional workforce needs, we encourage you to use Regional Workforce Plans.

If you offer vocational education, ensuring provision meets the needs of employers and industry is critical. The Workforce Development Plans published by WDCs provide important insights into industry skill and training needs.³

Regional needs

Regional tertiary education needs to respond to workforce needs at all levels from foundation studies and vocational education through to higher education.

RSLGs are supporting the tertiary education sector to understand regional workforce needs. For information about skill needs and priorities in the regions, see Regional Workforce Plans. You can use these to support the planning of your provision.

When we make decisions relating to new provision, we will take into account how the proposed provision responds to regional needs and gaps in current provision.

³ WDC Workforce Development Plans can be found on individual WDC websites.

The targeted priorities for degree + provision highlight specific industries and areas

Higher education, which describes all degree and above provision, is a critical part of the tertiary education sector. Degree-level provision and above contributes to a highly skilled workforce needed to meet the needs of the future. A strong higher-education sector is vital for innovative research, technological advancements, solving complex problems and preserving and promoting te reo Māori and mātauranga Māori. Our targeted priorities for degree and above provision include sectors and occupations that require more graduates or more diversity of graduates.

Our targeted priorities identify specific industries and areas of provision where there is an identified need for:

- › growth due to labour market demand,
- › increased diversity, and/or
- › improvements in retention and qualification completion rates.

Quality and relevance will be our first consideration, along with distribution across regions to ensure access. Decisions on investment in growth will not only be based on meeting the targeted priorities.

Please note that the targeted priorities for vocational education and training will be published in Supplementary Plan Guidance in early June 2023 following further advice from WDCs and RSLGs.

This table outlines our targeted priorities for degree level and above provision.

	Category	Areas of study	NZQA Level/qualification and goal
Targeted priorities	Construction	All	<ul style="list-style-type: none"> › Growth in enrolments in: Construction sector-specific Level 7 degree + programmes <p>Increased diversity</p> <ul style="list-style-type: none"> › Programmes that support women entering construction careers › Programmes that specifically support increased participation and achievement for Māori and Pacific peoples
	Food, fibre, agritech and hort tech (Primary Industries)	All	<ul style="list-style-type: none"> › Growth in enrolments in: Food, fibre, agritech and hort tech sector-specific Level 7 degree + programmes, including a focus on leadership and innovation
	Health	For all health professions, we want to see increased ethnic diversity, specifically increased Māori and Pacific learner enrolments, as well as other forms of diversity.	

	Nursing	<p>Growth in specific provision – Level 7 degree +</p> <ul style="list-style-type: none"> › See the Nursing Council for a full list of qualifications that will lead to registration (pre-registration and nurse practitioner) <p>Improvements in retention and completion rates, particularly for Māori and Pacific learners</p>
	Midwifery	<p>Growth in specific provision – Level 7 degree +</p> <ul style="list-style-type: none"> › For a full list of qualifications that will lead to registration, see the Midwifery Council <p>Improvements in retention and completion rates, particularly for Māori and Pacific learners</p>
	Allied health and technical professions	<p>Growth in specific provision² – Level 7 degree +</p> <p>Increases in Māori and Pacific participation</p> <p>We will approach providers currently delivering the relevant qualifications around increases in provision and diversity. We are not currently seeking new providers for these qualifications.</p>
	Social workers	<p>Growth in specific provision – Level 7 degree +</p> <ul style="list-style-type: none"> › For a full list of qualifications that will lead to registration, see Social Workers Registration Board <p>Improvements in retention and completion rates</p>
	Clinical Psychology	<p>Growth in specific provision – Level 8 +</p> <ul style="list-style-type: none"> › Postgraduate Diploma in Clinical Psychology › Masters in Clinical Psychology › Doctor of Clinical Psychology
STEM	<p>Science, Technology, Engineering, and Maths (STEM) and Information Technology innovation skills</p>	<p>Growth in enrolments – Level 7 degree +</p> <ul style="list-style-type: none"> › Level 7 degree in relevant fields³ › Priority Engineering course classification › IT with a focus on innovation › Advanced Manufacturing › Increased enrolments of Māori and Pacific learners in these areas

² Allied health and technical roles include anaesthetic technicians; occupational therapists; pharmacists; cardiac physiologists; oral health therapists; physiotherapists; cardiac sonographers; paramedics; psychologists; medical imaging technologists; general sonographers; podiatrists; medical radiation technologists; audiologists; speech language therapists; medical laboratory scientists; addiction practitioners (drug and alcohol practitioners) and medical laboratory technicians. We will discuss these qualifications directly with the relevant providers.

³ This includes programmes under the broader NZSCED O1, O2, O3.

Education	Early Childhood Initial Teacher Education (ITE) provision	<p>Growth in specific provision – Level 7 degree +</p> <ul style="list-style-type: none"> • See the Teaching Council for a full list of qualifications that will lead to registration <p>Increased diversity including ethnicity and gender</p>
	Primary Initial Teacher Education (ITE) provision	<p>Maintained level of provision only</p> <p>No growth of Primary ITE is supported for 2024</p>
	Secondary Initial Teacher Education (ITE) provision	<p>Growth in specific provision – Level 7 degree +</p> <ul style="list-style-type: none"> • See the Teaching Council for a full list of qualifications that will lead to registration <p>Growth in enrolments that support subject specific targets where demand is greatest:</p> <ul style="list-style-type: none"> • Science, technology, engineering and maths • Te reo Māori. <p>Increased diversity including ethnicity and gender</p>

Adult and Community Education (ACE) provides learning opportunities that meet community learning needs

Our priorities for ACE investment remain unchanged. The priorities of ACE funding are for programmes that:

- › improve employability:
 - courses focused on employability
 - life skills such as financial literacy
 - introductory ‘taster’ courses
- › promote social and cultural inclusion and participation:
 - languages, including te reo Māori, New Zealand Sign Language (including ESOL), Pacific languages (especially Realm languages) and Asian languages
 - courses supporting digital inclusion
- › raise foundation skills:
 - courses in literacy, numeracy and/or digital literacy
- › improve health and wellbeing:
 - courses such as parenting, mental health and resilience, or conflict resolution/anger management.

