**Warwick Pitts – Ōritetanga Learner Success Conference, August 2019**

[MUSIC PLAYING]

Two confessions, first of all. One is that the poster spam that is on the wall all around you is from the outputs from the work that our guests-- our team have been doing. They kind of show both the qualitative and quantitative research outputs. So if you get a chance to look at it throughout today and tomorrow, please do. And do ask any of the team any questions.

The second confession is being a sponsor of a project gives you some rights, which is the ability to emotionally blackmail others to come and do a presentation with you. So I've actually got the wider Wintec project team here who will do most of the talking today. And I would just like to introduce them to you, if that's OK.

Mark McGeady is a senior business analyst at Wintec. Debbie Preston from the Design Factory New Zealand, a Wintec part of faculty, and Kate Wynyard, Wintec student experience manager. They, thankfully, will do most of the talking and chatting as we kind of go through our journey on applying Learner Success Framework.

Perfect. So the purpose of today. Today, we're going to outline our progress in applying our Learner Success Framework, which, at its heart, is an institutional level change framework. Most of the time will be spent over-viewing our insights from the analysis and planning phase of the framework. We've been calling this phase internally, "going from we think to we know" about our students. Because it's given us a better understanding of our students' needs and the opportunities that this knowledge then affords us to further support them in their study but, more importantly, in their life.

We will wrap up with a brief overview of prototype momentum strategies and business models that the team have been developing. As you were entering, I guess, this morning, you would have seen, hopefully, a printed handout. There is a version of the Learner Success Framework there that has been floating around for most of the day. In essence, what the framework is is a process for developing and implementing holistic student success strategies. Importantly, the framework is underpinned by data and insights. We seek to understand where attrition is happening, why it is happening, and more importantly, who it is happening to.

In response, momentum strategies are created to address these attrition points. It draws on international best practice, but, I must stress, it has been contextualised for New Zealand context. At its heart is the use of data and insights, as I said before, moving from "we think to we know" about our students, and putting them, ultimately, at the heart of a redesigned organisational operating model. We are at about the blue stage of the framework where we have been integrating 13 different data points, qualitative and quantitative research, and developing momentum strategies as we get a better understanding of our students and the things that impact their success and their general life.

I just thought I'd just spend a couple of second just on why is this actually important. We all know that parity gaps and issues around participation, retention, and completion are systemic, complex, and multi-dimensional. There is no silver bullet for this. And that there are pockets of good things happening in the sector to address parity. But patterns, as we've seen before, are largely staying the same.

The examples on the slide are ITP sector parity gaps. They widen if we include other TEOs, so it's a very real issue for us all. The benefits, if we get this right, are substantial. There are many different data sources that we could have used. The paragraphs on the right are ones that spoke to us, personally, as a project team. Because it begins to pull educational outputs into economic outcomes. And for us, that was the things that we're going to look at as we're driving the change in our organisation.

So as we began to understand our attrition data, we began to translate, in draft form at this moment, what our economic and societal impact could be if we are successful in increasing participation and success in education. It becomes quite compelling and can be a strong anchor for change efforts as we adapt our organisational model.

That diagram that looks like a rainbow has exploded on the screen is our research approach. It's our way that we are using data analysis, student journey mapping, and the momentum strategy development. Starting on the left-hand side, the green part, are the 13 data sources that we have used to understand our student cohorts and more importantly, their needs. It uses both quantitative and qualitative research methods.

The quant provides us data on the who, while in-depth student design personas provide us, more importantly, insights on the why. It brings the voice of the student to the fore and anchors what we're trying to do around them. These attrition points are then mapped. At the moment, we have eight across our customer journey to give a comprehensive picture of where we are losing students and why. Once we understand the drivers of attrition and the needs of students, we are then able to design momentum strategies to help retain and for them to be successful.

I now, thankfully, get to hand over to Mark and Debbie who will go into a bit more detail on the data and insights analysis.

Kia ora. Good afternoon, everyone. So just briefly coming back to the image that Warwick showed. On the left is really our information sources. So they really are the engine of our project. The middle is really underpinned by the four phases of the Learner Success Framework. Clarity of the path, students being able to enter the path as they wish, ensuring that they stay on the path, and also ensuring that education happens with deliberate outcomes.

