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TEQSA Stakeholder Survey 2019

Report of findings

September 2019

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Australian Survey Research Group Pty Ltd is accredited under the AS ISO 20252 quality standard applying to market and social research. This research project was carried out in compliance with the AS ISO 20252 quality standard.

# Executive summary

In August 2019 the Tertiary Education Quality Standards Agency (TEQSA) conducted an annual sector-wide stakeholder survey. The purpose of the survey was to increase TEQSA’s accountability, better understand its impact on higher education providers, and improve its performance.

TEQSA engaged Australian Survey Research (ASR) to deploy and analyse a web survey of 238 principal contacts (PC) within regulated providers, as well as those seeking provider status. Also included were representatives from 52 peak, professional and student bodies (PPSB). A total of 143 principal contacts and 24 PPSB representatives completed their respective surveys.

In 2019, the survey was subject to a review to ensure that KPIs remained fit for purpose and addressed TESQA’s strategic requirements. As a result, the 2019 PC survey questions (items) included some changes to those used in 2018.

The content of the surveys focused on TEQSA’s key performance indicators from its current Regulator Performance Framework. In addition, principal contacts were asked about various recent interactions with TEQSA including applications, case managers and sector risks. All respondents in all surveys were asked to rate TEQSA’s overall performance as a regulator.

## Response

A total of 238 principal contacts were invited to participate in their survey and 143 principal contacts responded, yielding a **response rate of 60%**. The sample is statistically representative of the principal contacts population at the 95% confidence level and a ±5.2% confidence interval. This is an acceptable scientific research confidence interval for scientific and market research. The profile of the response sample closely matched the population profiles on two demographics, meaning that it was a robust sample.

A total of 51 representatives from peak, professional and student bodies were invited to participate in their survey and 23 responded yielding a **response rate of 45%.** The results for this survey have a confidence interval of ±15.4%. With this higher confidence interval and a small sample of 23, PPSB results should be treated with caution and as indicative only.

## Principal contact survey key findings

Results were analysed to produce top 2 scores—the proportion of respondents selecting the two most positive rating points of *excellent* and *good*. *Don’t know / not applicable* and *no answ*er responses were excluded from all top 2 score calculations. Top 2 scores of around 80% and above are considered are a good result in customer satisfaction research.

#### 2019 highs and lows

The table below shows the 2019 survey items which achieved a top 2 score of 75% or more, with comparisons to 2018 items where available. Communication around the usefulness of regulatory information and the HES Framework were highly rated as were the clarity of the application guide, politeness and the respect shown by staff. There was a marked improvement in positive ratings of the usefulness of meeting face-to-face with case management teams.

Communication activities around regulatory information, HES-related information and national register were better performing and noted as an area where TEQSA does well.

| PC: TOP 10 SCORING ITEMS | 2019 n | 2019 TOP 2 SCORE (%) | 2018 TOP 2 SCORE (%) |
| --- | --- | --- | --- |
| Communication: Usefulness of regulatory information | 140 | 89 | 83 |
| Communication: Usefulness of the information on the HES Framework (Threshold Standards) 2015 | 138 | 88 | 86 |
| Regulatory activities: Treating with politeness and respect | 139 | 86 | NA |
| Application process: Clarity of the application guide | 84 | 80 | 70 |
| Communication: Usefulness of TEQSA-facilitated workshops and webinars to discuss regulatory requirements | 125 | 79 | NA |
| Interaction with TEQSA staff: Usefulness of meeting face-to-face with case management teams | 78 | 78 | 54 |
| Regulatory approach: Helping the sector as a whole to protect students | 134 | 77 | NA |
| Overall: TEQSA's performance as a regulator | 136 | 76 | 71 |
| CRICOS application process: Usefulness of information on how to use the provider portal | 72 | 75 | 66 |
| Application process: Clarity of assessment scope and evidence requirement | 81 | 74 | 64 |

*NA indicates new question for 2019*

The 10 lowest scoring items in the PC survey are displayed in the table immediately below. These scores were reflected in respondents’ open-ended comments, particularly around timeliness of responding to applications and making decisions. Monitoring quality, consultation and interacting with staff were all topics that were lower scoring across the survey.

| PC: LOWEST 10 SCORING ITEMS | 2019  n | 2019 TOP 2 SCORE (%) | 2018  TOP 2 SCORE (%)\* |
| --- | --- | --- | --- |
| Application process: Minimising time taken between submitting application and first receiving a regulatory decision | 65 | 37 | NA |
| Monitoring quality: Suggesting networks and resources that organisation might use to improve performance | 111 | 41 | NA |
| CRICOS Application process: Timeliness of feedback from TEQSA about application, including those unlikely successful | 68 | 41 | 52 |
| Monitoring quality: Providing timely feedback on whether organisation is meeting expected standards | 126 | 42 | NA |
| Application process: Timeliness of feedback from TEQSA about application, including those unlikely successful | 72 | 43 | 52 |
| CRICOS Application process: Minimising time taken between submitting application and first receiving a regulatory decision | 61 | 46 | NA |
| Consultation: Listening to organisation’s views on ways to reduce regulatory burden | 103 | 48 | NA |
| CRICOS Application process: Tailoring application process to meet needs | 67 | 51 | NA |
| Interaction with TEQSA staff: Demonstrating an understanding of organisation’s business or operating environment | 125 | 54 | 48 |
| KPI 4: TEQSA’s compliance and monitoring approaches for higher education providers are streamlined and co-ordinated | 132 | 54 | 52 |

*\*Indicates new question for 2019*

#### Sector risks

The highest threat risks combining all providers responses were identified as:

* Contract cheating
* Cyber security
* Stereotyping of private providers.

These risks varied somewhat between market groupings, with universities identifying different high threat risks than other providers. However, all types of providers identified contract cheating as a medium or high threat.

#### Overall rating

Principal contacts rating of TEQSA’s overall performance as a regulator was 76%--an improvement on the 2018 score of 71% but not statistically significant.

#### Comments and improvement suggestions

Open-ended comments highlighted the goods and bads of case management—where it worked well and where it needed to improve. TEQSA was recognised for its risk-based approach to regulation, its strong stance on academic integrity and the quality of the information provided about regulation and the sector in general.

Many of the suggestions for improvements or change are similar to previous surveys. Areas identified in 2019 that providers believe TEQSA needs to improve include:

* Reduce timelines for applications, reaccreditation and accreditation
* Streamline regulatory burden
* Respond to queries in a timely fashion and provide status updates
* Improve case managers’ knowledge of providers / internal dealings across other areas of TEQSA
* Have consistent engagement / collaboration to address strategic issues facing the sector
* Partner more with other regulatory bodies to address regulatory issues in the sector
* Better understand the role / representation of public providers and regional universities
* Continue to increase transparency around risk system and factors driving assessments
* Support innovation in processes covering regulation, teaching and new learning technologies.

Private / independent providers continued to have a view that TEQSA is university centric and does not understand the context in which non-public providers operate, particularly those that operate for profit or that are based in regional locations.

#### Attribute differences

Principal contact survey responses were analysed by various provider attributes to understand similarities and differences between provider sub-groups. This analysis helps identify issues with particular segments and allows TEQSA to tailor initiatives to these groups. For 2019, there were fewer instances of significant differences between provider sub-groups than in previous years. This, in itself, is a notable result for this year.

There were a small number of statistically significant differences in the 2019 results among the following sub-groups:

* Self-accrediting authority (SAA) or not
* High / moderate financial position risk as assessed by TEQSA
* High / moderate student risk as assessed by TEQSA
* Registered Training Organisation (RTO) activity
* CRICOS / not CRICOS registered
* Category (university, HEP and prospective HEP)
* Market groupings (university, profit, faith based, etc)

Analysis by state (location of provider) showed no significant differences.

Based on market groupings, the overall perception of TEQSA’s performance as a regulator (using the 2019 top 2 score) rated higher among universities (89%) and miscellaneous providers (88%) compared to prospective HEPs (57%), for profit (68%) and other providers (69%), with faith based providers (78%) similar to the overall average score (76%). However, none of these differences were statistically significant (as in measuring a true difference), mainly due to small sample sizes.

#### Provider and peak / professional / study body comparison

The comparative results from the two surveys are displayed in the table below. PPSB representatives rated most items at a similar level, given the difference in margins of error for both surveys.

| KPI ITEM | PRINCIPAL CONTACT TOP 2 SCORE (%) n=139 | PEAK / PROF / STUDENT BODY TOP 2 SCORE (%) n=23 |
| --- | --- | --- |
| KPI 1 - Regulation by TEQSA does not unnecessarily impede the efficient operation of higher education providers | 59 | 63 |
| KPI 2 - TEQSA’s communication with your organisation is clear, targeted and effective | 65 | 68 |
| KPI 3 - Regulatory actions undertaken by TEQSA are proportionate to the risks being managed | 63 | 65 |
| KPI 4 - TEQSA’s compliance and monitoring approaches for higher education providers are streamlined and co-ordinated | 54 | 63 |
| KPI 5 - TEQSA is open, transparent and consistent in its dealings with your organisation | 73 | 71 |
| KPI 6 - TEQSA continues to improve its regulatory framework | 67 | 68 |
| Overall TEQSA's performance as a regulator over the last 12 months | 76 | 64 |

## Conclusions

This year’s results are somewhat mixed: overall performance has increased slightly but not significantly; KPIs have remained at similar levels to 2018; communication activities continue to be a strength for TEQSA; monitoring quality (a new topic for this year) has not performed well, while aspects of application processes (not CRICOS-related) have improved.

TEQSA’s conference, usually high scoring, did not do so well this year. Providers indicated that consultation activities, interaction with TEQSA staff and CRICOS applications need considerable improvements. Anything to do with speed of response and efficiency scored poorly.

