



Competenz Investment Plan 2018-2020

July 2017

Competenz (C)

Contents

Chief Executive's message	4
Overview of Competenz	5
Vision and purpose	5
Competenz's 2020 strategy	5
Learners for life	5
Your skills partner	5
The skills innovators	5
A customer-centric Competenz	6
A change to our operating model	6
Accelerate 2020	6
Our approach: Human centred design	7
Design thinking case study: forestry project	7
Employer and learner satisfaction	7
Meeting tertiary education strategy priorities	8
TEC priority 1 – delivering skills for industry	8
Encouraging the uptake of apprenticeships to reach 50,000 by 2020	8
Apprenticeship Training New Zealand	8
Developing new and innovative approaches to support industry skill needs	8
Trans-Tasman fire protection resources partnership	9
Skills hubs	9
Competenz online learning (accessible through Competenz Central)	9
Competenz Microlearning	9
Ensuring qualifications, programmes and skill standards meet industry needs	10
Qualification development	10
Unit Standard development	10
Programme development	10
Summary by sectors	10
Summary of qualifications launched	11
Summary of planned qualification launches 2017 and 2018	11
Learning and assessment options	12
Industry engagement and forecasting skills needs over the longer term	12
A new sector engagement team	12
Horizons Forum – a day of future thought for industry	12
Forecasting	12
TEC priority 2 – getting at risk young people into a career	13
Continuing commitment to Level 2 as a vital career pathway starting point	13
Moving from a schools team to a career development team	13

Bootcamp experiments – March and August 2017	13
Online engagement	13
Working with school students and transitions to work Gateway	13
Launching careers with the inter-schools Toolbox Challenge	14
3+2 Education and Employment	14
Resources for schools	14
TEC priority 3 – boosting achievement of Māori and Pasifika	15
Māori and Pasifika trades training	16
TEC priority 4 – improving literacy and numeracy	16
Competenz Literacy and Numeracy Strategy 2017-2020	16
LNAAT	16
Interventions	16
Resources	16
Summary of Competenz 2018-2020 Initiatives	17
Response to three additional challenges set by TEC	19
Engagement in the Productivity Commission report process	19
Challenge 1: Raising basic skills	20
Department of Corrections partnership	20
Progressions	20
Case study – Real Journeys	20
Working with industry to upskill lower skilled workers particularly raising LLN	20
KiwiRail example	20
Case Study – OJI Fibre Solutions	20
Supporting young people into sustainable employment	21
Employability skills framework	21
Challenge 2: Facilitating continuing vocational education and training	22
Competenz as a skills broker and facilitator working closely with industry and businesses	22
Workforce development plan	22
Grow Your Business Guide for employers	22
Microlearning	22
Competenz scholarships for higher learning	22
Challenge 3: Fostering enterprise level innovation	23
Helping businesses develop strategies to recognise and recruit and training for skills that support productivity and innovation	23
Case study – Kraft Heinz takes global competition seriously	23
Mad Butcher Gateway programme	23
Buckley Systems	23
Our industry sectors	24
Sector growth	25
Our performance commitments	26
Participation at Level 4+	27
Trainees and apprentices at Level 4 and above	27

Māori	27
Pasifika	27
Under 25 years	27
Programme completion at Level 4+	27
Competenz financials	28
Industry cash contribution.....	28
Summary statement of comprehensive revenue and expenses.....	28
Focus areas for investment	29
Your skills partner	29
Learners for life.....	29
The skills innovators	29
Digitisation enabling more success for more learners	29
Mix of Provision	30
Level 1	30
Level 2	30
Level 3	31
Level 4 – industry training	31
Level 4 – NZA	31
Level 5	32
Level 6	32
Educational performance indicators	33
Competenz performance – old metrics.....	33
New cohort based measures	33
Cohort based – Level 1-3	33
Cohort based – Level 4+ NZCs	34
Cohort based – New Zealand Apprenticeships	34
Cohort based – Apprentice Retention Rates	34
Evidential Matrix – TEC Investment Plan Template for 2018	35
Section 1 – Mission and role	35
Section 2 – Contribution to Government Priorities	35
Section 3 – Addressing the needs of stakeholders	36
Section 4 – Programmes and activities	37
Section 5 – Outcomes and measures	37
Appendices	39
Appendix A: Infometrics Sector Summaries	
Appendix B: Competenz Annual Report 2016	
Appendix C: Competenz Response to the Productivity Commission 2016	
Appendix D: Grow Your Business Guide	
Appendix E: Competenz Mentoring Guide	
Appendix F: Competenz Trades Guide	
Appendix G: Competenz Ministerial Guide	

Chief Executive's message

Transforming lives. Every learner. Every time.

Turning our 2020 strategy into reality is Competenz's core focus over the next three years. In 2016 we redefined our strategic model and committed to becoming a truly customer-centric organisation. This led us on a journey of exploration, listening to our customers to determine what they expect from us and what they value. In the context of the rapidly converging global trends in the worlds of work and education, we also looked at what our customers will need in the future and how we can best help Kiwi industry grow skills, careers and businesses.

Our significant work programme – Accelerate 2020 – covers five major work streams designed to improve how we engage with our employers and learners. Our digital strategy will make it progressively easier for our employers, learners and our own teams to connect and engage.

We will focus on:

- » The growth of our learner pipeline throughout the career lifetimes
- » Supporting more learners to successfully complete higher level qualifications
- » Helping our Māori and Pasifika learners
- » Helping learners who are struggling, including with literacy, numeracy and life challenges
- » Working with employers to address their total workforce development needs.

Re-directing our strategic engagement with our industries will ensure our offerings are tailored to meet the rapidly changing needs of our employers.

Competenz had a successful 2016 with an surplus of \$500,000, which is appropriate for a not-for-profit organisation. We are in a strong position to resource and service our future strategic goals and to invest in developing and providing resources and increased support for learners and for our industry stakeholders. We monitor our core EPIs in our Investment Plan carefully and we have performed successfully against our Mix of Provision (MoP) commitments over the past two years. We have strong growth predictions from several of our industries and continue to focus on pathways for our learners through enterprise-wide engagement with our employers.

Finally, Competenz has strong governance, a driven senior leadership team and a dedicated staff focused on learner success. Together, these elements will ensure we deliver our customer promises and our government funding obligations.



Fiona Kingsford
CEO, Competenz

Overview of Competenz

Competenz is a multi-sector industry training organisation. We have coverage in 36 sectors, including manufacturing, engineering, forestry, maritime, printing, packaging, sign-making, food and beverage, textiles, apparel and laundry. We contribute to the up-skilling of the New Zealand workforce, improving productivity, economic prosperity and social wellbeing.

Owned by our industries, Competenz is responsible for setting the standards for qualifications in 36 sectors as well as supporting learners, employers and industry to achieve their goals. Each year, Competenz supports over 20,000 learners and more than 3,500 businesses nationwide.

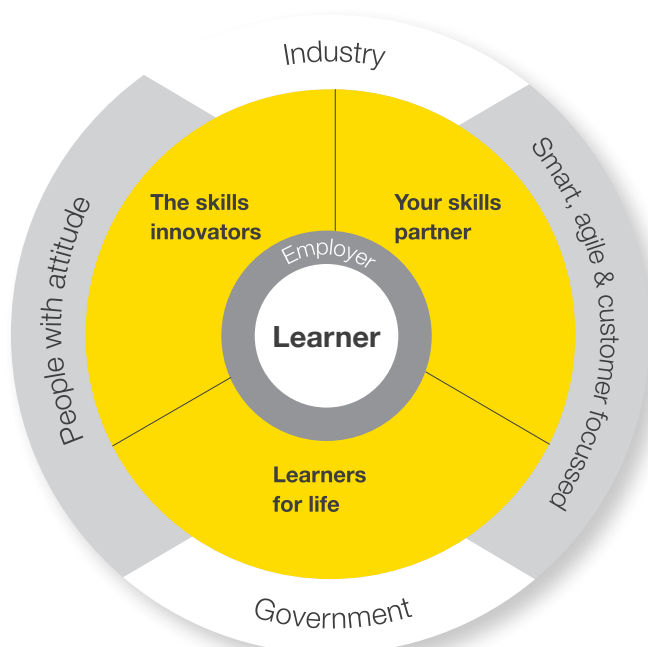
Vision and purpose

Our vision is to provide “World class skills for New Zealand industry”. This means delivering more of what our customers need, at the necessary pace, in a rapidly changing environment.

Our purpose is to “Transform lives. Every learner. Every time”. By investing in our learners, we grow their skills and their career opportunities. We know that our learners are the future business owners of New Zealand. We transform lives through the delivery of effective, industry-ready, on-the-job training in specific skills as well as the design of total workforce development solutions.

Competenz’s 2020 strategy

*Competenz 2020 Strategy to Action*¹ clearly identifies three key areas of focus with the learner and employer at the centre of our strategy: Learner for life; Your skills partner; and The skills innovators.



Learners for life

We create pathways to assist our learners to progress their careers, from school leavers to business leaders. Competenz is committed to increasing the number of learners with multiple qualifications and progressing to higher level qualifications. The trends show Competenz is exceeding expectations across both areas.

Your skills partner

We work alongside our customers on their workforce development planning. Our aspiration is to be a recognised partner for our customers' total workforce development. Competenz is focused on growing the number of companies engaged in training, as well as the number of companies engaged with us in both technical and transferable qualifications such as OSH, first line management and sales (also known as our “enterprise wide approach”).

The skills innovators

Increasingly, providing a personalised learning world has become more important to our customers and learners, therefore Competenz continues to invest in rolling out digital learning assets and providing online assessment.

All our programmes will have digital assets by 2020. We will continue to digitise learner engagement, such as online sign-ups, our online portal “Competenz Central” allowing customers and learners to check on their progress, and creating digital communities of support for learners through our online learning management system.

¹ Competenz 2020 Strategy to Action includes 2020 Measures & Milestones, Strategic Drivers and High Level Strategy timelines against all areas. This document is available on request.

A customer-centric Competenz

In 2016, we recognised that compliance was business as usual at Competenz. We redefined our strategic model and committed to becoming a truly customer-centric organisation. We undertook in-depth consultation internally and externally to hear what was valued by our employers and learners. We created a framework called the “Competenz Learning Journey” and undertook Customer Experience mapping. These two outputs are the anchor for Competenz’s future direction.

A change to our operating model

In the first half of 2017, Competenz reorganised our teams to ensure that were ready for a different type of engagement with customers. The anticipated benefits of this significant change to our operating model will result in growth in:

- » The number of engaged customers
- » Positive learner outcomes including providing interventions where there are learning difficulties
- » Workforce development opportunities identified within growing businesses.