This applies to ACE in Schools, ACE in Communities and ACE in Tertiary Education Institutions (TEIs).



Our approach to investment in
2024

Our approach to investment in 2024

We will apply a targeted, strategic approach to the allocation of all funds to ensure we meet the needs of learners in line with our priorities for investment. This approach means we will support high-performing priority provision for growth.

We will adjust our 2024 approach in line with available funding

Fiscal constraints will impact our approaches to indicative allocations, additional funding and new provider applications. We will consider funding reductions based on previous under-delivery or poor performance. We will also reduce funding for areas that are not strategic priorities for investment.

We encourage all providers to keep in mind that previous funding levels are not guaranteed and planning for 2024 should not be based on assumptions of maintaining or increasing funding.

Additional funding guidance will be available later

Later this year we will publish our process for additional funding for 2024 investment, subject to the availability of funding.

The strategic priorities for investment will drive our approach. Provider demand alone will not result in additional funding. We will only consider growth for providers that are successfully delivering priority provision. Enrolment and delivery patterns throughout 2023 will also inform our decisions.

When we have more details of the funding available, we will provide information on our website. We recommend that you plan on the basis that additional funding may not be available to your organisation.

We will consider new providers aligned with our priorities

We will publish our approach for new providers (providers that have not received TEC on-Plan funding in the last 12 months) by June. We will consider new providers that are delivering provision aligned with our strategic priorities for investment and meeting unmet needs. We do not expect many new providers for 2024, and we encourage you to engage with us early if you are planning to apply for funding with us for the first time.

Not all provision will see year-on-year growth

We will reduce investment for poor performing provision and providers

We will look to reduce our investment in provision where learners are not succeeding, where the outcomes for learners are poor or where we know the provision is not meeting the needs of industry, employers or regions.

Our understanding of poor performing provision will be informed by your performance data and WDC and RSLG advice.

For other provision we will consider all relevant factors

With a finite amount of funding available, TEC considers a range of factors to ensure tertiary education provision is distributed in a way that supports our strategic outcomes:

- › We consider where specific occupations or provision have been highlighted as requiring more graduates to meet labour market needs.
- › We take advice from WDCs, RSLGs and other government agencies to create priorities for investment, which we publish in Plan Guidance and Supplementary Plan Guidance.
- › We continue to fund a broad range of provision but will not necessarily look for growth in learner numbers or additional providers in these areas.

New work-based learning must meet an unmet need

In 2023 work-based learning was limited to providers that were named in transition plans (from Transitional Industry Training Organisations) or were already delivering work-based learning. In 2024 we will consider other providers that want to move into work-based learning only where you are meeting an unmet need. Approval will only occur when the specific contribution of the new provision meets our priorities and is not replicating existing provision. There should not be an expectation of approval.

The application process for providers that want to offer work-based learning for the first time in 2024 will be published on our website soon.

There are limitations on who will be considered for work-based learning

We have specific criteria for providers wanting to start offering work-based learning from 2024. This will ensure we fund provision that meets workforce needs and is delivered by high quality providers.

We will check that all providers being considered have:

- › planned provision that targets an unmet need (eg, a new or different programme, delivery in a different geographical area, provision targeting a new cohort not currently engaged in education, learning that is not currently available in a work-based context, or learning delivered in kaupapa Māori/Māori medium settings)
- › an External Evaluation and Reviews (EER) rating of 1 or 2
- › low financial risk (determined by TEC) or where TEC accepts the financial risk
- › appropriate approvals from the New Zealand Qualifications Authority (NZQA) and endorsements from the relevant WDC (under way if not complete, or approval conditional on receiving these)
- › evidence of support and evidence of need from employers and industry
- › appropriate processes that allow reporting.

We are still designing reporting requirements for work-based learning in 2024. Providers may be required to report using the [Industry Training Register \(ITR\)](#). We will support a very limited number of new connections to the ITR and these will be prioritised in line with the application process that will be published on our website soon.

Work-based learning can require different skills, processes and staff

Work-based learning requires providers to support employers to deliver training on-the-job. This function, previously known as arranging training, requires different skills, relationships and resources to provider-based learning where the learning is delivered directly by the provider.

We have expectations of high-quality delivery and outcomes in vocational education and want to see greater support provided for learners. We want to see that the providers that want to offer

work-based learning for the first time can provide evidence of how they are building their specific capability in this area and developing relevant relationships with industry, employers and other key stakeholders.

If you wish to provide work-based learning, we expect you to have capability in:

- › supporting employers to deliver high-quality training and education. This may mean capability building that develops subject matter experts into effective educators, assessors or workplace mentors
- › ensuring that the learner support and pastoral care every learner gets is of a high standard, including in environments where the learning is primarily delivered by the employer, not the provider
- › providing learning and assessment materials that are appropriate to the learning environment and support best-practice delivery
- › relationship management between the provider and the employer to ensure all the conditions and expectations set by TEC are understood and met in the workplace
- › planning to have regular and constructive contact with the trainers, assessors and supervisors working with your learners
- › ensuring you have staff with the specialist technical skills to support the learning in the different contexts in which it will be delivered
- › providing specialist support for learners, especially for previously underserved learner groups or those who are struggling
- › understanding the reporting requirements and practicalities of assessment and moderation in non-campus-based settings
- › providing periodic engagement directly with the learner⁴ (preferably face-to-face) that supports them in their training and sufficient pastoral care
- › adherence to specific requirements when delivering apprenticeships, including section 376 of the Education and Training Act 2020 and the Code of Good Practice for NZ Apprentices.

Industry and regions now have a stronger voice within our system

WDCs and RSLGs are now part of our system

WDCs and RSLGs play different roles in informing the investment round. It is important for you to understand the role these organisations play, how they inform our investment, and where you may need to engage with their work in the development of your Plan.

