

TEQSA Stakeholder Survey 2018

Report of overall findings

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Australian Survey Research Pty Ltd
258 Centre Road Bentleigh Victoria 3204
Level 3, 22 Darley Road | PO Box 807 Manly NSW 1655

| **T** 03 9557 4211 | **F** 03 9557 4311 | **E** info@aussurveys.com | **W** www.aussurveys.com



Table of contents



Executive summary	1
Response	1
Key findings	1
Introduction	5
Methodology	5
Questionnaire development	5
Data collection	5
Data analysis	6
Response and sample profile	6
Data file	7
Principal contact survey key findings	8
Key performance indicators	8
PC: Interactions with TEQSA	14
PC: Applications	15
PC: TEQSA's case management approach	18
PC: Guidance and support materials	20
PC: TEQSA overall	21
VC / CEO comments	22
Principal Contact: Year comparison	23
Provider attribute analysis	25
PC: Self-accrediting authority	26
PC: 2017 Risk to financial position	27
PC: 2017 Risk to students	28
PC: Category	29
PC: Registered Training Organisation (RTO) activity	29
PC: CRICOS registration	30
PC: Market groupings	31
Peak/professional/student body survey key findings	32
PPSB: Interaction with TEQSA	32
PPSB: Scores for all questions	33
PPSB: Year comparison	34
Survey comparisons	35
Conclusions	36
Appendix A: Table of item abbreviations	37
Appendix B: Questionnaires used in 2018 surveys	40



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 June 2018 the Tertiary Education Quality Standards Agency (TEQSA) conducted the third of its sector wide surveys. 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 235 principal contacts (PC) and 42 peak, professional and student bodies (PPSB). A total of 156 principal contacts and 24 PPSBs completed the survey.

The 2018 survey consisted of:

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

The 2018 survey items were almost identical to those used in 2017. 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 roundtables. All respondents in all surveys were asked to rate TEQSA’s overall performance as a regulator.

Response

There were sufficient numbers of principal contact responses and a well-constructed sample to conclude that the PC survey was representative of the population at the 95% confidence interval and a confidence level of $\pm 4.6\%$. The PPSB survey had a $\pm 13\%$ confidence interval meaning that results from that particular survey could, at best, be interpreted as indicative only.

Key findings

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

PC survey: 2018 highs and lows

The table below shows the 2018 survey items which achieved a top 2 score of 80% and over (when rounded). Guidance and support materials, the TEQSA conference and the quality and relevance of information were highly rated.

PC: TOP SCORING ITEMS	2018 n	2018 TOP 2 SCORE (%)	2017 TOP 2 SCORE (%)*
Conference: Opportunity to interact with other delegates	97	90.7	91.7
Guidance & Support materials: Relevance of information	138	90.6	92.9
Guidance & Support materials: The quality of the information	138	89.1	94.1
Guidance & Support materials: Ease of access to that information	138	87.7	82.4
Guidance & Support materials: Usefulness of information	138	86.2	90.6
Conference: The quality of speakers	97	85.6	90.4

PC: TOP SCORING ITEMS	2018 n	2018 TOP 2 SCORE (%)	2017 TOP 2 SCORE (%)*
Conference: The program	97	83.5	89.2
Guidance & Support materials: Amount of information	137	83.2	81.2
Conference: Relevance of material presented	97	82.5	86.7
KPI 2: Relevance of information	154	82.5	87.1
KPI 2: Quality of regulatory information	154	80.5	88.6

The lower scoring items (below 60% top 2 score) in the PC survey are displayed in the table immediately below. These issues were all reflected in respondent comments, particularly around timeliness, stability in case management, sector engagement and requests for some or more visits or face-to-face meetings.

The key areas requiring improvements are TEQSA's streamlining, taking action that are proportionate to risks, case management (organisational knowledge and consideration of needs), and building relationships through engagement and visits. A view still exists with private / independent providers that TEQSA is university centric (and using the term non-university is an example) and does not understand the particular situations and offerings of non-public providers: that TEQSA is hostile to them.

TEQSA's case management approach is well-received. Where it works well it is lauded; where it doesn't it is a major source of concern. While considerable effort has been made with provider engagement, providers are hungry for much more, particularly personalised engagement.

Regulatory burden is felt by many, irrespective of type or size of provider.

Statistically significantly different ($p < 0.05$) results highlighted in yellow.

PC: LOWER SCORING ITEMS	2018 n	2018 TOP 2 SCORE (%)	2017 TOP 2 SCORE (%)
KPI 5: Consistency of information	152	58.6	67.6
KPI 3: Consultative approach	132	56.1	53.2
KPI 2: Completeness of information	123	55.3	71.2
KPI 4: Reuse of material	102	53.9	56.4
KPI 6: Engagement	154	53.9	58.8
KPI 5: Consistency of decisions	117	53.8	60.6
KPI 2: Timeliness of information after making a decision	113	52.2	54.5
KPI 6: Making process improvements	138	52.2	61.8
Case mgt approach: Consideration of your needs	142	51.4	55.4
KPI 2: Communicating streamlining initiatives	144	51.4	59.2
KPI 4: Timely coordination of visits	77	49.4	53.3
Case mgt approach: Knowledge of your organisation	145	48.3	52.2
KPI 3: Actions proportionate to risks	116	47.4	60.9
KPI 1: Streamlining to reduce burden	138	47.1	59.2

PC survey: overall rating

Principal contacts rating of TEQSA's overall performance as a regulator has remained above a 70% top 2 score (71.1%), but has declined since 2017 (79.7%) and 2016 (82.3%). This trend does not differ significantly by provider attribute (type, size, category, etc).

PC survey: attribute differences

Responses from the principal contact survey were analysed by various provider attributes to understand where there were similarities and differences between provider sub-groups. This analysis helps identify issues with particular segments and allows TEQSA to tailor initiatives to these particular groups.

Provider size showed no statistically significant differences—an unusual result for this type of survey and a good result for TEQSA and one that has remained over time. It means that, from a provider perspective, TEQSA does not treat small, medium or large providers differently on the items surveyed. Results for state (location) were also not significantly different.

There were, however, some differences in 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
- Market groupings.

Providers with some or part SAA had the largest number of differences and were considerably more positive than providers without this authority. All or part SAA providers rated TEQSA's overall performance as a regulator with an 88.6% top 2 score while non-SAA providers rated TEQSA overall at 61.8%.

Survey comparison

For this piece of analysis, a simple average of the top 2 scores for each item was calculated within a topic (KPI) of the principal contact survey. These six average top 2 scores were then compared with the top 2 scores of the same KPIs within the PPSB survey, along with the top 2 scores of TEQSA's overall rating as a regulator.

The comparative results are displayed in the table below. It shows that PPSBs were considerably more positive than providers about TEQSA's performance on all KPIs and TEQSA's performance. We note that there was a very small sample size in the PPSB survey which means that results must be treated as indicative only.

KPI / ITEM and TOP 2 SCORE (%) FOR EACH SURVEY	PRINCIPAL CONTACT n=156	PEAK / PROF / STUDENT BODY n=24
KPI 1 - Regulation does not impede efficient operation	55.8	93.7
KPI 2 - TEQSA's communication with your organisation	63.8	87.1
KPI 3 - Regulatory actions are proportionate to risks	51.7	93.3
KPI 4 - TEQSA has a streamlined and co-ordinated approach	51.6	80.0
KPI 5 - TEQSA is open, transparent and consistent in its dealings	61.5	91.3
KPI 6 - TEQSA continues to improve its regulatory framework	57.2	79.0
Overall TEQSA's performance as a regulator over the last 12 months	71.1	100.0

Conclusions

For TEQSA's third survey of stakeholders, there were some excellent results, balanced by many results that declined universally in the last 12 months. Sub-groups within the provider population had some different views on aspects of TEQSA's performance and these differences need to be recognised. There were some providers (usually low risk and self-accrediting) who were happy with many aspects TEQSA's performance while for profit and prospective providers were less positive about particular aspects of TEQSA's performance, including overall performance.

The 2018 results clearly indicate where providers thought TEQSA was doing well (its conference and the quality and relevance of guidance materials and regulatory information) and where it could improve (streamlining, speed of response, consultation and case management for all and CRICOS applications where relevant).

While TEQSA's case management approach is welcomed, all providers want greater consideration of their needs and an opportunity to build ongoing relationships with TEQSA.

Importantly, overall TEQSA was fairly well-regarded by providers and extremely well-regarded by peak bodies as a regulator assuring the quality of Australia's higher education.

Introduction

In June 2018 TEQSA conducted sector-wide stakeholder surveys for 2017-18. The purpose of the surveys was to increase TEQSA's accountability, better understand its impact on higher education providers, and improve its performance. Results were also used in annual reporting activities. The feedback activity consisted of two surveys:

- 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 head of selected peak, professional and student bodies.

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

The 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

In 2016 TEQSA and ASR developed a series of questions based around TEQSA's Regulator Performance Framework (2015-16) which encompassed six key performance indicators (KPIs). The Framework also incorporated the key strategies and metrics within the TEQSA Corporate Plan 2015-19.

The questionnaire developed for TEQSA's principal contacts (PC) had an operational focus and included questions around recent interactions between themselves and TEQSA. VC / CEOs were given an opportunity to comment separately within the principal contact survey. The peak and professional body (PPSB) survey was very short and focused on TEQSA's overall KPI achievement.

The PC survey was pilot tested in 2016 with a small group of participants who were willing to be involved in the pilot phase. The pilot test resulted in a number of changes to the questionnaires. No pilot testing was conducted for the 2017 or 2018 surveys as questions and deployment method changed minimally.

In 2017 some new questions were added about TEQSA's conference and guidance and support materials. The 2018 surveys remained very similar to those used in 2017, with the addition of three questions around perceived quality or reputation of the Australian higher education sector.

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=235) that it regulates or is likely to regulate across Australia. The lists included contact details of TEQSA's principal contact within the provider. The listing also included provider attributes such as state, size, self-accrediting authority, etc, 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 peak, professional and student bodies' names and contact details (N=42).

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 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 provider 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 4 June to 20 June 2018.

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.

In some tables the total may not always equal 100.0%. This is due to rounding and is not an error.

Response and sample profile

A total of 235 principal contacts were invited to participate in their survey. A total of 156 principal contacts responded to the survey, yielding a **response rate of 66%**. The sample is statistically representative of the principal contacts population at the 95% confidence level and a $\pm 4.6\%$ confidence interval. This is an acceptable scientific research confidence interval.

A total of 42 representatives from peak, professional and student bodies were invited to participate in their survey. Twenty-four representatives from these bodies answered the survey achieving a **response rate of 57%**. The results for this survey have a confidence interval of $\pm 13\%$. With this higher confidence interval and a small sample of 24, we suggest treating the PPSB results with caution and as indicative only.

Representativeness of a sample is often assessed at a 95% confidence level (accuracy) and a $\pm 5\%$ 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 and from a group perspective, so was not included in the population figures and had no attributes associated with it.