Accelerate 2020

This programme of work covers five major workstreams designed to improve engagement with employers and learners.

1. Developing innovative products that our employers’ want
2. Creating tiers of service and solutions that meet our employers needs
3. Increase learner support to support improved learner outcomes
4. Easy to understand pricing and costs
5. Developing digital platforms to make it easier for our employers and learners to connect and engage with us.

This strategy sets a clear path of innovation for all our customers with technology as a core enabler.



Our approach: Human-centred design

In May 2015, Competenz participated in a New Zealand Trade and Enterprise masterclass in design thinking. Competenz now approaches problem solving by listening to the customer, creatively designing possible solutions, then prototyping, testing and iterating those ideas.

Design thinking case study: forestry project

The forestry sector had 3,000 learners engaged with Competenz, but completion rates were at 30%. The investigation of high profile incidents in the sector showed many reasons why training was being deprioritised and was not fit for purpose. Using human-centred design, we conducted reviews of our resources and service models over 12 months, including hundreds of face-to-face interviews and our resource development team working in the forest.

We tested new service models and resources including:

- » The opportunity to purchase individual learning and assessment packages in bite-sized pieces to meet industry demand for “training for task”
- » Videos of practical skills being produced and accessible from hardcopy materials via QR codes
- » New ways of working with contract assessors.

The forestry project ran for over a year and was launched in mid-2016. Anecdotal feedback² suggests that the changes are meeting stakeholder needs. The results are beginning to show benefits in increased 2016 credit achievement. We have also seen a significant increase in forestry learner satisfaction. Our first quarter 2017 survey of completed learners shows that our forestry learner Net Promoter Score (“NPS”) showed an increase of +25 points on the same time last year. This compares favourably with overall learner NPS over completed learners in all our industries³.

Employer and learner satisfaction

Competenz has been undertaking customer satisfaction research with completed learners and their employers over the past two and a half years, and with terminating learners and their employers for one year, using NPS as our core methodology. NPS scores measure learner satisfaction and produce a range of scores from a theoretical -100 to +100.

Information from these real-time, monthly reviews feeds into our NZQA consistency requirements and our programme review requirements, to get the best information and insights.

In 2017, we will be expanding our customer satisfaction and NPS monitoring to include current learners, particularly at the early stages of the learning cycle.

² “In regard to the new forestry resources, Competenz has done a fantastic job developing and presenting. You (Competenz) get a big thumbs up from the staff here at EIT that are using these”. Alan Paulson, EIT Tutor/Trainer Forestry.

³ Competenz’s overall completed learner NPS increased by 10 points from March 2016 to March 2017. We understand from MM Research, who undertakes Customer Satisfaction research across a number of ITOs, that Competenz is leading the way in NPS for completed learners.

Meeting tertiary education strategy priorities

TEC priority 1 – delivering skills for industry

This is at the heart of the work of every ITO. Competenz works with 36 industries to ensure the programmes we develop meet the needs of employers and learners. This includes extending our offerings beyond technical qualifications to other transferable skills including business and sales related qualifications.

Encouraging the uptake of apprenticeships to reach 50,000 by 2020

As one of the founding members of the “Got a Trade? Got it Made!” collaborative ITO initiative, Competenz is committed to leadership in the promotion of New Zealand Apprenticeships (NZAs).

Competenz also has an Ambassador Programme - a group of role models and ambassadors promoting apprenticeship pathways in our core industries. A range of videos have been developed to showcase apprentices enjoying success in their chosen career. These resources are used to promote apprenticeships in schools and in digital campaigns and they are readily accessible on our digital platforms.

The TRoQ reviews have resulted in NZA programmes better meeting the needs of industry. There are 27 approved NZA programmes within Competenz offerings. As a result of the qualification reviews in retail meat (butchery) and baking, there are more NZA programmes now available and these programmes are showing uptake. In addition, Competenz continues to look for sectors which could be adopt the apprentice model, for example, the New Zealand Certificate in Cellar Operations could be a future NZA for the wine industry.

Competenz staff were involved in the review of the NZA code of practice. We endorse the amended code and have placed greater focus on the NZA training advisors talking through the code requirements with employers and apprentices.

While there is now flexibility in the number visits per annum, Competenz’s training advisors continue to visit each NZA four times a year. The value of this commitment was reinforced during our “learning journey” research. There are times when more pastoral care and training support is required based on learning stage and other factors which may be outside of the workplace and Competenz research has identified that there is a greater drop-out of NZAs during the first 12 months. We plan to invest in more visits and engagement in the first year of the apprenticeship to ensure that the NZA has the pastoral care they need.

Our online learning management system is building cohorts of learners who engage with each other through peer-to-peer support. This new way of working is being tested in 2017 with full roll out expected in 2018. It is anticipated that this will result in fewer terminations and higher credit achievement from 2018 onwards for NZAs engaged in online learning.

Apprenticeship Training New Zealand

The ATNZ Trust is a sister organisation to Competenz that manages apprenticeships in the mechanical engineering sector.

At the end of June 2017, ATNZ had approximately 360 apprentices who are employed by ATNZ and seconded to engineering businesses. ATNZ is a group scheme, where companies require apprentice staff but do not want the responsibility of the employer/employee relationship. Selection of staff is streamlined following ATNZ stringent recruitment processes and training is closely monitored. The apprentices also have a high level of pastoral care with ten visits a year. The success rate for these apprentices is very high (86% based on 2016 data, 6% higher than who are in non-ATNZ training agreements). Programme completion rates are also higher (91%) for ATNZ apprentices.

Following the Competenz organisational structure changes, the ATNZ Trust is now run as a separate entity, led by a new General Manager. ATNZ’s new capacity has already seen B2B marketing campaigns to re-engage with businesses that previously seconded an apprentice and new business, including beyond mechanical engineering. B2C marketing campaigns are having a high lead generation result from potential apprentices.

Developing new and innovative approaches to support industry skill needs

Collaboration, commercialisation and using technology as an enabler are just three cores areas where we are developing new approaches to meet skills needs. For example:

Trans-Tasman fire protection resources partnership

Competenz is transforming the way the New Zealand fire industry learns, with help from the Fire Protection Association Australia (FPA Australia) and Fire Protection Association New Zealand (FPANZ). The three-way partnership delivers best practice industry training to the industry through the development of an online learning solution, rolling out in 2017.

The three parties have committed to working together to share learning content, to support consistency of training between the two countries and enable shared savings in resource development costs.

Specifically, the partnership will allow learning resources developed by FPA Australia to be modified for the New Zealand market and then delivered online by Competenz, supported by FPANZ.

Skills hubs

The Skills Exchange is a partnership between employers, central and local government, businesses and industry, tertiary providers, ATEED and ITOs focused on improving the development of relevant and appropriate construction and infrastructure skills in large scale projects in New Zealand. These include Auckland Airport, Tamaki and Auckland CBD.

Competenz online learning (accessible through Competenz Central)



Following Competenz's gold medal for Best New Technology Implementation (eLearning Widespread Adoption) at the international 2015 LearnX Impact Awards, we have continued to set the bar high with development of online learning programmes. In April 2017, we released Competenz Online Learning on the Canvas learning management system. Within the first month, we had over 1,300 learners completing modules and we have registered over 3,000 credits through online learning in mechanical engineering alone.

Competenz Microlearning



Our industries tell us that “training for task” is becoming increasingly more important to them than full qualifications. This is a global trend across all education platforms. We launched Competenz Microlearning in 2017, designed to give learners the opportunity to learn at their own pace or do one small chunk of learning at a time. Learners purchase training materials from Competenz and we register the credits for them, but they do not receive government funding. We have had strong initial uptake in:

- » Hydraulics and pneumatics
- » Refrigeration and air conditioning
- » General engineering
- » Fabrication
- » Electrical safety.

We also run initiatives based on employer and learner feedback in relation to core themes:

- » Rapidly changing skills needs
- » Finding motivated people to work and train in their businesses
- » Keeping motivation and achievement high through the life of a longer qualification like NZAs.

These include:

1. Recruitment assistance
2. Prototype testing of work-ready boot camps
3. Study groups for NZAs in the regions (a training advisor for advice, peer interaction as well as free wi-fi and pizza)
4. Text contact at key learner milestones
5. Mentoring for Success, A Guide for Employers (attached as addendum).

Industry feedback in 2016 showed that assistance on how to help an apprentice or trainee through the training journey was much needed by employers in all Competenz industries. We developed a mentoring guide based on the Ako Aotearoa Guide⁵ compiled by Downer, Connexis and Primary ITO. This was released under “creative commons” enabling us to reuse the content. We took the information from the original guide and have blended this with content from our own learning materials (management and leadership) to create the Competenz version.

The intention is to create supporting information beyond the printed guide for both for employers and for Competenz internal teams – who will be involved in the full rollout of this programme.

⁵ <https://ako.aotearoa.ac.nz/projects/mentoring-model-itos-and-employers>

Ensuring qualifications, programmes and skill standards meet industry needs

Qualification development

The targeted review of qualifications was completed in 2016. Competenz reviewed the highest number of qualifications and programmes of all ITOs. We started with 210 national qualifications and finished the review with a combination of 117 New Zealand certificates and diplomas. Also included was the development of three new qualifications for the cellar operations sector.

Unit standard development

The Learning Design Team at Competenz is responsible for confirming the need for a new unit standard and overseeing the development process. Unit standards are developed by either a Competenz standards developer or an appropriately skilled and experienced contractor. When a need has been confirmed and we believe it is realistic to expect that an application to list the unit standard on the DAS will be approved by NZQA, the standards developer will establish a Technical Advisory Group (TAG) to oversee the development and approval process. Competenz will also seek feedback from the wider industry prior to submitting an application to NZQA.

Programme development

Following the TRoQ, programmes are still in the process of being developed and launched. Competenz is methodically working through programme development for 237 programmes in parallel with resource development. 137 programmes are completed, 54 in progress, 13 in the 2017 pipeline and 33 to be undertaken in 2018.

Other than Print Management (L5) and Journalism (which Competenz is exiting) all other qualifications have final enrolment dates of December 2017 if not already "closed". Clear guides have been set outlining the final dates for enrolments in programmes and final assessment dates for the expiring national certificates.

