

Part 3:

Case Study Report

New Zealand

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Purpose of the project

The New Zealand Ministry of Education³ recently supported a successful bid by China for APEC support for a project on joint ventures in higher education. The Shanghai Institute of Higher Education is over-seeing the project under the leadership of the Chinese Ministry of Education.

One of the education goals of APEC is “to carry out regional co-operation in higher education in order to meet the needs of globalisation”. Joint ventures in higher education among APEC members are seen as empowering this goal.

The purpose of this project is:

- to share past experiences of joint schools in higher education among APEC economies;
- to analyse the present barriers and difficulties in joint schools of higher education among APEC economies;
- to explore the possible better ways of joint schools working together in higher education in future among APEC economies; and
- to improve capacity of higher education institutions in running joint schools through this study and following-up training activities.

Each participating APEC economy will introduce their own education policy on joint ventures and select two to three case study participating in joint ventures. Case studies will “sum up the experiences and lessons of running joint schools” and discuss advantages and disadvantages of present experience.

³ New Zealand’s participation in the APEC Human Resources Development Working Group (HRDWG) Education Network is managed out of the Ministry’s International Policy & Development Unit.

What is ‘offshore education’? What are joint venture schools?

‘Offshore education’ is a component of ‘export education’.⁴ There are a variety of ways in which export education can be defined. The World Trade Organisation (WTO) General Agreement on Trade in Services (GATS), APEC and other international bodies use the following four classifications:

- Consumption abroad, in which the student moves to the economy of the supplier to receive education (eg. an international student studying in New Zealand);
- Cross-border supply, in which an educational service is provided across borders but without the movement internationally of either student or teacher (eg. an international student enrolled in a ‘correspondence’ or distance course through a New Zealand provider, but studying from their home economy);
- Commercial presence, in which the provider establishes a presence in the economy in which the student resides, for example through a twinning programme or establishment of an offshore campus; and
- Presence of natural persons, in which the educator moves to the economy of residence of the student to provide the service.

In practical application, these types of services are often combined. For example, elements of both ‘commercial presence’ and some ‘consumption abroad’ combine to produce ‘twinning programmes’ or ‘joint ventures’, where education providers jointly provide courses leading to a qualification from one or other of the institutions. There may also be an element of provision via distance education (eg. over the internet or by traditional ‘correspondence’ learning), and staff from the provider economy may travel to the student’s economy to deliver or assure quality in some of the course.

Twinning programmes and joint ventures do not necessarily involve direct capital investment on the part of both partners. In most instances

⁴ Other education organisations such as IDP Education Australia and the Global Alliance for Transnational Education (GATE) use the term ‘transnational education’ in the place of ‘offshore education’.

in the case of New Zealand education providers, direct capital contribution is made by the partner institution in the host economy, while the New Zealand provider may contribute knowledge, expertise, curriculum, teaching staff, accreditation or a combination of these.

The New Zealand tertiary education system

In New Zealand, individual schools and tertiary providers (even those in the public sector) have considerable responsibility for their own governance and management, working within a framework of guidelines, requirements and funding arrangements set by central government and administered through its agencies. Administrative authority for most education service provision is devolved away from central government to education providers which are governed (in the public sector) by individual Boards or Councils, members of which are elected or appointed.

It is important for the purposes of this project to provide a general overview of tertiary education in New Zealand. The term 'tertiary education' in New Zealand is used to describe all aspects of post-school education and training. There are currently 36 public tertiary education institutions (TEIs), including 8 universities, 21 institutes of technology and polytechnics, 4 colleges of education, 3 wānanga (Māori indigenous tertiary education institutions). Students at TEIs represented 83% of the total number of formally enrolled tertiary students in 2002. There are also 46 industry training organisations, and approximately 915 private training establishments (PTEs), which include private English language schools, registered by the New Zealand Qualifications Authority.

The Ministry of Education (www.minedu.govt.nz), established under the Education Act 1989, carries out the following functions:

- provides education policy advice to the Minister of Education and the Government;
- purchases services on behalf of the Crown (and has responsibility and oversight of Crown risk);

- allocates funding and resources to early childhood education and schools;
- oversees the implementation of approved education policies;
- manages special education services;
- collects and processes education statistics and information; and
- monitors the effectiveness of the education system as a whole.

Established on 1 January 2003, the Tertiary Education Commission (www.tec.govt.nz) gives effect to the New Zealand Government's *Tertiary Education Strategy* through the negotiation of charters and profiles⁵, allocation of funding and building the capability of New Zealand's tertiary education system to contribute to national economic and social goals. The *Tertiary Education Strategy 2002-2007* was launched by the New Zealand Government in 2002.

Separate government and non-government education agencies have national responsibilities for qualifications and quality assurance. The New Zealand Qualifications Authority (www.nzqa.govt.nz) maintains an overview of qualifications in school and tertiary education and training.

Quality assurance of tertiary education in New Zealand focuses on the quality of learning outcomes recognised through qualifications as a whole, and also on the systems and processes that support quality delivery by providers.

Only those tertiary qualifications and providers that are quality assured by a quality approval body are eligible to apply for Government funding. Quality assurance bodies decide whether providers and qualification developers meet appropriate standards.