STATE	PRINCIPAL CONTACTS POPULATION		RESPONSE SAMPLE	
	<i>Freq</i>	<i>%</i>	<i>Freq</i>	<i>%</i>
NSW	101	43.3	72	46.5
VIC	62	26.6	38	24.5
QLD	26	11.2	15	9.7
SA	19	8.2	12	7.7
WA	17	7.3	12	7.7
ACT	5	2.1	3	1.9
NT	2	0.9	2	1.3
TAS	1	0.4	1	.6
Total	233	100.0	155	100.0

CATEGORY	PRINCIPAL CONTACTS POPULATION		RESPONSE SAMPLE	
	<i>Freq</i>	<i>%</i>	<i>Freq</i>	<i>%</i>
University	42	17.9	37	22.7
Higher Education Provider (HEP)	124	53.0	90	58.7
Prospective Higher Education Provider (Prop HEP)	68	29.1	28	18.1
Total	234	100.0	155	100.0

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.

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 orange note below) are presented along with a charted frequency distribution. The most common themes within free text comments are covered throughout each topic.

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.

The charts have been sorted by the proportion of positive responses and are presented in descending order.

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 means 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. Within the target group and the resulting answers there is considerable 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 the differences much clearer.

Key performance indicators

PC KPI 1: Regulation by TEQSA does not unnecessarily impede the efficient operation of your organisation

Sixty-five percent of PCs who rated TEQSA’s performance on the item *opportunity to give feedback*, rated it as either *good* or *excellent*. The other item under KPI 1, *streamlining to reduce burden*, was rated lower at 47%, and was the lowest rated item for the PC survey. Note that ratings for the item *streamlining to reduce burden* were significantly lower than in the 2017 results. Refer to the table below.

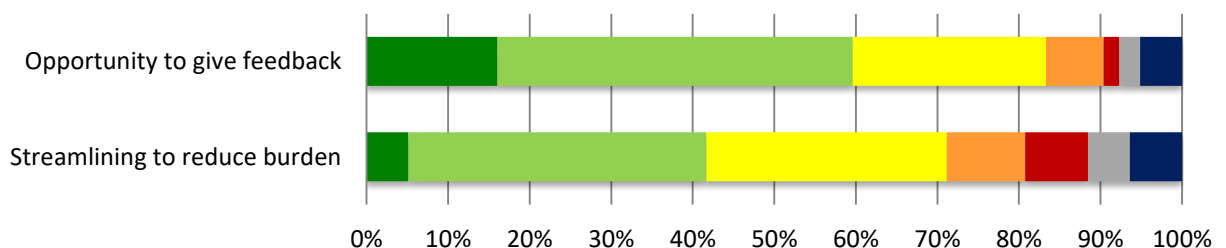
PC: KPI 1	TOP 2 SCORE (%)*
Opportunity to give feedback n=144	64.6
Streamlining to reduce burden n=138	47.1

*Excludes don't know / not applicable / no answer responses

The following chart shows the frequency distribution of answers (proportion of respondents choosing a particular answer) for KPI 1 items.

PC: KPI 1

% of respondents choosing a rating point; n=156



	Streamlining to reduce burden	Opportunity to give feedback
■ Excellent	5.1	16.0
■ Good	36.5	43.6
■ Fair	29.5	23.7
■ Poor	9.6	7.1
■ Very poor	7.7	1.9
■ Don't know / No answer	5.1	2.6
■ Not applicable	6.4	5.1

PC KPI 2: TEQSA's communication with your organisation is clear, targeted and effective

Two of the seven items under KPI 2 rated above 80% which is a noteworthy result for a stakeholder feedback survey. *Relevance of information* scored highest, with 83% of PCs rating this item as either *good* or *excellent*. *Quality of regulatory information* was the second highest scoring item with a top 2 score of 81%.

The items relating to *completeness of information* (55%) rated significantly lower this year than in 2017.

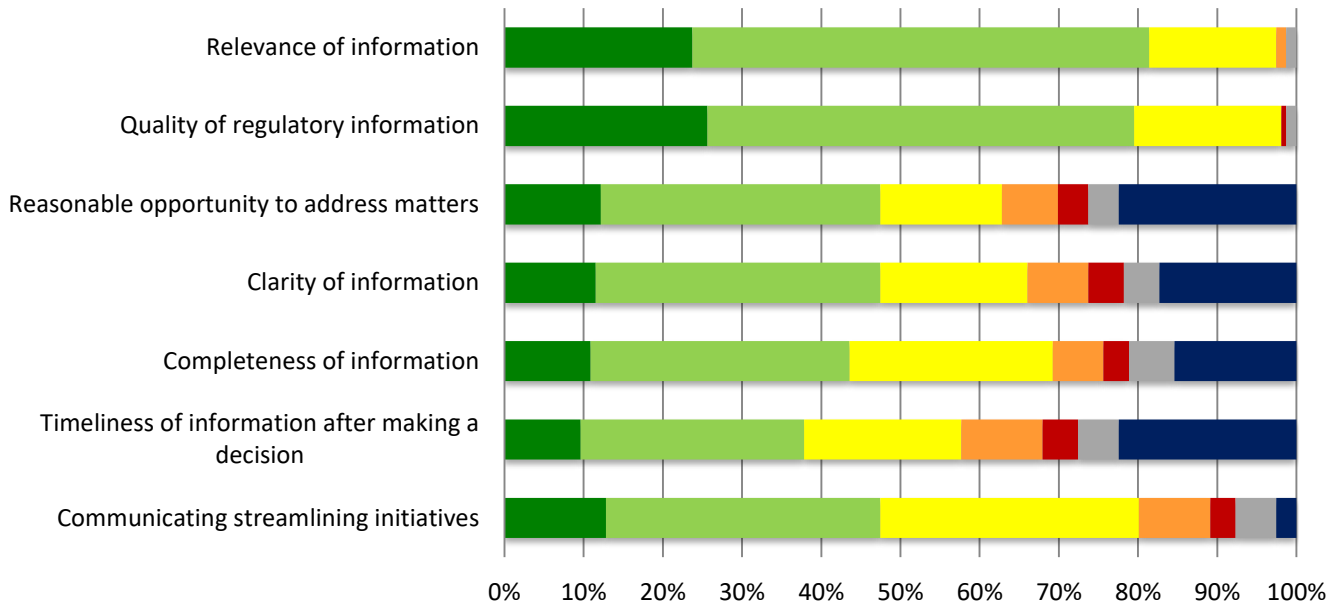
PC: KPI 2	TOP 2 SCORES (%)*
Relevance of information n=154	82.5
Quality of regulatory information n=154	80.5
Reasonable opportunity to address matters n=115	64.3
Clarity of information n=122	60.7
Completeness of information n=123	55.3
Timeliness of information after making a decision n=113	52.2
Communicating streamlining initiatives n=144	51.4

*Excludes don't know / not applicable / no answer responses

In the chart below, note the relatively high proportion of *don't know / not applicable / no answers* for some items relating to TEQSA's communication. This suggests that not all respondents had the experience or information to provide a rating response for these items. This may not be negative, but simply reflect a lack of opportunity or need.

PC: KPI 2

% of respondents choosing a rating point; n=156



	Communicat ing streamlining initiatives	Timeliness of information after making a decision	Completeness of information	Clarity of information	Reasonable opportunity to address matters	Quality of regulatory information	Relevance of information
■ Excellent	12.8	9.6	10.9	11.5	12.2	25.6	23.7
■ Good	34.6	28.2	32.7	35.9	35.3	53.8	57.7
■ Fair	32.7	19.9	25.6	18.6	15.4	18.6	16.0
■ Poor	9.0	10.3	6.4	7.7	7.1	0.0	1.3
■ Very poor	3.2	4.5	3.2	4.5	3.8	.6	0.0
■ Don't know / No answer	5.1	5.1	5.8	4.5	3.8	1.3	1.3
■ Not applicable	2.6	22.4	15.4	17.3	22.4	0.0	0.0

PC: KPI 3 - Regulatory actions undertaken by TEQSA for your organisation are proportionate to the risks being managed

Compared with all other KPIs, top 2 scores remained considerably lower for KPI 3 with scores of 56% and 47% for the two items. The item *actions proportionate to risks* was the second lowest rated item in the PC survey.

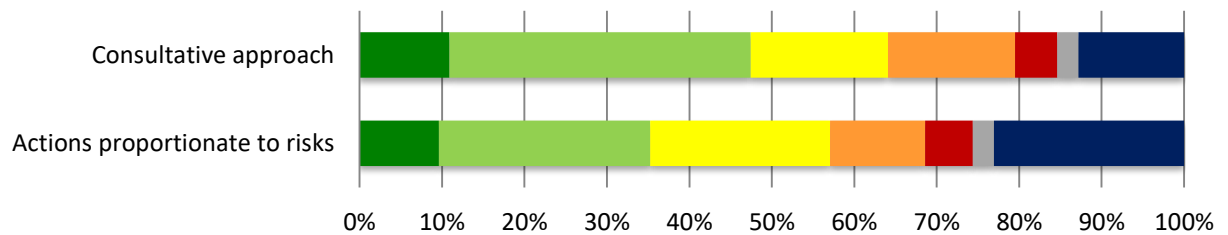
Referring to the table and chart below, note the relatively high proportion of *don't know / not applicable / no answer* responses for both items, suggesting that not all PCs had the experience or information to provide a rating response.

PC: KPI 3	TOP 2 SCORE (%)*
Consultative approach n=132	56.1
Actions proportionate to risks n=116	47.4

*Excludes don't know / not applicable / no answer responses

PC: KPI 3

% of respondents choosing a rating point; n=156



	Actions proportionate to risks	Consultative approach
■ Excellent	9.6	10.9
■ Good	25.6	36.5
■ Fair	21.8	16.7
■ Poor	11.5	15.4
■ Very poor	5.8	5.1
■ Don't know / No answer	2.6	2.6
■ Not applicable	23.1	12.8

PC KPI 4: TEQSA has a streamlined and coordinated approach to compliance and monitoring for your organisation

The ratings for both items within KPI 4 dropped slightly between 2017 and 2018. The item *reuse of material* was rated as *good* or *excellent* by 54% and *timely coordination of visits* by 49% (compared to 56% and 53% in 2017).

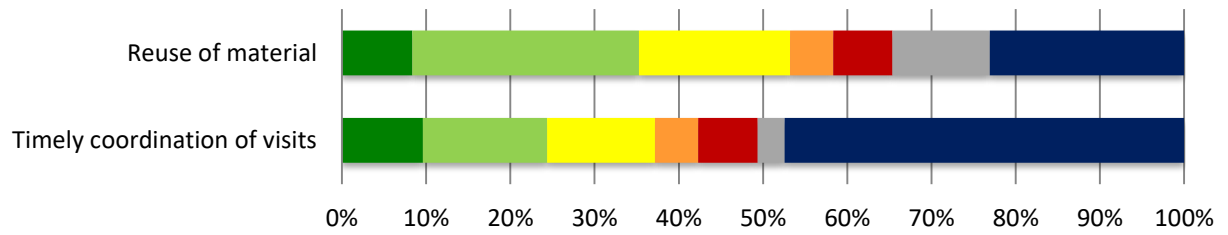
There was a considerable proportion of *don't know / not applicable / no answers* for these two items, particularly for *timely coordination of visits* (47%). It is likely these respondents had not experienced a TEQSA staff visit in the last 12 months and therefore were not able to provide a rating.