Summary by sectors

Sector	National Certificates	New Zealand Certificates and Diplomas
Apparel	11	3
Baking	10	6
Cellar operations	0	3
Competitive systems and practices	3	3
Fire protection	8	8
Food and beverage	3	2
Forestry	14	10
Furniture	3	3
General manufacturing	5	3
Glass	9	2
Journalism	6	3
Laundry and drycleaning	5	2
Maritime	9	13
Mechanical engineering	10	7
Paint	2	0
Pharmaceutical	3	0
Plastics	11	3
Printing	35	13
Pulp and paper	3	2
Radio broadcasting / screen production	0	5
Rail	4	2
Refrigeration and air conditioning	2	3
Retail meat	7	3
Solid wood	9	9
Textiles	31	3
Tissue converting	3	3
Wood panels	4	3

Summary of qualifications launched

Sector	Number of qualifications launched	Date launched
Baking	3	April 2017
Business*	2	May 2017
Cellar operations	3	June / August 2017
Competitive systems and practices	3	July 2016
Dairy systems	1	January 2017
Distribution	1	April 2017
*Energy and chemical operations	4	October 2017
Food or beverage	2	September 2016
Forestry	5	June 2016
Glass	4	February 2016
Laundry and drycleaning	2	June 2015
Manufacturing	4	August – December 2016
Maritime	5	October 2015 and July 2016
Print	2	November 2016
Pulp and paper	2	March 2015
Rail	2	February 2016
*Retail and sales	2	January and April 2017
Refrigeration and air conditioning	1	January 2016
Tissue converting	3	March 2015
Solid wood	9	March 2015
Wood panels	3	March 2015

* Qualifications which Competenz is not the Qualification Developer or Standard Setting Body

Summary of planned qualification launches 2017 and 2018

Sector	Number of qualifications launched	Date launched
Fibreboard packaging	3	September 2017
Fire protection	8	October to November 2017
Furniture	3	December 2017
Mechanical engineering	2	January to December 2018
Plastics	4	December 2017
Textiles	1	2017- 2018
Binding and finishing	1	2018
Fibreboard packaging	1	2018
Occupational health and safety	2	2018
Print	2	2018
Signmaking	1	2018

Learning and assessment options

Competenz offers a range of learning and assessment models to best suit employers.

Training provider driven

- » Competenz assists the employer to secure the right programme,
- » The provider delivers the tailored training and conducts the assessments.

In-house training and assessment

- » Competenz works with the employer in the roll out of the training within the workplace.
- » We also ensure that there are appropriately trained staff in the workplace to fill the assessor role.

In-house training with outsourced assessment

- » When the business does not want to take on the role of assessor, Competenz will source contract assessors to perform this role.

Centralised assessment through an online Learning Management System (LMS)

- » In 2017, Competenz launched a new LMS that currently has 321 unit standards (26 programmes) available for assessment.
- » Learners can complete assessment in an online environment which is then marked by centralised assessor.
- » Competenz will continue to migrate assessments and programmes onto this platform to allow learners the choice of both online or paper based assessment.
- » This new system will allow for new methods of assessment, including videos and uploaded imagery.

Industry engagement and forecasting skills needs over the longer term

Following the completion of the TRoQ engagement process, we have re-established our model of working with industry specific strategic advisory groups (SAGs) We have 12 active SAGs with over 140 industry representatives involved. The role of the SAG is to provide advice on strategic direction and trends within each sector and predict future skill needs and future labour force needs.

Every year, we support industry conferences and events all around the country. For example, in May 2017 we were participants, sponsors and/or presenters at ten separate industry events including the plastics, engineering, forestry, signmaking and print sectors.

Informal engagement occurs through bimonthly regional breakfasts and site visits hosted by our Board of Trustees around New Zealand and quarterly senior leadership team members' "Days in the Trade".

The rapidly changing environment has meant we are re-envisioning how we not only engage with our sectors, but also help them address the challenges of rapid workplace and workforce change.

A new sector engagement team

In our 2017 restructure, we created a new sector engagement group working inside the industry training team, alongside our training advisors and account managers. This team is made up of four sector managers responsible for increased sector penetration in workplace training. We have identified three sectors – manufacturing, forestry and engineering – as priority sectors, focussed on achieving increased growth and penetration in both New Zealand Apprenticeships and industry trainees.

Horizons Forum – a day of future thought for industry

We have unique pan-industry insights around common challenges as well as innovative solutions. Our industries can learn a lot from each other. We can facilitate this learning and add value by being a connector between industries. In 2017, we are trialling a pan-sector forum that will focus on the changing world of work and learning, the skills that we need for today, and more importantly tomorrow. If successful, we are hoping that "Horizons" will become our Competenz thought leadership platform through face to face meetings and digital channels.

Forecasting

We access forecasting data through the Infometrics portal and validate this through our close relationships with industry associations and business groups.

Following our 2017 restructure, we have established a stakeholder relations manager role. This role will work closely with the sector engagement team, but also be responsible for the long-term, strategic outlooks across our sectors, including engagement with regional development agencies to understand at a regional level the existing and future skill needs by region.

TEC priority 2 – getting at-risk young people into a career

Continuing commitment to Level 2 as a vital career pathway starting point

Fifty - five percent of all our Level 2 learners identify as Pasifika and 39% as Māori. Level 2 qualifications are an important second-chance learning jump-off point and a vital career pathway starting point for at risk young people currently working in low skilled jobs.

Our 2018 MoP figures show a 5.8% growth in Level 2 qualifications and we are developing policies to incentivise progression up the framework as well as looking at innovations around bundling qualifications, including Level 2, into NZA equivalent qualifications.

Moving from a schools team to a career development team

Our 2017 restructure has seen an increase in investment in career development resource. The previous schools team has been expanded to incorporate engagement with a pipeline of potential learners at all stages of the career cycle – from school students making study choices through to mature workers who need to re-train. Rather than just focusing on schools as we have in the past, this team of six also targets people in the NEET category and specifically supports Māori and Pasifika community engagement.

Bootcamp experiments – March and August 2017

Competenz partners with groups (including Oceania Careers Academy and SENZ Employment and Training) to deliver two-day pilot work readiness workshops for job seekers and potential apprentices from South Auckland. This partnership allows for the pooling of resources, access to existing pre-employment services, training and expertise, along with “vetting” processes. Presentations from successful apprentices who started out in the “at risk” category are motivating for workshop attendees. Employer visits give a taste of real workplaces and cold calling practice builds confidence to ask for opportunities. Thirty - two people currently on government benefits have experienced the pilot bootcamps to date and two have been placed in jobs in Competenz industries.

Online engagement

Competenz has entered a partnership with Joy Business Academy (JBA), an organisation focused on getting at-risk youth into jobs. In a “white label” arrangement, we have taken some of their basic online courses and re-branded them as Competenz. Jobseekers are given the opportunity to learn about CV writing, interview skills and other basics, while also learning about completing online forms. From this online engagement, we get useful data around computer literacy and access to devices that helps us develop our NEET strategies for the future.

Working with school students and transitions to work Gateway

In 2016, Competenz commissioned schools research⁶ with Gateway co-ordinators in Auckland, Hamilton and Rotorua that confirmed that a school's needs are impacted by its decile and location.

This research identified key issues in lower decile schools and in rural areas:

- » Students that required additional assistance (pastoral and academic)
- » Limited resources
- » Fewer networks to assist students find work placements
- » Cultural issues.

These schools are also more likely to have a greater number of students engaged in Gateway, have a greater acceptance of trades training, place greater value on the outcome therefore more likely to help students get a job or apprenticeship.

Higher decile secondary schools and schools in urban areas are likely to have a lower number of students engaged in Gateway programmes. They often view the programme as work experience for students and are more likely to encourage students to pursue full-time tertiary study, especially when they are close to a university.

We found that while the programme and standards being offered were appropriate, a greater level of pastoral care from Competenz would result in gains for the students.

In 2017, Competenz is providing a full support Gateway programme in limited sectors to test this. This includes resources, finding work placements and arranging assessments for 45 students across butchery, engineering and wood manufacturing.

Results will be reviewed to determine if this extra level of care makes a sufficiently positive difference for the students. The desired outcome for these students is that they enter the industry they have experienced while at school and that they already have a relationship with Competenz to help them with their qualification and learning goals.

⁶ Auckland Focus Groups Qualitative Full Report, Colmar Brunton 2016

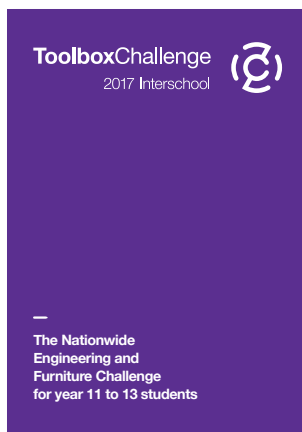
Launching careers with the inter-schools Toolbox Challenge

In 2016, we created the Toolbox Challenge to give trades students in furniture and engineering an opportunity to compete against their peers around the country. We wanted to build excitement around trade-based subjects while complementing the national curriculum and supporting the achievement of unit standards. For each industry, the challenge is to build an appropriate project in the classroom for submission at the end of the year.

The Toolbox Challenge integrates in-class learning with online exposure and credit. Students upload designs and images as their projects came to life over the course of the year. Final submissions require students to submit a video and online voting determined the People's Choice Award. The 2016 engineering winner started an engineering apprenticeship in May 2017 with Automac in East Tamaki.

In the first year of this challenge, one school reported additional benefits beyond having the winner of the furniture section. According to West Otago's Blue Mountain College, the initiative did more than create an individual winner. Materials, technology and design teacher Martin Murrell said: "Along with Tom's design, his Year 11 class made clocks and also set up a production line working in small groups manufacturing Cape Cod chairs that have been sold to raise money to buy new tools for the workshop."

After the initial launch of this initiative, a Toolbox Challenge app has been developed and is now available along with a new dedicated website⁷. This will continue to grow in momentum in the coming years thereby promoting career opportunities for secondary school students in Competenz related industries.



James Thompson – first place engineering



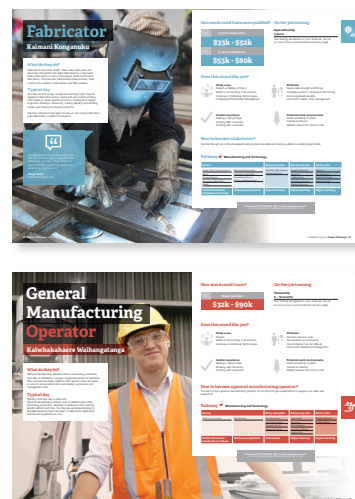
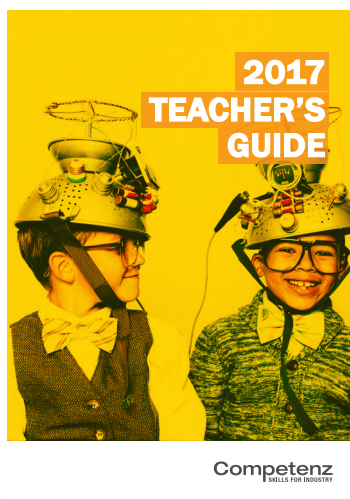
Tom Hancox – first place furniture and winner of people's choice

3+2 Education and Employment

Competenz has undertaken a small pilot in 3+2 Education and Employment with one of our employers. Based on this pilot, Competenz will expand this initiative based on employer interest and demand.