NZQA registers private education providers and recommends the approval of government training establishments to the Minister of Education. It approves courses and accredits and audits educational institutions and other registered learning establishments that offer

⁵ All publicly-funded tertiary education providers and industry training organisations in New Zealand are required to develop charters and profiles.

approved courses and award credit for registered qualifications. It also accredits Industry Training Organisations to register workplace assessors.

NZQA has delegated authority for the approval and accreditation of polytechnics and institute of technology courses to the Association of Polytechnics in New Zealand (APNZ) (www.apnz.ac.nz) and its Polytechnic Programmes Committee. Similarly, NZQA has delegated authority for the approval and accreditation of Colleges of Education courses to the Association of Colleges of Education in New Zealand (ACENZ) (www.acenz.ac.nz) and its Colleges of Education Accreditation Committee (CEAC).

The New Zealand Vice-Chancellors' Committee (NZVCC) (www.nzvcc.ac.nz) provides quality assurance for university qualifications through the Committee on University Academic Programmes (CUAP). This Committee oversees inter-university course approval and moderation procedures, provides advice and comment on academic developments, encourages the coherent and balanced development of curricula, and facilitates cross-crediting between qualifications.

The New Zealand Universities Academic Audit Unit (NZUAAU) carries out university academic quality audits, drawing on both New Zealand and international experts. NZVCC and NZQA use common criteria for the approval and accreditation of all courses, including degrees.

Regulatory environment for offshore education provision

Domestic legislative, regulatory and policy guidelines surrounding offshore education provision by New Zealand education providers are limited. New Zealand's Education Act was introduced in 1989 when export education activities were a lesser part of education activity. While the provisions of the Act can potentially be extended to apply to offshore provision, issues arise in terms of investing and borrowing; employment arrangements; enrolment; quality assurance requirements;

copyright, trademark and intellectual property issues; and, teaching and learning.

The New Zealand Government is concerned that the reputation of New Zealand qualifications be maintained, regardless of whether they are delivered in New Zealand or overseas. New Zealand providers offering courses leading to approved qualifications overseas as either stand-alone or joint ventures must obtain separate, site-specific accreditation in addition to normal requirements for approval and accreditation for on-shore delivery and assessment.

These separate requirements reflect the substance of formal agreements between overseas quality assurance and certification bodies and those in New Zealand, and are modelled on requirements established by the NZVCC's CUAP. CUAP's guidelines apply when:

- there is a formal agreement between institutions to provide courses taught by an overseas institution (including web-delivered courses) towards a New Zealand programme; and
- when the overseas contribution constitutes the core of a programme, a major or sub-major, or is more than 0.5 EFTS weighting within the programme.

Any MOU must be between institutions, not between individual departments or staff members.

Accreditation to offer any NZQA-approved qualification overseas is site-specific. Any New Zealand-based provider operating overseas must provide evidence to the NZQA that the overseas operations:

- are covered by the provider's quality management system;
- are consistent with the standards of the provider's New Zealand operations;
- comply with legal requirements in the particular economy; and
- are acceptable to the relevant educational authorities in the particular economy.

The NZQA requires additional information for New Zealand providers offering approved courses leading to qualifications overseas as

collaborative, ‘twinning’, franchise or joint venture activities with an overseas provider:

- a statement on the standing of the overseas provider and evidence that they meet appropriate quality and course management requirements. The requirements must essentially be equivalent to those expected of a New Zealand provider;
- a formal memorandum of cooperation between the New Zealand provider and the overseas provider. This must include a detailed outline of processes for the management and award of the qualification for students, including the provisions for the management of students and student results should the proposed arrangement cease to operate;
- details of the quality assurance processes applying to the overseas provider, where appropriate, with respect to the approval, accreditation and monitoring of the particular course under consideration.

Courses delivered overseas that lead to the award of New Zealand qualifications are subject to the same monitoring requirements as courses delivered within New Zealand, and the monitoring process may be extended to meet requirements of any relevant overseas accreditation body.

In addition, where courses are delivered in conjunction with an overseas provider, the monitoring process must include a formal evaluation of the effectiveness of the collaborative arrangements.

The New Zealand Government is also concerned with management of the risks involved in the provision of offshore education. The major reason for this requirement is to ensure that a New Zealand education provider’s financial resources and its equity are not subject to undue financial risk and possible loss, thus safeguarding the interests of the provider and its students. The Ministry of Education provides advice to tertiary education providers on effective risk management approaches.⁶ Risk in offshore education falls into the following categories:

⁶ Ministry of Education, *Education Beyond Our Shores – Defining the Way Forward: Workshop Report*, October 2002; and TAMU, *Offshore Education: A Risk Perspective*, September 2002, both available on the Ministry’s website at www.minedu.govt.nz/goto/international.

- strategic risks (is the venture part of an integrated overall distance education or international education strategy?);
- financial risks (does a robust multi-year business case underpin the venture? are financial and non-financial risks monitored, reported and acted upon?);
- operational risks (has due diligence been undertaken on partners and on the different legal framework in the host economy? is management distracted from parent entity eg. long CEO absences?); and
- academic risks (are local and New Zealand accreditation issues addressed? are retention and achievement targets/strategies in place? what are the attitudinal and/or cultural differences in teaching and learning offshore?).

The Ministry recommends a strategic approach, ensuring offshore education is part of an overall integrated medium-term institution-wide strategy. Links with the local community should be well-developed and robust contingency and extraction plans are required.