Principal contacts and peak, professional and student body representatives shared similar views across all KPIs and on TEQSA’s overall performance.

Notably, this year has also seen a convergence in views between sub-groups. For example, universities compared with for-profits and those with and without self-accrediting authority. In 2019, views were more homogenous (not completely the same, but more similar) than in previous years indicating that an issue for one group is likely to be an issue for all.

Survey results clearly show what the sector wants TEQSA to continue doing and to change. The challenge will be in modifying operations to address these aspects.

# Introduction

In August 2019 TEQSA conducted sector-wide stakeholder surveys for 2018-19. The purpose of the surveys was to increase TEQSA’s accountability, better understand its impact on higher education providers, and to improve its performance. Results were also used in annual reporting activities. Two surveys were involved:

* A provider-specific version with principal contacts for all higher education providers (those registered as well as those who had submitted initial registration applications)
* A brief survey for the operational heads of selected peak, professional and student bodies.

TEQSA engaged Australian Survey Research (ASR) to help design, deploy, analyse and report on the surveys.

This report outlines the methodology used to conduct and analyse the web surveys as well as key findings from each survey including provider attribute differences. The questionnaires used in the surveys form an appendix to the report.

# Methodology

This section outlines how the two surveys were developed; how survey participants were identified; how the survey was administered and analysed; and the composition of the response sample.

## Questionnaire development

Previously TEQSA and ASR had developed a series of questions based around TEQSA’s Regulator Performance Framework which encompassed six key performance indicators (KPIs). The Framework also addressed the key metrics within the TEQSA Corporate Plan .

The questionnaire developed for TEQSA’s principal contacts (PC) had an operational focus and included questions around recent interactions between themselves and TEQSA. The PC survey metrics were subject to an independent review in 2018-19 to ensure that KPIs remained fit for purpose and addressed TESQA’s strategic requirements. As a result, the 2019 PC survey questions (items) included some changes to those used in 2018. The main changes were to ask individual rating questions about each KPI, as well as adding questions around communication and consultation, as well regulatory approach and TEQSA’s monitoring of quality. The format of the sector risk question was also changed.

VC / CEOS ‘providers’ were given an opportunity to comment separately within the principal contact survey.

The wording of peak and professional body (PPSB) survey questionnaire remained unchanged from 2018.

## Data collection

The two web questionnaires were loaded into ASR’s proprietary web surveying tool, SurveyManager and hosted on ASR’s internet servers located at a high security data centre in Melbourne’s CBD.

TEQSA provided ASR with a full listing of all current and selected pending higher education providers (n=238) that it regulates or is likely to regulate across Australia. The lists included contact details of TEQSA’s principal contact within each provider. The listing also included provider attributes such as state, size and self-accrediting authority, which were used to analyse responses. Results of this analysis are discussed later in the report. Further to the higher education provider list, TEQSA provided ASR with a list of contact details for representatives from peak, professional and student bodies (n=51).

Prior to going live with the full survey, TEQSA’s Chief Commissioner, Professor Nick Saunders, AO and its CEO, Mr Anthony McClaran, emailed a joint letter to the CEOs and principal contacts of all potential participants advising them of the survey and requesting their participation. Soon after, ASR sent invitation emails to the principal contact within each potential respondent and each PPSB representative. The invitation email contained a unique hyperlink to access a recipient’s questionnaire.

ASR monitored response rates and sent two targeted reminder emails to all non-responders in each survey. The survey was in field from 23 July to 14 August 2019.

## Data analysis

Results were analysed to produce top 2 scores (the proportion of respondents selecting the two most positive rating points) and frequency distributions. A z test was used to determine any statistical differences between attribute sub-groups which included self-accrediting authority, 2018 financial risk rating, 2018 student risk rating, category, state, provider size, RTO activity, CRICOS registration and market groupings. All tests were reported at the p<0.05 level (95% confidence level). See the box below for further explanation of confidence levels and intervals.

Top 2 scores were calculated using only the number of respondents who chose a rating point answer. In other words, *don’t know, not applicable* and *no* *answers* (blank)were excluded from statistical calculations. A top 2% score of 100% can be interpreted as all respondents who answered a particular question indicated that TEQSA was performing at a *good or excellent* level on a particular item.

## Response and sample profile

A total of 238 principal contacts were invited to participate in their survey and 143 principal contacts responded, yielding a **response rate of 60%**. The sample is statistically representative of the principal contacts population at the 95% confidence level and a ±5.2% confidence interval. This is an acceptable scientific research confidence interval for scientific and market research.

A total of 51 representatives from peak, professional and student bodies were invited to participate in their survey and 23 responded yielding a **response rate of 45%.** The results for this survey have a confidence interval of ±15.4%. With this higher confidence interval and a small sample of 23, PPSB results should be treated with caution and as indicative only.

Representativeness of a sample is often assessed at a 95% confidence level (accuracy) and a ±5% confidence interval (precision).

The **confidence interval** (also called margin of error) is the plus-or-minus figure usually reported in newspaper or television opinion poll results. For example, if you use a confidence interval of 4 and 47% percent of your sample picks an answer you can be "sure" that if you had asked the question of the entire relevant population between 43% (47-4) and 51% (47+4) would have picked that answer.

The **confidence level** tells you how sure you can be. It is expressed as a percentage and represents how often the true percentage of the population who would pick an answer lies within the confidence interval. The 95% confidence level means you can be 95% certain; the 99% confidence level means you can be 99% certain. Most researchers use the 95% confidence level.

When you put the confidence level and the confidence interval together, you can say that you are 95% sure that the true percentage of the population is between 43% and 51%. The wider the confidence interval you are willing to accept, the more certain you can be that the whole population answers would be within that range.

For example, if you asked a sample of 1000 people in a city which TV channel they preferred watching, and 60% said Channel A, you can be very certain that between 40% and 80% of all the people in the city actually do prefer that channel, but you cannot be so sure that between 59% and 61% of the people in the city prefer the channel. *Reference: www.surveysystem.com/sscalc.htm*

#### Population / sample comparison

The profiles of the provider population and the survey sample were compared by state and category to identify any over/under-representation in the principal contact response set. Both profiles had very similar proportions (see tables immediately below) meaning that the response set showed no non-response bias, that is, the sample closely reflected the population on each attribute.

As a result, the response sample was considered closely representative of the population and **no weighting** was applied to the principal contact survey response set.

Note that throughout this report, the total sample n count varies slightly. This is not an error. One institution chose to answer additionally from a group perspective, so was not included in the population figures and had no attributes associated with it.

| LOCATION | PRINCIPAL CONTACT  POPULATION | | RESPONSE  SAMPLE | |
| --- | --- | --- | --- | --- |
|  | ***Freq*** | ***%*** | ***Freq*** | ***%*** |
| NSW | 107 | 46 | 64 | 45 |
| VIC | 62 | 26 | 35 | 25 |
| QLD | 26 | 11 | 15 | 11 |
| SA | 17 | 7 | 14 | 10 |
| WA | 16 | 7 | 9 | 6 |
| ACT/NT/TAS | 8 | 3 | 4 | 3 |
| Overseas | 1 | 0 | 1 | 1 |
| **Total** | **237** | **100.0** | **142** | **100** |

| PROVIDER CATEGORY | PRINCIPAL CONTACT POPULATION | | RESPONSE SAMPL**E** | |
| --- | --- | --- | --- | --- |
|  | ***Freq*** | ***%*** | ***Freq*** | ***%*** |
| University | 43 | 18 | 35 | 25 |
| Higher Education Provider (HEP) | 130 | 55 | 89 | 63 |
| Prospective Higher Education Provider (Prop HEP) | 53 | 22 | 15 | 11 |
| Non-HEP | 11 | 5 | 3 | 2 |
| **Total** | **237** | **100.0** | **142** | **100** |

## Data file

ASR has supplied de-identified and randomised raw data files to TEQSA. The files also contained all de-identified verbatim comments for TEQSA’s further investigation.

#### Important note about statistically significant differences

A statistically significant difference indicates that a true difference exists between two numbers; that the difference is not due to measuring error. Significant difference testing does NOT report on the size of a difference. Two numbers can be very similar and still be significantly different, simply because the underlying variance in the data is different. And vice versa: two numbers can be very different in absolute terms, but not statistically significant, usually because of small sample sizes or very wide variances.

# Principal contact survey - key findings

This section outlines the key findings from the principal contact (PC) survey. Respondents were asked to rate TEQSA’s performance on a number of items. Results are presented by topic, in the same order as presented to respondents in the online questionnaire. For most items, top 2 scores (see coloured note below) are presented along with a charted frequency distribution. The most common themes within free text comments are covered throughout each topic.

#### How to read the results in the charts

**Important notes about scores and charts**

A top 2 score is the total proportion of respondents selecting the two most positive rating points in their answer to a question. When calculating the proportion of respondents in this answer category, any respondents who answered with don't know, not applicable or no answer have been excluded from the base of the calculation.

As a result, the percentage of green (dark and light green) in the following charts may not always be equivalent to the top 2 score as presented in tables. The table figures will usually be slightly higher. This is because the chart percentages include don’t know, not applicable, and no answer proportions. These technically invalid answers have been included in charts to indicate the proportion of respondents who did not have a view. Sometimes this indicates a communication issue.

The charts have been sorted by the proportion of positive responses and are presented in descending order. Cells with only 1% or fewer of respondents have not been labelled.

When reading the charts, it is useful to look at the proportion of green (positive) and the proportion of orange/red (negative) responses. More green than other colours mean that positive ratings outweigh negative ratings. A lot of orange and red indicates considerable room for improvement.

In order to fit tables and charts within a page, item names have been abbreviated. Refer to appendix A for a table of abbreviations.