Resources for schools

New trades careers promotional resources have been developed for schools including a "Trades Guide" and poster sets delivered to 380 secondary schools showcasing different industries, highlighting gender equality.



⁷ www.toolboxchallenge.co.nz

TEC priority 3 – boosting achievement of Māori and Pasifika

In 2014 we embarked on a journey to develop the best possible strategy to positively increase Māori and Pasifika participation and performance in workplace training. We began with a joint research project with the University of Auckland Business School to assess our current state⁸. We established our internal, cross-functional, Māori and Pasifika Steering Committee in May 2014. This powerful group advises, consults and provides cultural competency development and leadership across the organisation.

In 2016, we had 4,210 Māori learners and 1,627 Pasifika learners actively engaged in achieving credits. Our Māori and Pasifika learners in the manufacturing (including food and beverage, wood and plastics) and forestry industries. We are in the process of analysing our learner data and investigating whether a reduction of Level 2 pathways in particular sectors and the high participation rates of Māori or Pasifika in our declining sectors correlates to our slightly reduced participation statistics. This research will inform potential changes to our current Māori and Pasifika strategy.

In 2015, we established the role of Māori and Pasifika Manager at Competenz. In our 2017 restructure, we acknowledged the progress we had made and the steps we needed to take in the future to increase our impact for Māori and Pasifika learner success. Key to this is better reflecting the needs of tangata whenua and each of the specific groups under the Pasifika umbrella.

We established two separate roles (trades careers advisor Māori and trades careers advisor Pasifika) within our expanded careers development team, to specifically work in community promoting trades careers and creating opportunities for work and qualifications.

We take a specific Māori and Pasifika focus in many projects including:

Digital campaigns to engage directly with Māori and Pasifika communities – our GetAMPT campaign was successfully launched at PolyFest in February 2017 and continues to create leads, particularly for apprenticeships.



Research. Together with Careerforce, ServiceIQ and The Skills Organisation, Competenz has participated in the Pacific Perspectives study to assess factors that affect Pasifika learners' participation, achievement and retention in ITO facilitated learning qualifications. This report was released in 2017 and toolkit is being developed for ITOs to use in applying the results of the research. Competenz co-ordinated and facilitated a Pasifika Learning "focus group" using talanoa (engagement) epistemology. This tested whether or not a Pasifika focus group, run by Pasifika, in a Pasifika setting, using Pasifika learning methodologies, with Pasifika people made any difference to the learning and success. It did. This validated the Competenz investment in a specific trades careers advisor Pasifika.

South Auckland night classes. Initial feedback has indicated positive results and these are continuing.

Schools and church engagement. This includes the 15 achievement in multi-cultural (AIM) high schools, mainly in South Auckland, and the Tongan Methodist and Catholic churches.

Early stage support. Pasifika learners in particular often enter industry with low or no school qualifications and require additional support in the early stages of their training. Our new structure provides greater support mechanisms through the training advisors including doing risk assessments and developing wrap-around support plans. Our literacy and numeracy programme also assists here.

Our new **mentoring resource**⁹ for employers will also assist the employers of Māori and Pasifika learners.

⁸ Helping Māori and Pasifika learners build their skills in the workplace. A Competenz research paper – August 2014

⁹ "Your Guide to Mentoring for Results", Competenz. Available on request.

Māori and Pasifika trades training

Competenz's CEO currently chairs the Auckland MPTT Consortium and has recently merged the governance of Auckland, TSI and TWOA MPPT programmes. Competenz is also involved with Weltec, EIT Hawkes Bay and Gisborne and Wintec, focused in engineering, plus forestry in Gisborne.

In 2017, Competenz and Unitec have entered a unique partnership to jointly fund a full-time relationship manager who is responsible for employment opportunity management and placements of MPTT graduates into apprenticeships in Competenz sectors. Early results of this focus are promising.

TEC priority 4 – improving Literacy and Numeracy

Competenz Literacy and Numeracy Strategy 2017-2020

Competenz Literacy and Numeracy Strategy 2017-2020, *“Raising the literacy and numeracy levels of our industries, one learner and one business at a time”* has been developed following the employment of a dedicated literacy and numeracy manager.

The Literacy and Numeracy Strategy has five pillars. Each pillar has an overarching strategic outcome that Competenz will measure success against.

1. **Learners** – Our learners' literacy and numeracy needs are identified and supported
2. **Businesses** – Our businesses are supported to improve the long-term literacy and numeracy capability of their workforce
3. **Internal capability** – Our products and services effectively support learners with literacy and numeracy needs
4. **Competenz** – Competenz is a recognised leader in New Zealand's workplace literacy and numeracy field and our industries see us as a trusted literacy and numeracy advisor
5. **Commercial** – Opportunities are explored once internal systems are mastered.

The strategy takes into account the OECD's Survey of Adult Skills New Zealand results. This acknowledges that the average Pasifika scores are significantly lower than other ethnicities. It also identifies that a number of industries and occupations that are within Competenz's scope have significant literacy and numeracy gaps – particularly in manufacturing.

LNAAT

All Competenz learners in Level 1 and 2 programmes are required to undertake the LNAAT assessment. Supporting learners with literacy and numeracy gaps may also be required for learners signed into programmes beyond Level 2. As part of the digital innovation within Competenz, a review of how the LNAAT is being delivered will occur. It is intended that this test will be available online when a new learner enrolls into a training agreement.

Interventions

To facilitate effective interventions, Competenz has developed a nationwide literacy and numeracy provider support network, which accesses both the TEO-led and Employer-led Workplace Literacy and Numeracy funds.

Resources

All resources are developed in relation to a learner profile, including demands of the specific job and a summary of LNAAT data from previous learners. For example, we have enhanced the effectiveness of resources for the forestry industry by including video content.

Summary of Competenz 2018-2020 Initiatives

Initiative	Description
Core Project Stream 1 Easy to understand, easy to apply pricing	<p>Easy to explain pricing frameworks that support sustainability.</p> <p>How can we give more value to customers who need it within our current resources? For example, we are not funded by the Government to provide resources, but we invest significantly in them because of their value to learners, employers and providers. If we ensure we cover our costs and have sustainability built into our pricing, we can invest in other areas of value to customers too.</p>
Core Project Stream 2 New courses and services	<p>Deliver extra value to customers and increase non-funded (commercial) revenue.</p> <p>Learners and employers have told us that they find huge value in our resources and would like to access them outside of formal qualifications. We need to make that easy for them.</p> <p>If we increase our non-funded revenue through offering products of value to learners, employers and providers, we can remain the trusted skills partner for our employers and help more learners succeed throughout the life of their careers. While meeting the changing needs of our learners and delighting our customers, we can remain true to our mission - Transforming lives. Every learner. Every time.</p> <p>Includes, among other things, Competenz Microlearning, selling resources and investigating a recruitment service to connect job seekers and businesses.</p>
Core Project Stream 3 Match customers to the right service level	<p>A tiered services model to support employers with the right solutions and services.</p> <p>Developing a tiered services model is at the heart of customer centricity for Competenz. We can service more learners and have more learners complete with the same resources by “right-servicing”. New service approaches will move us from our current “one size fits all” service model to giving more help where we add the most value and more self-service options for other customers.</p> <p>Continued development of the Competenz Central, a central self-service hub for learners and employers to get information and connect with Competenz and in online communities.</p>
Core Project Stream 4 Increase learner success	<p>Opening our communications channels (particularly digital) to engage directly with learners and prospective learners.</p> <p>Support learner outcomes with the right solutions and services</p> <ul style="list-style-type: none"> » Segment learners to identify best approaches to successful completion » Design tiered and flexible approach to learner support » Focus on face-to-face support where needed most » Opening our communications channels (particularly digital) to engage directly with learners and prospective learners <p>Includes, among other things: Literacy and numeracy interventions supported by partnerships, regional study groups, Competenz Online Learning cohorts, greater support for first year NZAs.</p>
Core Project Stream 5 Digital systems to automate and simplify	<p>Development of CZ Employer Portal, a data warehouse, our new SAAS based LMS (Canvas) and Online Assessments have been great achievements, but there is more work to do. Digital platforms are a key enabler to help Competenz make internal processes easier and provide a simple, accessible customer service experience.</p> <p>Includes, among other things, new Opportunity and Customer Relationship Management system; e-commerce platform and mobility for field team.</p>
Restructuring our operating model from 6 June 2017	<p>Gearing for a sustainable future.</p> <p>Restructuring the business to work in matrix style to focus on helping more learners have more success.</p>

Summary of Competenz 2018-2020 Initiatives

Initiative	Description
Partnerships (with ITPs, ITOs, etc) as an enabler	Exploring more opportunities to work collaboratively with other ITOs and ITPs, particularly to help transition learners between pre-trades into the workplace and on to higher level learning (L5 and above).
Workforce development	Working with more businesses as a workforce development partner, co-creating total workforce development solutions.
Māori & Pasifika participation and achievement	How can Competenz be a leader in engaging Maori and Pasifika people in trades career opportunities and life-long learning for economic resilience? Including community and school based engagement for pipeline development; internal cultural competency and mentoring for success.

Response to three additional challenges set by TEC

“Our industries are facing many challenges. In the manufacturing sector, automation is making employment reductions a reality. Health and safety continues to be a challenge in the forestry sector. Ongoing issues with recruitment continue to affect trade careers. Digital disruption continues to challenge the face of learning. Despite this in 2016 Competenz continued to grow in our sectors.”

Mike Simm
Competenz Chairman of the Board¹⁰

As a way to look beyond traditional industry training, we have formed a commercial innovation team to specifically look at ways to extend Competenz offerings to meet the diverse needs of our customers. This team considers ways to consider “out of the box” thinking and create new offerings that will support businesses and potential learners.

Engagement in the Productivity Commission report process

Changes addressed by the Productivity Commission address the additional TEC challenges. We were committed to ensuring that the voices of the 36 industries we represent are reflected in our response to the Productivity Commission recommendations.

