

20th July 2020

Dear members,

We are pleased to now share with you the school sector future focus plan for consultation. Future focus plans are an Education New Zealand initiative that encourages each sector peak body to develop a plan to support innovation and growth in response to the Covid-19 crisis.

As part of the initiative, ENZ has provided seed funding for approved plans with the aim of encouraging new approaches to a range of areas of international education. Developing the plan into more detailed projects will comprise one stream of work for SIEBA while we continue to support schools through our usual resource, PLD and advocacy services.

The projects that are proposed within this plan have been put forward by SIEBA and are intended to advance our sector after the damage caused by Covid-19. The projects seek to take us from the crisis that we currently face to a stronger more efficient and resilient sector for the future. However, the projects within this plan are not exhaustive and not all may proceed to implementation.

We are now seeking your feedback and input to the proposed projects and we look forward to exploring these with you in more detail in the coming weeks. You can engage with us on this plan in several ways:

1. Attend one of four consultation workshops.

The workshops are:

Christchurch:	Thursday, 30 th July	9.30am – 12.30pm
Dunedin:	Friday 31 st July	9.30am – 12.30pm
Auckland:	Monday, 3 rd August	9.30am – 12.30pm
Wellington:	Tuesday, 4 th August	9.30am – 12.30pm

Venues will be confirmed in the coming days and registrations will open on Eventbrite on Wednesday, 22nd July. <https://sieba.eventbrite.co.nz>

1. Make a written submission

You can make a written submission on the plan to be received by SIEBA no later than Friday 7th August 2020. Submissions should be addressed to Nik Morais nik@sieba.nz.

2. Complete an online survey

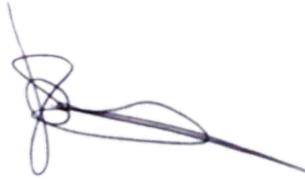
A link to an online survey will be available from 5th to 7th August.

3. Join a consultation webinar

For those unable to join a workshop in person, join our consultation webinar on Wednesday 5th August. The link to the webinar will be available soon.

Thank you very much to those who have assisted in the preparation of this draft plan and we look forward to the opportunity to explore these projects in more detail with you over the coming weeks.

Nga mihi nui



John van der Zwan
Executive Director

International education future focus plan for the school sector

30th June 2020

Purpose

This plan has been developed by SIEBA to guide innovation in international education across the New Zealand school sector. This plan outlines priorities for innovation for the school sector. It also identifies priority innovation projects for implementation.

Context

New Zealand's international education industry has been significantly impacted by the COVID-19 pandemic. It has highlighted the high degree of reliance that the industry has on inbound student recruitment and has engendered rethinking of 'business as usual' approaches. ENZ has provided support to SIEBA to help the school sector navigate an unprecedented time of strategic uncertainty.

Under the Future Focus Programme, ENZ has provided SIEBA with \$200,000 in seed funding to implement a two-step framework. The first step of the framework is for SIEBA to develop a future focus plan to identify priorities for innovation in the school sector. The second step will see the initiation of priority innovation projects to deliver on the plan. Innovation projects will focus in the areas of product development, online delivery, new business models and the development of innovation capability.

This programme explicitly focuses on innovation, rather than business as usual. In doing so, ENZ wishes to see the school sector adopt new ways of working for the future to mitigate the impacts of COVID-19 related developments. This is an opportunity for SIEBA to work with the school sector and ENZ to reimagine international education for the future.

International education in the school sector

International education in the school sector comprises state, state integrated and private schools. The regulatory framework for international education does not differentiate between state and private schools, and in many ways, international departments in New Zealand state schools operate as privatised businesses within the state sector.

International enrolments in New Zealand schools range from multi-year academic pathways to short term groups and study tours. Schools enrolling international students span New Zealand and range

from small regional schools to large schools in our main centres. These include primary, intermediate, and secondary schools.

The autonomous nature of the sector results from the Tomorrow's Schools education framework. Under this framework, schools have operational autonomy to make most education and business decisions at school level. As a result, both resourcing costs and proceeds from international student enrolments are managed as locally raised board funds rather than as state funding from central government.