Six Workforce Development Councils (WDCs) were established in October 2021 with the role of ensuring the vocational education system meets industry needs and gives a stronger voice to Māori business and iwi development. Success for WDCs will mean employers, including Māori business owners, are confident that vocational education graduates are ready for work and that the future skill needs of industry will be addressed by the vocational education system.

WDCs play a key role in designing and shaping the vocational education and training curriculum through the development of qualifications and credentials and the endorsement of programmes.

⁴ For some learners (such as NZ Defence apprentices) the contact will have to be through the employer as direct contact is not practical. In these cases, we expect the provider to seek agreement from TEC and receive assurance from the relevant employer that the necessary support is in place.

This ensures the system is responsive to the overarching trends and needs of employers and industry.

The endorsement of a new or existing programme by a WDC will be a strong signal to TEC that the programme meets the skills needs of employers, industry and regions and should be prioritised for investment.

The 15 Regional Skills Leadership Groups (RSLGs) are independent advisory groups that are locally based and regionally led. RSLGs are part of a joined-up approach to labour market planning where welfare, education and immigration systems work together to better meet the differing skills needs across regions and sub-regions. They are a fundamental part of the drive to build productive, inclusive, sustainable and resilient regions.

RSLGs can inform WDCs about specific regional issues and share insights about what things are working well in their regions. RSLGs are ideally placed to act locally and influence employers and providers in the regions. The RSLGs can provide advice across all levels of tertiary education while WDCs provide advice that is specifically focused on vocational education and training.

The system is designed so WDCs and RSLGs work together to create both national and regional insights.

For further information on WDCs see [Workforce Development Councils](#).

For further information on RSLGs see [Regional Skills Leadership Groups](#).

WDCs' and RSLGs' advice informs the investment round

Both WDCs and RSLGs have an important role in influencing the priorities for investment that inform TEC's funding decisions.

These are:

- 1. Broader priorities**

The broader priorities bring together the TES (which communicates the Government's key strategic aims), areas of government focus, and advice from WDCs and RSLGs. They explain our expectation of **how** good provision is designed and delivered and the outcomes it brings. The broader priorities are also the national and regional skills priorities that support allocation of the strategic component of Unified Funding System (UFS) funding.

- 2. Targeted priorities**

The targeted priorities identify specific areas of provision that we want to see growth or change in. These priorities focus on **what** provision we are seeking in the year ahead.

Both WDCs and RSLGs provide advice to TEC to inform these priorities. The advice process ensures that our investment reflects the needs of employers, industry and the regions.

The advice from WDCs and RSLGs can influence the content of both sets of priorities. The broader priorities represent a picture of good provision across the tertiary education system. WDCs and RSLGs have contributed to these priorities. These reflect their knowledge of the skills and approaches employers and industry require aligned to the specific needs of their regions.

The targeted priorities for vocational education investment will be released in Supplementary Plan Guidance in June 2023. They will detail specific areas of provision that the WDCs and RSLGs have identified for growth or a change. This will help TEC prioritise funding for vocational education and

training that delivers to the needs of employers, industry and regions. TEC is expecting advice that is actionable (by TEC), evidenced and defensible.

The information included in your Plan helps us assess the alignment of your proposed provision with our investment priorities. For relevant provision we want to see how the insights from WDCs and RSLGs have informed your planned approach. WDCs publish Workforce Development Plans (WDPs), which provide information on industry needs and pressures,⁵ and RSLGs provide information on the labour market needs of the regions in their [Regional Workforce Plans \(RWPs\)](#).

We will look for alignment with WDC and RSLG areas of focus

In some cases you, as a provider, will be working directly with a WDC or RSLG on your proposed provision. If this is the case, we want it to be clear in your documentation.

We know that WDCs and RSLGs may not always be able to work directly with providers on every programme in their coverage, so it may be more appropriate to simply show in your application how your application relates to a specific Workforce Development Plan or Regional Workforce Plan.

TEC's decision to fund a provider will not be based on whether a WDC and/or a RSLG has shown written support for your application. TEC's decision to fund a programme or credential will be influenced by how well your proposed delivery aligns to advice received from a WDC and/or RSLG. We strongly encourage providers to familiarise themselves with the content of WDPs and RWPs (which can be found on their respective websites) to enable you to demonstrate the direct alignment between your proposed delivery and the priorities of WDCs and RSLGs.

The Unified Funding System continues to support changes within the vocational education and training system

Underpinning the Reform of Vocational Education (RoVE), the Unified Funding System (UFS)⁶ continues to incentivise and support providers to make relevant work-based training available and provide greater individualised support for learners. It will address national and regional skills priorities to better support employers in their businesses. The UFS puts learners at the centre of the system.

Under the UFS delivery component, for 2024 funding, we will continue to use Equivalent Full-time Students (EFTS) and Standard Training Measures (STMs) as the basis to calculate this. We are continuing to work closely with the sector to develop the new shared unit of funding that is fair and transparent and supports the new system.

For more information on the UFS and its three interconnected components, see [Unified Funding System](#).

⁵ [Waihanga Ara Rau WDP](#), [Toi Mai WDP](#), [Ringa Hora WDP](#), [Hanga Aro Rau WDP](#), [Muka Tangata WDP](#), [Toitū te Waiora WDP](#)

⁶ The learner and delivery components of the UFS fund are also known as Delivery of Qualifications 3-7 (DQ 3-7).

We have aligned the 2024 PTE Strategic Fund more closely to the Investment Plan process

Strategic component funding for private training establishments (PTEs) is off-Plan (not determined by your Investment Plan); however, we have made improvements to better align this process with your Investment Plan process.

For PTEs looking to apply for the 2024 PTE Strategic Fund round, this will be held later in the year. Our website will be updated with the relevant resources closer to the Fund round opening. As with last year, you will be asked to develop and submit a proposal.

Funding is available to support innovative projects, initiatives, and provision that respond to national and regional skills priorities, which have been incorporated into our broader priorities for 2024 investment (see pp. 16-20 of this document).