We commissioned an independent research organisation to support us in gathering industry-wide feedback. This included interviewing more than 70 key stakeholders across all the industry associations and sector advisory groups that Competenz currently consults.

While the outcome of the report places more focus on the university sector, Competenz is positive about the removal of barriers and tensions within the tertiary education sector that will promote collaboration for the benefit of learners:

- » The lift in funding cap for Level 5 and above for industry training
- » Funding support for learners who do not intend to pursue a full qualification (this supports the rapidly growing “edubit”, “micro-credentialising” and “microlearning” trends)
- » Greater opportunity to collaborate with training providers, with the penalties being removed when students secure a job part way through their study
- » The possibility of equalising funding for whatever tertiary training a learner undertakes through the life of their career.

¹⁰ Mike Simm, Chairman's report, Competenz Annual Report 2016

Challenge

Initiatives / examples

1

Raising basic skills

TEC has identified that we need to get lower skilled workers into jobs as an important first step to improving wellbeing. Upskilling lower skilled workers, particularly in respect of literacy and numeracy is one challenge, and the other focus area is supporting young people into sustainable employment (bridging the “attitude gap” and making young people more attractive to employers).

Department of Corrections partnership

Competenz renegotiated its contract with the Department of Corrections (the department) at the start of 2017. We provide a number of key services to the department and its 18 nationwide sites. Prisoners are achieving education success that leads to reduced reoffending rates, improved economic, social and cultural outcomes. Through this agreement, the department will be measuring impact in areas of re-offending rates, employment outcomes, highest level qualifications, NCEA participation as well as achievement rates and education progression rates. Competenz provides training and assessment resources, along with assessor scope and accreditation. The training programmes cover a range of skills modules and full qualifications able to be taught within the prison environment. Additions to the previous year’s contract mean we are facilitating moderation support activities, developing new programmes and resources, providing links to industry employment opportunities and writing promotional materials to encourage inmates toward apprenticeships on release. Beyond the scope of the contract, we are also supporting the department by attending careers expos, graduation ceremonies and employers days. Additional opportunities are being explored with the probation and juvenile departments.

Progressions

Our 2016 (and year to date 2017) data shows an increase of learners progressing to higher level qualifications and that the percentage of Māori progressing is greater than all ethnicities. It also shows that of those that progress, more than 60% move from a Level 2 qualification to a higher level. Not all career progression translates into a linear progression to higher qualifications, but our commitment to Level 2 as a career and learning stepping-off point remains.

Case study - Real Journeys

We worked closely with Real Journeys to develop customised training programmes based around a range of essential skills that would mean operations staff would gain qualifications. Initially this only to develop maritime qualification pathways, this relationship has now been extended to include a full range of skills (maritime, engineering, hospitality, transport, guiding, sales, administration and more). Evidence from Real Journeys’ People and Performance 2015-2016 Annual Report outlines the transition to a culture of learning. The level of satisfaction and positive responses around training show that staff feels that they are now adequately trained for the work they do and that there are clear learning and development pathways.

Working with industry to upskill lower skilled workers particularly raising LLN

As already identified under Priority 4, Competenz has a new Literacy and Numeracy Strategy that will result in benefits for lower skilled workers with literacy and or numeracy gaps.

KiwiRail example

We identified that KiwiRail had many managers with literacy and numeracy gaps. They had been train drivers, but not trained as managers. We built a relationship with Learning Wave to provide additional support for these managers, enabling them to up-skill and fulfill their management roles much more effectively.

Case study – OJI Fibre Solutions

We helped OJI Fibre Solutions to reinvest back into training after a three-year period without any formal programme across their four sites in New Zealand. Their initial goal was to set a minimum level of skills and knowledge and address literacy and numeracy issues in one site. The Manufacturing Core Skills (Level 2) was set at this minimum level. We mapped competencies across the operational procedures and undertook LNAAT testing and workplace verifications. Competenz built the OJI Skills Pathway to clearly identify skills progression. Competenz also developed supplementary credit programmes (SCPs) and resources in Quality, Technical or Lean Manufacturing. Once people gained the minimum Level 2 qualification, staff had the opportunity to complete additional programmes. Workplace assessors were identified within OJI who were then coached by Competenz. Having this capacity within OJI meant that staff were able to stay on-site when undertaking training and assessments. Competenz facilitated a partnership between OJI and Education Unlimited to provide wrap-around learning support.

Challenge	Initiatives / examples
Supporting young people into sustainable employment	<p>Feedback from all our industries shows that their primary concern is finding motivated young people who are interested in growing their careers in Competenz sectors.</p> <p>We promote trades careers in our sectors all around New Zealand through our:</p> <ul style="list-style-type: none"> » Ambassador Programme » Trades Guide » Got a Trade? Got it Made! campaign <p>Competenz also has initiatives in place to connect young people with possible employers, discussed elsewhere in this document.</p> <ul style="list-style-type: none"> » Gateway » ATNZ relationship » Boot camp pilots » MPTT » Big Bus Tour where we take students out to workplaces, to show them around and let them connect to businesses » Speed meet where we create a marketplace/forum for job seekers and employers to connect. <p>In 2017, Competenz is also testing a recruitment service offering, initially in the engineering sector.</p>
Employability skills framework	<p>Competenz was involved in development of the employability skills framework and consulted with our industry strategic advisory groups to gain their support. We are utilising the framework learnings in the following ways:</p> <ul style="list-style-type: none"> » In work ready workshops, initially with Māori and Pasifika learners » Promotion across social media, directly to learners » In a pilot of online work-readiness mini-courses » Integrated into our Gateway programmes in engineering, butchery and furniture making » Focus for the ITO collaborative campaign “Got a Trade? Got It Made!”

Challenge

Initiatives / examples

2

Facilitating continuing vocational education and training

Competenz as a skills broker and facilitator working closely with industry and businesses

Competenz has the potential to have a unique role in the facilitation of being a skills broker, knowing what skills will be in demand and connecting industry to the tertiary sector. Today, we do participate in Skills Hubs, which act as a one-stop-shop for employers and embed them within the site of a major project, which directly connects employers to all relevant parts of the tertiary education and training sector. The genesis for skills exchange lies with the Auckland ITP-ITO Alliance, a collaboration between Unitec, MIT, BCITO, The Skills Organisation, Competenz and Connexis. This alliance was formed to help address the looming acute skills shortages in the construction industry in Auckland, based on the projected volume of work and modeling of current and forecast labour markets.

Workforce development plan

The Competenz business development team partners with our employers to understand their learning and development needs and to meet these needs through workforce development plans.

Grow Your Business Guide for employers

The Grow Your Business Guide highlights cross-industry training programmes that support an enterprise-wide approach to workforce training. The guide showcases non-technical qualifications that pathway outside of the traditional technical apprenticeship and traineeship qualifications. The qualifications range from sales and merchandising through to competitive systems and practices (CSP) and health and safety.

Microlearning

Employers and learners are demanding new resources and new structures for learning. Competenz Microlearning offers opportunities to undertake bite-sized pieces of learning (and assessment) through our learning management system and learner portal Competenz Central. This on-the-spot training meets immediate customer needs, either for up-skilling or filling a knowledge gap.

Thirty six products (based on unit standards) will form our technical collection. This is outside the scope of a training agreement, but provides a low risk approach for the employer to ascertain if the learner could progress into a traineeship or apprenticeship. Microlearning resources and assessment can also be used for those who already have qualifications but need additional skills to keep up with the changes in their role.

Competenz scholarships for higher learning

Competenz partnered with Skills4Work to deliver \$150,000 worth of scholarships over a three-year period (2017-2019 inclusive). These Competenz scholarships are candidates with a minimum of a Level 3 qualifications, to contribute toward higher level learning and skills development in their chosen field.

Scholarship winners are supported in achieving life and career goals by removing some financial barriers. These scholarships focus on priority groups of Māori, Pasifika and women.

Scholarship recipients receive \$3,000 each towards higher-level learning. In 2017, 15 scholarships were awarded from a pool of 69 applications across a broad range of industries.

3

Fostering enterprise level innovation

Helping businesses develop strategies to recognise, recruit and train for skills that support productivity and innovation

Business productivity and innovation is critical for the future of New Zealand and is underpinned by confidence to invest in recruitment and training. Supporting businesses with these areas and literacy and numeracy interventions will support productivity as will the new mentoring guide. Ensuring that businesses have the right training resources at the time they need them will also assist.

Competenz works with employers in different ways to produce innovative approaches to industry training.

Case study – Kraft Heinz takes global competition seriously

Kraft Heinz is the fifth largest food and beverage company in the world with sites in Hastings, Christchurch and Auckland. As part of their commitment to excellence they run a global competition: “Be the Best – Training for Championships”. Teams worldwide compete for recognition across a number of performance measures, designed to enhance every element of work performance – from production efficiencies to health and safety.

Competenz has formed a strategic partnership with Kraft Heinz and learning provider Octopus to develop training pathways aligned to this global competition. We designed, mapped and supported a multi-stage training process beginning with all staff completing the National Certificate in Manufacturing (Core Skills) Level 2 in 2015 with many progressing to Level 3 qualifications in Competitive Systems and Practices or Manufacturing in 2016 and beyond.

- » With over 1,000 learners already assessed in core manufacturing, we’re making a huge contribution to their manufacturing goals
- » Two supplementary credit programmes (SCPs) for Level 3 units in lean principles and quality principles provide training pathways to achieving the New Zealand Certificate in Competitive Systems and Processes Level 3
- » Twenty-eight territory managers have been enrolled in Sales Fundamentals, National Certificate in Sales Level 3
- » Additional programmes that Kraft Heinz are engaged in include:
 - » Business qualifications for the administration and consumer teams
 - » Sales qualifications for up to 130 merchandisers
 - » Higher-level general manufacturing qualifications (up to the Level 5 diploma) for the production management team.

Mad Butcher Gateway programme

Secondary school students from West and South Auckland are benefiting from a partnership between Competenz and The Mad Butcher Group.

“It’s about supporting the industry and young school leavers. If students show that they are keen and passionate about the business then that could lead onto full time positions with us,” says The Mad Butcher Group operations manager Dan Adams.

“The programme is designed for unit standards in mince making. The students are also involved in other areas of the business such as putting meat into trays and wrapping meat. They get an overall understanding of a working environment in this industry.”

Students do work experience at a local Mad Butcher store one day a week where they learn from experienced butchers.

“It’s a chance for a young person to get a taste of the butchery trade while gaining credits that go towards their NCEA results,” says Jim MacBride-Stewart, Competenz GM Industry Training.