#### Warning about averages and summary results

The survey results presented in this section are based on aggregate scores, that is, all respondents’ answers taken together. Between survey respondents there is some variation in views. This means that an average or summary answer does not reflect any single sub-group. Averaging loses detail, and for this survey, a detailed view makes a difference. When reading the summary results, it may be useful to keep this in mind. The section on attribute analysis makes sub-group differences, where they exist, clearer.

## Key performance indicators

KPI top 2 scores were between 54% and 73% as shown in the table below. KPI 5 was highest scoring (TEQSA is open, transparent and consistent dealings with providers) and KPI 4 was lowest (streamlined and co-ordinated compliance and monitoring approaches). There is considerable room for improvement in all KPIs.

| KPI ITEM | n | TOP 2 SCORE (%)\* |
| --- | --- | --- |
| KPI 1 - Regulation by TEQSA does not unnecessarily impede the efficient operation of higher education providers | 134 | 59 |
| KPI 2 - TEQSA’s communication with your organisation is clear, targeted and effective | 139 | 65 |
| KPI 3 - Regulatory actions undertaken by TEQSA are proportionate to the risks being managed | 132 | 63 |
| KPI 4 - TEQSA’s compliance and monitoring approaches for higher education providers are streamlined and co-ordinated | 132 | 54 |
| KPI 5 - TEQSA is open, transparent and consistent in its dealings with your organisation | 139 | 73 |
| KPI 6 - TEQSA continues to improve its regulatory framework | 123 | 67 |

*\*Top 2 scores and n counts exclude don’t know / not applicable / no answer responses.*

The following chart summarises the response distribution across the *excellent* to *very poor* rating scale for all six KPIs. Note the relatively high *don’t know/no answer* response to KPI 6 indicating that a notable portion of providers do not have a view, maybe because they don’t have enough information to form one.

### Provider comments about KPIs

Providers were given the opportunity to provide comments in relation to each KPI and these are summarised below.

#### KPI 1: Regulation by TEQSA does not unnecessarily impede the efficient operation of higher education providers

Providers offered 50 valid comments (excluding comments like *don’t know* or *not had enough experience to answer)* and the most common themes were:

* Positive comments including promoting genuine partnerships and good practice, improved turnaround times, intention to reduce red tape and alignment of university and registration dates.
* Regulatory burden has increased
* Slow / lengthy response times
* No clear timeframes set or agreed timeframes not adhered to
* Deadlines to respond unnecessarily tight
* No updates on progress of applications
* Responses from TEQSA unclear / poorly reasoned findings
* Lack of clarity as to TEQSA’s scope of interest in operational matters
* Data entry issues-mistakes and inconsistent information
* Case management related: not informed of case manager and people with limited experience or knowledge of higher education do assessments.

#### KPI 2: TEQSA’s communication with your organisation is clear, targeted and effective

A total of 58 valid comments were offered with the following themes:

* Positive comments around communications (clear, targeted, helpful, appropriate) including newsletters, discussion groups, guidance notes and website
* Positive about case managers (supportive, responsive, knowledgeable) and ability to seek further clarification through teleconference / videoconference.
* Negative about case managers (not fully trained / aware of regulations; slow / no response)
* Slow / no response from TEQSA
* TEQSA does not maintaining contact lists, so correspondence goes to wrong people
* Vague / unclear / not definitive responses from TEQSA
* Uncertainty about status of issues and processes; lack of communication.
* Hard to find information on website
* Complaints handling needs to be more transparent.

#### KPI 3: Regulatory actions undertaken by TEQSA are proportionate to the risks being managed

A total of 32 valid comments were offered with the following themes:

* Positive around regulation applied appropriately / proportionately and treatment of low risk providers
* Need for greater specificity on risk thresholds
* Risk assessments need to be based on current information and using valid and robust data (not small samples and minor changes)
* Consider more frequent but lighter touch assessments / too heavy handed
* Poor understanding of risk
* Don’t take adequate account of the differences in the level of resourcing between large and small providers
* Don’t place enough importance on past track record / role of a specific institution
* Turnaround times on regulatory decisions could improve
* Some risk actions not proportionate or equitable between providers
* Bias against private providers.

#### KPI 4: TEQSA’s compliance and monitoring approaches for higher education providers are streamlined and co-ordinated

A total of 51 valid comments were offered with the following themes:

* Improved automated data collection and re-use of existing information.
* Provider visits well-coordinated
* More streamlining required especially with ASQA, around CRICOS and professional bodies
* TEQSA staff issues (case manager churn; disorganised; lack skills; inconsistent)
* Lack of clarity as to what is wanted in response to requests / questions
* Need to communicate with nominated institutional contact,
* Slow to respond to submissions / approve minor changes
* Outdated risk assessments
* Insufficient ongoing monitoring once approvals given.

#### KPI 5: TEQSA is open, transparent and consistent in its dealings with your organisation

A total of 40 valid comments were offered with the following themes:

* Interactions with TEQSA senior staff / case manager improved
* Email responses are clear
* Clearer direction from TEQSA when issuing formal requests for information
* TEQSA / case managers not transparent including about standards and specific nature of a complaint; the result is rework
* Lack of updates / follow-up on progress of requests and submissions
* Case managers confusing and not consistent
* Dealings / operating model lacks integrity
* TEQSA defensive when significant errors made.

#### KPI 6 - TEQSA continues to improve its regulatory framework in consultation with your organisation

A total of 39 valid comments were offered with the following themes.

* Consultation is strong / effective / improving over last year
* Workshops are valuable and more desired
* Extended registration to providers with a good track record appreciated
* Increasing inclusion of non-university HEPs in regulatory framework considerations.
* Delays in responding to questions for clarification
* No / minimal evidence of being consulted about improving the regulatory framework or feedback informing improvements
* TEQSA has no intention of improving the regulatory framework
* Need to take more account of the role and place of independent providers by listening to peak bodies such as IHEA and ITECA
* Overhaul and simplify threshold standards
* Need more non-university examples of how providers have created effective leadership structures.

## Interactions with TEQSA

By far the most common interactions that providers had with TEQSA in the last 12 months were with TEQSA staff including case managers (90%) while a considerable portion of providers had been involved through applications or renewals of some type. Answers to this question were used to present questions to particular respondents around applications.

## Communication and consultation

The following series of tables and charts display the top 2 scores and frequency distributions of answers about aspects of providers’ ratings of TEQSA’s communication and consultation.

All communication items rated between 65% and 89% and this was the highest scoring topic within the 2019 survey. *Usefulness of regulatory information* and *usefulness of the information on the HES Framework* were also the highest scoring items in the survey. There appears to be considerable room for improvement around the TEQSA conference with a top 2 score of 65% and a considerable proportion of respondents rating this item as only *fair*. Refer to the table and chart immediately below.

| COMMUNICATION ITEMS | n | TOP 2 SCORE (%)\* |
| --- | --- | --- |
| Usefulness of regulatory information | 140 | 89 |
| Usefulness of the information on the HES Framework (Threshold Standards) 2015 | 138 | 88 |
| Usefulness of TEQSA-facilitated workshops and webinars to discuss regulatory requirements | 125 | 79 |
| Usefulness of information provided on National Register | 134 | 71 |
| Using a variety of media and channels to communicate sector-wide updates | 136 | 71 |
| Usefulness of the TEQSA conference | 120 | 65 |

*\*Top 2 scores and n counts exclude don’t know / not applicable / no answer responses.*

Consultation items rated between 48% and 65%, so there is considerable room for improvement for all these items, particularly *listening to providers’ views on reducing regulatory burden*. Note that there were a lot of *not applicable* responses to these items, probably indicating, in this instance, that these consultative activities did not occur with a large proportion of providers. Consequently, providers could not assess TEQSA’s response or consultative behaviour.

| CONSULTATION ITEMS | n | TOP 2 SCORE (%)\* |
| --- | --- | --- |
| Providing organisation with opportunity to give feedback on annual risk assessment process | 126 | 65 |
| Listening to organisation’s views on better ways to protect student interests | 92 | 63 |
| Providing organisation with opportunity to give feedback on application processes | 111 | 61 |
| Listening to organisation’s views on improving quality assurance | 103 | 56 |
| Listening to organisation’s views on ways to reduce regulatory burden | 103 | 48 |

*\*Top 2 scores and n counts exclude don’t know / not applicable / no answer responses.*

#### Comments about TEQSA’s communication and consultation

Principal contacts offered 24 valid comments about TEQSA’s communications and consultation. The more common themes focused on:

* TEQSA listen to responses / always willing to listen to feedback when seek out providers' views
* TEQSA’s public statements about contract cheating services appreciated
* Improved format needed for the TEQSA conference
* No or limited formal opportunities to be listened to / consulted with
* Provide advance notice of when the annual risk assessment is due
* Deadlines too tight or not clear
* TEQSA is too slow in responding / making a decision / not responding at all
* Emails sent to wrong person in the organisation NOT the principal contact
* Information on the 2015 HESF is out of date
* Slow to update National Register
* Some TEQSA's staff and experts can be arrogant / misinformed.