Offshore provision by New Zealand higher education providers - stocktake

An initial stocktake of offshore activity by New Zealand's TEIs by the Ministry of Education was completed in 2001⁷.

An analysis of results shows that:

- 17 of the 36 TEIs offered offshore programmes alone or in conjunction with offshore partners in 2001.
- A total of 63 programmes were delivered offshore in 2001 – up from six in 1997.
- Level of involvement varied greatly – just three institutions accounted for 35 programmes. Many providers offered just one programme offshore.
- The total number of students enrolled in offshore programmes in 2001 can be estimated at 2,200 – an increase from 380 in

⁷ Ministry of Education (International Policy & Development Unit), *New Zealand's offshore public tertiary education programmes: initial stocktake*, April 2002 (www.minedu.govt.nz/goto/international).

1997.

- New Zealand's offshore programmes in 2001 were concentrated in South-East Asia, China/Hong Kong and the Pacific. Malaysia accounted for the largest number – 15 programmes. This parallels existing and historical international education relationships with New Zealand.
- Although data on year of first intake were incomplete, most offshore programmes commenced recently (ie. 2000 or 2001). One programme has been offered offshore since 1986.
- Subject matter also varied – Business and Administration, Commerce, Management and Science courses featured often, but vocational/ professional programmes in the fields of Nursing or Medicine, Teaching and the Trades were also delivered offshore.

The Ministry of Education notes the New Zealand Government's interest in both the financial and academic viability of TEIs, and in the robustness of their strategic and business frameworks.

The New Zealand Ministry of Education hosted a workshop in 2002 on offshore education provision by New Zealand providers. One of the key findings of the workshop was that “satellite campuses” are faced with problems of scale and can expose the provider to considerable financial risk through capital investment offshore. The workshop concluded that perhaps the best approach, both in terms of mode of delivery and financial risk, is seen to be twinning programmes or joint ventures with local, established partners that involve an arrangement to offer curriculum and/or teaching without direct offshore capital investment. A more co-operative and collaborative approach to offshore provision minimises risk, especially for small providers or new entrants, and provides opportunity to share expertise regarding market intelligence, sound management processes and efficient procedures.

Notably, a small number of New Zealand secondary schools are also becoming involved in offshore education provision (New Zealand's

Marlborough Boys' College has recently opened its new Changzhou International Campus in China, for example).

Offshore provision by foreign providers in New Zealand

New Zealand's Education Act 1989 sets the requirements for establishment as TEIs. The Act also sets out the requirements for the use of protected terms such as 'university', 'college of education' or 'polytechnic', and the terms 'degree', 'bachelor', 'master' or 'doctor'. Due to the statutory restraints through Ministerial approval⁸ for applicants to use a protected term in their name in New Zealand, foreign service providers cannot automatically assume they can operate in New Zealand using the status they have in their home countries. A small number of foreign providers are operating in New Zealand as private training establishments (PTEs).

The Education Act 1989 sets the requirements for registration as a PTE. Where a foreign course is to be offered in New Zealand and approval is required⁹, the New Zealand provider is required to provide evidence of approval by an overseas agency and details of the approval process undertaken by that agency to the NZQA. If the criteria applied to the proposal are sufficiently similar to those of the NZQA and the process applied was adequately rigorous, the NZQA approves the proposal or negotiates an amended approval process. The NZQA considers the potential for legal, professional or cultural requirements and concerns to impact on the acceptability of the course for New Zealand conditions.

If the course is managed in conjunction with a New Zealand-based organisation, a memorandum of cooperation between the partner organisations is required by the NZQA, specifying responsibility for the delivery, assessment, moderation, resourcing, and monitoring of the course.

⁸ Ministerial approval requires recommendation to the Governor-General for the making of an Order in Council through the Executive Council.

⁹ Approval is required if the education provider is seeking New Zealand Government funding, if students wish to access Student Loans and Allowances, or if international students are to be enrolled.

Case studies

The purpose of undertaking case studies is as follows:

- to collect related data of joint schools of these sample institutes;
- to describe the content of joint schools of these samples;
- to sum up the experiences and lessons of running joint schools of these institutes;
- to analyse the advantages and disadvantages of each institute at present; and
- to map out co-operative prospects for running joint schools in higher education among APEC economies.

The New Zealand Ministry of Education acknowledges that the case studies presented offer a New Zealand perspective on offshore education joint ventures and do not reflect the views or cultural perceptions of other parties in these education collaborative arrangements.

The New Zealand Ministry of Education has selected three TEIs in New Zealand as case studies for this project. The case studies provided are self-reporting and not a critical evaluation. The New Zealand case studies are:

Christchurch College of Education

The Christchurch College of Education's (CCE) School of Business has entered into a joint venture relationship with Griffiths University, Australia. CCE also has offshore relationships in Malaysia, offering programmes in special education.