The autonomous nature of the sector brings both advantages and disadvantages

Advantages include:

- High levels of personalised local care for students
- Flexibility to tailor programmes to meet the needs of student cohorts
- Value propositions can be localised to meet niche opportunities
- Strong personalised relationships are built between schools and agents
- Schools can decide how international revenues are spent based on the needs of local school communities

Disadvantages include:

- Large variation in quality of service and capability
- Difficulty implementing effective collaboration
- Low levels of efficiency and scale across the sector
- Over reliance on individual schools travelling overseas for student recruitment
- Complex and time-intensive proposition for agents
- Lack of timely enrolment and market intelligence for the sector
- Lack of cohesion and ability to develop a school sector brand

Features of the school sector

Current features of the school sector include:

- 23,577 students enrolled in New Zealand schools during 2019
- This represents 13,520 full time equivalent students making the school sector second largest
- Secondary schools saw 3% growth for 2018 while primary schools grew 23%
- Direct international student revenues to signatory schools totalled \$201,603,646 in 2019
- Inbound study tours generate further revenues for the school sector
- Total economic value of the school sector for 2017/ 2018 was \$880m
- China is our largest sending market followed by Japan, Korea, Germany, and Thailand.

- 56% of all international students currently enrol in schools in the Auckland region

New Zealand schools currently offer a limited range of education products. These include:

- Multi-year academic pathways including NCEA, Cambridge and IB
- English proficiency programmes
- Enrolments from 1 to 4 terms focussing on cultural capability and life experience
- Short term study tours

The New Zealand school sector features an over-reliance on inbound enrolments with online delivery remaining largely undeveloped.

Agents from our key markets face difficulty in working with the school sector reporting variability in workflows, differences in business processes, and low levels of efficiency for enrolment and other administration tasks.

As peak body, SIEBA provides services to connect and lead the school sector, however, a lack of timely data to support decision making remains a major challenge and this presents a significant barrier to innovation and growth planning.

The impact of COVID-19

The school sector has been impacted significantly by the coronavirus pandemic. Key impacts include:

- The closure of borders has meant new and returning international students have been unable to travel to New Zealand to assume studies
- Repatriation efforts have seen a number of international school students return to their countries of origin
- It is unclear when international students will be able to start travelling to New Zealand again
- Covid-19 has highlighted the high reliance the school sector has on onshore enrolments
- There has been increased demand for virtual and online offerings, including marketing, recruitment services and distance learning
- Marketing and recruitment activities have been curtailed due to border closures around the world

Despite these negative impacts, significant opportunities exist, and these include:

- Approximately 10,000 students have remained in country during the lockdown and may consider extending their enrolment

- Due to the positive international acclaim from New Zealand's response, destination attractiveness may be increasing for school-age students
- Some competitor markets are in a less favourable position. China has warned residents not to travel to Australia, US remains in a state of unrest and afflicted by Covid-19 and Canada still has some lockdown measures in place.
- New Zealand educators and professional staff have been agile in working online proving that the capability exists
- Representatives from across the school sector have supported their international students in an unprecedented, dynamic, and complex environment

Innovation priorities and impact

The following innovation priorities have been identified for the school sector:

1. Development of a recovery planning framework

Due to continued border restrictions, the coming 1 to 18 months is uncertain for the school sector as it is for many others. Planning during this time is very difficult with many schools focussed on the day to day implications of the immediate crisis. This project will result in a framework for schools to identify and re-focus on rebuild activities during this time. The framework will be future-focussed and direct attention towards fresh approaches to key areas of international education. The framework will be supported by SIEBA professional learning and development such as resources, webinars, and workshops.

Proposed phases for the framework:

I. July to December 2020 – Get your house in order

- **Product development:** How reliant are you on inbound enrolments and what options do you have?
- **Market mix:** Where does your marketing effort go? How is it balanced between face-to-face and online?
- **Recruitment planning:** How are you going to undertake recruitment while borders remain closed? Are you prepared for virtual fairs?
- **Resourcing:** What changes do you need to make due to reduced budgets and staffing? How will you ensure you retain sufficient capability to provide ongoing student care and be well-positioned when borders re-open and demand resumes?
- **Stay informed:** Have you read the student experience survey and other government publications to assist in your planning? What changes can you make to student experiences at your school to help improve things for when students return?
- **Self-review:** How are you placed for compliance and business systems?

