

Education New Zealand Briefing

Title:	Education New Zealand quarterly report from 1 July to 30 September 2019		
Date:	25 November 2019	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1920-079

RECEIVED
 25 NOV 2019
 M. HICKSONS

Action sought

Addressee:	Action sought:	Deadline:
Minister of Education	<p>Note the attached Education New Zealand quarterly report from 1 July to 30 September 2019.</p> <p>Agree that this briefing is proactively released as part of the January 2020 release.</p>	

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact
John Goulter	General Manager, Stakeholders and Communications	[REDACTED]	[REDACTED]	
Angela Meredith	Accountability Manager	[REDACTED]	[REDACTED]	x

The following departments/agencies have seen this report

<input type="checkbox"/> ERO	<input type="checkbox"/> MBIE	<input type="checkbox"/> MFaT	<input type="checkbox"/> MoE	<input type="checkbox"/> MoH	<input type="checkbox"/> MSD
<input type="checkbox"/> NZQA	<input type="checkbox"/> NZTE	<input type="checkbox"/> TEC	<input type="checkbox"/> TPK	<input type="checkbox"/> Treasury	<input type="checkbox"/>

Minister's office to complete

<input type="checkbox"/> Approved	<input type="checkbox"/> Declined	<input type="checkbox"/> Noted	<input type="checkbox"/> Needs change
<input type="checkbox"/> Seen	<input type="checkbox"/> Overtaken by events	<input type="checkbox"/> See Minister's notes	<input type="checkbox"/> Withdrawn

Comments:

Proactively released

Education New Zealand Briefing

Title:	Education New Zealand quarterly report from 1 July to 30 September 2019		
Date:	25 November 2019	Priority:	Medium
Security level:	Unclassified	ENZ ID no:	1920-079

Recommendations

Education New Zealand recommends that you

- a. **note** the attached Education New Zealand quarterly report from 1 July to 30 September 2019

Agree / Disagree

- b. **agree** that this briefing is proactively released as part of the January 2020 release

Agree / Disagree



John Goulter
General Manager, Stakeholders and
Communications
Education New Zealand



Hon Chris Hipkins
Minister of Education

6 / 1 / 20

Proactive released

Purpose

1. Education New Zealand's (ENZ's) quarterly report for 1 July to 30 September 2019 is attached for your information

Background

2. The quarterly report provides the first quarter progress report against the intentions stated in ENZ's Statement of Intent 2019-2023 and Statement of Performance Expectations 2019/20.
3. Progress is reported under ENZ's four strategic priorities and ENZ's work to develop its capability to support those priorities. ENZ's strategic priorities are:
 - **Lead international education thinking:** Lead the future thinking of the international education industry and collaborate with other agencies to give effect to the government's goals for international education
 - **Promote an excellent education and student experience:** Capture the hearts and minds of international students and their families by delivering consistent storytelling around New Zealand's international student education experience. This will reinforce that New Zealand is an open, welcoming country that provides students with a rich and rewarding experience that prepares them for the future
 - **Grow sustainable international education:** Encourage innovation and diversification to ensure the long-term, sustainable growth of international education
 - **Develop global citizens:** Bring people together from all parts of the globe to share ideas, skills and knowledge
4. ENZ's monitoring agency, the Ministry of Education, has reviewed the quarterly report.
5. ENZ's Board Chair reviewed the quarterly report and authorised providing it to you.

Proactive release

6. ENZ intends to proactively release this briefing as per your expectation that information be released as soon as possible. Any information which may need to be withheld will be

Education New Zealand

Quarterly Report for 1 July to 30 September 2019

released
**THINK
NEW[®]**



Proactive



Contents

Executive summary	3
Impact measures	4
Performance measures.....	5
Activity indicator.....	6
Organisational capability	6
Financial performance to 30 September 2019	7
Lead international education thinking.....	8
Promote an excellent education and student experience	9
Grow sustainable international education.....	9
Develop global citizens	11
Our organisational development	11

Proactive released

This quarterly report covers the period 1 July – 30 September 2019¹. This is the first quarterly report against Education New Zealand's (ENZ's) *Statement of Intent 2019-2023* and *Statement of Performance Expectations 2019/20*.