## Regulatory approach and activities

All items for TEQSA’s regulatory approach rated between 65% and 77%. Many providers believe that TEQSA is helping the sector as a whole to protect students, but more work needs to be done in terms of providers’ capacity to protect students and to manage their risks. Refer to the table and chart below.

| REGULATOR APPROACH ITEMS | n | TOP 2 SCORE (%)\* |
| --- | --- | --- |
| Helping the sector as a whole to protect students | 134 | 77 |
| Helping the sector as a whole to manage risks | 130 | 73 |
| Helping the sector as a whole to deliver quality higher education | 136 | 71 |
| Helping organisation deliver quality higher education | 131 | 71 |
| Strengthening organisation’s capacity to protect students | 134 | 67 |
| Strengthening organisation’s capacity to manage risks | 127 | 65 |

*\*Top 2 scores and n counts exclude don’t know / not applicable / no answer responses.*

All items for TEQSA’s regulatory activities rated between 57% and 86%. The item *treating with politeness and respect* was one of the highest rating in the survey. However, there is considerable room for improvement around accountable regulatory processes which had a top 2 score of only 57%. Refer to the table and chart below.

| Regulatory activitY ITEMS | n | TOP 2 SCORE (%)\* |
| --- | --- | --- |
| Treating with politeness and respect | 139 | 86 |
| Being fair and reasonable | 137 | 74 |
| Being encouraging without setting up unrealistic expectations | 131 | 62 |
| Having accountable regulatory process where decisions are justified openly | 127 | 57 |

*\*Top 2 scores and n counts exclude don’t know / not applicable / no answer responses.*

### Comments about TEQSA’s regulatory approach and activities

Principal contacts offered 29 valid comments about TEQSA’s regulatory approach and activities. The more common themes focused on:

* Openness of regulatory decisions
* Case manager related: responsive, good service, polite, respectful
* Unpleasant experience dealing with TEQSA staff
* Annual provider risk assessment report useful, but needs to use more up-to-date data
* Risk assessment and general approach: one size does not fit all, too simplistic, discourages quality scholarship / learning
* Provide further guidance to all types of providers including best practice or real world examples, risk mitigation, MOUs and multilateral / bilateral arrangements
* Slow responses
* TEQSA interprets standards too literally and pedantically
* Compliance burden is too heavy.

## Regulatory decisions

Only 39% of providers that participated in the survey were involved with a regulatory decision in the previous 12 months. Only this sub-group were asked to answer about aspects of the decision, hence the smaller n count for these items. The three items about TEQSA’s regulatory decisions rated between 58% and 74%. The item around *consistent and clear goal posts* was the lowest scoring in the topic and has been mentioned in a number of open-ended comments.

| REGULATORY DECISION ITEMS | n | TOP 2 SCORE (%)\* | |
| --- | --- | --- | --- |
| Providing opportunities to address matters relevant to regulatory decision, prior to final decision | 50 | | 74 |
| Explaining clearly and constructively why a decision was made | 49 | | 65 |
| Consistent and clear about goal posts for successful decision outcomes | 52 | | 58 |

*\*Top 2 scores and n counts exclude don’t know / not applicable / no answer responses.*

## Experience of an unfavourable regulatory decision

Providers were asked to indicate if their organisation had been subject to an unfavourable regulatory decision in the past 12 months and 13% of survey respondents indicated that they had. This group was then asked if they agreed or not with the decision. Forty two percent indicated that they agreed while 58% did not. These results should be treated as indicative only due to the very small sample size (n=19).

Principal contacts offered eight valid comments relating to the steps taken to resolve an unfavourable regulatory decision. Their summarised comments were:

* Unable to disagree / no avenue to appeal
* Went to AAT
* Lodged a complaint with TEQSA
* TEQSA should be open to negotiation after its decision
* Ended up withdrawing application to appeal
* Appeal regarded as an unnecessary and costly process
* Tried to resubmit the application but were discouraged by TEQSA / uncertain how to proceed.

Eleven of the providers that received an unfavourable regulatory decision were then asked if they were satisfied with the steps taken to resolve the unfavourable regulatory decision. Only one provider was satisfied; five were partially satisfied; one was not satisfied and four were still waiting resolution.

## Monitoring quality

All items for TEQSA monitoring quality topic rated between 41% and 60%. This was the lowest scoring topic in the survey and it is one area where TEQSA needs to focus any improvement initiatives. The (lack of) timeliness issue is repeated throughout many open-ended comments. Refer to the table and chart below.

| MONITORING QUALITY ITEMS | n | TOP 2 SCORE (%)\* |
| --- | --- | --- |
| Providing quality feedback on whether organisation is meeting expected standards | 126 | 60 |
| Taking regulatory action that is necessary to manage risks effectively | 111 | 59 |
| Giving feedback that continuously improves the quality of higher education in organisation | 125 | 58 |
| Providing timely feedback on whether organisation is meeting expected standards | 126 | 42 |
| Suggesting networks and resources that organisation might use to improve performance | 111 | 41 |

*\*Top 2 scores and n counts exclude don’t know / not applicable / no answer responses.*

## Applications to TEQSA

This section outlines providers’ views of the interactions they had with TEQSA while making registration and accreditation applications, excluding CRICOS. The table and chart results within this section are based on a sub-set of the PC survey sample, that is, only those who indicated that they had made an application (non-CRICOS) in the previous 12 months.

Item scores for this topic varied widely: between 37% for minimising time (a repeated issue and the lowest scoring item in the survey) and 80% for clarity of the application guide—indicating TEQSA’s strength in written communication. Note the smaller n counts meaning results have a much larger margin of error, so should be treated as indicative for this topic. Also, note the proportion of the *not applicable* response for two of the items: *usefulness of feedback* and *minimising decision response time*. It is likely that respondents did not answer because these activities did not happen or have not yet happened. Refer to the tables and charts below.

| APPLICATION ITEMS | n | | | TOP 2 SCORE (%)\* |
| --- | --- | --- | --- | --- |
| Clarity of the application guide | | 84 | 80 | |
| Clarity of assessment scope and evidence requirements | | 81 | 74 | |
| Usefulness of information about how to prepare an application | | 80 | 74 | |
| Usefulness of feedback from TEQSA about application | | 68 | 63 | |
| Tailoring application process to meet needs | | 78 | 62 | |
| Timeliness of feedback from TEQSA about application, including those unlikely successful | | 72 | 43 | |
| Minimising time taken between submitting application and first receiving a regulatory decision | | 65 | 37 | |

*\*Top 2 scores and n counts exclude don’t know / not applicable / no answer responses.*

### CRICOS application

Providers that indicated they had made a CRICOS application for registration in the last 12 months were asked about aspects of their interactions. The table and chart within this section are based on a sub-set of the PC survey sample, that is, only those who indicated they had been involved with this particular interaction.

CRICOS application items had a wide range of scores: from 41% and 75%. Timeliness was lowest scoring and one of the lowest scoring items in the survey.

| CRICOS APPLICATION ITEMS | n | TOP 2 SCORE (%)\* |
| --- | --- | --- |
| Usefulness of information on how to use the provider portal | 72 | 75 |
| Clarity of assessment scope and evidence requirements | 73 | 71 |
| Clarity of the application guide | 72 | 65 |
| Usefulness of information about how to prepare an application | 72 | 63 |
| Usefulness of feedback from TEQSA about application | 63 | 62 |
| Tailoring application process to meet needs | 67 | 51 |
| Minimising time taken between submitting application and first receiving a regulatory decision | 61 | 46 |
| Timeliness of feedback from TEQSA about application, including those unlikely successful | 68 | 41 |

*\*Top 2 scores and n counts exclude don’t know / not applicable / no answer responses.*

## Interaction with TEQSA staff

Respondents who indicated that they had interacted with a case manager or were involved in an application process were then asked about their experiences of interacting with TEQSA staff over the last 12 months.

All items for interaction with TEQSA staff rated between 54% and 78% with efficiency and understanding an organisation scoring lowest. Meeting face-to-face with case management teams was useful for many of those providers who experienced it but note the large *not applicable* response for this item, indicating that interaction was mainly not face-to-face. Refer to the table and chart below.

| INTERACTION WITH TEQSA STAFF ITEMS | n | TOP 2 SCORE (%)\* |
| --- | --- | --- |
| Usefulness of meeting face-to-face with case management teams | 78 | 78 |
| TEQSA’s overall approach to case management | 128 | 69 |
| Being responsive to organisation’s needs | 126 | 59 |
| Demonstrating an understanding of organisation’s specific needs | 126 | 55 |
| Dealing with organisation efficiently | 126 | 54 |
| Demonstrating an understanding of organisation’s business or operating environment | 125 | 54 |

*\*Top 2 scores and n counts exclude don’t know / not applicable / no answer responses.*

### Suggestions for improving interactions with TEQSA staff

Principal contacts offered 45 valid comments for improving interactions with TEQSA staff.

While there were several positive comments about the service provided, describing case managers and staff as approachable, helpful, honest, clear and friendly, a number of suggestions were made for improving interactions with TEQSA staff and the service in general including:

* Case management related:
  + Rotate to increase knowledge
  + Increase case manager knowledge of organisation and regulation / compliance matters
  + Improve consistency / minimise churn of case managers
  + Assign them early
  + Follow up on issues
* Poor staff manner / attitude – be more consultative and proactive
* Improve response times to issues, emails, webforms and to making decisions
* Share information amongst staff
* Review partitioning of ESOS / CRICOS diminishes ability to interact with single point of contact
* Make it easier to find someone to talk to about CRICOS re-registration / difficult process
* Deadlines for providers are too tight
* Be more flexible re different modes of delivery and reviewing cases
* Provide more feedback on submissions provided / not just acknowledge receipt

## Changes in last 12 months

|  |  |
| --- | --- |
| Respondents were asked what they had noticed about TEQSA’s re-use of organisation-provided material in the last 12 months. Most had no answer (don’t know), but of those who did answer, most indicated that it had stayed the same in the last 12 months. Refer to the chart on the right. |  |
| Respondents were next asked about what they had noticed in relation to the administrative burden that TEQSA’s regulations imposed on their organisation over the last 12 months. Most (59%) indicated that it had stayed the same, while 20% thought it had worsened. Refer to the chart on the right. |  |

#### Suggestions for lifting reporting burden

Principal contacts were asked to nominate one reporting burden that could be lifted without adversely affecting the performance of their organisation. Thirty-five valid comments were offered.