Funding is also available under the strategic component to support the costs of programme development and maintenance. We want you to develop programmes that are innovative, flexible and responsive to investment priorities and changes in the vocational education system.

If you are successful, payments will be connected to milestones and deliverables. Ongoing monitoring and reporting will be crucial to ensuring the funding is having a positive impact and enabling the shifts we seek to achieve.

Transitions funding will be available for PTE delivery of priority or niche provision through UFS

PTEs that are eligible for transitions funding for 2024 will have this funding communicated to them as part of their indicative allocations in June 2023. Transitions funding will be paid to eligible PTEs in 12 equal monthly instalments.

Transitions funding is focused on enabling PTEs with strategically important provision to adapt to the new incentives introduced by the UFS.

Transitions funding will be available again in 2024 for eligible PTEs that received this funding in 2023, and other PTEs that we determine may need additional transition support. Eligible PTEs will receive transitions funding for 2024 at a rate of half their 2023 transitions funding.

To be eligible for transitions funding, PTEs must:

- a. continue to face a significant (at least 10 percent) decrease in funding* for UFS provision, and
- b. continue to deliver either:
 - i. priority provision, or**
 - ii. niche provision (the only provider delivering a particular area of provision within the region or nationally).

* based on funding for delivery and learner components only.

** these priority provision areas are based on TEC's targeted priorities that highlight specific industries and areas of provision.

There is an exemption process for non-domestic migrant learners in work-based training

As part of the UFS implementation, Cabinet agreed to remove training subsidy eligibility for non-domestic tertiary students. Subsequently, Government agreed to a targeted exemptions process to still subsidise work-based learning that is in the national interest. This exemption process is only for work-based learning programmes, and assessment and verification modes of delivery. More

information on the exemption scheme, the list of funded qualifications for non-domestic learners and post-study work visa settings can be found at [Non-domestic learners' tuition subsidy exemption scheme for work-based learning](#).

You should use the list to ensure potential learners have the correct eligible residential status for their enrolments. Eligible non-domestic learners will be treated as domestic learners, including for [Fees Free eligibility](#). 2023 is the first year for the exemptions process. It is expected that the 2024 process will build on what we have learned through the 2023 process

The 2024 exemption process is currently under design and nearing the finalisation stages.

Prison-based learners require high quality tertiary provision

There is a range of tertiary education provision supporting people currently serving prison sentences in the 18 prisons across New Zealand. There may be opportunities for more education providers to work with Ara Poutama Aotearoa (Department of Corrections) in this area. The requirements of this provision are unique, and you will need to review all the information in this section carefully.

Prison-based learning requires unique design and delivery

Delivering in a prison environment is unique and when you are proposing prison-based delivery, the following factors need to be considered:

- › Face-to-face learning will be in smaller groups.
- › Short programmes are best as the prison population fluctuates and is mobile.
- › Providers need to work in partnership with Ara Poutama Aotearoa (Department of Corrections) on all aspects of delivery.
- › Teaching staff need to have experience and passion working with high-needs learners.
- › The pedagogical approach needs to be mana-enhancing, respectful, reciprocal and collaborative for the learner.
- › A culturally responsive curriculum is expected.

Opportunities for more prison-based provision

In recent years the volume and range of provision available to prison-based learners has decreased. There are potential opportunities for additional delivery in Ara Poutama Aotearoa (Department of Corrections) facilities that considers the factors above and provides:

- › mātauranga Māori programmes or contexts for learning, or
- › face-to-face programmes at Level 3 and above which build skills for life and work, or
- › distance learning programmes that are fully paper-based (do not rely on online learning or computer access).

This provision generally does not attract additional funding, so it is important you consider what is achievable within TEC's published funding rates.

If you are a provider that wants to offer Corrections provision for the first time, or if you are an existing provider that wants to increase the range or volume of what you deliver, you will need to get agreement from Corrections before you approach TEC for funding. TEC will only consider funding requests for people in Corrections' care when we receive endorsement from the Ara Poutama Aotearoa (Department of Corrections) national education team.

Proposed prison-based delivery must be identified in your Mix of Provision

If you are delivering programmes for people in Corrections' care, we need to know the details of this provision. Please outline in your Mix of Provision (MoP):

- › the programme
- › the delivery site(s)
- › the delivery model (especially if it is face-to-face or extramural).

By providing this information we can be assured that we are funding a good range of provision across the prison network. Ara Poutama Aotearoa (Department of Corrections) will verify with us how the proposed provision in your Plan matches its expectations for the year ahead.

For 2023 onwards, all provision for people in Corrections' care funded through DQ1-2 attracts the higher rate of funding (all prison-based provision is paid at the trades rate). This change is to support smaller group learning, development of appropriate resources and any additional support needs for this cohort. Getting the correct rate of funding requires approval during the Plan process and accurate reporting throughout the year.



Plan components

Plan components

An Investment Plan is made up of different components

An Investment Plan is made up of different components. The following table explains what each of these components is and how you can determine which components you need to submit for investment in 2024. If you are unclear about which elements you need to submit or what they need to contain, we encourage you to contact your Relationship Manager, phone us on 0800 601 301 or email customerservice@tec.govt.nz.

All components of your Plan should be submitted to us by 7 July 2023 via [Workspace 2](#). For new providers who do not have access to Workspace 2 please send documents to us by email.

All required components must be fully completed when they are submitted. If we do not receive all fully completed documents by 7 July 2023 this may delay your funding or make you ineligible for specific funding.