PC: KPI 4	TOP 2 SCORE (%)*
Reuse of material n=102	53.9
Timely coordination of visits n=77	49.4

*Excludes don't know / not applicable / no answer responses

PC: KPI 4

% of respondents choosing a rating point; n=156



	Timely coordination of visits	Reuse of material
■ Excellent	9.6	8.3
■ Good	14.7	26.9
■ Fair	12.8	17.9
■ Poor	5.1	5.1
■ Very poor	7.1	7.1
■ Don't know / No answer	3.2	11.5
■ Not applicable	47.4	23.1

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

TEQSA’s item *quality of information* under KPI 5 was rated fairly positively, with a top 2 score of 74% (-5% since 2017). The three other items all rated between 54% and 60% - slightly lower than the 2017 results.

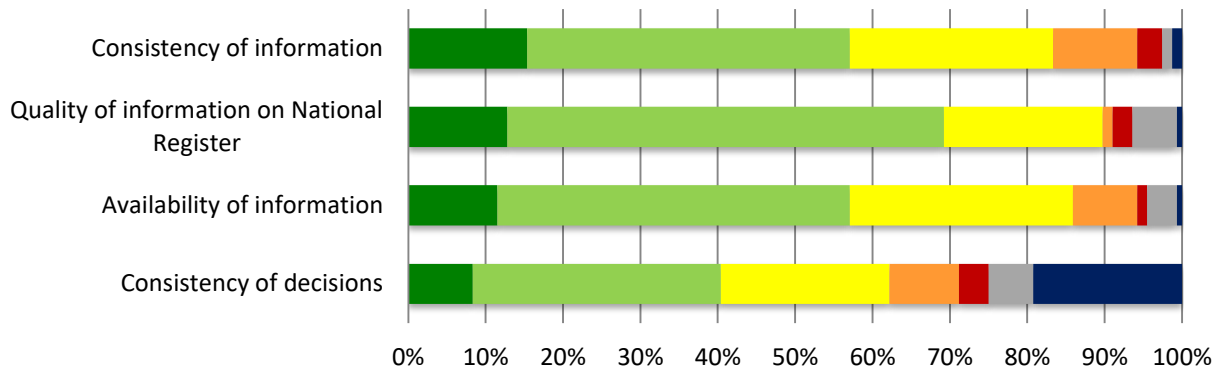
Note that the item *Consistency of decisions* received a relatively high proportion of *not applicable* ratings.

PC: KPI 5	TOP 2 SCORES (%)
Consistency of information n=146	58.6
Quality of information on National Register n=149	74.0
Availability of information n=152	59.7
Consistency of decisions n=117	53.8

*Excludes don't know / not applicable / no answer responses

PC: KPI 5

% of respondents choosing a rating point; n=156



	Consistency of decisions	Availability of information	Quality of information on National Register	Consistency of information
■ Excellent	8.3	11.5	12.8	15.4
■ Good	32.1	45.5	56.4	41.7
■ Fair	21.8	28.8	20.5	26.3
■ Poor	9.0	8.3	1.3	10.9
■ Very poor	3.8	1.3	2.6	3.2
■ Don't know / No answer	5.8	3.8	5.8	1.3
■ Not applicable	19.2	0.6	.6	1.3

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

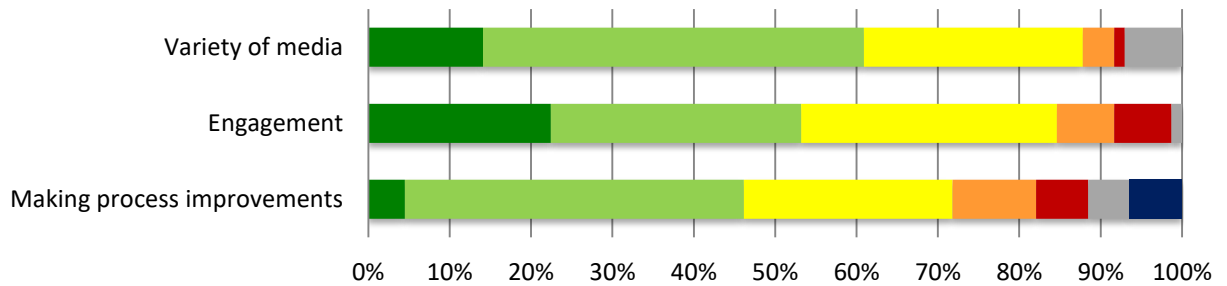
Variety of media was the highest scoring item for KPI 6 with a top 2 score of 66%. Note that positive ratings for Making process improvements dropped notably this year: to 52% from 62% in 2017.

PC: KPI 6	TOP 2 SCORE (%)*
Variety of media n=145	65.5
Engagement n=154	53.9
Making process improvements n=138	52.2

*Excludes don't know / not applicable / no answer responses

PC: KPI 6

% of respondents choosing a rating point; n=156



	Making process improvements	Engagement	Variety of media
■ Excellent	4.5	22.4	14.1
■ Good	41.7	30.8	46.8
■ Fair	25.6	31.4	26.9
■ Poor	10.3	7.1	3.8
■ Very poor	6.4	7.1	1.3
■ Don't know / No answer	5.1	1.3	7.1
■ Not applicable	6.4	0.0	0.0

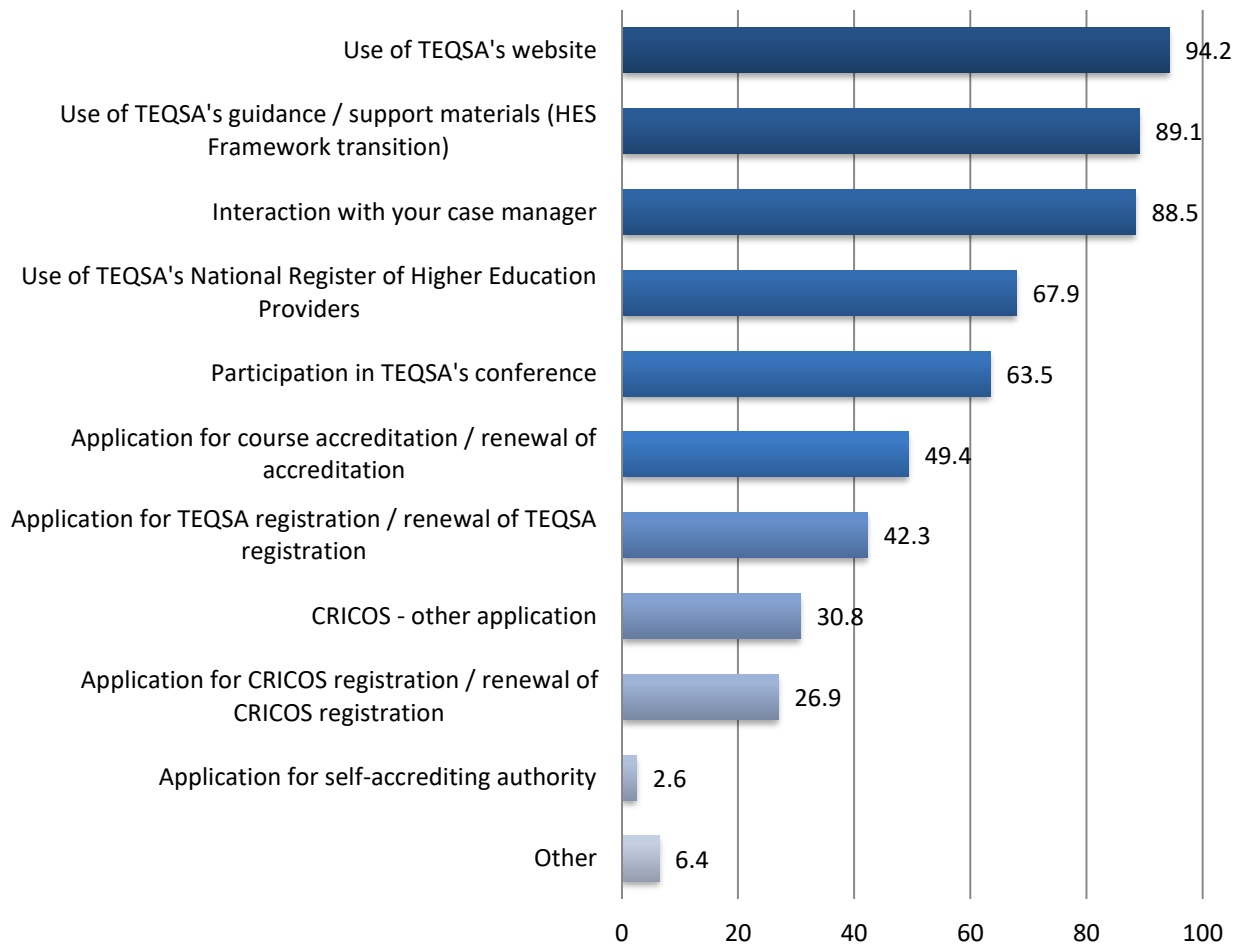
PC: Interactions with TEQSA

Providers were asked to indicate the types of interactions they had with TEQSA in the last 12 months. The most common interactions were *use of TEQSA's website* (94%) and the *Use of TEQSA's guidance / support materials* (89%).

PC: Types of interactions with TEQSA in last 12 months

% of respondents choosing a rating point; n=156

Multiple answers allowed so total may be >100%



PC: Applications

This section outlines providers' views of the interactions they had with TEQSA while making registration and accreditation applications, including for CRICOS and self-accrediting authority (SAA). The table and chart results within this section are based on a sub-set of the PC survey sample (n=102), that is, only those who indicated that they had a particular interaction in the previous 12 months.

The following series of tables and charts display the top 2 scores and frequency distributions of answers about aspects of these interactions.