The Butchery Gateway programme is currently only available in West and South Auckland, with the prospect to expand to Mad Butcher stores nationwide.

Buckley Systems

We set up the Buckley Systems pre-apprenticeship programme to help them source their right next apprentices. This programme is an innovative way to set up a breeding ground for apprentices, providing a six-month training opportunity where potential apprentices get to experience a variety of tasks around the business. With Competenz’s assistance, these potential apprentices also gain unit standards depending on the roles they perform.

Our industry sectors

There were 268,462 people employed across all Competenz sectors in 2016 which equates to 11% of the New Zealand workforce. In 2016, there were 44,127 business units, up from 43,048 five years earlier which was a 0.5% increase.

Between 2011 and 2016, employment across all Competenz sectors grew by an average of 0.5% per annum. In the two years to 2016, employment growth in the total Competenz was 1.6% per annum. Employment across all Competenz sectors is forecast to grow by an average of 0.6% per annum between 2016 and 2021.

People employed in the total Competenz sector with a Level 4 or above post-school qualification increased by 4.1% between 2006 and 2013. There was also a 3.8% decline in the number of people with no post-school qualification.

Based on information from Infometrics, labour productivity growth for Competenz's sectors in total between 2011 and 2016 was 0.2%. This is double the total labour productivity growth for the whole of New Zealand. The average earnings for Competenz's sectors is above that of the total for the whole of New Zealand.

Sector growth

Sector	Apprentices/trainees	Industry forecast	Training forecast
Apparel and textiles	35 trainees	<i>Decline (4%)</i>	Fragmented sector with large number of small businesses
Baking	Majority NZAs 480 learners	<i>Growth since 2014</i>	Growth through new NZA and industry engagement
Engineering fabrication	1,148 learners NZAs	<i>Growth since 2010</i>	Modest growth through new quals and industry engagement
Fire protection	470 learners NZAs	<i>Growth (2.4%)</i>	Strong growth through new quals and industry engagement
Food and beverage processing	1,193 learners Trainees	<i>Growth (1%)</i>	Growth area through industry engagement and pathwaying learners from L2 to L3 and above
Forestry	3,354 learners Majority trainees	<i>Slight decline but more static</i>	Growth driven by new service model, new quals and industry engagement
Furniture making	252 learners NZAs and Trainees	<i>Decline (-3.8%)</i>	Modest growth following a service model review in 2018
General manufacturing	3,883 learners Trainees	Growth since 2010	Growth area through industry engagement and pathwaying learners from L2 to L3 and above
Journalism	33 learners Trainees	Decline (-1.9%)	Exiting this sector as training is being accessed through university study
Laundry and drycleaning	46 learners Trainees	Static	Small sector will grow if we can penetrate large customers and DHBs
Locksmithing	56 learners NZAs	Growth	Static learner numbers – service model to be reviewed
Maritime	1,547 learners Trainees	Growth	Growth at Level 4 and diploma level through new qualifications
Mechanical engineering	2,102 learners NZAs	Slight growth trend	Modest growth through new quals and industry
Packaging	182 learners Trainees	Decline (-3.1%)	Growth will come if we can secure major customers
Plastics processing	250 learners Majority trainees	Decline (-1.8%)	Small growth with launch of new quals
Print	269 learners NZAs and Trainees	Decline (-3.6%)	Decline in learner numbers due to industry consolidation
Rail	252 learners Trainees	Growth (2.7%)	Growth only if we can convert KiwiRail to train to quals
Retail meat	520 learners Majority NZAs	Slight decline	Growth in NZAs with new quals
Refrigeration heating ventilating & air conditioning	585 learners NZAs	Growth (2.9%)	Growth through impact of building and construction boom
Signmaking	98 learners Majority NZAs	Growth	Modest growth in learners through industry engagement
Wood manufacturing	873 learners Majority trainees	Decline (-2.8%)	Modest growth in NZAs driven through industry engagement
Non Competenz qualifications			
Business	765 learners Trainees		Significant growth through our workforce development plans with industry
Distribution	147 learners Trainees		Significant growth through our workforce development plans with industry
Health and safety	2,069 learners Trainees		Decline in learners numbers following a spike in learner numbers in 2016
Sales and merchandising	615 learners Trainees		Static learner numbers as we promote these quals beyond the FMCG industry

With the changes to Competenz operating model, there are now designated managers and departments focusing on business development, apprenticeships and commercial (business relationships). This change will result in greater opportunities to grow the number of engaged businesses along with further developing the relationships with existing businesses to extend the offerings within these.

Our performance commitments

The data provided by TEC regarding the achievement “2016 Credit achievement and funding by programmes” identified that there had been lower levels (less than 50%) of achievement against some Competenz programmes (qualifications).

We address this low-level achievement in the table below in programmes where there were 20 or more STMs.

Figure 1 – 2016 programmes with credit achievement below 50%

Maritime (L3)	This relates to c. 680 Royal NZ Navy enrolments in NZC in Domestic Maritime Crewing, with September/October 2016 start dates. There was minimal credit achievement for these learners in 2016, however there has been a lot of activity in 2017, particularly in January resulting in a YTD Apr 2017 credit achievement of 69% for this programme (and 72% overall for all Maritime L3 programmes).
Mechanical Engineering (L5)	This qualification has both delivery and design issues causing low credit achievement and low completions. This qualification has been reviewed as part of the TRoQ. The new qualification is being designed and the delivery mechanism reviewed to increase support for learners to achieve, including improvements to off-job block courses.
Plastics Processing Technology (L4)	This qualification is being delivered in a declining sector and has some design issues. A new Level 4 qualification is currently in development for delivery in January 2018. The service delivery mechanism is also being updated to support the learners better.
Fibreboard Packaging (L3)	An upward trend in credit achievement figures can be seen YTD April 2017 at 58%.
Manufacturing (L3)	This is partly a timing issue. The low credit achievement in 2016 relates to c. 100 enrolments with a major employer in the New Zealand Certificate in Manufacturing, with October 2016 start dates. These learners were just inside the 90-day period and did not achieve any credits in 2016.
Print Industry Management (L5)	This relates to c. 60 enrolments in the National Diploma in Print Industry Management across multiple companies. Improved YTD Apr 2017 data shows credit achievement of 57% for this programme (and 56% overall for all Print Industry Management L5 programmes).

Competenz believes that the new programmes and resources post TRoQ, and the organisational changes will result in positive shifts in learner outcomes.

Participation at Level 4+

Trainees and apprentices at Level 4 and above

Participation in this area will continue to increase as a result of the new programmes following qualification reviews and launch of NZAs within new sectors (including retail meat and baking). Greater focus on pathways resulting from workforce development planning starting progressive learning programmes from Level 2 within workplaces will also see uptake of additional and higher level qualifications.

Learners by level	2015	2016
Level 4	7,818	7,953
Level 5	437	350
Level 6	45	43
Total	8,300	8,346

Māori

Data available as at the end of May 2017 indicates that 38% of Māori are undertaking a Level 4 or above programme. This was an increase compared to the same time in 2016.

Pasifika

22.5% of Pasifika learners enrolled with Competenz at the end of May 2017 were in Level 4 or above programmes.

Under 25 years

As outlined above, the change in offerings at Level 4 in some sectors will naturally impact on the number of younger learners undertaking qualifications at this level.

Programme completion at Level 4+

Qualification completions by level	2015	2016
Level 4	1,375	1,569
Level 5	123	76
Level 6	3	6
Total	1,501	1,651

Competenz financials

Industry cash contribution

The level of contribution from industry in 2016 was \$6.5m (approximately 20% of Competenz non-exchange transaction revenue).

It is anticipated that this will be consistent as a percentage of revenue in 2018-2020. However, our plans include growth in industry contribution through the uptake of new offerings such as Competenz Microlearning and recruitment services.

Summary statement of comprehensive revenue and expenses For the year ended 31 December 2016

Assets	2016 \$000
Revenue from non-exchange transactions	
Government grants	25,268
Industry income	6,492
	31,760
Revenue from exchange transactions	
Industry income	19,285
Other revenue	354
	19,639
Total revenue	51,399
Expenses	
Training costs	9,851
Employee entitlements	29,093
Other expenses from ordinary activities	11,903
Total expenses	50,847
Net Surplus	552
Other Comprehensive income	-
Total comprehensive income for the year	552

Focus areas for investment

Competenz's 2016 surplus was \$552,000. This surplus will be invested directly into initiatives and resources to activate our 2020 strategic objectives:

Your skills partner

- » Growth by working with more employers as a workforce development partner

Learners for life

- » Improved learner outcomes through targeted support during the learner journey (improving both retention and completions for all learners, with special focus on Māori and Pasifika learners)
- » Growth of our careers pipeline, helping to connect employers with those wanting to enter into our industries

The skills innovators

- » Relevant learning and assessment materials to support improved learning outcomes, and taking into account literacy and numeracy needs
- » Digitisation of our content and platforms to improve usability and accessibility for our employers and learners

Digitisation enabling more success for more learners

Competenz is on a journey to a new digital future. We are ensuring the tools and resources that we make available to employers and learners are easy to use, and allow for self-service. Our online portal Competenz Central enables our customers to have instant access to progress data (employers can see their employees' progress and achievement) and learners can track their own progress in near real time.

Other new tools, such as our new online learning management system and online sign up process mean we can service more employers and learners in a way that fits the realities of their work and life arrangements.

We are working to automate every system we can, while freeing up our dedicated team to focus on support for more learners. New systems free up Competenz staff time spent on administration and this means we can spend longer and add more value to employers, learners, schools and other stakeholders.

Mix of Provision

Competenz is seeking the approval of our Mix of Provision (MoP) for 2018-2020. This MoP has been developed from the ground up, taking into account industry insights and economic trends within our sectors, overlaid with past qualification performance and planned roll out of post-TRoQ qualifications.