Some providers indicated that the administrative load and responsive case management had improved in the past 12 months. Themes for other suggestions were:

* Have an easier way to update PIR staffing
* Review appropriateness of requests for additional information / material change notifications
* Remove duplication of data reporting
* Allow capacity limit on a campus within overall CRICOS code
* Useful to have a 30 day prompt in advance for key reports
* Keep the same date each August for annual risk assessment and allow 10 business days to respond
* Stop changing (external) reporting systems
* Standardise reporting formats across government agencies
* Requests to provide policies / procedures / explanations have increased significantly over the past 2 years. These are not differentiated by provider risk level, and/or self-accrediting status
* CRICOS: Reduce volume of documentation for registration renewal and harmonise CRICOS and re-registration
* Reduce the requirement to submit all teaching materials for a reaccreditation at once
* Review HEP annual reporting process / provide sample template or report framework to ensure only pertinent information provided
* Provide feedback on quality of provider reports or submissions
* Provide clearer explanation of what TEQSA expects for student staffing ratios, and / or permanent to casual staffing ratios
* Operate with real time data to enable current risk ratings to be more meaningful / risk assessment data very dated.

## Sector risks

Providers were asked to indicate the level of threat to the strength and reputation of the sector of risks identified in the 2018 survey. The risks with the highest perceived threat (more than 40% indicated high threat level) were:

* Contract cheating
* Cyber security
* Stereotyping of private providers.

The item with the lowest level of perceived risk to the sector was micro-credentials. Refer to the chart below.

*.*

### Sector risks by market groupings

The table below shows the perceived threat level for each sector risk based on average (mean) threat ratings for each market grouping. To generate a mean threat level, each threat level was weighted (x6 for high threat, x4 for medium threat and x2 for low threat) and then the average calculated using the proportion of respondents that chose a particular threat level for each risk. Scores in the table below will be somewhere between 6 (high) and 2 (low). Any number above 4.5 should be treated as high threat and these have been **bolded**; treat 3.5 to 4.5 as medium; and treat anything less than 3.5 as low threat.

*Don’t know/no answer* answers have been excluded from mean calculations, so the valid n count will vary for each threat within a group. The maximum n count for each group is shown in a column header.

There were few differences in ratings of sector risks that were statistically significant. *Stereotyping of private providers* was perceived as a much greater threat by all market groups with the exception of universities. Profit and prospective HEPs indicated a number of higher threats than the other market groups, as shown with the yellow highlights in the table below.

This analysis needs to be interpreted keeping in mind that there are extremely small sample sizes for each group, that is, the following figures are only roughly indicative, and therefore should not be used to make major decisions.

*Significantly higher results highlighted in yellow.*

|  | MARKET GROUPINGS^ - MEAN THREAT LEVEL | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| TOPIC / ITEM | Faith based  n=11^ | Miscellaneous#  n=27^ | Profit  n=38 | University  n=35 | Other+  n=16^ | N/A as  prospective HEP n=15^ |
| Reliance on income from overseas students | 4.2 | **4.6** | 4.3 | **5.1** | 4.5 | **4.6** |
| Admission of underqualified students | 4.0 | 4.5 | 4.4 | 3.8 | 3.8 | **4.9** |
| Graduating poorly trained students | 3.2 | 3.8 | 4.5 | 3.5 | 4.4 | **4.9** |
| Contract cheating | 4.5 | **5.0** | **5.1** | **4.6** | 4.5 | **5.1** |
| Micro-credentials | 3.2 | 2.3 | 3.2 | 2.7 | 2.6 | 3.2 |
| Students whose well-being has not been safeguarded | 4.0 | 4.3 | 3.9 | 3.8 | 4.0 | 4.5 |
| Management of sexual harassment / sexual assault on campus | 3.2 | 4.0 | 3.9 | 3.6 | 3.6 | 4.0 |
| Management of bullying on campus | 3.4 | 3.7 | 3.6 | 3.1 | 3.5 | 3.6 |
| Stereotyping of private providers | **4.9** | 4.2 | **5.4** | 2.9 | **4.7** | **5.4** |
| Cyber security | 4.2 | **4.8** | 4.5 | **4.9** | 4.0 | **4.9** |
| Discouragement of free enquiry in higher education sector | 3.6 | 3.5 | 3.5 | 2.9 | 3.2 | 4.3 |
| Stifling of innovation through accreditation processes | 4.0 | 4.0 | **4.6** | 3.3 | 3.9 | **5.0** |
| Costs of research for the higher education sector | 4.0 | 4.0 | 3.9 | **4.6** | 4.4 | 4.2 |
| Over-reliance on paper-based assessment of providers including desk audits | 2.4 | 3.2 | 3.5 | 3.0 | 3.5 | 4.2 |
| TEQSA being unable to see problems in large complex providers | 3.3 | 3.7 | 4.4 | 3.1 | 4.0 | 4.3 |
| Difficulty in holding to account providers that are too big to fail | 4.0 | 4.1 | **5.1** | 3.1 | 4.5 | **5.0** |
| Having a regulator that operates under cost recovery model | **4.9** | 4.1 | 4.1 | 3.7 | **4.6** | 3.7 |
| Poor cooperation among national and international professional accreditation bodies, national regulators and government | 3.8 | 3.7 | 3.9 | 3.6 | 3.8 | 3.7 |

*The maximum possible n for each market group is displayed in the table header.  
^Some cell numbers (n counts) are very small so results should be interpreted with extreme caution.  
#Includes Government Agencies, Pathways, Professional Bodies and TAFEs +Includes not for profit and non-faith base*

### Future risks that TEQSA should investigate

Principal contacts were asked to nominate the immediate or future threats to the higher education sector that TEQSA should be investigating. A total of 59 principal contacts provided valid comments which were broad ranging. The more common risk identified in provider comments are outlined below, noting that this is not an exhaustive list and TEQSA has been provided with detailed responses:

* Skills requirements of employers / careers not being met by traditional higher education
* Reclassification of HEPs / delineation between VET & HE
* Penalising full paying students who access FEE HELP by charging a 25% loan fee
* Admission of underqualified students / not meet English language requirements
* Academic integrity / contract cheating / student attitudes to plagiarism especially other cultures / use of translation and paraphrasing websites and tools
* Impact of casualisation / academic staff payment may not be correct
* Currency of knowledge of staff; keeping up with technology and the associated costs
* International Education Agents
* Fraud and corruption in international operations
* Cyber security
* Lack of innovation, with funding and regulatory disincentives to do so
* Sexual assault and sexual harassment issues
* Mental health issues for domestic and international students
* Adequacy of infrastructure with contemporary requirements / environmental sustainability
* Focus on revenue generating with less of a focus on quality outcomes
* Reduced funding for universities on ability to deliver quality outcomes
* Publication of risk assessment and LANTITE information without full understanding of the impact on the sector
* Having a regulator (TEQSA) that operates under a cost recovery model
* Regulatory framework designed for universities, not other models
* Universities held to account more
* Cost of compliance

## Principal contacts - TEQSA overall

All providers were asked to rate TEQSA as a regulator. Seventy-six percent of respondents who answered this question rated TEQSA’s performance over the last 12 months as either *good* or *excellent* —up 6% since 2018 but not a statistically significant result.

*Note that the total of the excellent and good proportions in the chart below is slightly less than 76%. This is because the chart includes a proportion of don’t know / no answer respondents who have been excluded from the top 2 calculation.*

## Overall comments

The following discussion may raise some contradictions with previously discussed results. For example, while some providers have been negative about TEQSA’s case management, others indicate that this is a TEQSA strength. These are not the same people contradicting themselves, but different people who have different experiences. The comments indicate that higher education providers have a diversity of needs and expectations and/or that TEQSA does not behave uniformly.

While ASR takes all care in identifying common themes, with expert or knowledgeable observer insight, other themes may emerge. ASR has provided TEQSA with all de-identified verbatim comments so that they can gain further insight into what stakeholders are saying. These comments are a valuable and rich source of feedback.

### What TEQSA does well that it should continue doing

A total of 100 principal contacts offered ideas about what TEQSA does well. The key themes were:

* Proportional approach to regulation / focus on high risk providers and reduction in administrative burden on good providers
* Strong stance on academic integrity / maintaining high standards / high barriers to entry
* Case management approach / efficient / responsive / supportive, although need to retain continuity of case managers to establish knowledge / relationship with providers
* TEQSA engagement with providers on sector issues / approachable / accessible / consultative
* Opportunities to exchange views, for example, conference, round tables, workshops, forums
* Provides an encouraging environment for industry newcomers
* Quality of information—transparent, clear, useful. Including in relation to Guidance Notes, Good Practice Notes, unpacking standards / regulatory requirements, TEQSA website, commentary on decisions
* Clear format of annual risk assessment
* Turnaround time of applications to add courses to CRICOS reduced significantly
* Critical analysis of the HE provider's capability
* Providing valuable data to the sector.

### What TEQSA could improve

Principal contacts offered 89 valid suggestions about one thing that TEQSA should improve or change that would make the most difference to its effectiveness as a regulator. The suggestions covered the following ideas:

* Regular updates on accreditation status
* Greater advance notice of impending reaccreditation or annual risk assessment
* Improve response times and internal communications around accreditation, CRICOS, submissions, annual risk assessment
* More information about the impact of the work of the Higher Education Standards Panel, e.g. survey on work integrated placement
* Adopt innovation to improve processes to accommodate regulation, eLearning, and flex learning
* Update PIR reporting format and process
* Assist with provider staff training, for example on-site professional development in relation to the Standards, help build positive relationships to improve compliance
* Develop strategies to improve quality of higher education staff and teaching skills
* Greater transparency about how TEQSA makes decisions, for example specific ratios expected, requirements of Higher Ed Standards Framework
* Provide constructive, helpful responses to questions, for example. interpretation of Threshold Standards
* Improve knowledge of case manager / better understanding of provider context
* Improve case manager staff retention
* Provide access to experts who can advise on key practice area when required
* Reduce constant expansion of requirements for reaccreditation and accreditation
* Ensure website downloads function properly, e.g. checklists for reaccreditation
* Improve ease of accessing portal
* Expert panel needs to include representation from more private providers
* Reflect greater diversity of views in the Guidance Notes
* More equitable response to the independent HE sector / small providers
* More flexibility in dealing with small unusual providers to encourage diversity into the sector.