PC: Registration, accreditation and SAA application processes

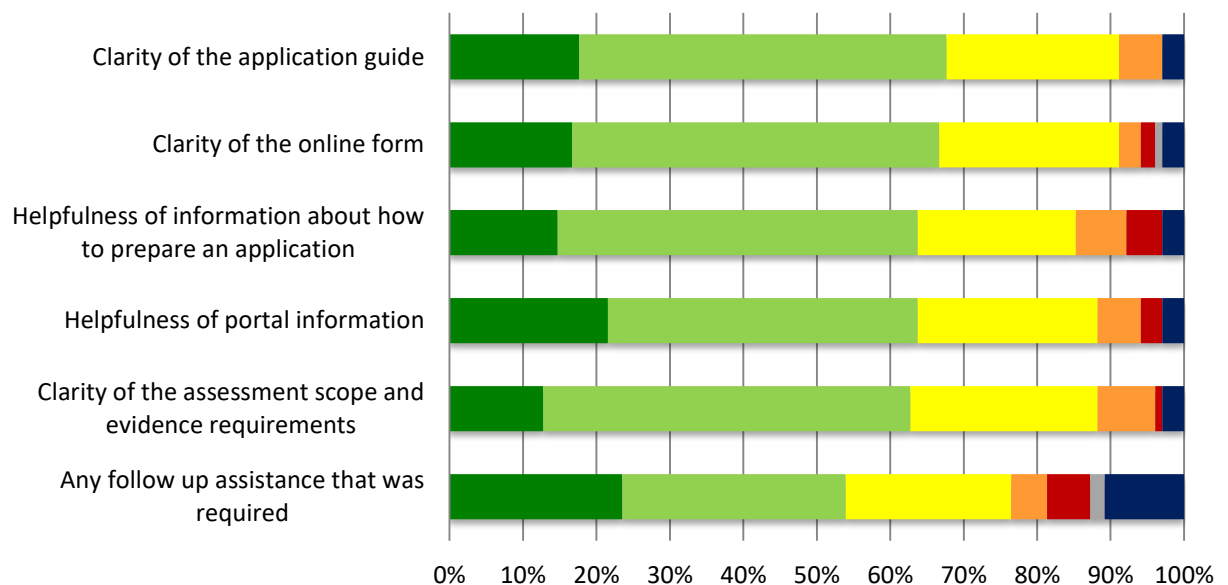
All items for TEQSA's Application Process rated between 60% and 70%. The item *clarity of the online form* and *application guide* remained key strengths, rated positively by 70% and 69% of respondents.

PC: REGISTRATION, ACCREDITATION AND SAA APPLICATION PROCESSES	TOP 2 SCORE (%)*
Clarity of the application guide n=99	69.7
Clarity of the online form n=98	69.4
Helpfulness of information about how to prepare an application n=99	65.7
Helpfulness of portal information n=99	65.7
Clarity of the assessment scope and evidence requirements n=99	64.6
Any follow up assistance that was required n=89	61.8

*Includes only respondents who were involved with aspects of registration, accreditation or SAA. Top 2 scores and n counts exclude don't know / not applicable / no answer responses.

PC: TEQSA Application process

% of respondents choosing a rating point; n=102



	Any follow up assistance that was required	Clarity of the assessment scope and evidence requirements	Helpfulness of portal information	Helpfulness of information about how to prepare an application	Clarity of the online form	Clarity of the application guide
■ Excellent	23.5	12.7	21.6	14.7	16.7	17.6
■ Good	30.4	50.0	42.2	49.0	50.0	50.0
■ Fair	22.5	25.5	24.5	21.6	24.5	23.5
■ Poor	4.9	7.8	5.9	6.9	2.9	5.9
■ Very poor	5.9	1.0	2.9	4.9	2.0	0.0
■ Don't know / No answer	2.0	0.0	0.0	0.0	1.0	0.0
■ Not applicable	10.8	2.9	2.9	2.9	2.9	2.9

PC: CRICOS application process

The providers who indicated that they had interacted with TEQSA about CRICOS registration or any other aspect of a CRICOS application in the last 12 months were asked about aspects of their interactions. The table and chart results within this section are based on a sub-set of the PC survey sample (n=74), that is, only those who indicated that they had this particular interaction.

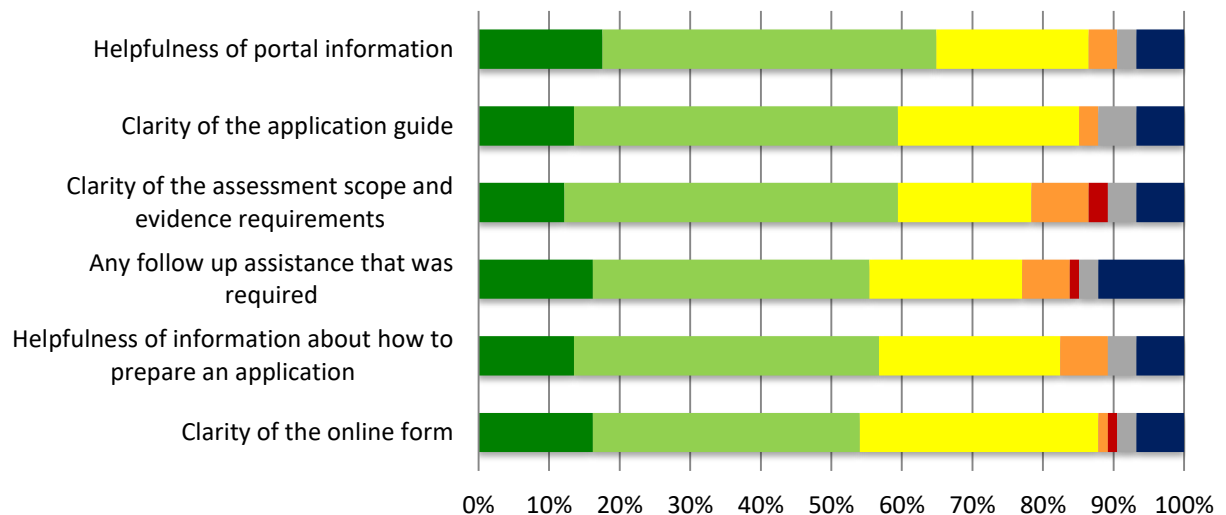
Three of the six items relating to this process had a significantly lower top 2 score this year: *Clarity of the application guide* (now 68% and 85% in 2017), *helpfulness of information about how to prepare an application* (now 64% and 79% in 2017) and *clarity of the online form* (now 60% and 90% in 2017).

PC: CRICOS APPLICATION PROCESS	TOP 2 SCORE (%)*
Helpfulness of portal information n=67	71.6
Clarity of the application guide n=65	67.7
Clarity of the assessment scope and evidence requirements n=66	66.7
Any follow up assistance that was required n=63	65.1
Helpfulness of information about how to prepare an application n=66	63.6
Clarity of the online form n=67	59.7

*Includes only respondents who were involved with CRICOS registration or other CRICOS applications. Top 2 scores and n counts exclude don't know / not applicable / no answer responses.

PC: CRICOS Application process

% of respondents choosing a rating point; n=74



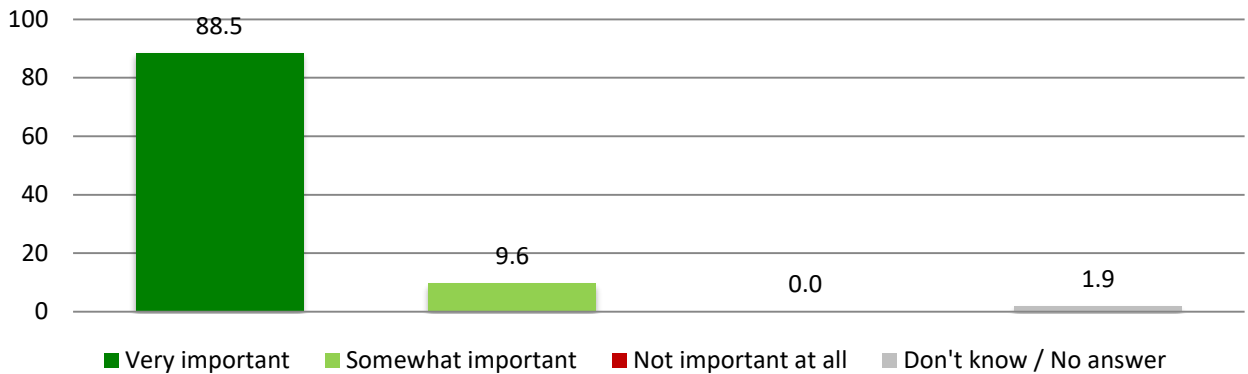
	Clarity of the online form	Helpfulness of information about how to prepare an application	Any follow up assistance that was required	Clarity of the assessment scope and evidence requirements	Clarity of the application guide	Helpfulness of portal information
■ Excellent	16.2	13.5	16.2	12.2	13.5	17.6
■ Good	37.8	43.2	39.2	47.3	45.9	47.3
■ Fair	33.8	25.7	21.6	18.9	25.7	21.6
■ Poor	1.4	6.8	6.8	8.1	2.7	4.1
■ Very poor	1.4	0.0	1.4	2.7	0.0	0.0
■ Don't know / No answer	2.7	4.1	2.7	4.1	5.4	2.7
■ Not applicable	6.8	6.8	12.2	6.8	6.8	6.8

PC: TEQSA's case management approach

The vast majority of respondents (86%) indicated TEQSA's case management approach was very important to their organisation and 10% indicated that it was somewhat important.

PC: Importance of TEQSA's case management approach

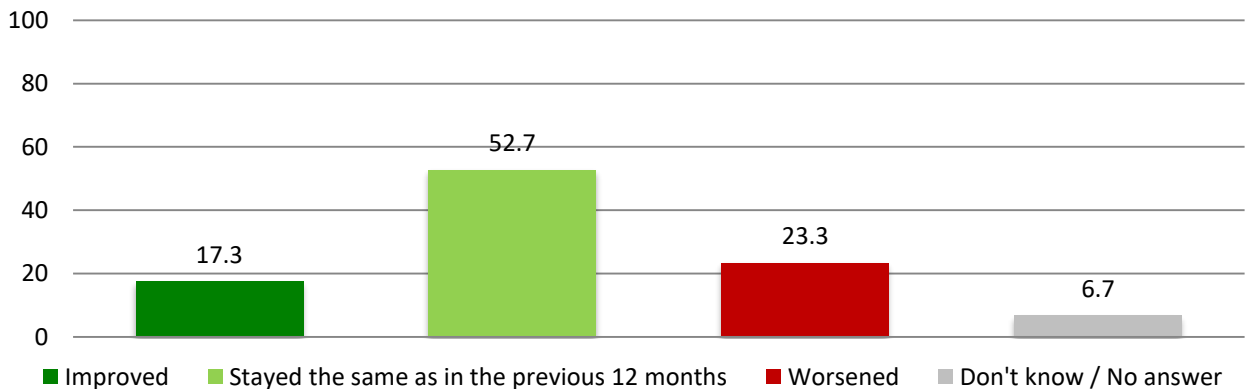
% of respondents choosing a rating point; n=156



Respondents who had had interaction with a case manager or were involved in an application process were then asked about their experiences of TEQSA's case management over the last 12 months. Seventeen percent indicated their experiences had improved, while for 53% case management experiences had stayed the same. However, 23% of respondents indicated that their experiences had worsened. Refer to the chart below.

PC: Experiences of TEQSA's case management

% of respondents choosing a rating point; n=150



Those providers who indicated that case management had improved or worsened were asked to comment about what had happened with their case management over the previous 12 months.

Positive comments focussed on communicative, consultative, responsive and/or proactive case management.

Negative comments focussed on not having a case manager or not knowing who their case manager was, having multiple case managers in a short time, unresponsiveness of case managers and poor quality case management.