Lincoln University

New Zealand's Lincoln University has established a number of offshore education ventures in the APEC region. Lincoln University's main areas of interest in the APEC region are in Malaysia and Singapore:

Economy	Partner institution	Name of programme	Study level	No. of students
Malaysia	University Tenaga Nasional (UNITEN)	Bachelor of Commerce and Management	Undergraduate	700
Malaysia	Sarawak State Government	Certificate of Conservation and Eco-tourism Management	Undergraduate	68
Singapore	Centre for Management Excellence	Bachelor of Landscape Architecture	Undergraduate	90
Singapore	Oriental School of Business	Foundation Studies	Post-secondary	7
Singapore	Oriental School of Business	Diploma in Commerce	Undergraduate	120

UNITEC Institute of Technology

New Zealand's UNITEC Institute of Technology and the Beijing Fanzhidu Education Information Consulting Company Ltd jointly established the Xicheng District Fanzhidu Training School in Beijing, opening in July 2001. The Fanzhidu Training School provides courses in English language. In 2001, the Fanzhidu Training School enrolled 191 students and employed 9 New Zealand staff in China.

Christchurch College of Education

The New Zealand Ministry of Education thanks Greg Scott, International Dean, Christchurch College of Education for the contribution of this case study.

Introduction

This case-study describes the background, features and outcomes experienced in the development and implementation by the Christchurch College of Education, New Zealand of a jointly delivered and conferred undergraduate business management degree with an Australian university partner.

The Christchurch College of Education (the College), formerly a Teachers Training College, was established in 1877 and is currently one of four Colleges of Education in New Zealand with approximately 7,000 students. While retaining a strong presence across the full range of teacher education and professional development activities, since 1990 it has diversified its core business, particularly in the fields of business, sport coaching and performing arts. It has also established six degree programmes, two of which include collaborative delivery with a local university in the same city.

Griffith University (the University) was established in 1971 and is presently located on six campuses in South-East Queensland, Australia, with enrolments totalling over 25,000 students. Griffith has a commitment to being responsive to community and industry needs and has become a leader in new academic areas such as Modern Asian studies, Environmental Sciences and Technology Management. Although relatively young, Griffith has a growing research profile and is currently ranked within the ten leading Australian universities. The University also has a strong international profile with on-campus study, exchange agreements and offshore delivery and collaborative research overseas.

The first academic interaction between Griffith University and the Christchurch College of Education involved College staff studying within the Griffith Doctorate in Education, Applied Linguistics and Special Education programmes

Initial discussions with the New Zealand Ministry of Education and New Zealand Treasury regarding a College affiliation with an Australian university raised no apparent barriers and encouraged this initiative that would further strengthen the close bilateral relationship with Australia under the terms of the Australia-New Zealand Closer Economic Relations trade agreement (ANZCERTA or CER).

Arising from past academic interaction, discussions with Griffith University led to the recognition in 1997 of the Christchurch College of Education as an affiliated institution (one of three) under the State of Queensland law while retaining independence of governance and management¹⁰. All co-operation with regard to the affiliation is overseen by a joint liaison committee.

Background to joint degree programme

In 1998 Griffith University commenced the delivery of a Bachelor of Business Management (BBusMgt) with approximately 150 equivalent full-time students (EFTS) using a new delivery format called “flexible delivery”. The outcomes, structure and mode of delivery of the degree were already well aligned with those of diploma qualifications already offered by the College. Between 1998 and 2000 significant interaction took place at academic and management level to gain approval and accreditation from the New Zealand Qualifications Authority (NZQA) to offer the BBusMgt degree as one degree conferred by the Councils of both institutions. (The degree parchment is signed and sealed by those authorised to do so at Griffith University and the Christchurch College of Education). This partnership, we believe, has a unique set of characteristics; the same degree approved in each economy,

¹⁰ Griffith University is constituted by a State law in Queensland, Australia. This allows for affiliated institutions to be recognised by a ‘Deed of Affiliation’.

collaboration in delivery across national boundaries preserving a large measure of autonomy with equivalence in the outcomes of students to enable the same degree to be conferred.

In delivering the BBusMgt degree at the College, the qualification structure and learning outcomes are consistent with Griffith University but there is variation in content where the New Zealand environment differs from Australia. The same assessment tools and website material are used in some courses and not in others. Both Christchurch and Griffith staff have considerable autonomy within the partnership to make independent decisions however the objective is that a team approach is taken in the delivery at both locations.

The first students (90 EFTS) commenced at the Christchurch College in February 2000 and there are currently 180 EFTS enrolled at the College and 400 EFTS at the University.

Summary of outcomes

The development of the jointly conferred degree has resulted in a number of positive outcomes although somewhat different within each institution. These were the subject of a study in 2001 by Scott & Fraser¹¹ and can be summarised as organisational, programme and individual.

Each institution has furthered their respective internationalisation goals and more specifically created marketing opportunities, particularly within New Zealand for the College and internationally for both. Griffith University has gained a potential source of exchange and post-graduate students and the relationship has been valuable to the College for the approval of degree qualifications.

At the degree programme level, an exchange of respective strengths, namely teaching and learning (College) and research, flexible delivery (university) has taken place. The sharing of course development and

¹¹ Scott, G.W & Fraser, C. *Partnership in Qualification Delivery; A Trans-Tasman Experience*, Conference of Association of Tertiary Education Managers, Canberra 2001.

maintenance responsibilities is a significant opportunity not yet fully realised. Over the past 3 years, there have been regular staff exchanges for course development in all degree core courses as well as seminar presentations and participation. The delivery of a degree has enabled the College to attract academic staff with higher qualifications and research experience. Within the College School of Business refereed journal articles have increased from 0 to 10 per annum within two years.

At an individual level, the partnership has allowed access by staff at both institutions to shared resources and best practice examples. Limited student exchange has occurred with a formal arrangement for staff teaching exchange currently being established.