### What TEQSA should stop

A total of 57 valid suggestions were offered. The most common themes among these were:

* Nothing
* Lengthy timeframes to assess submissions
* Manage provider requests internally so case manager informed across different areas of TEQSA
* Not differentiating between the way a university is assessed and a independent provider is assessed, one size fits all approach / should consider each provider on their merits
* Expecting private providers to have the same resources as universities / bias against private providers / not trusted
* Barriers to the sector being more innovative and diversifying course delivery
* Focusing on international MOUs would prefer more resources devoted to Australian needs
* Over-reaction to perceived sector threats without cause / data.

There were quite a few other types of answers to this question but were offered by one or two providers, so very little commonality in their themes.

### What TEQSA should be more involved in

A total of 68 principal contacts offered valid suggestions about activities that TEQSA should be more involved in. Common themes were:

* Nothing
* Better support for small providers e.g. list of consultants can go to get advice on how better to achieve compliance with rules, regulations, norms and conditions
* Support sector innovation / make use of technologies, e.g. alternative course delivery
* Provide more good practice examples, including admissions, meeting threshold standards
* More face to face contact with key staff / engagement / consultation / visits
* Better understanding of specialist HEPs / increase communications and engagement with independent providers
* Improve level of case management and support available
* Be more proactive in promoting TEQSA’s role both here and overseas
* Help build support processes / best practice to drive quality education
* Address academic integrity, particularly contract cheating.

## VC / CEO comments

To ensure that TEQSA could still give VC / CEOs the opportunity to make personal comments about TEQSA’s performance in the last 12 months, a separate section has been included in the PC survey. All participants were aware of this section / opportunity before answering.

The common themes from the 54 valid suggestions offered within the VC / CEO question were:

* Positive comments around the:
  + Value of TEQSA, its activities and approach
  + Level of support provided and responsiveness of case managers
  + Advice provided to improve governance / policies protecting students and provider
  + Willingness to listen and engage, offer constructive advice and guidance, responsiveness to questions
  + Help and assistance provided to new entrants.
* While improvements over the last 12 months have been noted, further opportunities to improve that were mentioned included:
  + Improve timeliness of response / delays to CRICOS and accreditation having negative impact on provider operations
  + Ensure availability of sufficient staff to process requests promptly
  + Address staff turnover / lack of consistency
  + Be more transparent, proactive, cooperative, flexible, forward thinking in dealing with the private sector:
  + Do more to simplify the regulation and reduce compliance burden
  + Do more to encourage innovation and appropriate risk-taking
  + Be more transparent about re/registration / compliance.

Again, so as not to lose the value of individual and detailed comments, ASR strongly recommends that relevant TEQSA staff read the de-identified verbatim comments from this survey.

# Principal contact year comparison

For this year’s principal contact survey, some questions were added, some deleted and some edited, as noted previously. With previous years’ survey results, a KPI average score was generated from a number of individual items related to each KPI. In 2019, a single question was asked about each KPI. The previous year’s KPI scores were based on an average. Because of the difference in calculation method, significance difference testing has not been conducted on the KPI items.

Apart from the KPI questions, only those questions that were considered equivalent between periods were compared, so the comparative table below does not include all survey items. Only two items in 2019 were statistically significantly different between 2019 and 2018—one higher than the previous year and one lower. The table is presented by topic.

IMPORTANT NOTE: The percentage change between years must be read with the survey’s confidence interval (±5.2%) in mind. This plus / minus percentage is the margin of error in this year’s survey. All measuring processes, irrespective of how the measuring is conducted, have a margin of error. It means that any change within this margin could be considered a measuring error. If exactly the same survey was run again with the same people, scores could realistically change within this interval and still be considered an accurate or true result.

*Statistically significantly different (p<0.05) results between 2019 and 2018 highlighted in yellow.*

| TOPIC / ITEM | 2019  n | 2019  Top 2 score | 2018  Top 2 score | Change  ± % |
| --- | --- | --- | --- | --- |
| KPI 1: Regulation by TEQSA does not unnecessarily impede the efficient operation of higher education providers | 134 | 59 | 56 | 3 |
| KPI 2: TEQSA’s communication with organisation is clear, targeted and effective | 139 | 65 | 64 | 1 |
| KPI 3: Regulatory actions undertaken by TEQSA are proportionate to the risks being managed | 132 | 63 | 52 | 11 |
| KPI 4: TEQSA’s compliance and monitoring approaches for higher education providers are streamlined and co-ordinated | 132 | 54 | 52 | 2 |
| KPI 5: TEQSA is open, transparent and consistent in its dealings with organisation | 139 | 73 | 62 | 11 |
| KPI 6: TEQSA continues to improve its regulatory framework in consultation with organisation | 123 | 67 | 57 | 9 |
| Communication: Usefulness of regulatory information | 140 | 89 | 83 | 7 |
| Communication: Usefulness of information provided on National Register | 134 | 71 | 74 | -3 |
| Communication: Using a variety of media and channels to communicate sector-wide updates | 136 | 71 | 66 | 5 |
| Communication: Usefulness of the information on the HES Framework (Threshold Standards) 2015 | 111 | 88 | 86 | 1 |
| Communication: Usefulness of the TEQSA conference | 126 | 65 | 83 | -18 |
| Consultation: Providing organisation with opportunity to give feedback on application processes | 78 | 61 | 65 | -3 |
| Consultation: Providing organisation with opportunity to give feedback on annual risk assessment process | 50 | 65 | 56 | 9 |
| Application process: Clarity of the application guide | 72 | 80 | 70 | 10 |
| Application process: Clarity of assessment scope and evidence requirements | 68 | 74 | 65 | 9 |
| Application process: Usefulness of information about how to prepare an application | 49 | 74 | 66 | 8 |
| Application process: Timeliness of feedback from TEQSA about application, including those unlikely successful | 84 | 43 | 52 | -9 |
| CRICOS Application process: Clarity of the application guide | 81 | 65 | 68 | -2 |
| CRICOS Application process: Clarity of assessment scope and evidence requirements | 80 | 71 | 67 | 5 |
| CRICOS Application process: Usefulness of information about how to prepare an application | 72 | 63 | 64 | -1 |
| CRICOS Application process: Usefulness of information on how to use the provider portal | 72 | 75 | 66 | 9 |
| CRICOS Application process: Timeliness of feedback from TEQSA about application, including those unlikely successful | 73 | 41 | 52 | -11 |
| Regulatory decisions: Providing opportunities to address matters relevant to regulatory decision, prior to final decision | 72 | 74 | 64 | 10 |
| Regulatory decisions: Explaining clearly and constructively why a decision was made | 126 | 65 | 61 | 5 |
| Interaction with TEQSA staff: Demonstrating an understanding of organisation’s specific needs | 125 | 55 | 51 | 3 |
| Interaction with TEQSA staff: Being responsive to organisation’s needs | 126 | 59 | 60 | -1 |
| Interaction with TEQSA staff: Demonstrating an understanding of organisation’s business or operating environment | 120 | 54 | 48 | 5 |
| Interaction with TEQSA staff: Usefulness of meeting face-to-face with case management teams | 138 | 78 | 54 | 24 |
| Overall: TEQSA's performance as a regulator | 136 | 76 | 71 | 5 |

# Provider attribute analysis

Attribute analysis is conducted to identify where there are similarities and differences between providers. It provides insight that overall or aggregated analysis cannot. It helps answer the questions “Do some groups perceive that they are treated differently?” and “Do sub-groups have similar or different views?” Essentially this analysis is used to discover whether or not TEQSA has the same or different interactions with various sub-groups and conversely if these sub-groups have the same or different perceptions of TEQSA.

For 2019, there were many fewer significant differences between provider sub-groups than in previous years of surveying. This, in itself, is a notable result for this year of surveying.

The following section presents the results of principal contact responses across seven provider attributes:

1. Self-accrediting authority
2. 2018 risk to financial position
3. 2018 risk to students
4. Category
5. Registered Training Organisation (RTO) activity
6. CRICOS registration and
7. Market groupings.

There were no significant differences across provider size and state (location) so there is no discussion of data for these two attributes.