II. January to December 2021 – Implement new approaches

- **Product roll-out and further development:** What are you going to offer students? Consider those who can get to New Zealand and those who can't.
- **Market engagement:** How are you going to maintain current relationships with agents and build new ones for the future? What market presence do you need for 2021?
- **Recruitment activities:** Will you attend virtual fairs, use online enrolment technologies or social media? Is your website up to the task for effective recruitment of students?
- **Budgeting:** Have you allowed budget for marketing without offshore travels?
- **Product review and refinement:** How will products be improved to better meet the needs of students and your school?
- **Continuous improvement:** What processes will you have to review and improve your approach to marketing, recruitment, and product development?

2. Explore approaches for combining autonomy with more efficient core services

The current autonomous model for New Zealand schools brings advantages and disadvantages. This project will explore combining autonomy with more efficient core services to increase consistency, improve access to real-time market intelligence and contribute to a sustainable school sector brand while retaining the value offered through school autonomy.

This project will explore approaches for streamlining:

- **Student enrolment processes:** How can processing be improved to achieve consistency for schools, agents, and students and make better use of enrolment resourcing?
- **Contracts, refunds, and disputes:** How can we achieve consistency and improve legal outcomes across the sector for students and schools?
- **Market intelligence:** How can we maximise the capture of timely lead and enrolment intelligence for schools and the sector as a whole?
- **ENZ pipelines and campaigns:** How can we maximise outcomes from ENZ developed pipelines and online campaigns for the school sector?
- **School sector brand:** What effect will a more efficient approach to core services have on the brand perception of the school sector?

3. Research a quality standards framework for the school sector

While we have a Code of Practice for international education, the Code offers a minimum consumer guarantee framework but does not ensure high quality and consistent services by signatories. Furthermore, the autonomous nature of the school sector leads to a large variation in the quality of services provided by schools. SIEBA has developed many resources

to encourage consistency across business, care, and accommodation services, however, use of SIEBA resources remains voluntary and at the discretion of schools.

This project will research quality standards frameworks used by other organisations and offer recommendations relating to a quality standards framework for the school sector. In making a recommendation, this project could consider:

- Current business practices employed in the school sector
- Approaches for marketing and promotion
- Website and online effectiveness
- The value of the New Zealand School brand
- Educational outcomes linked to internationalisation and cultural competence
- Resourcing and workforce capability
- Leadership capability
- Professionalisation across all parts of the supply chain
- Sustainability and environmental factors
- Accommodation practices

4. Development of a resource to build international education leadership capability for principals and boards of trustees for innovation, investment, and sustainability

As key decision makers for international education in schools, principals and other school leaders are key stakeholders when considering innovation and rebuilding the sector. This project aims to develop a comprehensive resource to support principals to invest in and adopt innovative, long term and sustainable practices in their schools. This project will prepare a draft resource and seek support from school leaders and allied leadership groups such as SPANZ, NZPF, NZSTA, ENZ, MoE and NZQA to achieve maximum influence and encouragement for innovation.

Through a purposeful focus on school leadership, this project seeks to facilitate professionalism and investment across the sector. To achieve this, the project will focus on innovation, investment, and sustainability in areas such as:

- Marketing
- Recruitment
- Resourcing
- Product development
- Finances
- Staffing
- Compliance

5. Explore online and blended product development options for the school sector

The school sector has long considered the provision of online and blended options for school-age international students. However, despite recognition that these are important opportunities, they have not yet been progressed or developed into a sustainable product range for New Zealand schools. Reasons for this include:

- Low incentive from strong inbound enrolments
- Perceived complexity in delivery
- Regulatory barriers such as approvals and quality assurance

The onset of Covid-19, however, has forced schools to offer learning online to students within New Zealand and offshore. Through this process, schools have recognised capability to deliver online learning to international students and now recognise potential to develop online New Zealand high school preparation products.

Furthermore, temporary approvals for online delivery have been put in place by Government in response to the impact of Covid-19 for students enrolled but unable to enter New Zealand. This provides test case for successful delivery of online learning to international students by New Zealand schools. In addition, temporary approval has been provided for assessment of NCEA offshore which, if successful, will support future proposals for NCEA offshore delivery and assessment.

