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# About this template

Subhead



Section heading

Providers should use this template to structure a new Learner Success Plan as part of your Investment Plan (Plan).

This template captures what you must submit for the Learner Success Plan part of your proposed Plan if you are completing a Learner Succes Plan for the first time. The expectations for this are stated in the [Plan Guidance](http://www.tec.govt.nz/funding/funding-and-performance/investment/plan-guidance/), and the [Gazette notice](https://www.gazette.govt.nz/notice/id/2020-au2808). The template should be submitted alongside your other Plan documents.

If you have previously submitted a Learner Success Plan, use the template for a significant progress update.

When you complete this template, use [Plan Guidance](https://www.tec.govt.nz/funding/funding-and-performance/investment/plan-guidance-and-toolkit/)  to understand our priorities, requirements and expectations. We also recommend that you ensure you are familiar with [Learner Success Framework](https://www.tec.govt.nz/oritetanga-learner-success/new-oritetanga-tertiary-success-for-everyone/learner-success-framework/).

#### Assessment of proposed Plans

The criteria we use for assessing proposed Plans are set out in Plan Guidance and the Gazette notice. Please refer to these criteria as you complete each section.

#### Plan documents are due July 5th

All components of your Plan must be submitted together by July 5th 2024. This may include:

* your Strategic Intent,
* your Learner Success Plan (this template) or significant progress update (to your LSP)
* your Disability Action Plan (DAP) if you don’t already have one, or a link to your published DAP (which needs to have been updated in the previous six months),
* Mix of Provision (MoP) templates, and
* Educational Performance Indicator Commitments (EPIC) template.[[1]](#footnote-1)

Refer to the page 70-71 of Plan Guidance to help you understand the parts of a Plan you need to submit.

#### Tips for submitting documents

* You must submit all parts of your Plan to us via DXP Ngā Kete as either a Word or PDF document.
* We recommend naming your document [PROVIDER name] *Learner Success Plan*
* Documents, including appendices, must be 75MB or under.
* Please don’t encrypt your documents or embed any PDF files in them, as TEC’s anti-malware service cannot scan these documents, and they cannot be uploaded.
* **New providers only** can submit documents by email **to** [customerservice@tec.govt.nz](mailto:customerservice@tec.govt.nz)with subject line [Edumis # - New Provider Learner Success Plan for 2025 funding].

#### Questions

For general queries about your Plan or this template please contact us at [customerservice@tec.govt.nz](mailto:customerservice@tec.govt.nz) or 0800 601 301 or speak to your Relationship Manager.

We encourage you to check the [TEC website](http://www.tec.govt.nz/) regularly for new information.

Feel free to personalise the design of this template with your branding.

# Learner Success Plan

If you receive more than $5m[[2]](#footnote-2) in on-Plan funding from us, you are required to have a Learner Success Plan (LSP). Our assessment of LSPs will inform our investment decisions.

The LSP must:

* be approved by your Council or Board; and
* detail your approach to improving outcomes for all learners (and in particular, learners who are under-served including Māori learners, Pacific learners, disabled learners, neurodiverse learners, or learners with low prior achievement backgrounds); and
* include a roadmap of tangible goals and milestones.

You must report against its LSP in line with your funding conditions.

If we determine that your LSP is incomplete or inadequate, we may request that you resubmit a LSP outside of the Plan cycle.

**Specific requirements for TEOs without a current LSP**

If you do not currently have an LSP and are receiving $5m or more in on-Plan funding from us, you must provide a **new LSP** as one of the Plan documents.

**Specific requirements for TEOs which have a current LSP**

If you have a current LSP, you must provide a **significant update** on progress against your LSP using the [template](link).

You may also provide any other relevant or supporting information as an appendix.

#### Tertiary education organisation (TEO) details

Please complete the following:

|  |  |
| --- | --- |
| TEO name |  |
| New Zealand Business Number (NZBN) (if known) |  |
| EDUMIS number |  |
| Lead contact for Plan discussions:  This person must have a good understanding of the proposed Plan, be able to access DXP Ngā Kete and be contactable by the TEC for at least three months from the submission date. If there are different contacts for your Learner Success Plan and other parts of the Plan please make that clear. |  |
| Work phone |  |
| Mobile |  |
| Email |  |

## 

## Section 1 – future state

|  |
| --- |
| Provide a short vision statement of your long-term goal(s) for achieving equity of educational outcomes, including:   * What does success look like for your organisation and your learners? Include a specific target date for achieving this vision. * How well does your vision represent the aspirations of your stakeholders? * How is the vision owned and driven by your Council/Board and senior leadership team? |

Write your response here.

(Recommended words: 2,000 or fewer)

|  |
| --- |
| Provide a snapshot of current learner performance, including data and evidence:   * Problem definition – what are the main issues or areas of concern aligned to the seven learner success capabilities? * Do you know the cause(s) of these issues? What evidence do you have? * What interventions and initiatives have you already tried? Have these been evaluated? Have they worked? Why or why not?[[3]](#footnote-3) * What stage of the Learner Success Framework are you at? If you are beyond Stage One (Preparing for Success) – what specifically have you done (including budget and resourcing)? * Who owns this work at the Executive Leadership level, and how is it being managed? * What have been the outcomes of your learner success projects? Is progress reported up to your Council or Board? |

## Section 2 – current state

Write your response here.

(Recommended words: 2,000 or fewer)

|  |
| --- |
| Provide an overview of a project plan which demonstrates how you will get from the current state to the future state, including:   * What is the next stage of the Learner Success Framework to be implemented? How have the outcomes from previous stages informed the next steps? * Detail timelines, milestones, deliverables, targets, measures and resources * How does the roadmap link to the problem definition in Section 2, ie, why are you doing these specific things? Your roadmap plans must align with Learner Success Framework stages and the seven learner success capabilities. * How will progress be monitored? This includes who will be accountable for progress and achievement of milestones. * What are the specific medium- to long-term goals, targets and measures? * Who has been involved in developing the roadmap, targets and measures, including any external stakeholders? |

**Section 3 – a roadmap**

Write your response here.

(Recommended words: 2,000 or fewer)

|  |
| --- |
| Please add any further comments to support our understanding of your learner success work (optional). |

**Further information (optional)**

Write your response here.

(Recommended words: 2,000 or fewer)

1. If you are a new provider, you will be asked to submit MoPs and EPICs later if your application for funding is approved. [↑](#footnote-ref-1)
2. The $5 million threshold is decided based on the final funding allocation you were given for 2024 (as confirmed to you by letter in late 2023). [↑](#footnote-ref-2)
3. Not all TEOs will be at the point of being able to do this because they have not done anything yet, or they have not evaluated anything. [↑](#footnote-ref-3)