

Summary of planned shifts in your 2020-2022 Investment Plan

Instructions for filling in this template

**What is this?**

This is a new template required for the 2020-2022 Investment Plan process. It replaces the requirement to submit a draft Plan.

The template is designed to support Investment Plan (Plan) engagement by capturing the high-level shifts you propose to make in response to the government’s priorities. This will enable us to have early discussions on key strategic areas as you develop your Plan.

Please refer to the [Tertiary Education Strategy 2014-2019](http://www.education.govt.nz/further-education/policies-and-strategies/tertiary-education-strategy/), [Plan Guidance for 2020](https://www.tec.govt.nz/funding/funding-and-performance/investment/plan-guidance/), and the Investment Briefs and Focus Area Briefs in the [Investment Toolkit](https://www.tec.govt.nz/funding/funding-and-performance/investment/investment-toolkit/) for more information about the government’s priorities.

**Who needs to complete this?**

You are required to complete this if you are: a tertiary education institution; an industry training organization; or a private training establishment that was in receipt of more than $5 million of TEC funding in 2018.

**How to complete this template?**

Some examples of the type of content this template is designed for are included. Please delete these as you complete the template.

This template must be submitted using the document upload function in Workspace 2 by 30 April 2019.

**What else do you need to know?**

Your Relationship Manager will discuss this template with you as part of our engagement over your Plan for 2020-2022.

**Key notes:**

• This template replaces the requirement to submit a draft Plan. Please talk to your Relationship Manager if you wish to submit a full draft Plan instead.

• The template does not form part of your Plan. It should provide a high-level indication of, and be consistent with, the more significant proposed shifts and initiatives that you subsequently present in more detail in your Plan. You do not need to detail every proposed change you intend to make.

• The document has a simple format, to encourage you to give a concise summary of the most significant shifts that you are planning and the expected impact on government priorities.

• Proposed changes in provision or performance should be quanitifed in estimated EFTS/dollars or other relevant metrics, e.g. EPI percentage shifts.

• Any planned changes in response to post study outcomes (PSO) data or low-performing provision should be included in the template.

| **Summary of planned shifts for 2020-2022** | | |
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| **TEO Name:** | | **EDUMIS Number:** |
| **Government priority area** | **Brief description of proposed shift/initiative and its expected impact** | **Expected changes in EFTS/dollars and/or performance** |
| E.g. Tertiary Education Strategy Priority 1 – Delivering skills for industry  E.g. Focus Area Brief on Innovation  E.g. First year retention at Level 7 (degree) for Māori learners  Please discuss the areas you will cover with your Relationship Manager. | E.g. We are changing our first year equity support to improve our first year retention for Māori  E.g. We are partnering with employers to ensure our graduates have more relevant industry experience  E.g. We’re offering this programme to more learners. Our stakeholder engagement and research shows it meets a specific regional need and is linked to good outcomes for our graduates in the PSO data  E.g. We are restructuring this part of our business to improve our ability to deliver on our mission and role in the system | E.g. increasing this provison by 50 EFTS over three years  E.g. lifting our First Year Retention at Level 7 (degree) for Māori learners rate by 5 percent over three years |
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