It is perceived by some that, in the early years of the joint degree partnership, the benefits have accrued to a larger extent to the College however there is evidence to suggest that advantages already flow both ways and that both institutions have much to gain as the relationship matures.

Factors assisting success

The most important factors in partnering with an Australian institution were the similarities to New Zealand in educational approach and programmes in business.

One of the most significant factors assisting the success of this joint venture has been that the leaders of both institutions have had a vision for international education collaboration, quickly established a positive working relationship, demonstrated a personal interest in success of the partnership and positively promoted collaborative activity within their senior staff. The establishment of an effective cross-institutional liaison committee at senior level is also considered vital.

The collegiality and professional trust between academic staff has been important, but not always easy, to establish and maintain. The retaining of autonomy within most aspects of course delivery has

avoided the necessity for academics to work together by force with the alternative approach of investing in regular travel opportunities for exchange of ideas. It is also considered an advantage that each institution has already established quality teaching as of prime importance while each has additional distinct strengths to complement this. While the BBusMgt degree is not offered by distance, it is considered advantageous that much of the course material has been developed for web-based learning.

It is regarded as vital that each organisation ensures that demonstrable benefits are consistently provided to its partner organisation and most importantly, to the students. It is argued that these benefits need not be equivalent or result in large financial gains in the short-term. The importance, however, of communicating these to governing bodies, staff and students is emphasised.

Factors hindering success

One of the major factors perceived to have detracted from potential benefits is the absence of awareness among academic and general staff at both institutions of agreements made at management level which are not seen to infiltrate daily practice. This has led to a lack of responsiveness from staff and uncertainty in the roles expected. A lack of an effective decision making group at operational level or operational agreements of service expectations has been noted with the possibility of control being too closely held at the joint management liaison committee level.

Differences in size, structure, staff turnover, priorities and culture of each organisation have created challenges to effective collaboration. There is a feeling that the potential of the partnership for students and staff alike has not been communicated as effectively as possible. There has been some concern from both students and staff at the unequal nature of the partnership resulting in lack of ownership. Initially, students at the College were concerned that material sometimes reflected only Australian content and at the potential loss of the highly

supportive learning environment they valued. This has largely diminished as the degree has become more established.

The pressure on academic staff to develop new courses and find the additional energy to collaborate and maintain or develop research partnerships was a major hurdle. An underlying constraint with respect to the development of the partnership was the presence of conflicting priorities for the institutional partners, both at an organisation and individual level. Examples of this include commitments to other external relationships and the competing priorities within the workload of academic staff.

Conclusion

It can be concluded that the affiliation between the Christchurch College of Education (New Zealand) and Griffith University (Australia) and resulting conjoint degree development has delivered significant but differentiated positive outcomes to both institutions. A valuable platform has been established for activities that enhance academic activity between New Zealand and Australia.

Lincoln University

The New Zealand Ministry of Education thanks Geoff Ormandy, Director, International, Lincoln University for the contribution of this case study.

Introduction

Lincoln University is the smallest of New Zealand's eight government University's but throughout its 125 year history has been regarded as the most entrepreneurial especially in respect to international activities. The University has always welcomed the enrolment and the involvement of international students in its programmes and been involved in a range of off-shore education activities. The 1989 amendment to the Education Act created an opportunity for all New Zealand education providers to become more active in international education and Lincoln's previous involvements provided an excellent foundation for the University to capitalise on changes to the regulations. An extended range of off-shore activities were initiated and during the past nine years over one thousand students and a large number of staff have been involved in seven programmes that have been delivered outside of New Zealand. The University is firmly of the opinion that off-shore education activities contributes significantly to its goal of building an international reputation in niche areas including natural resources, bio-sciences, management, commerce and the social sciences.

This brief paper discusses the benefits that offshore education brings to Lincoln University and some of the barriers and difficulties that the University has experienced in developing its offshore programmes.

The benefits of offshore activities

Even after years of experience in developing and operating offshore education activities there are some who would argue that it is easier

and less complex to simply focus on the domestic market. However, others (and especially those who have been involved in offshore activities) are firmly convinced of the advantages, as the competition for students intensifies and an increased number of opportunities emerge for offshore activities.

The major beneficiaries of the University's offshore programmes are the students who participate in the activities. In an increasingly commercial education environment the students benefit from their involvement in more cost effective programmes as it is cheaper for them to study in their home economy than to travel to New Zealand for their higher education. Studying in their home economy is also more culturally comfortable for the students and they also have the benefit of having more personal support for their study than if they were studying at a distance.

The staff who have been involved in offshore activities have also benefited. As a result of teaching and spending time in other countries and amongst people from a range of different ethnic origins the staff have developed a greater cultural awareness and increased appreciation of the differences that exist in people's backgrounds, aspirations and learning environments. These understandings and the increased empathy with people from other cultures have assisted the staff to modify their teaching methods and to work more effectively with an increasingly diverse student population both on and offshore. The experiences of staff in off-shore education and the fact that programmes have been delivered overseas have also lead to changes being made to the curriculum content of some programmes. The content is now less ethnocentric and more internationally relevant.

Lincoln University has for a period of time had a comparatively high proportion of international students. The impact of a significant number of students from very diverse cultural backgrounds has had to be responsibly managed. The offshore delivery of programmes has been one strategy that has been actively pursued by the University as a means for managing this diversity.