¹ This report includes calendar year and financial year information. A calendar year is shown as a single year, such as 2018, while dates such as 2019/20 refer to a financial year.

Executive summary

This quarterly report covers the period 1 July – 30 September 2019². This is the first quarterly report against Education New Zealand's (ENZ's) *Statement of Intent 2019-2023* and *Statement of Performance Expectations 2019/20*.

ENZ developed communications to support the Reform of Vocational Education announcements and agreed with the Chair of the New Zealand Institute of Skills and Technology Establishment Board to cooperate on marketing, messaging and public relations for international education.

ENZ and Immigration New Zealand (INZ) agreed to a Joint Work Programme to support the international education sector. As part of the work programme, ENZ supported the development of a first-time visa application checklist by INZ.

A China-hosted version of the StudyInNewZealand website was launched to increase ENZ's digital presence in China and ENZ's AgentLab was launched all education agents with the tools, training, and information to promote New Zealand.

To support those working with international secondary school students, a new mental health resource was created.

Proactive released

² This report includes calendar year and financial year information. A calendar year is shown as a single year, such as 2019, while dates such as 2019/20 refer to a financial year.

Impact measures

	Target 2019/20	2018/19 Full Year Result	2019/20 YTD result	On track ³	Comment
International student perceptions of education quality.	2020: 8.2 out of 10	2018/19: 8.0 out of 10		●	The result will be reported in Q4.
The percentage of international students who were satisfied or very satisfied with their overall experience.	2019: Establish new baseline	New baseline in 2019/20		●	The result will be reported in Q2.
The economic value from New Zealand's international education sector.	2019: \$5.7 billion	2018: 4.94b		●	The result will be reported in Q4.
The economic value per international student.	2019: Increase	2018: \$39,000		●	The result will be reported in Q4.
The percentage of international students enrolled to study outside Auckland.	2019: Increase	2018: 44%		●	The result will be reported in Q4.
The percentage of the international education sector's economic value coming from New Zealand's top two markets.	2019: Decrease	2018: 45.5% of economic value		●	The result will be reported in Q4.
Awareness of the contribution of international education to New Zealand.	2019/20: Increase	2018/19: 58%		●	The result will be reported in Q4.

³ **Key:** ✓ on track to achieve full year target * not met

● not measured, or not currently on track to achieve full year target

Performance measures

	2019/20 Target	2018/19 Full Year Result	2019/20 YTD result	On track ⁴	Comment
Percentage of facilitated customers that agree ENZ's services and support have added value to their organisation.	≥ 75%	93%		●	The result will be reported in Q4.
Percentage of Active Visits on ENZ's studyinnewzealand.govt.nz website.	≥ 75%	77%	80%	✓	
Number of registrations to ENZ's Student Membership Programme through studyinnewzealand.govt.nz website.	80-100,000	New measure in 2019/20	35,362	✓	
Number of registrations to NauMai NZ	Establish baseline	New measure in 2019/20	1,146 registrations	✓	
Number of key messages about the benefits to New Zealand from international education delivered by third parties.	≥ 180	156	27	✓	
Percentage of users satisfied with the information and intelligence provided by ENZ.	≥ 87%	78% of industry users rated ENZ's information and intelligence as 'good' or higher		●	The result will be reported in Q4.
Percentage of Prime Minister's Scholarship recipients who report making five or more professional/business connections during their time on scholarship.	≥ 60%	56%	51%	●	47% of Prime Minister's Scholarships for Asia (PMSA) awardees reported making five or more professional/business connections compared to 70% for Prime Minister's Scholarships for Latin America (PMSLA) awardees.
Percentage of Prime Minister's Scholarship recipients who report making five or more academic connections during their time on scholarship.	≥ 60%	52%	54%	●	53% of PMSA awardees and 60% of PMSLA awardees reported making five or more academic connections.