Component	How the requirement to submit is decided		How to submit
Strategic Intent	The volume of funding you receive	Providers that receive \$5 million ⁷ or more in TEC on-Plan funding AND are submitting a full Plan (when the current Plan approval is expired) will need to submit a Strategic Intent.	We recommend submitting this information to us using the Strategic Intent and Learner Success Plan template . If you would rather create your own document, we recommend you use the headings provided.
	Your performance	All Category 3 or 4 (EER-rated) providers must submit a full Plan including a Strategic Intent.	
	If you are new to on-Plan funding	Providers that have not received on-Plan funding in the last 12 months will need to submit a Strategic Intent. ⁸	
Learner Success Plan (LSP)	The volume of funding you receive	Providers that receive \$5 million or more in TEC on-Plan funding AND are submitting a full Plan (when the current Plan approval is expired) will need to submit an LSP. TEIs are expected to have a Council-approved LSP. Your Relationship Manager will communicate any Learner Success Plan requirements for 2024.	We recommend submitting this information to us using the Strategic Intent and Learner Success Plan template .
Disability Action Plan (DAP)	The volume of funding you receive	Providers that receive \$5 million or more in TEC on-Plan funding AND are submitting a full Plan (including a Strategic Intent and LSP) must also submit a DAP. We are also requesting providers that receive \$5 million or more, did not submit a DAP last year and are not Plan required to submit DAPs for 2024. This will enable a consistent approach to supporting learners with a disability in the tertiary system. Your Relationship Manager will confirm this with you.	There is no set template for your DAP. Instead, create your own document using the Disability Action Plan Guidance (PDF 561 KB).

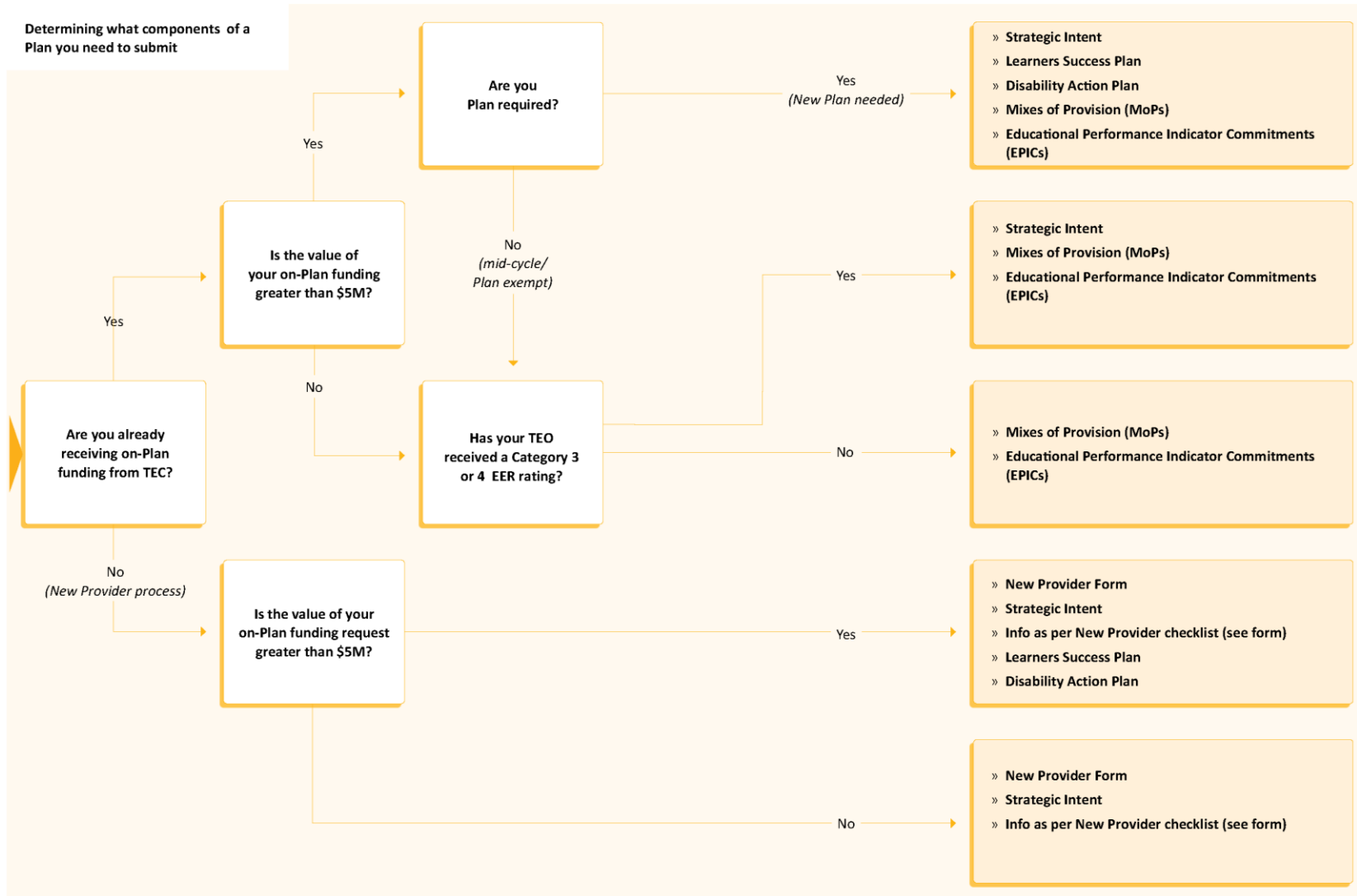
⁷ The \$5 million threshold is decided based on the final funding allocation you were given for 2023 (as confirmed to you by letter in late 2022).

⁸ If you are a new provider you will need to submit a full Investment Plan (including the Strategic Intent and Learner Success Plan) and complete the [New Provider Application](#) as well as attaching the necessary supplementary financial information.

		TEIs are expected to have a Council-approved DAP. If you are a TEI, your Relationship Manager will communicate any specific Disability Action Plan requirements to you for 2024.	
Summary of Activity (MoPs)	All providers are expected to submit MoPs every year.	For many providers submitting Mixes of Provision (MoPs) will fulfil this requirement. However, you may submit additional information to explain how you have decided on the mix and how it meets our priorities. A narrative is expected when significant changes to the kind or mode of provision is proposed. For providers requesting UFS funding, you will need to signal the mode of delivery in this component of your Plan.	The MoP template will be uploaded to Workspace 2 closer to the Plan submission date.
Performance Measures (EPICs)	These are required when current EPICs are outdated.	For many providers submitting Educational Performance Indicator Commitments (EPICs) will fulfil this requirement. However, you may submit additional information to explain your targets, especially if your current EPICs are below sector averages.	The EPICs template will be uploaded to Workspace 2 closer to the Plan submission date.