You know, the middle piece of that diagram is really where we create evidence from information. And so this diagram is really mapping out our path to a future state, a future model for our system. And the evidence that is generated in the middle there has manifest itself as evidence of indicators of success and evidence of strategies that we might employ to close some of the gaps that we've identified.

Continuing with our explosive rainbow theme, this is the 2018 attrition data from Wintec. We've modelled between 13,000 and 16,000 students each year from '16, '17, '18, and '19. And this is an example of what one of those models looks like.

So we have eight data segments running vertically. Each one of those eight data segments can be mapped to one of the four phases of the Learner Success Framework. And so what I'd like to do briefly in the next six minutes or so is just go through some of the insights that we have learned from our exploration of attrition.

So this one here is ethnicity. The horizontal lines represent the enrolled cohorts for Māori, Pasifika, and non-Māori, non-Pasifika. The lines above and below for the top represent the difference between those cohort percentages and the percentages of attrition. So you can see for Māori, Pasifika across the entire journey bar, the last segment, that they are overrepresented in attrition statistics. For non-Māori, non-Pasifika-- that's the green-- they are underrepresented across nearly the entire journey. Across the entire student journey.

This is gender. The orange and yellow lines represent female attrition across the student journey. The yellow line is Māori female attrition of the Māori cohort, and as you can see, it is slightly above the female average. Interestingly for Māori males, they attrite at a slightly lower rate than the average male attrition.

Now this slide, in particular, is quite interesting because this kind of information helps us to see the challenge for the EPIs (Education Performance Indicators). Because what it's saying is that there are subsets of our cohorts that are differently sensitive to attrition factors, and that difference in sensitivity is not currently measured by the EPIs. And so, the further we go through this project, the further we can tease out this framework and how we might look at where we overlap the current EPIs.

Just to provide some sort of context for that, approximately 56 percent of the Wintec student population are female. Attrition across the segments ranges between 60 percent to 70 percent and the majority of that is before day one. So our project measures attrition from the first time they cross the Wintec radar. The first time we become aware of them right through to the end, where they might find employment. So we deliberately cast a wide net because that's what's going to give us the insight.

OK. Attrition per age group. And there's really no surprises here. 18 to 24 is the most dominant age group at Wintec. And you can see that they make up the largest proportion of all attrition across the student journey except for the end. Now age mirrors ethnicity and there is a kick down. For Māori and Pasifika, there's a kick down for young people. Attrition increases for older people, and attrition increases for non-Māori, non-Pasifika.

I don't believe that that's a coincidence, and I think that some of our qualitative work will tease out some of the reasons behind that. But it's likely that there are reasons outside of Wintec, where the pull to exit is more desirable than staying. So there are opportunities outside of Wintec for those particular cohorts.

And finally, NCEA qualification. And again, there's no surprises here. Having no qualifications is a key factor in attrition across the pathway. As I said before, one of the key parts of our project is to create evidence of things. And in order to do that, we need to be able to-- we need to better not just understand the who of our attrition, but we need to understand the why. So I'm going to pass over to Debbie and she is going to help join together those two things.

Ko Kinder-Scout te maunga, ko Grand Union te awa, ko Ngāti Ingarahi te iwi, ko Preston te hapū, ko Debbie tōku ingoa.

Very nice to be here with you all. Going to share a few more data sets to help us understand some of the why. No? OK. Oh, you missed that one. OK. So quantitative research that we undertook with-- in focus groups that we undertook with students who left Wintec helped us to understand some of the challenges that they have. And the posters on display have further insights around this as with the other research that we'll go into.

But, briefly, what we found is it's the student's background and their circumstances play a significant role for those who left. One of the main reasons for leaving was financial concerns. There were only 15 percent who said that they were doing well financially. Another main reason for leaving is family commitments. We had 42 percent of participants who have dependents that they're caring for whilst they were trying to study.

Another reason is work commitments. We have two out of three who left Wintec who were also trying to be in employment at the same time. We have 52 percent said that they had commitments outside of study that took up over 20 hours a week. And we had 31 percent that said this is over 40 hours a week.

In the most part, those that left had goals and they related to the study. But in the face of adversity, motivation to achieve these goals dropped. And we'll start to hear some of the why shortly. In addition, 53 percent of the students who faced challenges and left, they left without speaking to anyone at Wintec about it. It's just heartbreaking.