PC: TEQSA's case management approach

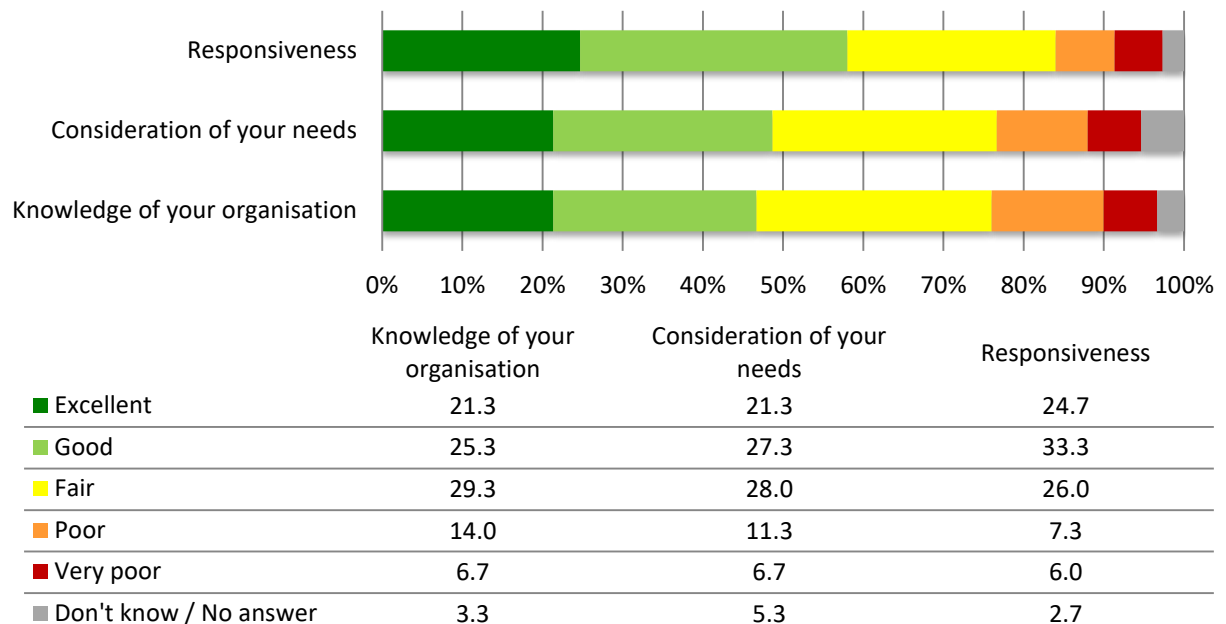
Those providers who had interacted with a TEQSA case manager in the last 12 months were asked about different aspects of TEQSA's case management approach. Ratings for the three items remained relatively consistent with last year's scores. *Responsiveness* scored highest at 60%.

PC: CASE MANAGEMENT APPROACH	TOP 2 SCORE (%)*
Responsiveness n=146	59.6
Consideration of your needs n=142	51.4
Knowledge of your organisation n=145	48.3

*Includes only respondents who interacted with case managers in the last 12 months.
Top 2 scores and n counts exclude don't know / not applicable / no answer responses.

PC: Case management approach

% of respondents choosing a rating point; n=150



PC: TEQSA conference

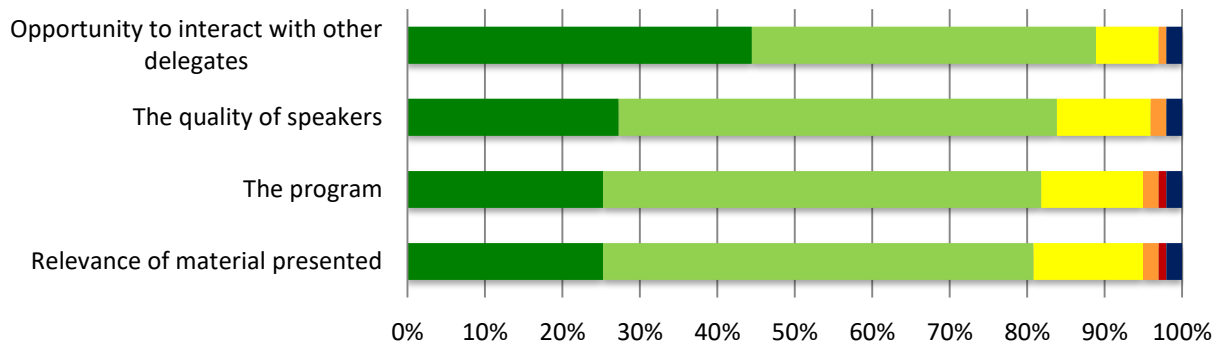
Ratings for the TEQSA conference were amongst the highest in the PC survey. Of the providers who attended the conference, 91% rated the item *opportunity to interact with other delegates* as excellent or good. All items scored above 80% in this topic, making it one of the higher scoring topics in the PC survey.

PC: TEQSA CONFERENCE	TOP 2 SCORE (%)*
Opportunity to interact with other delegates n=97	90.7
The quality of speakers n=97	85.6
The program n=97	83.5
Relevance of material presented n=97	82.5

*Includes only respondents who attended the TEQSA Conference.
Top 2 scores and n counts excludes don't know / not applicable / no answer responses.

PC: TEQSA Conference

% of respondents choosing a rating point; n=99



	Relevance of material presented	The program	The quality of speakers	Opportunity to interact with other delegates
■ Excellent	25.3	25.3	27.3	44.4
■ Good	55.6	56.6	56.6	44.4
■ Fair	14.1	13.1	12.1	8.1
■ Poor	2.0	2.0	2.0	1.0
■ Very poor	1.0	1.0	0.0	0.0
■ Don't know / No answer	0.0	0.0	0.0	0.0
■ Not applicable	2.0	2.0	2.0	2.0

PC: Guidance and support materials

TEQSA's guidance and support materials were rated highly, with all top 2 scores rating between 83% and 91%. *The relevance of the information* and *the quality of the information* were the highest scoring items (91% and 89%) making this topic one of the highest scoring in the survey, along with the TEQSA conference.

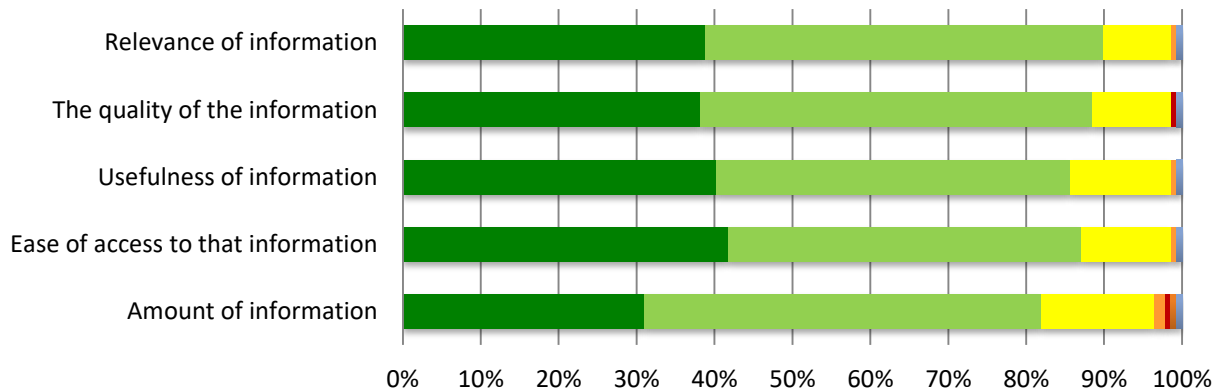
PC: GUIDANCE AND SUPPORT MATERIALS	TOP 2 SCORE (%)*
Relevance of information n=138	90.6
The quality of the information n=138	89.1
Usefulness of information n=138	86.2
Ease of access to that information n=138	87.7
Amount of information n=137	83.2

*Includes only respondents who used guidance and support materials.

Top 2 score and n counts exclude don't know / not applicable / no answer responses.

PC: TEQSA guidance and support materials

% of respondents choosing a rating point; n=139



	Amount of information	Ease of access to that information	Usefulness of information	The quality of the information	Relevance of information
■ Excellent	30.9	41.7	40.3	38.1	38.8
■ Good	51.1	45.3	45.3	50.4	51.1
■ Fair	14.4	11.5	12.9	10.1	8.6
■ Poor	1.4	.7	.7	0.0	.7
■ Very poor	.7	0.0	0.0	.7	0.0
■ Don't know / No answer	.7	0.0	0.0	0.0	0.0
■ Not applicable	.7	.7	.7	.7	.7

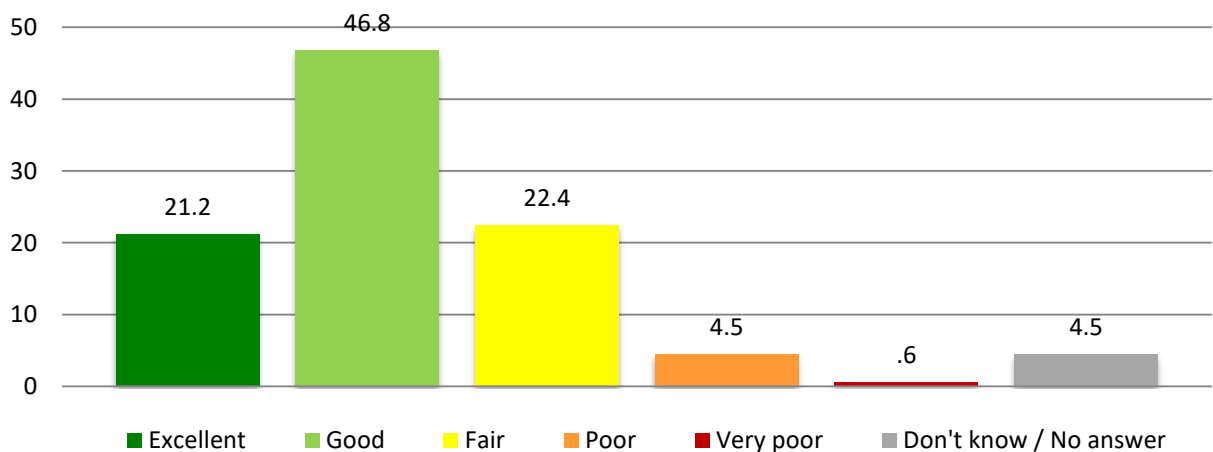
PC: TEQSA overall

All providers were asked to rate TEQSA as a regulator. Seventy-one percent of respondents who answered this question rated TEQSA’s performance over the last 12 months as either *good* or *excellent* - down 9% since 2017.

Note that the total of the excellent and good proportions in the chart below is slightly less than 80%. This is because the chart includes a proportion of don't know / no answer respondents who have been excluded from the top 2 calculation.

PC: TEQSA as a regulator

% of respondents choosing a rating point; n=156



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 52 valid suggestions offered within the VC / CEO question were:

- Positive comments around the value of TEQSA, its activities and approach
- Negative / adversarial approach, particularly with private and potential providers
- Be more of a partner
- Protracted process, lack of response
- More interaction / face-to-face communication
- Little consideration of context.

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

In the last 12 months, principal contacts' perceptions of TEQSA's performance declined in many areas; six items decreased significantly—four of these related to the CRICOS application process which we note just over 40% PC survey respondents were involved with in 2017.