By taking learning programmes offshore the University has been able to increase the size of its international student enrolment and as a consequence receive additional revenue. There is no denying the commercial motifs for becoming involved in offshore education.

The University's consistent presence in offshore destinations has helped to raise the institution's profile in the countries where the programmes have been delivered. As a result, new opportunities have emerged. A cornerstone of international education is the establishment and development of strong partnerships. Such partnerships are even more critical when programmes are delivered offshore. The partnerships that have been forged by the University have led to a range of additional international activities and long lasting relationships.

Barriers and difficulties

Lincoln University's experience in offshore education has been very positive. There is no hiding however that some ventures have been more successful than others and that barriers have had to be overcome and difficulties have been experienced as each activity has been developed.

The common barriers and difficulties have included adjusting to the local laws and regulations especially in respect of local Ministry of Education requirements and the local employment conditions. These requirements and conditions vary from economy to economy and in some cases within an economy.

Ensuring that you are working with an appropriate in-economy partner and developing a conducive relationship has been critical to all of Lincoln's offshore activities. A relationship which shares a respect for the differences that are present and a preparedness to make adjustments to the teaching and learning that do not undermine the quality of the programmes is very significant to the success of the programme.

Maintaining quality at a distance is potentially a difficulty however, without exception it has been Lincoln's experience that the integrity and the quality of the offshore activities has been at least equal to that which is achieved on campus. While it has been necessary to modify the curriculum and the way in which the programme is delivered the changes have been made without effecting the fabric of the course of study. Some would suggest that the quality of the programme has actually been enhanced by the changes that have been made. Another significant quality consideration is the provision of facilities and resources at the offshore campus. This provision is often taken for granted at home however they may not be as readily available offshore.

Following some earlier experiences when the need to carefully select staff to participate in off-shore activities were overlooked the University subsequently took care to ensure that staff who were involved would be able to work successfully in the different environment and that they were well briefed and prepared. The most effective staff off-shore have been those that have been able to successfully transfer aspects of their 'home economy teaching styles' to the host economy and at the same time make adaptations that were appropriate to the local environment.

When working offshore there is sometimes an absence of the extra-curricula dimension which is readily available at the home campus. To ensure that the students are able to participate in an augmented education experience innovations that are culturally appropriate have had to be made to provide this experience.

Lincoln's experience has been that there are difficulties associated with managing programmes at a distance. For each programme project teams have been appointed to manage the activities and where possible to link the administration of the offshore programme back into the structures and systems of the home campus.

Perhaps the most difficult barrier to manage in respect of offshore education is the perception of other institutions and authorities that the

programmes cannot meet the same quality assurance standards if they are delivered at a distance. As more providers become involved in offshore education these perceptions will change.

Conclusion

The internationalisation of education has taken large steps during the recent decade. A more recent component of the internationalisation has been the development of offshore programmes and activities. Lincoln University has been privileged to be a pioneer in New Zealand in respect of offshore education and as a result of the experience there is a commitment to additional initiatives which feature programme, resource and staff mobility as opposed to student mobility.

UNITEC Institute of Technology

The New Zealand Ministry of Education thanks Nick Shackelford, Head of School of Languages; Chelsea Blickem, Programme Leader, Certificate in Intensive English; and, Frank Doogan, Director of Studies, Fanzhidu Training School (July 2001 – July 2003), UNITEC Institute of Technology for the contribution of this case study.

Introduction

In June 2001 the School of Languages, UNITEC and the Beijing Fanzhidu Education Information Consulting Company Ltd (BFEIC) entered an agreement to establish the Xicheng District Fanzhidu Training School (The Fanzhidu Training School) in Beijing. Suitable premises were found and refurbished by BFEIC and the training school opened for business in July 2001 with over 100 students.

BFEIC and UNITEC have had an established business partnership since 1997 for the recruitment of Chinese study-abroad students, many of who need to undertake an English language course before entering diploma and degree level programmes. The development of a training school in Beijing was planned as a way of increasing the flow of students from China into UNITEC programmes, preparing students for their academic study in New Zealand and as an entrepreneurial activity.

The owner of BFEIC identified that an opportunity existed in Beijing for the establishment of a training school with good facilities that would offer English language training run in partnership with an institution with a strong reputation for quality delivery of English language. UNITEC's Certificate in Intensive English is a well-developed programme and the decision was made to offer this programme at the Fanzhidu Training School. It was also envisaged that courses from the New Zealand Diploma in English would also be

offered to those students who reached the required 6.0 IELTS entry requirement although this has not yet eventuated.

The parties agreed that BFEIC would own the school, establish the necessary teaching and marketing services and provide the non-academic management and administrative support for the school. UNITEC retained ownership of the academic programmes and agreed to appoint a Director of Studies to be resident in Beijing and to coordinate the delivery of the programme. UNITEC's Academic Board and New Zealand Qualification Authority had to be assured that the programme quality would be of the same standard as the delivery of the programme at UNITEC and, following the submission of the necessary documentation, both bodies approved the delivery of the Certificate in Intensive English programme for delivery off-shore in Beijing.