We also asked similar questions of our first-year students. We wanted to understand, as a first year student, what are some of the challenges that you face? So this was done in about 12 weeks into their study. Helped us to explore some of these challenges. And their top three challenges were: balancing work and study, managing finances, balancing family and study. And these challenges rated higher than academic learning, which was fourth highest challenge.

In terms of family commitments, we have one out of three students, these our first year students, who are supporting dependents. 51 percent say that they are missing class due to other commitments. In terms of finances, only 34 percent of our first year students say that they can meet their weekly expenses. In terms of work and study, 80 percent of first year students are working or looking for work, with 35 percent of those experiencing changes in their shifts, and one in three saying their work impacts your ability to study.

When you consider these results with the previous slide, it's showing us that working while studying is a norm. Adding to these statistics, we had 30 percent who were first in family. And 74 percent who said that they had no guidance when it came to deciding what they were going to study. We can see that we have a cohort of students here who are juggling a lot of commitments outside of study that also have financial concerns and lacking guidance. It's also important-- well, it's important for us to note that at this point, 27 percent of these new students say that they had considered leaving.

The team undertook qualitative research. There were 35 in-depth interviews and this provided a really rich data set. Analysis of these as well as focus groups with leavers identified distinct persona, and you'll see some of these persona around the walls. Persona are a fictional character. They're based on research, and in human-centered design, we use them to help people connect to the data to help understand the person, their needs, their motivations, their goals, and their expectations. Persona are an aggregation based on research, based on common needs, but they are not definitive.

Nine distinct persona were identified, and we'll go into further detail on five of these soon. In order to better understand the students' total experience, we mapped the journey of each of our nine personas. A journey map is a visual representation of the interactions that customers have. And the broader you define your customer experience, the more opportunities there are to elevate. So we take a really wide net on this.

This is another exploding rainbow, and we're good at these, right? And so across the top there, you'll see the yellow Post-its. Those are every interactions that we heard students talk about during the interview. So these are the things that they say happen, and they're in the order of when they happen, pretty much.

Then we have each of the nine personas tracking through these interactions. Based on the research, how do they experience that interaction? Is it a pain point? Is it a delight point? And what are they saying about that? Why is it painful? Why is it delightful? So this has been helpful for us to understand in greater detail what our students are actually experiencing.

Next, we'll take a look at four of our persona. These are Rimu, Bronwen, Matiu and Tina. They help us to understand a little bit more of the why behind the attrition data. They represent some of the students that have more complex needs. So as we go through, we'll watch a short video. These are actors, but what they're saying are real statements that were made.

So this is Rimu. Rimu is Māori and he's aged between 16 and 24. Let's meet him.

[VIDEO PLAYBACK]

- I want to go somewhere in life. Growing up, I was just thinking about the basics, like food, staying warm, getting myself up. I helped raise my younger sisters. I wasn't thinking about study. It was tough. At school when I was picked on, I found a place to hide. I was pretty lost. There weren't any adults to guide me. What do I need? I need someone beside me. Someone to ask when I need help. I need a tutor with a practical teaching style, and someone who wants to connect with me. In my class, our group learns from each other. When someone lags, we support each other. I like that.

[END PLAYBACK]

So Rimu has had a rough childhood, and he struggled to fit in the high school system, and he struggled with that style of learning. He's often been told by others that he's good for nothing, and this leaves him low in confidence. It takes him a while to feel a sense of belonging, and he's got a lot to work through.

For Rimu, without role models, it's hard for him to be what he cannot see. He doesn't have the confidence to ask people questions, especially if he can't identify with them. His confidence is low when it comes to talking to people and asking questions of people that don't look like him.

Being accepted to his course is a real highlight. But before his first day of study, he wonders, will I be able to afford the bus every day? Will my limited access to technology mean that I can't actually succeed? Rimu is unsure how to connect with his tutors. He's told by one tutor to read from the book, and answer the questions, and he tunes out of this class, and he falls behind.

He really enjoys the class where the tutor changes the style of learning until Rimu understands. And he also loves it when support is offered. This could be mana sessions, or counselling, or literacy support. This is the sort of thing that helps Rimu stay at Wintec.

This is Bronwen. She's Pakeha. She's aged between 16 and 25. Let's meet her.