Competenz MOP Re-submission 2018-2020											
Fund	LEVEL	2016 Trainees	2017 MOP* Trainees	MOP Submission			2016 STM Actual	2017 STM MOP*	MOP Submission		
				2018 TrainDDs	2019 Trainees	2020 Trainees			2018 STM	2019 STM	2020 STM
IT	1	64	56	8	-	-	9.98	13.64	2.00	-	-
IT	2	6,032	5,163	3,537	3,430	3,430	1,487.58	1,590.79	1,089.82	1,056.92	1,056.92
IT	3	6,816	6,342	4,592	4,995	5,241	1,981.09	1,802.48	1,305.10	1,419.53	1,489.49
IT	4	2,120	1,932	1,524	1,677	1,779	691.70	597.95	471.74	518.98	550.68
IT	5	332	274	151	196	238	100.91	90.78	49.96	65.07	78.88
IT	6	41	93	28	64	64	16.64	43.80	13.21	30.00	30.00
IT	7	-	-	-	-	-	-	-	-	-	-
Total IT		15,405	13,860	9,840	10,362	10,752	4,287.90	4,139.43	2,931.83	3,090.49	3,205.97
NZA	4	5,050	4,761	5,062	5,160	5,285	2,083.20	2,296.73	2,442.17	2,489.43	2,549.75
MA	3	6	-	-	-	-	0.91	-	-	-	-
MA	4	81	29	-	-	-	27.68	9.61	-	-	-
Total MA		87	29	-	-	-	28.58	9.61	-	-	-
MA non ITO MAC	3	2	-	-	-	-	0.19	-	-	-	-
MA non ITO MAC	4	251	101	-	-	-	97.60	31.34	-	-	-
Total non ITO MAC		253	101	-	-	-	97.79	31.34	-	-	-
Grand Total		20,795	18,751	14,903	15,522	16,038	6,497.48	6,477.11	5,374.00	5,579.92	5,755.72

Detailed commentary on each level is outlined below:

Level 1

2016-2020 -100%

There remains only a small number of learners at Level 1, completing the plastics Level 1 qualification (expires at the end of 2018). Competenz will not be offering any programmes at Level 1 beyond 2018. This represents significant movement "up the framework" in our MoP. For example, in 2011, our MoP contained 10% of STMs at Level 1 (and this would have been a higher percentage when combined with pre-merger ITOs) .

Level 2

2016-2020 +5.8%

Competenz utilises the Level 2 food and beverage and manufacturing as part of a pathway for learners to move to higher level qualifications. A number of new customers such as Kraft Heinz and Wineworks have multiple learners who begin their learning journey with a Level 2 qualification and then progress up the framework to achieve one or more Level 3 qualifications in manufacturing and/or competitive systems and practices. Competenz sees these entry level qualifications at Level 2 as critical to getting lower skilled workers into learning and moving up to higher level qualifications.

We are seeing increased demand for these pathways from industry across all our manufacturing sectors, with learners pathwaying into more technical qualifications in sectors such as plastics and print where their technical Level 1 and 2 qualifications have been expired as part of the TRoQ. Competenz has consolidated a large number of sector specific qualifications into a generic manufacturing qualification to address this.

Drivers for Level 2 growth:

At Competenz in 2016, 39% of our Level 2 learners were Māori and 55% were Pasifika. Level 2 programmes allow these educationally disadvantaged ethnic groups to engage in workplace learning, achieve a nationally recognised qualification and, in many cases, pathway to a higher level programme. Not being able to provide these Level 2 qualification to industry would disadvantage these (often second chance) learners and result in them not being able to achieve at higher levels.

The increase in Level 2 provision in 2018 reflects learners in Maritime Level 2 as the Royal New Zealand Navy grows naval recruits to crew the new ship it has ordered.

Competenz is forecasting growth in overall STMs however we see the percentage of STMs at Level 2 decreasing from 22.9% in 2016 to 21.3% in 2020. This is a significant mix change when compared to 2011 where Competenz delivered 39% of STMs at Level 2 and 49% of its STMs delivered at Levels 1 and 2.

Level 3

2016-2020 +14.9%

The significant areas of growth at Level 3 are in General Manufacturing and Food and Beverage manufacturing. Prior to 2017, the qualifications at this level were not fit for purpose and were not being utilised by industry. The new qualifications match industry wants, facilitate pathways from Level 2 and we are seeing increased learners at this level.

Forestry is forecast to continue its growth in Level 3 following the launch of the new post TRoQ programmes, increased learner support and upgraded industry engagement models.

We are forecasting significant growth in distribution and business programmes as we take an enterprise wide approach to workforce development plans across our customer's whole organisation. Fire protection will grow steadily following the launch of our online learning programme and a new service delivery model for that sector.

There is forecast decline in occupational safety and health programmes following the significant number of learners completing this programme in 2016.

Both Butchery and Bakery will steadily decline through until 2020 as we see learners enrolling in the Level 4 NZA which is currently provisioned at Level 3.

Competenz has been focussed on lifting the level at which it engages learners and since 2011 it has increased its delivery of STMs at Level 3 and above from 51% to 77% in 2016, and will grow this to 79% in 2020.

Level 4 – industry training

2016-2020 +23%

Competenz is forecasting significant growth at Level 4 in the Industry Training fund. This growth is driven by industry demand, increased pathways for learners and new qualifications post TRoQ.

Manufacturing is going to grow, with new qualifications in Manufacturing and Competitive Systems and Practices being well received by industry. Forestry is forecast to grow steadily with new qualifications, increased learner engagement and the new service delivery model we introduced in 2016. We have introduced a new Maritime qualification for the Royal New Zealand Navy. New programmes in mechanical engineering, fire protection, plastics and print with increased industry engagement will see growth in all these sectors' technical training.

Level 4 – NZA

2016-2020 +14.8%

We are focussed on aligning our MoP to growth at higher levels and apprenticeships. This growth is supported by our new organisational structure which has an operations team solely focussed on apprentice support, and we are investing in increasing the support we provide individual learners to ensure they have the support they need to successfully achieve their qualification.

Half of our apprentice learners are in the mechanical engineering and fabrication sectors, and we see steady growth in learner numbers through to 2020 as we will be launching the new qualifications for these sectors in 2018, and increasing industry engagement and learner support. With the current building boom we are forecasting significant growth in our refrigeration and air conditioning and fire protection apprenticeships. Both these sectors will have had their new New Zealand Apprenticeship post TRoQ programmes launched by 2018 and in fire protection especially there are a number of significant changes making the qualification and support offered with it more achievable by the learner.

Retail meat and baking both have significant growth as their old Level 3 qualifications have been replaced with a New Zealand Apprenticeships post TRoQ. In addition to this, Progressive Enterprises (Countdown Supermarkets) has committed to significantly increase the number of apprentices they train in store across New Zealand.

Most other apprenticeships we offer will maintain learner numbers or grow incrementally as our new organisational structure focuses investment and resource on new models of industry engagement and learner support. This includes New Zealand Apprenticeships in forestry, heating and ventilation, wood manufacturing, furniture, sign-making and packaging. We are forecasting a reduction in plastics apprentices through into 2020 as this sector faces a business decline.

Level 5

2016-2020 +14.8%

The 2018 forecast is down on 2016, but we are forecasting growth at Level 5 for 2020. Our Level 5 Mechanical Engineering programme needs to have the service support model and programme redesigned and this work will be completed in 2018.

We have small numbers of learners at Level 5 in Business where we are forecasting modest growth together with a New Manufacturing Management programme. We are launching a new Level 5 Fabrication programme mid-2018 and we are forecasting a steady build in learners in this programme through to 2020.

Level 6

2016-2020 +5.9%

We have forecast significant growth in 2018 as the Navy is completing a large number of learners in the Diploma in Nautical Science and Maritime engineering and then they will have a smaller cohort completing this programme through 2019 and 2020. We are forecasting small growth in our Diploma in Engineering, however this is offset by our discontinuation of the Diploma in Journalism following extensive consultation with industry.

Educational performance indicators

Competenz performance – old metrics

Competenz forecasts improved performance in all areas of Credit Achievement, Programme Completion and Participation across all ethnicities when compared to 2016. This is as a result of the Learner and Customer Centric strategies and organisational initiatives we have outlined in this Investment Plan.

Competenz – old educational performance indicator metrics 2018-2019

		2015 Actuals	2016 Actuals	2017 Commitment	2018 Commitment	2019 Commitment
Credit achievement	All Trainees and Apprentices	69.9%	74.6%	75.0%	77.0%	78.0%
Credit achievement	Maori Trainees and Apprentices At Level 4+	64.4%	71.3%	73.0%	72.0%	73.0%
Credit achievement	Pasifika Trainees and Apprentices At Level 4+	68.1%	66.2%	76.0%	67.5%	69.0%
Credit achievement	Aged under 25 Trainees and Apprentices At Level 4+	77.5%	78.6%	77.0%	78.0%	78.5%
Participation	Proportion of Maori Trainees and Apprentices At Level 4+	19.2%	18.3%	19.4%	19.0%	19.5%
Participation	Proportion of Pasifika Trainees and Apprentices At Level 4+	4.0%	4.2%	7.4%	5.0%	5.5%
Participation	Proportion of Aged under 25 Trainees and Apprentices At Level 4+	46.0%	44.5%	49.5%	46.0%	48.0%

New cohort based measures

Our emphasis in developing our EPIs has been on the new cohort measure. This has been difficult without historic data with which to draw trends and is impacted by data derived prior to a number of our mergers. Competenz's forecast performance based on the new cohort measure is outlined below:

Cohort based – Level 1-3

- » 2016 69%
- » 2017 74.8%
- » 2018 81%
- » 2019 81.5%

Competenz forecasts higher levels of achievement in New Zealand Certificates in the coming years maintaining over 81% completions with small growth forecast by 2019. This reflects a significant improvement from 2016 where we achieved 69%. These outcomes are driven by high completion percentages in some of our larger sectors including maritime and manufacturing.

Māori and Pasifika are forecast to perform well achieving an increase in achievement with Māori learners forecast to increase from 58% in 2016 to 81.2% by 2019 and Pasifika learners forecast to increase from 75% in 2016 to 81.3% by 2019.

Under 25 year olds achieve at the same rate as the cohort average at Levels 1-3 with a completion percentage of over 81% by 2018 and 2019.

Cohort based – Level 4+ NZCs

- » 2016 35.4%
- » 2017 50.4%
- » 2018 50.8%
- » 2019 63.4%

Competenz forecasts an improvement in the outcomes at Level 4 and above with a significant increase in the completions percentage by 2019. This performance is driven down by our achievement in Forestry which continues to be a challenge to lift above 60% programme completions (and this is a key area of focus for Competenz as 60% of the Level 4 NZC enrolments are in the Forestry sector). It should be noted a large percentage of the learners being measured in the above relate to learner completions prior to our new service delivery model in Forestry being implemented in mid 2016. Both rail and business qualifications will deliver a completion percentage of greater than 80% in 2018.

Māori and Pasifika performance continues to increase in these qualification groups. Māori performance increases from 37.5% in 2016 to 47% by 2019, and equally, Pasifika performance is forecast to increase from 38.2% in 2016 to 67.9% by 2019 as we continue to focus on improved delivery at Level 4.