The business partners

The choice of a suitable business partner who will work in the best interests of both parties is a key factor in the success of a joint venture of this kind. UNITEC has been fortunate in the choice of its first offshore business partner in China. The Chinese owner of the school is now a New Zealand resident, a graduate from a UNITEC language programme and has a good understanding of the New Zealand education system. He also has a strong links with key departments and personnel within the Chinese bureaucracy and this has proved to be essential in the complicated process of gaining Chinese government approval for the establishment of the school. Without this partnership, it would have been impossible for UNITEC to establish its programme with a private company.

The business arrangement

A clear agreement is essential to the establishment of a joint project. UNITEC is paid an agreed percentage of the tuition fees for the use of the CIE programme and for the services of the Director of Studies. UNITEC was given the opportunity to become a joint financial partner

in the school, which is an option that would not have been available if the co-operation had been with a university. However, UNITEC declined this offer as it did not think it appropriate, as a publicly funded institution, to expose itself to unnecessary risk by making a capital investment in the school and in a economy where it has had no experience of business activity. UNITEC has been able to restrict its activity to providing a service and has not had to become too closely involved in the operational running of the school.

The disadvantage of not being a financial partner is that UNITEC is less able to influence the strategic direction of the school. Forward planning and the development of a coherent business planning is problematic as the owner of the school often makes decisions over which UNITEC, as a service provider, has little control.

Legal issues

During the establishment phase, there was some ambiguity for UNITEC about the legal status of the school. This impacted on the ability of UNITEC teachers to gain the appropriate work visa, causing some anxiety amongst participating staff. It is important for institutions entering a partnership of this kind to be clear that they are entering a relationship that has full approval of the local authorities and their committees.

There was similar uncertainty about the Chinese government's requirements for teachers having to pay income tax. Advice was sought from the New Zealand Embassy on these questions.

School facilities

UNITEC needed to ensure that students in Beijing had similar opportunities to physical resources as their peers in Auckland, including access to a Language Learning Center (LLC) and a computer lab. UNITEC undertook to provide resources for the establishment of the LLC and for some teaching resources and these set-up costs were unexpectedly high. The computer laboratory initially had no printer, the computers had no storage facility and Internet links were

unreliable. However, the Chinese partner demonstrated his commitment to the success of the project by resolving the computing problems quickly.

Further necessary resources were soon identified after the programme started. The Director of Studies had to balance the expectations and budget of the local partner with the requirements that UNITEC has to deliver a high quality programme. Some basic classroom resources like stationery and regular access to photocopiers were initially insufficient and careful negotiation by the Director of Studies with the owner of the school was required before securing these necessities.

The students and local teachers in Beijing struggled initially with the idea of self-study and what this meant. Students in Beijing were assisted in their self-study in the Language Learning Center and were also allocated extra hours each week with a Chinese teacher of English to discuss aspects of course and this proved to be useful for the students.

Management

By working alongside a third party (the owner) the programme needed to consider lines of reporting. A three-way management process between the Director of Studies, the owner of the school and the administrative staff became complex and confusing and clear guidelines and parameters had to be developed.

A consultative process developed within Fanzhidu School that required frequent interpretation and cross checking to ensure that all parties in the project were aware of what was being done and its justification. Communication pathways between the school and UNITEC were defined to ensure that the appropriate information reached the relevant people and this reduced the possibility of overlap and miscommunication. Regular email activity with UNITEC ensued and minutes from meetings held at the school were sent to UNITEC to coordinate actions and decision-making. The presence of Chinese staff at the school who were largely bilingual were essential to the success of

these communication pathways and UNITEC staff developed excellent working relationships with the Chinese staff.

The programme managers in New Zealand needed to be clear about the diverse range of issues that needed resolution and the lines of responsibility that were developing at the school. The actual management of the programme and its quality at distance was largely successful due to the openness and frequency of communication, the New Zealand-based managers' ability to respond quickly and the fact that the programme, its processes and its content were clearly documented, packaged and transportable.

There was also a strong desire from all parties to make this venture a success. UNITEC staff based in Beijing were aware of pragmatic issues such as time differences, delays and technical hiccups and allowed for these. A general openness in encountering and exploring some fundamental cultural and contextual issues were key features that contributed to the success of the project. Staff from UNITEC was aware of the need to respect and acknowledge cultural differences and to approach delicate issues with of understanding.

Administration

Chinese staff were appointed by BFEIC to manage the administrative and marketing functions of the school. In the first months of the operation of the school, one of the challenges for the UNITEC-appointed Director of Studies was to work effectively with these staff, often young graduates with good English language skills but with little or no management or work experience, particularly in the running of a language school. The Chinese staff at the school were also unable to make any significant decisions without the authority of the school's owner, and this caused some delays in the decision-making process.

UNITEC staff had to become responsible for training local staff in various administrative processes that met the needs of the programme, the students and staff of the school. The Beijing-based Associate Director of the school continues to work there and is now experienced

in the school's management. She also benefited from a visit to UNITEC where she received some skills' training in office management and the institute's administrative systems.

The school learned to cope with irregular intakes and adjustment to class composition and size. Continuous intake was allowed in order to increase student numbers to an acceptable level. Student placement tests into the school's classes mirrored those at UNITEC in terms of tasks and assessment criteria. The recording of fees paid to Fanzhidu and the communication of this to UNITEC has evolved into a more efficient process and a system was set up to monitor the number of students from Fanzhidu who planned to move to programmes at UNITEC in Auckland.