Significant or notable declines that affected most responding providers included completeness of information, streamlining to reduce burden, making process improvements, consistency of information and overall performance as a regulator.

Attribute analysis gives a different view of respondent sentiment where some sub-groups had similar but not identical views to those expressed in 2017. However, scores declined across nearly all items, irrespective of sub-group. The most positive sub-groups in 2017 were less positive in 2018.

All scores were lower in 2018 compared with 2016 (where applicable). However a few scores were only slightly lower and well within the survey's margin of error.

IMPORTANT NOTE: The percentage change between years must be read with the survey's confidence interval ($\pm 4.6\%$) in mind. This plus / minus percentage is the margin of error in this survey, this year. 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.

Note that some differences in ratings between years for some of the items have not been highlighted in yellow because these were not statistically significant at the 95% confidence level. This apparent discrepancy is about the way in which significant difference is calculated and the test's reliance on the overall spread or variance of answers to a question.

Only significant differences between the 2018 and 2017 responses have been highlighted below.

Statistically significantly different ($p < 0.05$) results between 2018 and 2017 highlighted in yellow.

ITEM	Count 2018	2018 % +VE	2017 % +VE	2016 % +VE	\pm 2017 / 2018 only %
CRICOS Application process: Clarity of the online form	67	59.7	89.9	84.1	-30.2
CRICOS Application process: Clarity of the application guide	65	67.7	84.5	76.1	-16.8
KPI 2: Completeness of information	123	55.3	71.2	81.0	-15.9
CRICOS Application process: Helpfulness of information about how to prepare an application	66	63.6	79.2	70.4	-15.5
CRICOS Application process: Any follow up assistance that was required	63	65.1	79.1	84.8	-14.0
KPI 3: Actions proportionate to risks	116	47.4	60.9	65.0	-13.5
CRICOS Application process: Helpfulness of portal information	67	71.6	84.5	86.8	-12.9
KPI 1: Streamlining to reduce burden	138	47.1	59.2	71.4	-12.1
CRICOS Application process: Clarity of the assessment scope and evidence requirements	66	66.7	77.5	73.2	-10.8
KPI 6: Making process improvements	138	52.2	61.8	69.9	-9.7
KPI 5: Consistency of information	152	58.6	67.6	74.8	-9.1
Overall performance	149	71.1	79.7	82.3	-8.6
KPI 2: Clarity of information	122	60.7	68.9	80.5	-8.3
KPI 1: Opportunity to give feedback	144	64.6	72.8	77.0	-8.2

ITEM	Count 2018	2018	2017	2016	± 2017 / 2018 only
		% +VE	% +VE	% +VE	%
Application process: Clarity of the online form	98	69.4	77.5	79.3	-8.1
KPI 2: Quality of regulatory information	154	80.5	88.6	80.8	-8.1
KPI 2: Reasonable opportunity to address matters	115	64.3	72.3	80.7	-7.9
KPI 2: Communicating streamlining initiatives	144	51.4	59.2	78.9	-7.8
Application process: Helpfulness of portal information	99	65.7	72.8	73.0	-7.2
Application process: Any follow up assistance that was required	89	61.8	68.5	80.0	-6.7
KPI 5: Consistency of decisions	117	53.8	60.6	73.7	-6.7
Application process: Clarity of the application guide	99	69.7	76.0	76.9	-6.3
Application process: Clarity of the assessment scope and evidence requirements	99	64.6	70.8	71.1	-6.2
Conference: The program	97	83.5	89.2	N/A	-5.7
KPI 5: Quality of information on National Register	146	74.0	79.1	80.5	-5.1
Guidance & Support materials: The quality of the information	138	89.1	94.1	N/A	-5.0
KPI 6: Engagement	154	53.9	58.8	78.9	-4.9
Conference: The quality of speakers	97	85.6	90.4	N/A	-4.8
KPI 2: Relevance of information	154	82.5	87.1	86.8	-4.7
Guidance & Support materials: Usefulness of information	138	86.2	90.6	N/A	-4.4
Conference: Relevance of material presented	97	82.5	86.7	N/A	-4.3
KPI 4: Timely coordination of visits	77	49.4	53.3	75.0	-4.0
Case mgt approach: Consideration of your needs	142	51.4	55.4	70.9	-4.0
Case mgt approach: Knowledge of your organisation	145	48.3	52.2	71.1	-3.9
KPI 5: Availability of information	149	59.7	63.3	61.2	-3.6
Case mgt approach: Responsiveness	146	59.6	62.9	78.3	-3.3
Application process: Helpfulness of information about how to prepare an application	99	65.7	68.8	66.3	-3.1
KPI 4: Reuse of material	102	53.9	56.4	70.8	-2.5
Guidance & Support materials: Relevance of information	138	90.6	92.9	N/A	-2.4
KPI 2: Timeliness of information after making a decision	113	52.2	54.5	76.5	-2.2
Conference: Opportunity to interact with other delegates	97	90.7	91.7	N/A	-0.9
Guidance & Support materials: Amount of information	137	83.2	81.2	N/A	2.0
KPI 3: Consultative approach	132	56.1	53.2	56.6	2.9
KPI 6: Variety of media	145	65.5	61.8	68.8	3.7
Guidance & Support materials: Ease of access to that information	138	87.7	82.4	N/A	5.3

*Top 2 scores and n counts exclude don't know / not applicable / no answer responses.
N/A – question was not asked in 2016

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.

The following section presents the results of principal contact responses using nine provider attributes:

1. Self-accrediting authority
2. 2017 risk to financial position
3. 2017 risk to students
4. Category
5. Provider size
6. State
7. Registered Training Organisation (RTO) activity
8. CRICOS registration and
9. Market groupings.

The table below and which continues on the following page shows the sub-sets used in the analysis of each attribute.

ATTRIBUTE	SUB-GROUPS	n	% of RESPONSE SAMPLE
Self-accrediting authority+	No	81	63.8
	Yes / Part yes	46	36.2
2017 Risk to financial position	High / moderate	37	28.9
	Low	74	57.8
	Other	17	13.3
2017 Risk to students	High / Moderate	59	46.5
	Low	55	43.3
	Other	13	10.2
Category	University*	37	23.9
	Higher Education Provider (HEP)	90	58.1
	Prospective HEP	28	18.1
Provider size	<100	34	29.3
	100 - 499	21	18.1
	500 - 4,999	28	24.1
	5,000 - 19,999	17	14.7
	≥ 20,000	16	13.8
State	NSW	72	46.5
	VIC	38	24.5
	QLD	15	9.7
	WA	12	7.7
	SA	12	7.7
	Other	6	3.9
Active RTO	No	61	48.0
	Yes	66	52.0

ATTRIBUTE	SUB-GROUPS	n	% of RESPONSE SAMPLE
CRICOS# registered	No	27	21.3
	Yes	100	78.7
Market groupings	Faith based	13	8.3
	Miscellaneous [^]	27	17.3
	For profit	36	23.1
	University	37	23.7
	Other (not for profit, non-faith based)	14	9.0
	N/A as prospective HESPs	28	17.9
	No value available	1	0.6

+ Note that the attribute analysis below excludes the proposed higher education providers (n=28).

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

[^]Includes Government Agencies, Pathways, Professional Bodies and TAFEs

#stands for Commonwealth Register of Institutions and Courses for Overseas Students

Only items which were statistically significantly different at the 95% confidence level have been included in the sub-group comparison tables below. These differences are presented using top 2 (% positive) scores only and were analysed using a z test. Statistically significantly higher results are highlighted in yellow.

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% means that all respondents who answered a question rated the item as *good* or *excellent*.

Important note: there were NO significant differences in any items for the various sub-groups within **provider size, state and on the yes/no question relating to concern about sector quality /reputation**. Results for these attributes were not included in the report.

PC: Self-accrediting authority

For all items in the table below, providers who had self-accreditation status rated 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.

Significantly higher results highlighted in **yellow**.

SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM	SELF-ACCREDITING AUTHORITY TOP 2 SCORES (%)	
	No max n=84	Yes / Part yes max n=46
KPI 1: Opportunity to give feedback	60.0	81.0
KPI 2: Communicating streamlining initiatives	48.1	67.5
KPI 2: Reasonable opportunity to address matters	60.3	83.9
KPI 2: Timeliness of information after making a decision	46.2	67.6
KPI 2: Clarity of information	53.6	78.4
KPI 2: Completeness of information	50.0	70.3
KPI 2: Quality of regulatory information	78.8	93.3
KPI 3: Actions proportionate to risks	40.6	65.7
KPI 5: Quality of information on National Register	65.8	83.3

SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM	SELF-ACCREDITING AUTHORITY TOP 2 SCORES (%)	
	No max n=84	Yes / Part yes max n=46
KPI 5: Consistency of information	52.5	71.1
KPI 6: Engagement	45.0	66.7
CRICOS Application process: Any follow up assistance that was required	51.7	79.3
Case mgt approach: Responsiveness	53.9	73.3
Overall performance	61.8	88.6

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.

PC: 2017 Risk to financial position

The providers that TEQSA rated as having a low risk to financial position in 2017 rated TEQSA's performance highest on all items in the below table.

Significantly higher results highlighted in **yellow**.

SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM	2017 RISK TO FINANCIAL POSITION TOP 2 SCORES (%)		
	High / mod max n=37	Low max n=74	Other max n=17 [^]
KPI 2: Clarity of information	46.9	72.9	56.3
KPI 2: Relevance of information	83.8	88.9	64.7
KPI 3: Actions proportionate to risks	30.3	59.6	53.3
KPI 5: Quality of information on National Register	69.4	80.9	40.0
Guidance & Support materials: The quality of the information	91.9	97.0	73.3
Guidance & Support materials: Relevance of information	91.9	97.0	80.0
Guidance & Support materials: Ease of access to that information	83.8	97.0	93.3
Guidance & Support materials: Usefulness of information	89.2	93.9	73.3

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.

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

PC: 2017 Risk to students

The providers that TEQSA rated as having a low risk to students in 2017 rated TEQSA's performance highest on all items in the below table. There were a considerable number of differences for this attribute, including for TEQSA's overall performance.

Note the large differences in TEQSA's overall performance rating.

Significantly higher results highlighted in yellow.

SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM	2017 RISK TO STUDENTS TOP 2 SCORES (%)		
	High / mod max n=59	Low max n=55	Other max n=13 [^]
KPI 1: Streamlining to reduce burden	38.2	62.5	46.2
KPI 1: Opportunity to give feedback	56.9	82.4	53.8
KPI 2: Reasonable opportunity to address matters	58.0	89.2	50.0
KPI 2: Clarity of information	52.0	77.3	58.3
KPI 2: Quality of regulatory information	81.0	92.6	61.5
KPI 2: Relevance of information	84.5	90.7	53.8
KPI 3: Consultative approach	47.4	71.4	54.5
KPI 3: Actions proportionate to risks	30.2	72.5	63.6
KPI 4: Timely coordination of visits	36.4	75.0	37.5
KPI 5: Quality of information on National Register	68.4	83.7	41.7
KPI 6: Engagement	43.1	66.7	46.2
CRICOS Application process: Any follow up assistance that was required	45.8	82.8	60.0
Case mgt approach: Responsiveness	46.4	75.5	66.7
Case mgt approach: Consideration of your needs	39.3	66.0	58.3
Guidance & Support materials: The quality of the information	94.5	96.2	63.6
Guidance & Support materials: Relevance of information	94.5	96.2	72.7
Guidance & Support materials: Usefulness of information	90.9	94.2	63.6
Overall performance	61.8	86.5	61.5

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.