Under 25 year olds achieve at a lower rate than the cohort at Level 4 at a rate of 47% in 2018 and 2019. However, this is a significant improvement on the achievement of 19.7% in 2016 and this is an area of focus for Competenz in identifying at risk learners. It should be noted however that the under 25 year old cohort represents less than 9% of the total number at this level.

Cohort based – New Zealand Apprenticeships

- » 2016 69.9% (Note: this is pre-merger)
- » 2017 54.4%
- » 2018 51.7%
- » 2019 51.9%

The new cohort performance based measures reflect the achievement of apprentices enrolled in 2013 and 2014. The performance of Competenz as an Industry Training Organisation has been an area of continued focus. Competenz's mergers with FITEC, PAMPITO, CMITO and RMITO were being completed during this time and some of the learner progression was under the management of these pre-merged organisations and was not being effectively managed.

Competenz forecasts a reduction in the completion percentages in 2018 and 2019 due to a high number of learner withdrawing from their programme in 2013 or during the subsequent 5 years. This occurs most prominently in Forestry where 88% of apprentices have withdrawn from 2013 and 77% from 2014. This translates to a maximum completion rate if all apprentices completed of 12% in 2018 and 23% in 2019. Other merged sectors have similar performance rates (e.g. Plastics which has a maximum completion rate in 2018 of 20%). Most Competenz pre-merger apprenticeships have a completion rate of over 50% including Fabrication at 58.6% by 2018 and 61.8% by 2019 and Mechanical at 62.2% by 2018 and 67.0% by 2019.

Māori and Pasifika completions performance is forecast to decline as the impact of the mergers reflects in the Competenz numbers. Māori performance declines from 70.0% in 2016 to 39.8% by 2019, and equally, Pasifika performance is forecast to decline from 58.3% in 2016 to 54.9% by 2019.

Under 25 year olds completion of their apprenticeship will decline with the new cohort metrics from 69.9% in 2016 to 32.8% by 2018 and improve to 53.0% by 2019. This again reflects the impact of mergers with lower performing ITO's and their learners impacting Competenz's apprentice completion rates.

Cohort based – Apprentice Retention Rates

- » 2016 79.9%
- » 2017 80.0%
- » 2018 80.2%
- » 2019 80.3%

Competenz forecasts improved apprentice retention rates as a result of the Learner and Customer Centric activity we have commenced, increasing support levels for at risk learners and ensuring apprentices have appropriate levels of support in the workplace to ensure they complete their qualifications.

As a result of this activity we are forecasting improved retention rates across both Maori and Pasifika cohorts and our under 25 year old cohort.

Evidential Matrix – TEC Investment Plan Template for 2018

The following matrix lists the evidence that confirms Competenz has met each of the assessment criteria set out in the Education (Proposed Investment Plans: Requirements, Content, Submission and Assessment; and Plan Summaries) Notice 2017.

Section 1 – Mission and role		Evidence	Location
1a.	The TEOs proposed mission and role, and the outcomes the TEO intends to contribute to, show an awareness of and are appropriate to the TEOs place in the regional and national tertiary system and the Government’s priorities.	Competenz Strategic Plan (2017-2020)	Available on request
		Vision and purpose, TEC priorities	2018-20 Investment Plan (pages 5, 8-16)
		2016-17 Investment Plan	With TEC
1b.	The TEOs proposed mission and role, as outlined in its proposed Plan, is relevant to its current and likely future environment. The TEOs proposed mission and role demonstrates that it clearly understands its distinctive mission and role within the system, and how this relates to the community it serves. The TEO demonstrates it has developed a sustainable plan for fulfilling its mission and role through its programmes and activities.	Competenz Strategic Plan (2017-2020)	Available on request
		TEC priorities, additional challenges, our industry sectors	2018-20 Investment Plan (pages 8-16, 19-25)
		2016-17 Investment Plan	With TEC
Section 2 – Contribution to Government Priorities		Evidence	Location
2a.	The TEO’s proposed mission and role, and the outcomes the TEO intends to contribute to, show an awareness of, and are appropriate to the TEO’s place in the regional and national tertiary system and the Government’s priorities. » Identify and respond to the needs of industry and employers, and/or » Support them to progress into sustainable work, and/or » Attract and engage Māori and Pasifika students and support them to succeed and achieve better outcomes, and / or » Respond to adult foundation learners with literacy and numeracy skill needs.	Competenz Strategic Plan (2017-2020)	Available on request
		Approaches to support industry, skills hubs, qualifications and programmes and industry engagement	2018-20 Investment Plan (pages 8-12)
		Grow Your Business Guide	Appendix D
		Competenz Trades Guide	Appendix F
		50,000 apprentices by 2020, getting at-risk young people into careers, and sustainable employment	2018-20 Investment Plan (pages 8, 13-14, 21)
		Boosting achievement of Māori and Pasifika	2018-20 Investment Plan (pages 15-16, 18)
		“Helping Māori and Pasifika learners build their skills in the workplace – A Competenz research paper (August 2014)”	www.competenz.org.nz/assets
Improving literacy and numeracy	2018-20 Investment Plan (pages 16-17)		

Section 3 – Addressing the needs of stakeholders		Evidence	Location
3a.	The TEO has clearly and accurately identified its key stakeholders, including: » Learners or prospective learners (in particular those who are Māori, or Pasifika, or young people, or who have low levels of literacy, language, and numeracy) » Employers, businesses or industries relevant to the TEO's areas of delivery » Relevant communities, including those that support Māori and Pasifika learners.	Competenz Strategic Plan (2017-2020)	Available on request
		Competenz Response to the Productivity Commission 2016	Appendix C
		Industry engagement, boosting achievement of Māori and Pasifika, improving literacy and numeracy, Productivity Commission	2018-20 Investment Plan (pages 12, 15-19)
		Competenz Literacy and Numeracy Strategy (2017-2010)	Available on request
		“Helping Māori and Pasifika learners build their skills in the workplace – A Competenz research paper (August 2014)”	www.competenz.org.nz/assets
3b.	The TEO has ascertained the needs of its key stakeholders, through direct consultation and the use of statistical information about regional or national demographics and employment market demand.	Infometrics sector summaries	Appendix A
		Competenz Response to the Productivity Commission 2016	Appendix C
		A customer-centric Competenz, industry engagement	2018-20 Investment Plan (pages 6-7, 12)
		Performance commitments and Mix of Provision 2018-20	2018-20 Investment Plan (pages 26-32)
		Competenz Ministerial Guide	Appendix G
3c.	The TEO has reviewed its current and proposed Plans against the needs of its stakeholders, and has documented what changes it has made, or will make to better accommodate these.	Summary of Competenz 2018-20 initiatives	2018-20 Investment Plan (pages 17-18)
		A customer-centric Competenz, supporting industry skill needs and summary of initiatives	2018-20 Investment Plan (pages 6-9, 17-18)
		Competenz Ministerial Guide	Appendix G
Section 4 – Programmes and activities		Evidence	Location
4a.	The TEO's proposed programmes and activities are appropriate in the context of: » Regional and national needs, including those of employers, businesses or industries relevant to the TEO's areas of delivery » Benefits to learners and the proposed programmes, and » The activities of other TEOs.	Competenz Annual Report 2016	Appendix B
		A customer-centric Competenz, employer and learner satisfaction, innovative approaches to support industry, industry engagement, partnerships, industry sectors	2018-20 Investment Plan (Pages 6-12, 18, 24-25)
		Performance commitments and Mix of Provision	2018-20 Investment Plan (pages 26-32)

Section 4 – Programmes and activities		Evidence	Location
4b.	The TEO is capable of delivering the proposed programmes and activities, and outcomes.	Competenz Strategic Plan (2017-2020)	Available on request
		Competenz Annual Report 2016	Appendix B
		Performance commitments and Mix of Provision 2018-20	2018-20 Investment Plan (pages 26-32)
		Educational Performance Indicators	2018-20 Investment Plan (page 33)
Section 5 – Outcomes and measures		Evidence	Location
5a.	The TEO’s proposed performance commitments are: » Designed and presented so they give clear evidence about the quality of the activity being measured » Relevant, so that they give meaningful information about the TEO’s progress towards its proposed outcomes » Set at a level that represents a meaningful improvement on past performance, especially with respect to outcomes for priority learner groups, and » Complete, so that they cover all significant programmes and activities the TEO intends to undertake, and all important dimensions of those activities.	Performance commitments and Mix of Provision 2016-17	Section 6
		Performance commitments and Mix of Provision 2018-20	2018-20 Investment Plan (pages 26-32)
		Educational Performance Indicators	2018-20 Investment Plan (page 33)
5b.	The TEO has reviewed its own performance against its current and previous Plans	Competenz Annual Report 2016	Appendix B
		ITR reports	With TEC
		Performance commitments	2018-20 Investment Plan (pages 26-27)
		Educational Performance Indicators	2018-20 Investment Plan (page 33)

Section 5 – Outcomes and measures	Evidence	Location
<p>5c. If applicable, the TEO has performed well against its current and previous Plans, and in particular has:</p> <ul style="list-style-type: none"> » Improved its performance over time (this may include reference to return on investment, for example employment outcomes of its graduates) » Met its plan commitments and KPIs » Demonstrated satisfactory educational performance, including meeting the upper thresholds of the TEC's performance-linked funding framework (for TEOs subject to performance-linked funding) » Demonstrated satisfactory financial performance, including meeting the TEC's prudential financial standards for PTEs » Been assessed as satisfactory in terms of its last external review by the relevant quality assurance body » Demonstrated good governance and management capability in forecasting, planning, and implementation, and the (where applicable) ability to provide supplementary information » Demonstrated its ability and commitment to work with other organisations to build system responsiveness and sustainability, and pathways through the education system » Complied with conditions imposed on funding approval » Complied with any other requirements and expectations imposed on funding approval, and » Complied with its obligations to report to TEC. 	Competenz Annual Report 2016	Appendix B
	Competenz Strategic Plan (2017-2020)	Available on request
	Competenz 2016 financial reports	With TEC
	Educational Performance Indicators	2018-20 Investment Plan (page 33)
	2014 NZQA EER report	Available on request
	ITR reports	With TEC

Appendices

Appendix A: Infometrics Sector Summaries

Appendix B: Competenz Annual Report 2016

Appendix C: Competenz Response to the Productivity Commission 2016

Appendix D: Grow Your Business Guide

Appendix E: Competenz Mentoring Guide

Appendix F: Competenz Trades Guide

Appendix G: Competenz Ministerial Guide