⁴ **Key:** ✓ on track to achieve full year target ✗ not met

● not measured, or not currently on track to achieve full year target

Activity indicator

	2019/20 Activity standard	2018/19 Full Year Result	2019/20 YTD result	On track ⁵	Comment
Number of New Zealand International Doctoral Research Scholarships funded.	10-20	27	19	✓	

Organisational capability

	2019/20 Target	2018/19 Full Year Result	2019/20 YTD result	On track ⁵	Comment
Employee engagement.	Increase	New baseline established		●	The result will be available in Q4.

Proactive released

⁵ **Key:** ✓ on track to achieve full year target

x not met

● not measured, or not currently on track to achieve full year target

Financial performance to 30 September 2019

STATEMENT OF FINANCIAL PERFORMANCE	As at 30 September		
	Actual 2019/20 YTD	Budget 2019/20	Actual 2018/19
\$000s			
Operating Revenue			
Revenue from the Crown - Operating	6,882,999	6,882,999	6,908,000
Revenue from the Crown - EEL	816,250	816,250	816,250
Other revenue	1,733,826	1,744,783	512,422
Total operating revenue	9,433,075	9,444,032	8,236,672
Scholarship Revenue			
Revenue from the Crown - scholarships	1,087,500	1,087,500	1,137,500
Total scholarship revenue	1,087,500	1,087,500	1,137,500
Operating Expenditure			
Personnel costs	3,208,692	3,435,266	2,907,208
Other expenses	6,164,911	5,666,805	4,257,248
Depreciation & amortisation expenses	87,553	70,078	73,367
Total operating expenditure	9,461,156	9,172,149	7,237,823
Scholarship expenditure			
Scholarship expenses	(3,925)	150,000	126,599
Total scholarship expenditure	(3,925)	150,000	126,599
Net surplus	1,063,344	1,209,383	2,009,750

STATEMENT OF FINANCIAL POSITION	As at 30 September		
	Actual 2019/20 YTD	Budget 2019/20	Actual 2018/19
\$000s			
Assets			
Total current assets	6,718,909	5,774,000	6,478,968
Total non-current assets	708,581	621,000	508,174
Total assets	7,427,490	6,394,000	6,987,142
Liabilities			
Total current liabilities	3,702,108	4,000,000	2,498,758
Total non-current liabilities	170,779	0	84,634
Total liabilities	3,872,887	4,000,000	2,583,392
Net assets	3,554,603	2,394,000	4,403,750

The year-to-date actual expenditure of \$9.461 million was \$0.289 million ahead of budget.

Recruitment to support the strategic project area is getting underway slightly later than planned. This is offset by marketing campaign and co-funding initiatives being well advanced for the year-to-date. The first round of the 2019/20 Prime Minister's Scholarships applications were assessed in October 2019 and have not been paid yet, a small credit relates to a wash-up for a previous scholarship round.

Lead international education thinking

Reform of Vocational Education

ENZ developed communications to support the Reform of Vocational Education announcements made on 1-2 August. This includes a series of questions and answers that form the basis of the information we share with stakeholders.

ENZ Chief Executive Grant McPherson met with the Chair of the New Zealand Institute of Skills and Technology (NZIST) Establishment Board Barry Jordan. It was agreed that ENZ and NZIST will cooperate on marketing, messaging and public relations for international education within the new institution.

Joint work programme with Immigration New Zealand

ENZ and Immigration New Zealand (INZ) agreed to a detailed Joint Work Programme to support the international education sector by sharing clear, consistent and relevant information. The Work Programme includes:

- a joint Communications Plan with INZ and ENZ key messages and a plan for a range of communications activities until the end of the year
- coordination of market strategies ([REDACTED] are initial priorities) to ensure agencies are aligned in terms of marketing and promotion activities
- improving student outcomes through a student visa application checklist to guide the sector, education agents and students/parents to provide decision-ready applications
- exploring opportunities to identify potential high value students for providers through sharing of data-sets between the agencies.

*Withheld under s6(a)
of the OIA*

ENZ supported INZ's development of a first-time visa application checklist which was published on INZ's website. The checklist assists student visa applicants to provide decision-ready applications and defines what these are. The sector's peak bodies were informed about the checklist at a monthly peak bodies forum meeting and ENZ updated its digital platforms with links to the checklist. The checklist was also circulated to ENZ's in-market staff to ensure that they are aware of it and can share it with their contacts when appropriate.