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

PC: Category

Where there were differences, universities provided significantly higher ratings compared with HEP and prospective HEP groups, as displayed in the table below. Ratings for TEQSA overall as a regulator were consistent across the groups.

Significantly higher results highlighted in yellow.

SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM	CATEGORY - TOP 2 SCORES (%)		
	University [^] max n=37	HEP max n=90	Prospective HEP max n=28
Guidance & Support materials: The quality of the information	97.0	90.5	70.0
Guidance & Support materials: Ease of access to that information	90.9	92.9	60.0
Guidance & Support materials: Usefulness of information	100.0	85.7	65.0
KPI 2: Communicating streamlining initiatives	67.7	50.0	33.3
KPI 2: Quality of regulatory information	91.7	80.9	64.3

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

PC: Registered Training Organisation (RTO) activity

Non-active RTOs rated all items in the table below higher than RTOs that were active. Ratings for TEQSA overall as a regulator were consistent across the groups.

Significantly higher results highlighted in yellow.

SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM	RTO ACTIVITY - TOP 2 SCORES (%)	
	Active RTO max n=66	Non-active RTO max n=61
KPI 1: Streamlining to reduce burden	37.3	59.6
KPI 4: Reuse of material	40.8	67.4
KPI 6: Making process improvements	41.4	64.9
CRICOS Application process: Helpfulness of information about how to prepare an application	46.9	82.8

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.

PC: CRICOS registration

Only two items significantly differed 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=100	Not CRICOS registered max n=27
KPI 1: Opportunity to give feedback	71.9	50.0
KPI 5: Availability of information	54.6	80.8

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.

PC: Market groupings

Universities scored significantly higher than nearly all other market groups on most of the items in the table below. There were considerable differences between sub-groups for this attribute, but TEQSA's overall performance rating was NOT an area of difference. Where there were significant differences, the *For profit* group was generally lowest scoring. This overall view was reinforced in open-ended comments with comments like TEQSA is adversarial, suspicious and not understanding of their context.

Significantly higher results highlighted in yellow.

SIGNIFICANTLY DIFFERENT ITEMS TOPIC / ITEM	MARKET GROUPINGS [^] - TOP 2 SCORES (%)					
	Faith based n=13 [^]	Miscellaneous n=27 [^]	For profit n=36	University n=37	Other (not for profit, non-faith based) n=14 [^]	N/A as prospective HEP n=28 [^]
KPI 2: Clarity of information	72.7	73.9	35.3	71.4	90.0	46.7
KPI 2: Quality of regulatory information	92.3	96.3	61.1	91.7	92.3	64.3
KPI 2: Timeliness of information after making a decision	70.0	66.7	27.3	68.0	60.0	46.2
KPI 3: Actions proportionate to risks	70.0	62.5	15.2	65.4	63.6	27.3
KPI 5: Consistency of decisions	63.6	65.2	33.3	57.7	90.0	38.5
Guidance & Support materials: The quality of the information	100.0	91.7	85.3	97.0	92.3	70.0
Overall performance	91.7	72.0	44.1	85.7	85.7	67.9
Case mgt approach: Consideration of your needs	83.3	58.3	33.3	52.9	66.7	43.5

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.

[^]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 key findings

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.

Note: Due to the relatively small number of respondents for this section (a total of 24 peak / professional/student bodies answered the survey) 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.

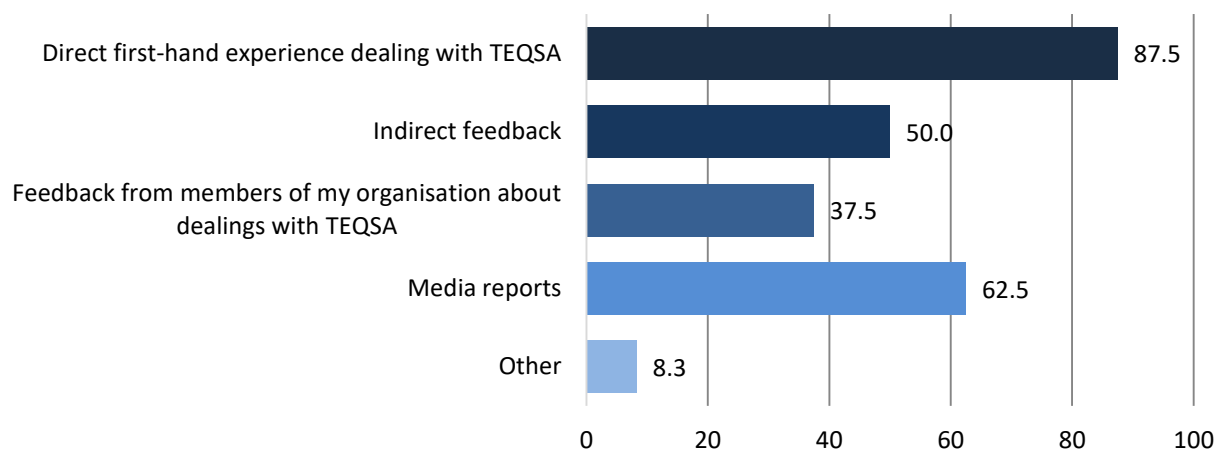
PPSB: Interaction with TEQSA

The chart below displays the types of direct or indirect interactions PPSBs had with TEQSA in 2017/2018. The most common type of interaction with TEQSA was *direct first-hand experience* (88%). Fifty percent of PPSBs had indirectly dealt with TEQSA or had feedback from members.

PPSB: Interactions with TEQSA in last 12 months

% of respondents choosing a rating point; % based on n=24;

Multiple answers allowed so total >100%



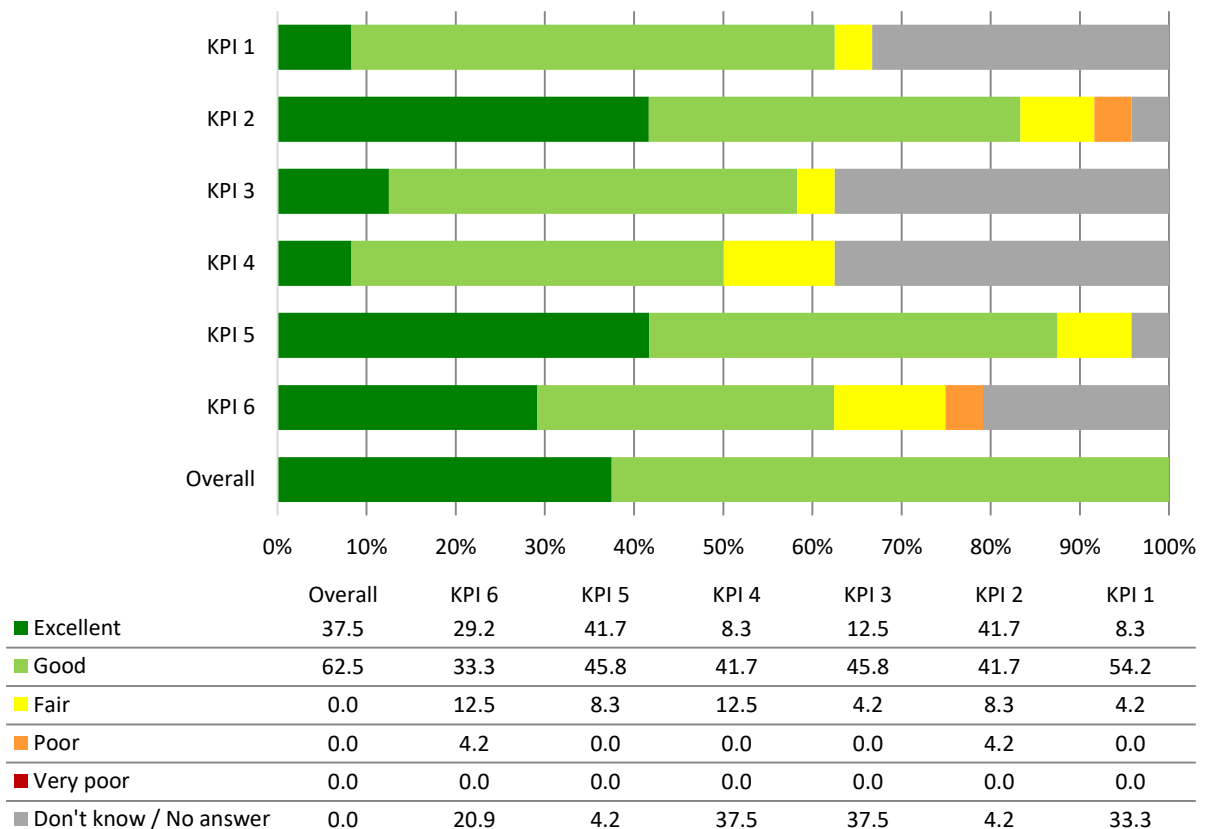
PPSB: Scores for all questions

From a PPSB perspective, TEQSA performed well on all KPIs. Refer to the table and chart below. The KPIs around *impact*, *risk approach* and *approach* were key strengths for TEQSA from a PPSB perspective. TEQSA's performance on the six KPIs varied from a high of 94% (KPI 1) to a low of 79% (KPI 6). Note that for KPIs 1, 3 and 4 there was a considerable proportion of *don't know / no answer* responses.

PPSB: KPIs		n	TOP 2 SCORE (%)
KPI 1 Impact	Regulation by TEQSA does not unnecessarily impede the efficient operation of your organisation	16	93.7
KPI 2 Communication	TEQSA's communication with your organisation is clear, targeted and effective	23	87.1
KPI 3 Risk approach	Regulatory actions undertaken by TEQSA for your organisation are proportionate to the risks being managed	15	93.3
KPI 4 Compliance / monitoring	TEQSA has a streamlined and co-ordinated approach to compliance and monitoring for your organisation	15	80.0
KPI 5 Approach	TEQSA is open, transparent and consistent in its dealings with your organisation	23	91.3
KPI 6 Continuous improvement	TEQSA continues to improve its regulatory framework in consultation with your organisation	19	79.0
Overall	TEQSA performance over the last 12 months as a regulator	24	100.0

PPSB: TEQSA ratings

% of respondents choosing a rating point; n=24



PPSB: Year comparison

Between 2017 and 2018 ratings for all but two of the seven items in the below table increased, with the biggest increase in top 2 score for KPI 6, up 12%.

Due to very small sample sizes these results should be treated as indicative only. The sample sizes are too small to conduct reliable or valid comparative statistical analysis.