[VIDEO PLAYBACK]

- I really want to build a better life for myself. I had a rough time at school. I didn't fit in. I was bullied a lot. I have a few friends who are important to me. I've changed courses a few times before I worked out what to study. I didn't ask others to help me decide. It took me a while to work out what I wanted to do, but now I know. I do hope there isn't too much writing, as I do struggle to read. There is a lot happening in my life outside of study.

[END PLAYBACK]

So Bronwen carries with her, pain and doubt. And leaving high school early meant that she didn't have many qualifications behind her. She's not intrinsically motivated. She doesn't have much money, and she doesn't have family supporting her. Bronwen is excited to be accepted, but she finds it challenging when she has to complete StudyLink and start arranging the parts of her life. Finances, part-time work, transport, and personal well-being.

Bronwen doesn't like waiting for study. She's low on confidence and doubt can set in. Developing relationships with tutors and peers is a delight point for her. The friends that she makes are her rock, and they support each other, and they help each other through.

This is Matiu. He's aged between 25 and 40. Let's meet him.

[VIDEO PLAYBACK]

- At school, I didn't fit in anywhere. I left before finishing. I never had faith in myself to pass. I think I can't get a good job because I've never had one, but I want to try. I'm a slow learner. In maths class, my way of learning didn't fit. I couldn't understand. I didn't have my style that worked for me. What I need, I need someone beside me who understands my learning style. And I need positive role models to guide me.

[END PLAYBACK]

Matiu has not had many positive role models in life or people to guide them. In his previous educational experiences, he hasn't experienced a lot of success. So he's not sure that he can succeed. Being accepted is, again, a real highlight. As is the positive tutors and the relationships in getting support. He wants to change his story, but he finds it difficult, things like not owning a computer.

He finds things like StudyLink challenging, and he needs somebody beside him helping him, helping him to arrange finances, helping him to organise transport. Matiu wants positive relationships, and he wants certainty. And when he's successful in attaining these, he has a strong sense of belonging. This sense of belonging and the relationships he develops, they're pivotal to his success and completion through to graduation.

This is Tina. She's aged between 25 and 35. She has young dependents. She's juggling a lot. Let's meet her.

[VIDEO PLAYBACK]

- I want to complete my study for myself, and my kids, and to make sure my family is comfortable. I want my kids to see something other than people sitting on the couch doing nothing. Having sick kids makes it impossible to study. Family is important. Mum, my partner, friends, they all help with the kids so I can study. I have a lot to organise. Timetable changes have a big impact on me. If part-time study were an option, I'd take it. I feel demanding asking for help from my tutors, but it's necessary.

[END PLAYBACK]

So Tina started her family young, and raising children has been a focus for her. Because she's juggling so many commitments, she needs part-time study that is really, really flexible. She's motivated to study to build a better life for herself and her children. Rearranging her life is difficult. She needs upfront information and clarity so that she can be really organised.

Tina tends to have family support, and she actually needs it to able to stay and study. It doesn't take much though to make study impossible for her. For instance, if the kids get sick or if the car breaks down. Tina draws her strength from a solid peer group and her relationships with her tutors. These relationships, again, are crucial for Tina so that she can stay on track and that she doesn't lose her footing.

We've been mapping student journeys, and if we map these four journeys as a heartbeat, and understand their pain points and delight points, it starts to look a little bit like this. We've got Rimu, Matiu, Bronwen, and Tina. And doing this helps us to see, where are those clusters? Where there is lots of people experiencing pain and understanding the depth of pain behind it. And where are they having delight points and why? Helps us to understand the areas for innovation and improvement.

There are common themes also at every stage of the journey. And for these four, those are some of the themes that are coming through. Understanding these themes is really helpful when we start to think about momentum strategies. Also, analysis of all of the different data sources has helped us to identify lots of student needs. We have over 70 student needs that we've identified so far. And as we design for each these, we can create momentum strategies that can push them through the path, through the pain, and help them even further in the delight. This is an example of some of those needs, and it's really helpful for us as we start to talk about momentum strategies which Kate will introduce to us.

Kia ora koutou, ko Ngā Puhi te iwi, Ngāti Manu te hapū, ko Pōmare te tupuna, ko Kate Mea ahau.