You may not need to submit all Plan components every year

The flow chart below clarifies what you need to submit. If you need more information, contact your Relationship Manager or our Customer Contact Group, phone 0800 601 301, email customerservice@tec.govt.nz.



Not all providers need to submit all Plan components every year. The factors that affect what you need to submit include:

- the amount of on-Plan funding you receive
- whether you already have an approved Plan.

Tertiary education institutions (TEIs) have been notified of their Plan status. For all other providers, you will shortly receive confirmation of your Plan status for 2024.

There are special requirements for tertiary education institutions (TEIs)

Your Strategic Intent must contain additional content

TEIs (Te Pūkenga, universities and wānanga) have the capacity and statutory obligation to make contributions of regional and national importance. This includes community engagement, knowledge-sharing activities and a focus on understanding and meeting in-demand skill and research needs. We want you to provide us with your Statement of Service Performance (SSP) annually and we expect the content of your SSP to align with your Plan.

For Te Pūkenga, include your submission for UFS strategic component funding in your Plan

Your submission for strategic component funding should form part of your 2024 Investment Plan.

You can seek both national and regional skills priorities (NRSP) funding and Programme Development and Maintenance fund (PDMF) funding. NRSP funding is available to support you to meet your charter obligations (outlined in schedule 13 of the Education and Training Act 2020), through the creation of a sustainable network of provision for vocational education.

In relation to your submission for NRSP funding, we will expect to see:

- › identified initiatives equitably spread across your network of provision
- › how the initiatives will go towards meeting your Charter obligations
- › how the proposed initiatives will contribute to a sustainable network of provision
- › clear links between your proposed initiatives and projects and their strategic aims (ie, how they respond to the NRSPs).

For the strategic component funding generally, we will want to see:

- › evidence that you are engaging and partnering with key stakeholders across the system to support the realisation of this funding
- › the alignment of your intended initiatives with the strategic component's aims
- › the results, impacts or outcomes you expect, including how they align with the Reform of Vocational Education strategic objectives, how they will be achieved, and how learners will benefit from them.

Funding is available for wānanga to develop and maintain programmes

You will have the opportunity to seek time-limited funding to develop or redevelop programmes under the PDMF element of the UFS strategic component.

We will work with you to confirm the 2024 process for submitting a proposal for programme development and maintenance funding.

We will expect your proposal to include details of the programmes you are looking to develop and/or maintain and how this work meets the requirements of this funding. We want to see:

- › how you would use this funding to develop and maintain programmes
- › why this funding is needed and why you have selected the identified programmes
- › evidence of engagement (regular or specific to this proposal) with stakeholders and/or partners, including local iwi and/or hapū, and how this has contributed to your proposal funding
- › how you would continue this engagement if successful in your application
- › the results, impacts or outcomes you expect, including how they align with the Reform of Vocational Education strategic objectives, how they will be achieved, and how learners will benefit from them.

The learner component of the UFS

Under the learner component, you will be allocated funding primarily based on the number of your previous years' learners who were disabled or had low prior qualifications. Further funding will be allocated for Māori and Pacific learners, recognising the need to ensure the system is designed to enable their success. For 2024 funding we will calculate this. You do not need to submit any additional information in your Plan.

The learner component performance element applies to more providers in 2024

TEC has taken a phased approach to implementing the incentive payments paid to providers on achieving learner component performance expectations (LCPE).

In 2023, incentive payments for the learner component were implemented through a targeted approach with nine providers that are currently delivering a significant amount of vocational education.

In 2024, it is expected that more providers will be part of the LCPE. Design work for this is ongoing and we will provide further information once this work is finalised.

We may also ask for additional financial information

For any provider, we may also ask you to provide additional information about your financial performance and forecasts. We may use this, or information we already have, to assess whether your organisation is likely to have the financial ability to deliver on its Plan.



Plan assessment

Plan assessment

We take a holistic approach to Plan assessment

This section describes the main things we look for when we assess your Plan.

We invest public funding in a provider based on our assessment of how effectively its Plan will contribute to meeting stakeholder needs and investment priorities. These stakeholders include, but are not limited to, learners, communities, regions, iwi/Māori, employers and industries.

We want to support you to make informed plans for your organisation based on a good understanding of our goals for the system, performance expectations and investment intentions. When assessing proposed Plans against the criteria we will take a holistic approach and may use a range of evidence, including:

- › the information contained in a proposed Plan;
- › the TEC's engagement and monitoring information, including:
 - previous funding allocations;
 - past delivery, including under-delivery and over-delivery (above 105% where relevant);
 - performance; and
 - organisational and financial data;
- › provider annual reports and strategic plans;
- › quality assurance bodies' information and reports;
- › Plan engagement (where applicable);
- › both national and regional demographic and economic data; and
- › information about the post-study outcomes of learners.

We use a framework to assess specific components of your Plan

For the specified components of your Plan, we will look for certain content to be included and well explained. The following table helps you understand our expectations and assessment approach.