This project will scope opportunities and barriers to online provision of preparatory courses and education content to foreign students living outside New Zealand. Online provision may successfully:

- Reduce dependence on onshore enrolments
- Strengthen our enrolment pipeline and improve onshore enrolment pathways
- Improve the readiness of students to be successful in the New Zealand education system
- Reduce our carbon footprint
- Increase New Zealand's product range to international students
- Support students enrolled but currently offshore

6. Research business models and support for primary and intermediate schools

The primary school sector was the fastest growing for 2018 with a 23 % increase in equivalent full-time enrolments from the previous year. Even though enrolments are low in number compared to other student cohorts, they are highest in economic value and this results from the requirement for these students to live with a parent in New Zealand. This growth

highlights significant opportunity stemming from increased demand to establish our primary school sector as a niche area of international education. The primary school sector further serves as an important pathway to other schooling areas and tertiary enrolments in the future.

Covid-19 has forced a review of the current Primary Schools Programme (PSP), currently one of the main support programmes for primary and intermediate schools. Alternative approaches to building capability for the primary and intermediate area of the school sector are now needed to ensure recent gains continue as part of the rebuilding process. This project will investigate options to better support and build capability for primary and intermediate schools.

Proposed impact of this plan

This plan has been developed in-order-to bring about changes in sector behaviours, business models, products, and capability.

	Proposed impact
Sector behaviours	<p>What behaviours will this plan encourage?</p> <ul style="list-style-type: none"> • Improve the sector’s focus on customer service • Improve efficiency for the sector and aid consistency • Enable school leaders to support rebuild and growth • Reduce our carbon footprint as a sector • Increase the use of technology for enrolment, recruitment, and administration
Sector business model	<p>How will this plan change business models?</p> <ul style="list-style-type: none"> • Introduce more efficient core business functions • Better support low resourced schools • Retain successful elements of school autonomy • Improve collaboration and better allocation of resources
Sector products	<p>What new products does this plan anticipate?</p> <ul style="list-style-type: none"> • Online and blended learning options developed by schools • Preparation courses to improve student readiness for learning in New Zealand including English preparation, cultural competence, and local content • NCEA options for foreign students located offshore
Sector capability	<p>What capability needs to be developed to implement new ways of working?</p> <ul style="list-style-type: none"> • Capability to capture data and transform into market intelligence for decision making • Business and product development capability for school leadership • Operational capability for school staff • Improved online marketing and recruitment capability • Improved customer focus

Future focus projects

	Project title	Description of project	Key actions / steps	Timeframes	Key resources	Total investment
1	Develop a recovery planning framework	<p>This project aims to:</p> <ul style="list-style-type: none"> • Guide schools through the recovery and rebuild process • Set the focus for activities over an 18-month time frame • Prepare schools for innovation and new approaches <p>This project will achieve this by:</p> <ul style="list-style-type: none"> • Setting markers for the completion of activities • Providing templates for rebuild planning • Providing support PLD through resources, webinars and workshops <p>This project will engage the sector through:</p> <ul style="list-style-type: none"> • Consultation with school leader networks (SPANZ, NZPF, STA) • Consultation with ISNZ • Consultation with SIEBA board of directors • Consultation with school international staff 	<ul style="list-style-type: none"> • Document a draft recovery planning framework • Engage with stakeholders • Refine framework • Develop resources and plan PLD support 	<ul style="list-style-type: none"> • Planning phase: July to August 2020 • Implementation phase: September 2020 to December 2021 	<ul style="list-style-type: none"> • Staffing • PLD 	\$30,000
2	Investigate approaches for combining autonomy with more efficient core services	<p>This project aims to:</p> <ul style="list-style-type: none"> • Improve efficiency for the sector • Reduce waste and increase the use of technology for enrolment and administration • Improve workflow outcomes for agents 	<ul style="list-style-type: none"> • Investigate and identify services to be considered for efficiency • Prepare a proposal setting out possible approaches 	<ul style="list-style-type: none"> • Proposal draft – end of term three 2020 • Consultation and engagement with stakeholders 	<ul style="list-style-type: none"> • Staffing 	\$40,000