As you would have heard and as we've all explained today, the students are having so many-- they've got so many needs. And we are pulling on these specific student needs to create some momentum strategies, and to systemise our high-level design. So through various data sources that you've heard about, the statements with the 70 needs are across all stages of the journey.

We've then divided these needs by the key stages, including learning about tertiary study while the students are still at high school. Some needs were identified as being across all stages. We've called these universal needs that don't change regardless of the stage that the students are at. And there are needs that are specific to particular attrition stages. So some of the needs relate to before they enrol with us, some of them are relevant for the first few weeks, and others are only really to be considered after they've been in class for a little while.

Oh. Which one did this?

The green one.

The other one.

Oh, the big one.

Yeah.

The big one, people. And that is not the slide. Here we go.

So as a process to start creating momentum strategies, we decided to look at the universal needs first. And I found that some of these needs naturally cluster together. So here, we've written up momentum strategies to address these clusters. We've also highlighted needs that are specifically relevant to the students' teaching and learning experience, which I'll talk about in a little bit.

So, for instance, universal needs such as Wintec being inclusive and sensitive to students' language and culture, students needing someone they can trust and feel safe with, and students' need to be valued as a person and believed in as a student, these sorts of things have been clustered together. We've then delivered some high-level goals around each of the clusters. Goals like we need to create a culture of care at Wintec where a holistic view is taken of each student, and their every interaction is rewarding and respectful for all parties involved, both the students and the staff.

These goals have then led to momentum strategies. For example, something like the creation of a one-to-one method of proactive, personalised outreach system for high-needs students that meet their personal and the learning needs. As you look at each attrition stage, there may be nuances to the momentum strategies that we've already created. Some further detail may be added to them, or some new ones may be created. What we've then done is worked to align these against a care pathway where strategies are nuanced for students identified as being high in complex or low needs.

The slide over here shows a high-needs, high-touch example. For instance, a high-needs student may receive triangulated, tailored, and proactive, and better support; set up with the student, a support person and a tutor; and provided with only a learning environment. They would receive this in addition to a tuakana, or a peer tutor, who are set up to develop relationships with new students and guide them where they study, an initiative that's available to all students.

A third care pathway will monitor learners at each stage of the journey and escalate or de-escalate to a high or a low-touch care pathway as a student's needs change and are proactively identified through initiatives like a holistic needs assessment that's delivered early on. As I've mentioned earlier, we identified that the student's learning experience is a key area of focus going forward, and we've talked about the role of the tutor this morning.

If we're looking at the student's needs, then, of course, the teaching and learning experience are a huge part of it. So, again, in the example behind me, we've clearly articulated the student needs around teaching and learning. We've thought about the environment that we need to create to ensure that these needs are being met.

At Wintec we know that students want relationships with their tutors. How do we develop these relationships? What skill sets do students need to have, so they can meet the needs of our diverse student body? What is in our curriculum? As a project team, we're currently working in this space. And at this stage, it's really important to be mindful of ensuring that the student needs are being pulled into the solutions through different ways, including ways that speak to the various backgrounds, experiences, and cultures of the students.

As we continue on the project, we also need to think about the impact of the key pillars around people, technology, systems, leadership, and these will all be pulled into the business case.

Oh, I've gone too far. Perfect. So to wrap up, we're at the stage of the program of work at the moment where we are designing the momentum strategy across the eight attrition pathway points. And we're using a business model canvas to be able to do that. We're identifying who are the students, what are their needs, what's the value that we can offer them, what partnerships do we need to have to deliver that value. From a people perspective, roles, competencies, skills, what needs to be within the organisation to able to realise those value propositions. And some of them, as Kate has said, are universal, and some are at specific attrition pathways.

The diagram out there is just-- because I'm a simple person, I like simple diagrams. It shows, basically, we'll be stacking up the business model canvasses into one targeted operating model, and then, doing an assessment against our current model. So we can get a sense of the level of change required and investment. And we're working on that at the moment to be able take to our counsel, and to the Tertiary Education Commission (TEC).

I do just want to say, also upfront, that this body of work would not have been possible without the support of TEC. And they have also had one of their team working with us over the last four months in particular, helping us move through the testing and our understanding of the framework. We are genuinely excited about this body of work and the views that it offers us into our students, and how we can better support them.

Thank you very much for your time. Cheers.

[APPLAUSE]

[MUSIC PLAYING]