Industry digital partnerships

ENZ engaged with the sector on an Enrolment Opportunity Service (EOS) to enable providers to leverage ENZ's digital marketing capability and resources. This secure digital service enables prospective student leads from the ENZ student database to be piped directly into intuitions' own sales funnels and means that participating institutions (such as Massey University) can respond to leads automatically. This lowers the institution's cost per acquisition and achieves resource efficiencies.

The school sector does not have the digital capability at an individual school level to link to EOS, so we have developed a partnership with Enroller to enable participating schools (currently over 50) to access the EOS service via the Enroller ed-tech platform. Initial feedback from providers indicates that this is a valuable initiative and we are continuing to work on addressing barriers to scale.

Promote an excellent education and student experience

StudyInNewZealand.cn

ENZ has increased its digital presence in China with the launch of a China-hosted version of the StudyInNewZealand website. This is a significant accomplishment and is the culmination of over 12 months of work. The new website has a China domain name, has been search engine-optimised and is tracked with Baidu analytics (China's equivalent of Google). The site has been integrated with ENZ's database marketing system, enabling ENZ to follow up leads and capture marketing data and insight. The new site works strategically with ENZ's account on WeChat, China's most popular social media app. ENZ has had an account on WeChat since 2014 (currently over 53,000 followers) and launched MyStudyNZ on WeChat in 2018.

AgentLab

ENZ's AgentLab was launched on 8 July to connect agents with the tools, training, and information they need to promote New Zealand accurately and with confidence. In the first 48 hours over 530 people registered to use the platform. AgentLab. It is designed to be useful for all education agents regardless of their current understanding of the New Zealand international education system, or their prior experience working with New Zealand education providers. New content and information will be added to the platform regularly, with three new training courses scheduled to be added in the next two months.

Mental health resource for providers and teachers

The Schools International Education Business Association (SIEBA), in partnership with ENZ, created a new mental health resource for those working with international secondary school students. The free resource was launched on the SIEBA website and is available for all providers and teachers. The resource includes information on common mental health issues, and barriers that may prevent international students from seeking support. There are also downloadable resources and links to key health care providers.

Grow sustainable international education

Rugby World Cup 2019

From 21-26 September, ENZ coordinated several in-market events and meetings to leverage the Rugby World Cup 2019 and the Prime Minister's visit to Japan:

- ENZ participated in a consumer event in Tokyo run by Tourism New Zealand. During the event the Prime Minister and former All Blacks Captain Ritchie McCaw met with 20 Japanese alumni of New Zealand education institutions. Photographs from the event will be used for in-market public relations activity.
- ENZ ran an Education Fair for prospective international students and their parents, which included representatives from New Zealand schools, English language providers and universities.
- ENZ ran an Agent Seminar in Tokyo.
- ENZ met with the Hokkaido Board of Education to discuss common interests and potential opportunities for future agreements. Insights from the meeting have been shared with New Zealand international education providers.
- ENZ Chief Executive Grant McPherson attended the Prime Minister's luncheon in Tokyo, hosted by the Australian and New Zealand Chamber of Commerce, and attended a New Zealand Trade and Enterprise reception with Japanese business members.
- Mr McPherson gave several media interviews while in Japan.

During the events, ENZ promoted the 'Think New' education brand and 'I am New' brand messaging.

National Association of College Admission Counseling

ENZ facilitated the New Zealand presence at the National Association of College Admission Counseling (NACAC) annual conference in Kentucky, United States of America. The annual conference attracted 6,000 attendees and is the largest business to business conference in North America focused on full degree recruitment. This is an important conference for promoting to college counsellors, independent education consultants and other admissions representatives.

Five universities were represented at the New Zealand booth, including the universities of Otago, Auckland, Massey, Waikato, and Victoria University of Wellington. ENZ, the University of Otago and Victoria University of Wellington presented sessions at the conference on 'Expanding the College Search: Think New Zealand' and the 'Impact of Semester Study Abroad on College Applications'.