One area that was not adequately predicted before the programme opened in Beijing was the hidden costs associated with running a school. The cost of telephones, faxing and courier deliveries became problematic and clarification was needed as to what was 'essential' and which costs belonged to each party in the agreement. Email was essential to the UNITEC staff but there were different perceptions about the need for staff to access computers. For example, when UNITEC staff arrived, the computer software was in Chinese and offices did not have phones or computers as standard resources. Teachers quickly learned to exercise patience in these situations and the Chinese partner has worked consistently to meet these expectations.

The programme

The Director of Studies managed a careful balancing act of ensuring that the outcomes and regulations of the Certificate in Intensive English programme were met consistently within the constraints of the local context.

The programme's content and topics, the assessment methods and tools were all transferred to Beijing. Students in Beijing and Auckland receive the same information about assessments that are marked and

post-moderated to the required standard in both locations. However, it became obvious that some tasks and content areas were alien to the students in Beijing. The communicative language teaching approach was quite new and adjustments needed to take place to ensure successful delivery in the Chinese context. At times these adjustments needed extensive discussion, and the processes and regulations of the UNITEC programme needed to be reinforced. The managers of the programme in Beijing and in Auckland discussed issues openly and demonstrated a willingness to create systems in which the needs of the local context were considered whilst still ensuring that the objectives of the programme were achieved.

Annual visits by the Programme Leader from UNITEC succeeded in establishing the programmer's success in China. Staff in China appreciated the commitment from UNITEC in having access to the academic leaders of the programme and the programme leader was able to understand better the contextual issues that the programme faced in China. This encouraged the programme managers in New Zealand to think about the systems and elements of the programme necessary for offshore delivery.

Staffing

The role of the Director of Studies broadened from academic leadership to include administrative functions including resourcing, promotion and management. Regular meetings were held at the school to define and refine areas of responsibility as staff became more skilled in dealing with their allocated tasks. Frequent consultation with UNITEC and the local partner in Beijing resulted in precise job descriptions for teaching and allied staff.

In the early weeks of the programme, finding suitably qualified teaching staff in Beijing was difficult and UNITEC English language staff volunteered to work in Beijing to meet the shortfall of locally employed native speakers. Some staff remained on UNITEC salary while others took leave of absence from UNITEC and were employed by the local partner. This proved to be problematic and it was later

decided that any UNITEC staff member working at the Fanzhidu School would remain as a UNITEC employee but the Chinese partner would contribute to the salary of the UNITEC teachers.

UNITEC staff undergoes pre-departure orientation but in some cases the relocation of staff to Beijing has presented challenges of adaptation to a new school management system and structure. Many staff experience symptoms of culture shock but most report very favourably on their experiences in China. For others, the experience is less comfortable. Of specific concern was the standard of accommodation that was available to visiting UNITEC teachers in the first months and this became a major issue before satisfactory resolution was achieved.

Suitable non-UNITEC staff were later recruited via referrals, talent fairs, employment agencies in Beijing and the Internet. The school wrote contracts to non-UNITEC staff and all parties worked to maintain some parity between UNITEC and non-UNITEC staff. The salary and conditions that are offered to non-UNITEC staff are generous by Chinese standards and help to attract well qualified and experienced teaching staff to the school.

Different expectations were apparent in the earlier stages of the school with local staff seemingly less disposed to taking initiative and more inclined to respond to top-down directives. A significant change in the job description of Chinese teaching staff, which reduced the number of days, worked per week and upgraded the content of their input into the classroom led to their playing a more significant role within the school.

Both Chinese and locally-recruited native English speaking teachers went through a period of UNITEC enculturation which involved:

- upskilling in the requirements of the Certificate in Intensive English;
- regular observation and training by the Director of Studies;
- increased awareness of the various policies that apply to UNITEC staff;
- familiarisation to UNITEC through the website;

- a work culture of hard work and unqualified support from UNITEC in Beijing and New Zealand.

Regular communication and support from UNITEC staff in Auckland enabled all staff at the Fanzhidu School to grow and develop into their roles and to take real responsibility for the programme. Staff found it reassuring to know that people were available to advise and assist and that the local context would be taken into consideration when difficult decisions had to be made.

Summary

The issues that faced the programme as it was being prepared for overseas delivery were numerous. Whilst many of the issues could be predicted, several issues became apparent only after the programme started in Beijing. The first six to eight months were the most challenging. Since then, several of the issues we faced then would not now be problematic for a provider considering a similar venture. This is especially true of materials and teaching-related resources that are now easily accessible in China.

UNITEC walked a delicate tightrope between respecting and responding to local and cultural needs, norms and processes, and ensuring that the programme was transported and delivered in its entirety – and emerging at the other end having satisfied both.

The project has been time-consuming and demanding especially during the first year of operation but it has provided invaluable experience for the UNITEC teachers and managers whose work involves a close association with Chinese students. Although the school closed during the SARS outbreak, the programme is open again, although with reduced enrolments. Anecdotal evidence suggests that students who have attended the Fanzhidu School prior to arrival at UNITEC are well equipped for their New Zealand study and adjust more quickly to the academic and social expectations of their new learning environment than those who arrive without a period of study before departure.

The school has consolidated its working relationship with the Chinese owner of the school and it is exactly this kind of special relationship and co-operation that New Zealand institutions need to develop as competition increases in the international student market and as New Zealand moves towards a better understanding of China and its people.