The table immediately below shows the sub-sets used in the analysis of each attribute.

| ATTRIBUTE | SUB-GROUPS | n | POPORTION OF RESPONSE SAMPLE % |
| --- | --- | --- | --- |
| Self-accrediting authority | No | 101 | 71 |
| Yes / Part yes | 41 | 29 |
| 2018 Risk to financial position | High / moderate | 41 | 32 |
| Low | 64 | 50 |
| Other | 23 | 18 |
| 2018 Risk to students | High / Moderate | 45 | 35 |
| Low | 63 | 49 |
| Other | 20 | 16 |
| Category | University\* | 35 | 25 |
| Higher Education Provider (HEP) | 89 | 63 |
| Prospective HEP | 15 | 11 |
| Non-HEP | 3 | 2 |
| State | NSW | 64 | 46 |
| VIC | 34 | 24 |
| QLD | 15 | 11 |
| WA | 9 | 6 |
| SA | 14 | 10 |
| Other | 4 | 3 |
| Active RTO | No | 69 | 54 |
| Yes | 59 | 46 |
| CRICOS# registered | No | 58 | 41 |
| Yes | 84 | 59 |
| Market groupings | Faith-based | 11 | 8 |
| Miscellaneous^ | 27 | 19 |
| Profit | 38 | 27 |
| University | 35 | 25 |
| Other | 16 | 11 |
| N/A as proposed HEPs | 15 | 11 |

*\*University includes Australian university, Australian university of specialisation and overseas university*

*^Includes Government Agencies, Pathways, Professional Bodies and TAFEs*

**Only items which were statistically significantly different** at the 95% confidence level have been included in the sub-group comparison tables below. These differences have been determined using t (% positive) scores only and were analysed using a z test. Tope 2 scores were calculated using only the number of respondents who chose a rating point answer. In other words, *don’t know, not applicable* and *no* *answers* (blank)were excluded from statistical calculations. A percent positive score of 100% means that all respondents who answered a question rated the item as *good* or *excellent.*

## Self-accrediting authority

For all items in the table below, providers who had self-accreditation status rated most of the items significantly higher than providers who did not have this authority. This should not be a surprise to TEQSA as higher quality providers are likely to have this authority and also have a more positive view of TEQSA as a result of being granted the authority. They also probably have fewer interactions with TEQSA.

However, the exceptions were *timeliness of feedback from TEQSA about application* and *minimising time taken between submitting application and first receiving a regulatory decision*, where providers who had did not have SAA rated these items significantly higher than providers who had this authority.

*Significantly higher results highlighted in yellow.*

|  |  |  |
| --- | --- | --- |
| SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM | SELF-ACCREDITING AUTHORITY TOP 2 SCORES (%) | |
| No max n=101 | Yes / Part yes max n=41 |
| KPI 6: TEQSA continues to improve its regulatory framework in consultation with organisation | 59 | 84 |
| Regulatory activities: Being encouraging without setting up unrealistic expectations | 55 | 78 |
| Application process: Timeliness of feedback from TEQSA about application, including those unlikely successful | 50 | 13 |
| Application process: Minimising time taken between submitting application and first receiving a regulatory decision | 43 | 8 |
| CRICOS Application process: Tailoring application process to meet needs | 39 | 64 |
| Overall: TEQSA's performance as a regulator | 72 | 88 |

*Total n varies by item because not all respondents were eligible to answer all questions. The maximum possible n is displayed in the table header.*

## 2018 Risk to financial position

Only two items were significantly different for the attribute of 2018 risk to financial position. Both of these items are high for the *Other* category which comprises providers who have suspended or no financial risk data provided by TEQSA.

*Significantly higher results highlighted in yellow.*

|  |  |  |  |
| --- | --- | --- | --- |
| SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM | 2018 RISK TO FINANCIAL POSITION  TOP 2 SCORES (%) | | |
| High / mod max n=41 | Low max n=64 | Other max n=23^ |
| Communication: Usefulness of information provided on National Register | 54 | 76 | 86 |
| Application process: Timeliness of feedback from TEQSA about application, including those unlikely successful | 46 | 20 | 62 |

*Total n varies by item because not all respondents answered all questions. The maximum possible n is displayed in the table header.*

*^Some cell numbers (n counts) are small so results should be interpreted with caution.*

## 2018 Risk to students

The providers that TEQSA rated as having a low risk to students in 2018 rated TEQSA’s performance highest on the three items in the table below.

*Significantly higher results highlighted in yellow..*

|  |  |  |  |
| --- | --- | --- | --- |
| SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM | 2018 RISK TO STUDENTS  TOP 2 SCORES (%) | | |
| High / mod max n=45 | Low max n=63 | Other max n=20 |
| KPI 5: TEQSA is open, transparent and consistent in its dealings with organisation | 53 | 87 | 74 |
| Regulatory activities: Being encouraging without setting up unrealistic expectations | 45 | 77 | 67 |
| Regulatory activities: Having accountable regulatory process where decisions are justified openly | 37 | 73 | 58 |

*^Some cell numbers (n counts) are very small so results should be interpreted with extreme caution.*

## Category

For three of the four items where there were differences, HEP had significantly higher ratings compared with Universities and prospective HEP providers, as displayed in the table below. However, universities rated TEQSA overall as a regulator significantly higher than the other two groups.

*Significantly higher results highlighted in yellow.*

| SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM | CATEGORY TOP 2 SCORES (%) | | |
| --- | --- | --- | --- |
| University^ max n=35 | HEP\* max n=89 | Prospective HEP max n=15 |
| Application process: Clarity of the application guide | 60 | 89 | 67 |
| Application process: Clarity of assessment scope and evidence requirements | 64 | 83 | 50 |
| Regulatory decisions: Providing opportunities to address matters relevant to regulatory decision, prior to final decision | 50 | 85 | 33 |
| Overall: TEQSA's performance as a regulator | 88 | 74 | 57 |

*Total n varies by item because not all respondents were eligible to answer all questions. The maximum possible n is displayed in the table header.*

*^ includes Australian university, Australian university of specialisation and overseas university*

*\*HEP=Higher Education Provider*

## Registered Training Organisation (RTO) activity

Providers that only deliver higher education (Non-active RTO in the table below) rated three items higher than dual sector providers. Refer to the table below.

*Significantly higher results highlighted in yellow.*

|  |  |  |
| --- | --- | --- |
| SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM | RTO ACTIVITY - TOP 2 SCORES (%) | |
| Active RTO max n=69 | Non-active RTO  max n=59 |
| CRICOS Application process: Tailoring application process to meet needs | 40 | 65 |
| Interaction with TEQSA staff: Demonstrating an understanding of organisation’s specific needs | 45 | 66 |
| Interaction with TEQSA staff: Demonstrating an understanding of organisation’s business or operating environment | 45 | 63 |

*Total n varies by item because not all respondents were eligible to answer all questions. The maximum possible n is displayed in the table header.*

## CRICOS registration

There were five significantly different items between CRICOS-registered organisations and organisations that were not CRICOS registered. Refer to the table below.

*Significantly higher results highlighted in yellow.*

|  |  |  |
| --- | --- | --- |
| SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM | CRICOS - TOP 2 SCORES (%) | |
| CRICOS  registered max n=84 | Not CRICOS registered max n=58 |
| KPI 6: TEQSA continues to improve its regulatory framework in consultation with organisation | 74 | 53 |
| Communication: Usefulness of information provided on National Register | 64 | 81 |
| Regulatory approach: Helping the sector as a whole to deliver quality higher education | 79 | 59 |
| Application process: Timeliness of feedback from TEQSA about application, including those unlikely successful | 30 | 56 |
| Overall: TEQSA's performance as a regulator | 85 | 63 |

*Total n varies by item because not all respondents were eligible to answer all questions. The maximum possible n is displayed in the table header*

## Market groupings

There were considerable variations in top 2 scores between market groupings but only three statistically significant differences, as shown in the table below, due to small sample sizes within each group. These differences are highlighted in yellow below. Note that the overall TEQSA rating across all market groupings has been included as the last line in the table below. However, these scores are NOT statistically significantly different. They are shown for information only.

In general, the *Profit* group was generally lowest scoring which was reflected in their open-ended comments about TEQSA not being understanding of their context and being university centric in their views.

*Significantly higher results highlighted in yellow.*

| SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM | MARKET GROUPINGS^ - TOP 2 SCORES (%) | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| Faith based  n=11^ | Miscellaneous# n=27^ | Profit  n=38 | University  n=35 | Other+  n=16^ | Prospective HEP n=15^ |
| KPI 1: Regulation by TEQSA does not unnecessarily impede the efficient operation of higher education providers | 64 | 81 | 43 | 62 | 56 | 44 |
| KPI 6: TEQSA continues to improve its regulatory framework in consultation with organisation | 100 | 68 | 39 | 81 | 80 | 56 |
| Regulatory activities: Having accountable regulatory process where decisions are justified openly | 64 | 61 | 39 | 61 | 86 | 45 |
| Overall: TEQSA's performance as a regulator | 78 | 88 | 68 | 88 | 69 | 57 |

*^Some cell numbers (n counts) are very small so results should be interpreted with extreme caution.*

*#Includes Government Agencies, Pathways, Professional Bodies and TAFEs +Includes not for profit and non-faith based*

# Peak, professional, student body survey results

This section outlines the key findings from TEQSA’s peak, professional and student body survey. For all items, top 2 scores are presented along with a frequency distribution. Results are presented by topic, in the same order as presented to respondents in the online questionnaire. The most common themes within free text comments follow.

Due to the relatively small number of respondents for this section (a total of 23 peak / professional/student bodies answered) these results should be treated with considerable caution and only indicative at best.

In this section, the term peak, professional and student body has been abbreviated to PPSB.

## PPSB interaction with TEQSA

The chart below displays the types of direct or indirect interactions PPSBs had with TEQSA in 2018/2019. The most common type of interaction was *direct first-hand experience* (81%), while 62% had indirectly dealt with TEQSA or had feedback from members. Refer to the chart below.