Agreements between New Zealand and overseas education providers

During the quarter, ENZ supported agreements between New Zealand and overseas education providers.

ENZ and the New Zealand Ambassador to China attended the launch of Aulin College, a joint school between the University of Auckland and Northeast Forestry University in Harbin, China. The College will deliver both undergraduate and postgraduate programmes, and PhD programmes in computer science and technology, biotechnology, and applied chemistry. Total combined offshore enrolments are capped at 1,200 with a forecast 45% transfer rate through to the University of Auckland, for an estimated potential of 700 cumulative onshore EFTS by mid-2026 (figures commercial in confidence).

ENZ hosted a signing agreement ceremony in Santiago, Chile to celebrate three new agreements between Auckland University of Technology (AUT) and three top Chilean Universities. Led by AUT's Faculty of Design and Creative Technologies, the 'FUTURESPACIFIC' agreement, one of the three agreements signed, is planned for an initial three-year period with establishment funding from (which may be cash and/or 'in-kind' contributions to the value of NZ\$200,000 per year) from each university.

Mutual recognition for aviation pilot licences with Saudi Arabia

The Civil Aviation Authority of New Zealand (CAA NZ) and the Saudi General Authority of Civil Aviation (GACA) signed a mutual recognition agreement for aviation pilot licences at the International Civil Aviation Organisation Annual Assembly. The agreement, signed following an ENZ-sponsored Saudi aviation delegation visit to New Zealand in 2018, paves the way for aviation pilot training providers to receive sponsored Saudi students. Saudi first-time student visas have increased 65% in 2019 (+60), following several scholarship cohorts being secured.

Familiarisation visit to New Zealand

ENZ hosted a familiarisation visit to New Zealand for study abroad professionals from the United States, an education agent from France and an education agent from the United Kingdom. The group visited all eight New Zealand universities, looking at the range and quality of study opportunities and campus experiences in New Zealand. ENZ also worked closely with relevant

regional economic development agencies to coordinate an integrated itinerary that highlighted the academic strengths of each university and showcased each region or city, giving the delegates a true feel for students' daily life.

The familiarisation visit provided the delegates with an enhanced understanding of the New Zealand education experience and New Zealand's unique bicultural society, and set the framework for establishing new (or building on existing) partnerships. As with previous delegation visits from the United States and Europe, ENZ's goal is to boost New Zealand's profile with key influencers in the study abroad space, to support strengthened and innovative relationships through research collaboration or joint presentations, in addition to increasing student mobility.

Develop global citizens

He Aputahi Taketake delegation visit to Chile

ENZ accompanied He Aputahi Taketake delegation to Chile in July for an indigenous education leaders' project, with a focus on improved outcomes for indigenous learners and the growth of indigenous enterprise. He Aputahi Taketake connected with leaders from Chile's Mapuche community to explore language revitalisation and the inclusion of indigenous education in our respective school systems. The group included four kaiako (teachers), four tumuaki (principals) from Waikato secondary schools, and Waikato-Tainui's General Manager for Education and Pathways and Manager for Te Reo and Matauranga.

The project was initiated by Waikato-Tainui and the University of Waikato's Te Whai Toi Tangata, with funding from the Latin America Centre of Asia Pacific Excellence. ENZ supported the relationship development between the organisations and facilitated the farewell event for the delegation at the New Zealand Embassy in Santiago, with the support of the Ministry of Foreign Affairs and Trade.

Our organisational development

Te Rautaki Māori

ENZ launched its Māori name, *Manapou ki te Ao*, to staff during Te Wiki o te Reo Māori from 9-15 September. *Manapou* means supporting and sustaining life which allows growth and progression, while *ki te Ao* means to the world. By weaving both names together ENZ has a name that shows how we support the international education sector by nourishing and empowering, New Zealand education enables students to flourish and provides the next generation of problem solvers to the world.

Updated corporate branded materials being rolled out as part of the wider rollout of the refreshed 'Think New' brand will include *Manapou ki te Ao* in the New Zealand Fern logo. ENZ will share *Manapou ki te Ao*, and the story behind it, with stakeholders and providers, and encourage them to embrace it and feel ownership.