Plan content

How we will assess the content of your Plan

<p>1. Strategic Intent</p>	<p>Mission and role</p>	<p>Your mission and role provide descriptions of your organisation and the specific niche in tertiary education you fill. We want to see detail that helps us understand your provider’s unique contribution to the system, including:</p> <ul style="list-style-type: none">› the learners you support› your mix of New Zealand Qualifications and Credentials Framework (NZQCF) levels› your subject specialisation and any industries you target› your modes of provision, and› your research intensity and specialisation (where relevant). <p>We will look for evidence that your mission and role have shaped your proposed activities, and of how you plan to build and maintain your organisation’s capability.</p>
	<p>Investment priorities</p>	<p>TEC expects to clearly see in your Plan how you are responding to our published investment priorities.</p> <p>Some priorities apply to all provision (eg, learner success and learner outcomes) while others apply to certain provision (eg, mātauranga Māori or specific health and education roles). We want to see that you understand the priorities that are relevant to you and are building responses to them into your planning. This should be evident in your leadership, strategy and policies as well as the programmes you create and deliver.</p> <p>TEC publishes priorities for investment each year. These priorities reflect the priorities in the Tertiary Education Strategy (TES), priorities informed by government strategies and initiatives, and priorities informed by WDC and RSLG advice. Plan Guidance outlines the priorities for investment for 2024 in detail.</p>
	<p>Te Tiriti o Waitangi</p>	<p>We want to see how your organisation honours Te Tiriti o Waitangi (Te Tiriti). This is an expectation for all providers funded by TEC.</p> <p>For tertiary education institutions (TEIs) we also want to see evidence of how your Council acknowledges and supports the principles of Te Tiriti in the performance of its functions and in the exercise of its powers.</p>
	<p>Stakeholder relationships</p>	<p>We will look for evidence in your Plan that you know who your stakeholders are, what they need and expect of you, and how you’re going to respond. We will look for evidence that your assessment of stakeholders’ needs has shaped your proposed activities.</p>

	<p>We expect some of your stakeholder engagement to target underserved learners. This may involve working with learner groups, community groups, disability groups, iwi/Māori organisations and Pacific community groups.</p> <p>For all providers delivering vocational education, we also expect to be able to see in your Plan knowledge of and responses to provision that has been highlighted by WDCs in their Workforce Development Plans and RSLGs in their Regional Workforce Plans. In some cases, you may be working directly with WDCs and/or RSLGs and we want to hear about those relationships when relevant.</p> <p>For relevant provision we also want to see connection to regulators/professional bodies.</p>
Learner voice	<p>Learners are a critical stakeholder, and we want your Plan to show how you are responding to specific learner feedback.</p> <p>We want to see in your Plan how you are proactively capturing a broad and diverse range of learner voices including those of underserved learners. We also want to see how you are using the insights you gather to shape your programmes, processes, policies and the learning environment. Your work around the learner voice is critical to meeting the expectations of the TES and successfully implementing a learner-centric operating model.</p>
Continuous performance improvement	<p>We want to see in your Plan what improvements and changes you have made since your last Plan to better serve your learners.</p> <p>We will look for commentary in your Plan about:</p> <ul style="list-style-type: none"> › reflection on your previous performance (including against the commitments you made in your previous Plan if you had one) › changes or planned changes in provision, and how these will improve your performance › the findings of any quality assurance reviews and your response to these. <p>You should also let us know about any changes to your organisation that could have a significant impact on your future performance.</p> <p>Where relevant we also want to see that you have delivered within your allocated provision and have not over-delivered without receiving approval.</p>
Governance and management	<p>We want to see that your governance and management shows high levels of capability across all necessary skills and is representative of the learners you serve.</p>

	<p>Well-informed and engaged governing bodies are essential for sustainable educational success – for you as a provider, and for your learners and the communities you serve. Where you have proactively made changes to your governance and leadership these are important to highlight.</p>
Response to performance issues	<p>Any provider that has received a category 3 or 4 assessment (before the date of Plan submission) through EER will need to include a specific narrative in their strategic intent that responds to the issues raised in the EER report and responses to any recommendations from that report. If your EER is unpublished and is, or becomes, category 3 or 4 prior to your funding being confirmed, even if this is being disputed, we need you to engage with us directly as we may require additional information.</p> <p>This is only required for providers that are category 3 or 4 EER.</p>
Apprenticeships	<p>We need to see specific content in your Plan if you are delivering apprenticeships. The Education and Training Act 2020 requires additional information to be included in the Plans of providers that deliver apprenticeships.</p> <p>If you will be delivering apprenticeships, your Plan needs to describe how specifically you will meet the requirements of the following apprenticeship training activities:</p> <ul style="list-style-type: none"> › promoting apprenticeship training › identifying prospective apprentices and employers › providing or arranging training or employment that may lead to apprenticeship training for prospective apprentices › helping prospective apprentices enter into apprenticeship training agreements › producing individual training plans and facilitating their implementation › monitoring individual apprentices › ensuring that the Code of Good Practice for New Zealand Apprenticeship is applied to apprenticeship training and every apprenticeship training agreement, and › providing or procuring appropriate pastoral care and support for apprentices. <p>While these activities are requirements for apprenticeships we consider them best practice for all work-based training and expect to see similar approaches for all work-based learners.</p> <p>This is only required for providers that deliver apprenticeships.</p>

<p>1B. Learner success</p>	<p>Learner Success Plans (LSPs)</p>	<p>In assessing LSPs, the TEC will be looking to see:</p> <ul style="list-style-type: none"> › a well-articulated statement of your vision for learner success for your organisation › clear commitment from governance and senior management to improving outcomes for all learners, and particularly for under-served learner groups in your organisation › a clear and detailed understanding of current issues and problems which are resulting in poor outcomes for your learners, or a clear commitment to building this understanding (including how you will achieve this) › a coherent roadmap for how you will implement your learner success approach, from the present to the next 3–5 years. This should include deliverables, timeframes, resourcing and performance measures. This roadmap should demonstrate clear linkages to the TEC’s Learner Success Framework › a description of the progress made against any previous LSP. <p>When assessing LSPs we will take into account the size and composition of your organisation</p> <p>All TEIs are required to have a Council-approved plan for learner success that includes a roadmap of tangible goals.</p>
	<p>Disability Action Plans (DAPs)</p>	<p>We want to see DAPs that outline changes that will benefit disabled learners. These may include:</p> <ul style="list-style-type: none"> › increased participation levels and higher levels of achievement for disabled learners › increased employment outcomes for disabled learners › noticeable improvements in provider staff’s understanding of disability discrimination issues › improvements in the physical accessibility of education facilities › a description of the progress made against any previous DAP. <p>A DAP must include clear evidence of use of the Kia Ōrite Toolkit and the best practice standards described in it, such as:</p> <ul style="list-style-type: none"> › goals and targets › evaluation strategies › allocation of responsibility › communication of policies and programmes. <p>All TEIs are required to have a Council-approved Disability Action Plan.</p>