ITEM		2018 n	2018 TOP 2 SCORE (%)	2017 TOP 2 SCORE (%)	± %
KPI 6: Continuous improvement	TEQSA continues to improve its regulatory framework in consultation with your organisation	19	78.9	66.7	12.3
KPI 3: Risk approach	Regulatory actions undertaken by TEQSA for your organisation are proportionate to the risks being managed	15	93.3	89.5	3.8
KPI 5: Approach	TEQSA is open, transparent and consistent in its dealings with your organisation	23	91.3	88.9	2.4
KPI 2: Communication	TEQSA's communication with your organisation is clear, targeted and effective	23	87.0	84.6	2.4
KPI 1: Impact	Regulation by TEQSA does not unnecessarily impede the efficient operation of your organisation	16	93.8	91.7	2.0
Overall	TEQSA performance over the last 12 months as a regulator	24	85.7	87.5	-1.8
KPI 4: Compliance / monitoring	TEQSA has a streamlined and co-ordinated approach to compliance and monitoring for your organisation	15	80.0	85.0	-5.0

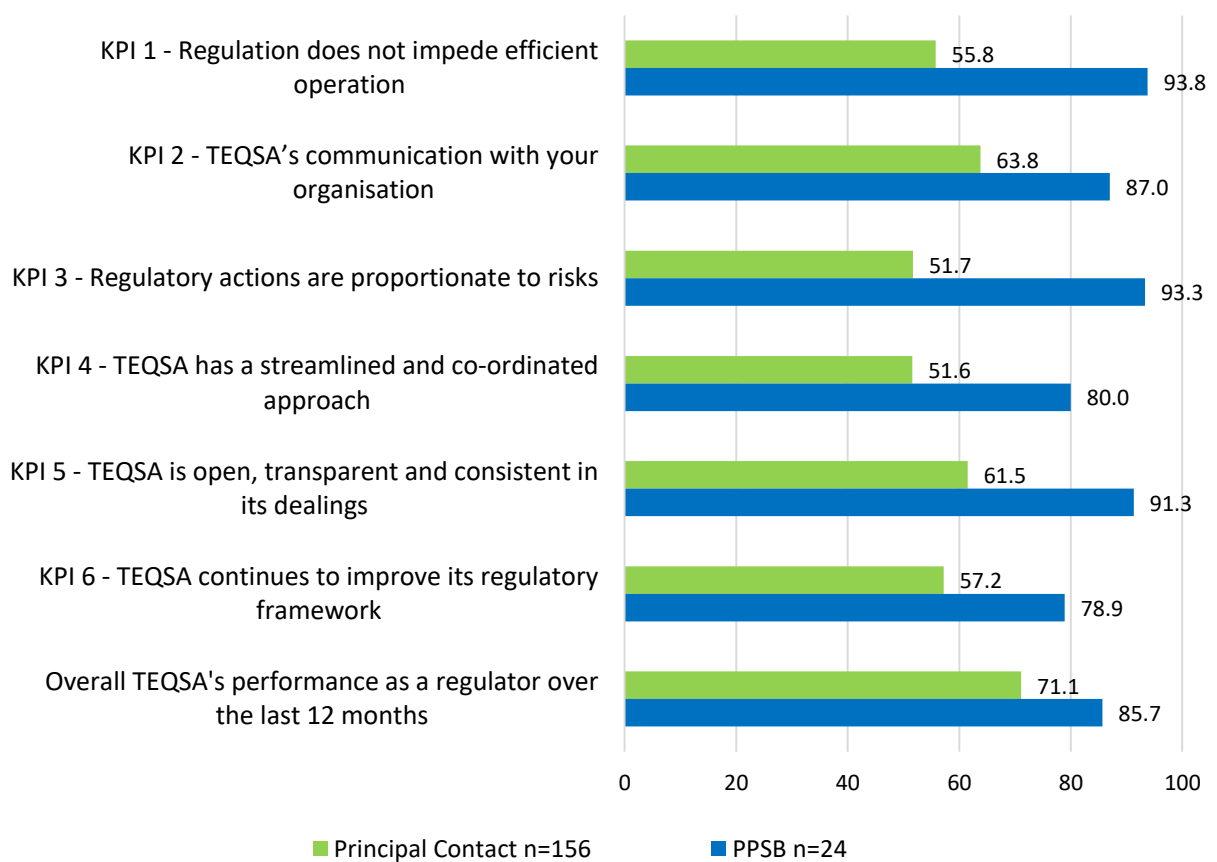
Survey comparisons

For this piece of analysis, a simple average of the top 2 scores for each item within a topic (KPI) of the principal contact survey was calculated. These six average top 2 scores were then compared with the top 2 scores of the same KPIs within the PPSB survey, along with the top 2 scores of TEQSA's overall rating as a regulator (the same overall regulator performance question was asked in both surveys). The comparative results are displayed in the chart below.

It shows that PPSBs were more positive about TEQSA's performance on all KPIs; all had a top 2 score of 79% or higher for PPSBs, compared to top 2 scores ranging between 52% and 71% for principal contacts.

KPI and overall comparison across 2 target groups

Top 2 scores (%) for each topic (averaged for PCs)



Conclusions

After an excellent result in TEQSA's first stakeholder survey (2016), this third year of surveying has a lower percentage of respondents rating TEQSA *excellent* or *good* on all indicators and this decline is universal across sub-groups within the provider population. There are some providers (usually low risk and self-accrediting) who are extremely happy with TEQSA's performance while for profit providers are less positive.

This year's results should continue to give TEQSA clear guidelines on where to focus service initiatives. Many of the suggestions for improvements or change are similar to previous surveys. The majority of providers continue to rate TEQSA *excellent* or *good* in each of its 6 KPIs and the relationship between TEQSA and the PPBS results continue to be extremely positive. Providers have not notably changed their requests for areas of change.

The activities or processes that providers think TEQSA is doing well include:

- Provision of guidance and support materials
- TEQSA's annual conference
- The quality and relevant of regulatory information
- Its overall performance as a regulator

Areas that providers believe TEQSA needs to improve include:

- CRICOS applications
- Streamlining regulatory burden
- Speed of response when making decisions
- Consultation and engagement
- Case management, in particular, case managers' knowledge of providers and consideration of their needs as well as more visits / face-to-face meetings.

Peak, professional and student bodies have much more positive views about TEQSA's performance than providers.

Importantly, overall TEQSA was fairly well-regarded by providers and extremely well-regarded by peak bodies as a regulator assuring the quality of Australia's higher education.

Appendix A: Table of item abbreviations

TOPIC	ITEM FULL NAME	ABBREVIATED NAME
KPI 1	Streamlining its regulatory processes and practices to reduce (or positively affect) administrative burden for your organisation	<i>Streamlining to reduce burden</i>
	Providing your organisation with the opportunity to give feedback on proposed changes to TEQSA's practices (including streamlining initiatives)	<i>Opportunity to give feedback</i>
KPI 2	Communicating its streamlining initiatives to your organisation	<i>Communicating streamlining initiatives</i>
	Providing a reasonable opportunity to address matters relevant to a regulatory decision, prior to a final decision being made	<i>Reasonable opportunity to address matters</i>
	Timeliness of information provided by TEQSA after TEQSA makes a regulatory decision	<i>Timeliness of information after making a decision</i>
	Clarity of information about TEQSA's regulatory decisions	<i>Clarity of information</i>
	Completeness of information about TEQSA's regulatory decision	<i>Completeness of information</i>
	Quality of information on TEQSA's regulatory policies and processes provided through TEQSA's website and newsletters	<i>Quality of regulatory information</i>
	Relevance of information on TEQSA's regulatory policies and processes provided through TEQSA's website and newsletters	<i>Relevance of information</i>
KPI 3	The consultative approach taken to confirm the annual risk assessment results with your organisation	<i>Consultative approach</i>
	Regulatory actions undertaken by TEQSA for your organisation are proportionate to the risks being managed	<i>Actions proportionate to risks</i>
KPI 4	TEQSA's reuse of material provided by your organisation for a range of regulatory matters	<i>Reuse of material</i>
	Timely coordination of TEQSA staff visits to your organisation	<i>Timely coordination of visits</i>
KPI 5	Availability of information on trends and observations on sector performance	<i>Availability of information</i>
	Quality of information provided on the National Register (showing the results of the regulatory decisions)	<i>Quality of information on National Register</i>
	Consistency of information provided to your organisation	<i>Consistency of information</i>
	Consistency of TEQSA's decisions about your organisation	<i>Consistency of decisions</i>

TOPIC	ITEM FULL NAME	ABBREVIATED NAME
KPI 6	Using a variety of media and channels to communicate sector-wide updates	<i>Variety of media</i>
	Direct engagement with your organisation through briefings and roundtables	<i>Engagement</i>
	Making improvements to its processes and policies in areas that impact your organisation	<i>Making process improvements</i>
Application process	Clarity of the application guide (easy to understand)	<i>Clarity of the application guide</i>
	Clarity of the assessment scope and evidence requirements	<i>Clarity of the assessment scope and evidence requirements</i>
	Helpfulness of information about how to prepare an application	<i>Helpfulness of information about how to prepare an application</i>
	Helpfulness of information on how to use the provider portal (for preparing and submitting applications online)	<i>Helpfulness of portal information</i>
	Clarity of the online form	<i>Clarity of the online form</i>
	Any follow up assistance that was required	<i>Any follow up assistance that was required</i>
CRICOS application process	Clarity of the application guide (easy to understand)	<i>Clarity of the application guide</i>
	Clarity of the assessment scope and evidence requirements	<i>Clarity of the assessment scope and evidence requirements</i>
	Helpfulness of information about how to prepare an application	<i>Helpfulness of information about how to prepare an application</i>
	Helpfulness of information on how to use the provider portal (for preparing and submitting applications online)	<i>Helpfulness of portal information</i>
	Clarity of the online form	<i>Clarity of the online form</i>
	Any follow up assistance that was required	<i>Any follow up assistance that was required</i>
Case mgt approach	Responsiveness to the needs of your organisation	<i>Responsiveness</i>
	Knowledge of your organisation's specific needs / issues / environment	<i>Knowledge of your organisation</i>
	Consideration of your organisation's specific needs / issues / environment for tailoring the application process	<i>Consideration of your needs</i>
Conference	The program	<i>The program</i>
	The quality of speakers	<i>The quality of speakers</i>
	Relevance of material presented	<i>Relevance of material presented</i>
	Opportunity to interact with other delegates	<i>Opportunity to interact with other delegates</i>

TOPIC	ITEM FULL NAME	ABBREVIATED NAME
Guidance and support materials	The quality of the information	<i>The quality of the information</i>
	Relevance of information	<i>Relevance of information</i>
	Ease of access to that information	<i>Ease of access to that information</i>
	Usefulness of information	<i>Usefulness of information</i>
	Amount of information	<i>Amount of information</i>
Overall	Overall: TEQSA's performance over the last 12 months as the regulator assuring the quality of Australian higher education	<i>Overall performance</i>

Appendix B: Questionnaires used in 2018 surveys

The appendix contains the full questionnaires used in the principal contact survey and the peak, professional and student body survey.