## PPSB scores for all questions

From a PPSB perspective, TEQSA’s performance on its six KPIs varied from a high of 72% (KPI 5) to a low of 63% (KPI 4). Refer to the table and chart below. Note that for KPIs 1, 3 and 4 there was a notable proportion of *don’t know / no answer* responses.

| TEQSA KPIs |  | n | TOP 2 SCORE (%) |
| --- | --- | --- | --- |
| **KPI 1** Impact | Regulation by TEQSA does not unnecessarily impede the efficient operation of your organisation | 19 | 63 |
| **KPI 2** Communication | TEQSA’s communication with your organisation is clear, targeted and effective | 22 | 68 |
| **KPI 3** Risk approach | Regulatory actions undertaken by TEQSA for your organisation are proportionate to the risks being managed | 17 | 65 |
| **KPI 4** Compliance / monitoring | TEQSA has a streamlined and co-ordinated approach to compliance and monitoring for your organisation | 16 | 63 |
| **KPI 5** Approach | TEQSA is open, transparent and consistent in its dealings with your organisation | 21 | 71 |
| **KPI 6** Continuous improvement | TEQSA continues to improve its regulatory framework in consultation with your organisation | 22 | 68 |
| **Overall** | TEQSA performance over the last 12 months as a regulator | 22 | 64 |

## PPSB KPI comments

#### KPI 1: Impact comments

Eleven respondents provided comments in relation to KPI 1. Three provided positive feedback about their dealings with TEQSA. Areas where TEQSA could improve related to more consistent engagement and consultation. The high turnover of case managers was mentioned as contributing to a lack of consistency. Three respondents indicated they didn’t have enough information to answer.

#### KPI 2: Communication comments

When asked to provide comments about TEQSA’s communication, eight respondents offered feedback. Four respondents commented positively about TEQSA communications particularly the amount of material provided about how and why it carries out its regulatory and quality assurance activities. The Guidance Notes and conference activities were positively received. Two respondents commented that the purpose of some communication could be clearer.

#### KPI 3: Regulatory risk approach comments

Five respondents offered feedback about TEQSA’s risk approach. While TEQSA was seen to be efficient, one commented they were less sure that it operated at sufficient depth to effectively quality assure higher education. Another commented that TEQSA appeared to be focused on capital city-based universities and did not adequately recognise the role of public-private partnerships in supporting regional institutions. Two respondents indicated they didn’t have enough information to answer.

#### KPI 4: Compliance / monitoring comments

Eight respondents commented on TEQSA’s compliance and monitoring. Three respondents commented positively. Five respondents made suggestions for improvement: wanting TEQSA to do more to monitor Higher Education Providers and support those flagged at risk, as well as enhance the value of partnerships, e.g. work with NEAS when managing ELICOS providers but guard against being overly interventionist to allow providers to follow their statutory internal processes. One respondent indicated they didn’t have enough information to answer.

#### KPI 5: Approach comments

Eight respondents commented on TEQSA’s approach. Four respondents provided a positive response and were happy with the level of help provided. Four respondents made suggestions for improvement: including more consistency in approach by different case managers and ensuring that TEQSA follow-up when requested. Another respondent suggested that more could be done to bring universities and higher education providers together to improve the sector overall.

#### KPI 6: Continuous improvement comments

Seven respondents commented on TEQSA’s continuous improvement. Two respondents were positive about TEQSA’s level of consultation to evolve the regulatory framework through activities such as the industry bodies forum. However, five respondents felt that more could be done to be proactive and follow-up providers better to address regulatory issues. One respondent felt that while they had provided input in the past it appeared to make no difference to TEQSA’s approach.

## Overall comments

#### PPSB: What TEQSA does well

When asked what TEQSA does well that it should continue doing, seven respondents provided comments. Areas that TEQSA did well included:

* Engaging / consulting / collaborating with the sector
* TEQSA key staff approachable and collegial
* High quality communications, including Guidance Notes, Key Principles of Risk Assessment
* Course registration process, reduced turnaround time to add courses to CRICOS
* Regulatory activities including, accreditation and monitoring to maintain the standard of higher education in Australia and high barriers to entry
* Well-structured standardised process and framework to benchmark education.

#### PPSB: What TEQSA could improve

A total of eight respondents suggested improvements. Areas for improvement included:

* More consistent engagement / collaboration to understand strategic issues facing the sector
* Partner more with other regulatory bodies to address regulatory issues in the sector
* Less churn in case managers / more consistent case managers
* Better understanding of the role of regional universities
* Continue to increase transparency around its risk system and its assessments
* Engage with signatories to the MOU
* Respond to queries in a timely way.

#### PPSB: What TEQSA should stop doing

A total of six respondents offered suggestions here. Comments included:

* Greater focus on engaging with Australian bodies than building international relationships
* Improve consistency of approach among case managers
* Provide more written instructional adherence to standards, over reliance on Guidance Notes
* Cut back on conferences and find way to conduct low cost information sharing sessions instead
* Make more use of information provided by professional accreditation bodies
* Make it easier to find the right people within TEQSA to talk to. Case managers tend to be suspicious when we make contact.

#### PPSB: What TEQSA should be more involved in

A total of four respondents provided suggestions. Comments included:

* More regular partnership type interactions
* More collaboration with professional bodies interested in self-regulation
* Asking MOU partners to share information/concerns as part of provider assessments
* Liaise with professional accreditation bodies in a purposeful manner, especially with respect to new programs commencing at universities.

# PPSB risks to sector

Representatives from peak, professional and student bodies were asked if they had any concerns with the quality or reputation of the Australian higher education sector. A total of 57% indicated “yes” meaning they did and, of this group, five offered descriptions of their concerns. These were about:

* Erosion of principles around academic integrity, particularly contract cheating.
* The awarding of poor-quality qualifications and the conduct of poor-quality research which damage Australia’s reputation
* The systemic reduction in professional, administrative and educational supports for professional courses resulting in poor course and student experience coordination
* The affordability of obtaining a tertiary degree.
* Inadequate Commonwealth funding squeezing staff numbers and driving up student numbers at expense of high quality delivery and attention to innovation
* Application of the HESF regarding staffing requirements for programs not being applied

The drivers of these issues, where offered, were identified as:

* No consequences for a university from TEQSA, so universities are at liberty to commence courses without concerns
* Lack of funding in the Higher Education sector
* The lessening of professional engagement in program development and accreditation of programs.

# PPSB year comparison

The 2019 ratings for all of the seven items in the below table were lower than for 2018. However, the extremely small sample sizes mean that results should be read as indicative only. The sample sizes were too small to conduct reliable or valid comparative statistical analysis.

|  | 2019 n | 2019 TOP 2 SCORE (%) | 2018 TOP 2 SCORE (%) | ± % |
| --- | --- | --- | --- | --- |
| ITEM |
| KPI 1: Regulation by TEQSA does not unnecessarily impede the efficient operation of higher education providers. | 19 | 63 | 94 | -31 |
| KPI 2: TEQSA’s communication with your organisation is clear, targeted and effective. | 22 | 68 | 87 | -19 |
| KPI 3: Regulatory actions undertaken by TEQSA are proportionate to the risks being managed. | 17 | 65 | 93 | -29 |
| KPI 4: TEQSA’s compliance and monitoring approaches for higher education providers are streamlined and co-ordinated. | 16 | 63 | 80 | -18 |
| KPI 5: TEQSA is open, transparent and consistent in its dealings with your organisation. | 21 | 71 | 91 | -20 |
| KPI 6: TEQSA continues to improve its regulatory framework in consultation with your organisation. | 22 | 68 | 79 | -11 |
| Overall: How would you rate TEQSA's performance over the last 12 months as the regulator assuring the quality of Australian higher education. | 22 | 64 | 86 | -22 |

# Survey comparisons

For this piece of analysis, the top 2 scores for each KPI item and the overall item were compared and displayed in the chart below. It shows that both groups rated TEQSA’s performance on all items at a similar level, given the margin of error that needs to be applied when interpreting results.

# Conclusions

This year’s results are somewhat mixed: overall performance has increased slightly but not significantly; KPIs have remained at similar levels to 2018; communication activities continue to be a strength for TEQSA; monitoring quality (a new topic for this year) has not performed at all well, while aspects of application processes (not CRICOS-related) have improved.

TEQSA’s conference, usually high scoring, did not do so well this year. Providers indicated that consultation activities, interaction with TEQSA staff and CRICOS applications need considerable improvement. Anything to do with speed of response and efficiency scored relatively low.

Principal contacts and peak, professional and student body representatives shared similar views across all KPIs and on TEQSA’s overall performance.

Notably, this year has also seen a convergence in views between sub-groups, like universities compared with for-profits and those with and without self-accrediting authority. In 2019, views were more homogenous (not completely the same, but more similar) than in previous years indicating that an issue for one group is likely to be an issue for all.

The activities or processes that providers think TEQSA is doing well include (noting that many of these are contradictory to numeric results):

* Proportional approach to regulation / focus on high risk providers and reduction in administrative burden on good providers
* Providing a clear regulatory framework and processes to maintain the standard of higher education in Australia / high barriers to entry
* High quality communications
* Willingness to engage, consult and collaborate with the sector
* Opportunities to exchange views, such as through conferences, round tables, workshops, forums
* Case management approach which is efficient, responsive and supportive (when it functions well)
* Turnaround time of applications to add courses to CRICOS which has reduced significantly.

Many of the suggestions for improvements or change are similar to previous surveys. Areas identified in 2019 that providers believe TEQSA needs to improve include:

* Reduce timelines for applications, reaccreditation and accreditation
* Streamline regulatory burden
* Respond to queries in a timely fashion and provide status updates
* Improve case managers’ knowledge of providers / internal dealings across other areas of TEQSA
* Have consistent engagement / collaboration to address strategic issues facing the sector
* Partner more with other regulatory bodies to address regulatory issues in the sector
* Better understand the role / representation of public providers and regional universities
* Continue to increase transparency around risk system and factors driving assessments
* Support innovation in processes covering regulation, teaching and new learning technologies.

Overall TEQSA was fairly well-regarded by providers and peak bodies as a regulator assuring the quality of Australia’s higher education, with many noting improvements in TEQSA’s communications, processes and support provided by staff in 2019.

Survey results clearly show where the sector wants TEQSA to continue doing and to change. The challenge will be in modifying operations to address these aspects.