<p>2. Summary of activities</p>	<p>Mix(es) of Provision</p>	<p>This section includes the Mix(es) of Provision (MoPs). If you want to provide a short narrative about your MoPs this can be submitted as a supporting document or as part of your strategic intent.</p> <p>In assessing your programmes and activities, we will consider whether:</p> <ul style="list-style-type: none"> › you will be able to successfully deliver your proposed programmes and activities given past delivery levels › your programmes and activities will support the goals set out in your Strategic Intent (where relevant) › your programmes and activities will support the success of all learners, especially those who have been traditionally underserved › you have provided accurate information about all your planned programmes and activities, including those undertaken through a subsidiary, and any subcontracting arrangements › your proposed programmes and activities align with our investment priorities. <p>Funding decisions are in part based on the content of your MoPs and how these relate to our priorities. Where we provide funding for a priority area, we expect the funding to be used in that area and not significantly reallocated to other provision without prior approval.</p> <p>Where there are significant changes from previous commitments to the mix of programmes and activities (including mode changes) you are proposing, we expect you to include an explanatory narrative. This must include explanations where provision is moved away from higher priority areas.</p>
<p>3. Performance measures</p>	<p>Educational Performance Indicator Commitments</p>	<p>For many providers, EPICs form a substantial part of the performance measures component of your Plan. EPICs should be achievable and reflect your consideration of the cohorts and programme represented. Your Plan may contain more detailed commentary about performance commitments. Where these are proposed in your Plan please ensure they are:</p> <ul style="list-style-type: none"> › relevant, achievable and complete; if your current performance is below parity we recommend setting EPICs with annual progress of between 0.5 and 2 percent as this is achievable for most providers. For providers with particular learner success performance issues, expectations of change may be higher › a meaningful improvement on your past performance, showing a journey of continuous improvement, particularly with respect to outcomes for priority learner groups. <p>For larger providers your regular engagement with your Relationship Manager should help to inform your EPICs.</p>

Glossary

Ākonga	Learner or student.
Credential	A credential (or micro-credential) means study or training that leads to an award on the New Zealand Qualifications and Credentials Framework: Micro-credentials – NZQA
DAP	Disability Action Plan.
EER	External evaluation and review. The name given to the periodic review of tertiary education organisations (TEOs) conducted by NZQA as part of NZQA’s Evaluative Quality Assurance Framework.
EFTS	Equivalent full-time student (EFTS). One EFTS unit is defined as the learner workload that would normally be carried out in a single academic year (12-month period) by a learner enrolled full-time, and generally equates to 120 credits on the New Zealand Qualifications and Credentials Framework (NZQCF).
EPIC	Educational Performance Indicator Commitment.
EPis	Educational performance indicators. A group of performance indicators that give a view of how well tertiary providers are helping their learners to achieve.
Indicative allocation	Our yearly estimate of each provider’s ‘on-Plan’ funding that they could receive in a year if their Investment Plan is approved.
ITR	Industry Training Register. An online data collection service that captures information about activity for work-based learning in near real time.
Ka Hikitia	The Māori Education Strategy: Ka Hikitia
Kia Ōrite Toolkit	A toolkit that provides current, New Zealand-specific guidance to help tertiary education organisations better support disabled learners: Kia Ōrite Toolkit
Learner Success Framework	A framework that providers can use to address inequities in the tertiary education system: Learner Success Framework
Learner Success Operating Model	A model/plan developed by a provider to assist them to implement their Learner Success Plan.
LSP	Learner Success Plan.
Mātauranga Māori	Māori knowledge in its widest and broadest terms, including all aspects of Māori culture.
Modes of delivery	A mode of delivery is the funding designation describing the way to deliver education to a learner, such as extramurally or in

	the workplace. Five modes of delivery have been designed as part of the Unified Funding System (UFS): Modes of delivery – Unified Funding System
MoP	Mix of Provision.
National and regional skills priorities (NRSPs)	These priorities are determined in conjunction with the WDCs and RSLGs. They are used to support the financial allocation of the strategic component of UFS funding.
Ngā Kete	A secure web portal or ‘doorway’ into our information. It gives providers quick access to information from multiple sources through search and browse functionality.
NZQA	New Zealand Qualifications Authority.
NZQCF	New Zealand Qualifications and Credentials Framework.
PDMF	Programme Development and Maintenance fund. This is one of the elements of the strategic component in the UFS.
Plan Guidance	Guidance we publish on the content and process for criteria used to assess proposed Plans.
PTE	Private training establishment.
Regional Skills Leadership Groups (RSLGs)	Independent advisory groups identifying and supporting better ways of meeting future regional skills and workforce needs across Aotearoa. There are 15 RSLGs: Regional Skills Leadership Groups
Regional Workforce Plans (RWPs)	Plans developed by RSLGs.
RoVE	Reform of Vocational Education. RoVE includes seven key changes to create a unified vocational education system.
SSP	Statement of Service Performance. Reports that provide primarily non-financial information recording performance against specified objectives.
STEM	The academic disciplines of science, technology, engineering and mathematics.
Supplementary Plan Guidance (SPG)	A document that supplements the information contained in Plan Guidance. It will provide any updates and is usually released in June.
Tau Mai Te Reo	The Māori language in education strategy: Tau Mai Te Reo
TEI	Tertiary education institution. TEIs include universities, Te Pūkenga and wānanga.

TES	Tertiary Education Strategy. Sets out the Government's long-term strategic direction for tertiary education: Tertiary Education Strategy
Unified Funding System (UFS)	The funding system for vocational education and training from 1 January 2022: Unified Funding System
WDC	Workforce Development Council. Six WDCs have been established as part of RoVE: Workforce Development Councils
WDPs	Workforce Development Plans. These are published by the WDCs.
Workforce Development Plans	Plans published by the WDCs.