		<ul style="list-style-type: none"> Contribute to a strengthened school sector brand <p>This project will achieve this by:</p> <ul style="list-style-type: none"> Identifying services that could be delivered consistently across all areas of the sector Understand the barriers and opportunities for agencies and schools relating to more efficient core services <p>This project will engage the sector through:</p> <ul style="list-style-type: none"> Consultation with school leader networks (SPANZ, NZPF, STA) ISNZ, SIEBA board of directors, school international staff and agents 	<ul style="list-style-type: none"> Consult with stakeholders Refine framework Progress proposal with key decision makers (Govt, private stakeholders, Sector groups) 	<p>during term four 2020</p> <ul style="list-style-type: none"> Draft proposal finalised by end of 2020. Socialising and advancement of a proposal during 2021 		
3	<p>Research a quality standards framework for the school sector</p>	<p>This project aims to:</p> <ul style="list-style-type: none"> Improve the quality of services offered by New Zealand schools Support the development of a school sector brand Achieve consistency across key workflows for international education <p>This project will achieve this by:</p> <ul style="list-style-type: none"> Offering a framework for quality service delivery Providing a mechanism to monitor and manage the provision of services <p>This project will engage the sector through:</p> <ul style="list-style-type: none"> Engagement with international staff 	<ul style="list-style-type: none"> Research QS frameworks Engage with stakeholders Prepare draft proposal Review and refine the proposal 	<ul style="list-style-type: none"> Research July to August 2020 Engage with stakeholders September 2020 Prepare draft proposal by December 2020 	Staffing	\$40,000

4	<p>Develop a resource to build international education leadership capability for principals and boards of trustees</p>	<p>This project aims to:</p> <ul style="list-style-type: none"> • Improve capability for international education leadership • Provide support to enable continuous improvement thinking • Prepare the school sector for growth through investment in sustainable and long-term business approaches <p>This project will achieve this by:</p> <ul style="list-style-type: none"> • Providing school leaders with comprehensive information on international education leadership • Linking school leadership capability with quality standards for the school sector • Collaborating with school leaders' networks <p>This project will engage the sector through:</p> <ul style="list-style-type: none"> • Engaging with allied leadership groups such as SPANZ, NZPF, NZSTA, ENZ, MoE and NZQA. 	<ul style="list-style-type: none"> • Develop a resource framework • Draft content • Engage with stakeholders • Review and refine the resource 	<ul style="list-style-type: none"> • Develop framework July to August 2020 • Draft content August to December 2020 • Engage with stakeholders during first quarter 2021 • Review and refine by June 2021 	Staffing	\$40,000
5	<p>Explore online and blended product development options for the school sector</p>	<p>This project aims to:</p> <ul style="list-style-type: none"> • Identify options for blended and online delivery • Identify barriers to online delivery • Recommend initial online products for schools <p>This project will achieve this by:</p> <ul style="list-style-type: none"> • Investigating current online delivery and blended learning products 	<ul style="list-style-type: none"> • Review current provision • Review legal framework • Identify barriers • Make recommendations for initial online products 	<ul style="list-style-type: none"> • Explore current provision and legal frameworks – July to August 2020 • Identify barriers August 2020 • Make recommendations by December 2020 	Staffing	\$30,000

		<ul style="list-style-type: none"> Review the current legal and regulatory framework for online delivery by schools <p>This project will engage the sector through:</p> <ul style="list-style-type: none"> Engagement with international staff Engagement with private sector providers 				
6	Research business models and support for primary and intermediate schools	<p>This project aims to:</p> <ul style="list-style-type: none"> Increase the number of primary schools enrolling international students Better allocated and use scarce primary and intermediate school resources Improve capability of international education staff Build improved pathways from primary to secondary schools <p>This project will achieve this by:</p> <ul style="list-style-type: none"> Investigating alternative business models for primary and intermediate schools Proposing a range of business models for the sector Targeting capability PLD at primary and intermediate school leadership and staff <p>This project will engage the sector through:</p> <ul style="list-style-type: none"> Engagement with international staff Engagement with primary school leaders 	<ul style="list-style-type: none"> Identify current barriers and pain-points Identify key resourcing needs Develop options for effective business models Identify PLD needs for staff and leadership 	<ul style="list-style-type: none"> Identify barriers and resource needs – July to August Develop options August to September Consult and review October to December Implement 2021 	Staffing	\$20,000

Review

Review of this plan will initially occur in accordance with the Education New Zealand Future Focus Programme. Thereafter, ongoing review will monitor and manage progress toward outcomes for successful projects.

Plan owner

This plan is managed by:

John van der Zwan
Executive Director
SIEBA