



# International Student Wellbeing Strategy 2019/2020 Funding

## Guidance for Applicants

August 2019

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## Purpose

### Purpose of this document

This guidance document provides:

- Background information on the policy context of the New Zealand International Education Strategy (IES) and the International Student Wellbeing Strategy (Wellbeing Strategy), and the Wellbeing Strategy Funding which delivers on Wellbeing Strategy outcomes.
- Information on general eligibility for Wellbeing Strategy Funding, and the application and assessment process for Expressions of Interest (EOI) and project proposals.
- Information on intervention logic models, and the logic model for the initiatives.

### Purpose of the Wellbeing Strategy Funding

The purpose of Wellbeing Strategy Funding is to support initiatives that deliver on the outcomes of the Wellbeing Strategy. This will build a community of support for International Students through a collective toolbox of wellbeing initiatives, linkages between organisations, and reach into International Student communities.

#### *About the Wellbeing Strategy Funding*

From 2017/18, up to \$750,000 has been allocated annually from the Export Education Levy (EEL) as funding to support the implementation of the Wellbeing Strategy.

The Wellbeing Strategy Funding has an annual competitive funding round and from 2019/20, has two funding streams with the following approximate split:

- **Small projects** up to \$15,000.
- **Large projects** over \$15,000.

#### *Collaboration*

The Wellbeing Strategy is designed to coordinate government and non-government stakeholders in the international education sector and International Students to identify priorities and work together on solutions. We want to see this collaboration between organisations and International Students in the design, implementation and evaluation of initiatives funded through this process. Input from International Students could be representative (speaking on behalf of International Student bodies) or non-representative student voices (individual Students or Ambassadors).

#### *Collective toolbox*

It is our goal to create a toolbox of International Student wellbeing programmes, resources, events and initiatives, which will be published on the Ministry's website. We will work with funded organisations who have delivered successful initiatives to set up the collective toolbox.

#### *Scalability and repeatability*

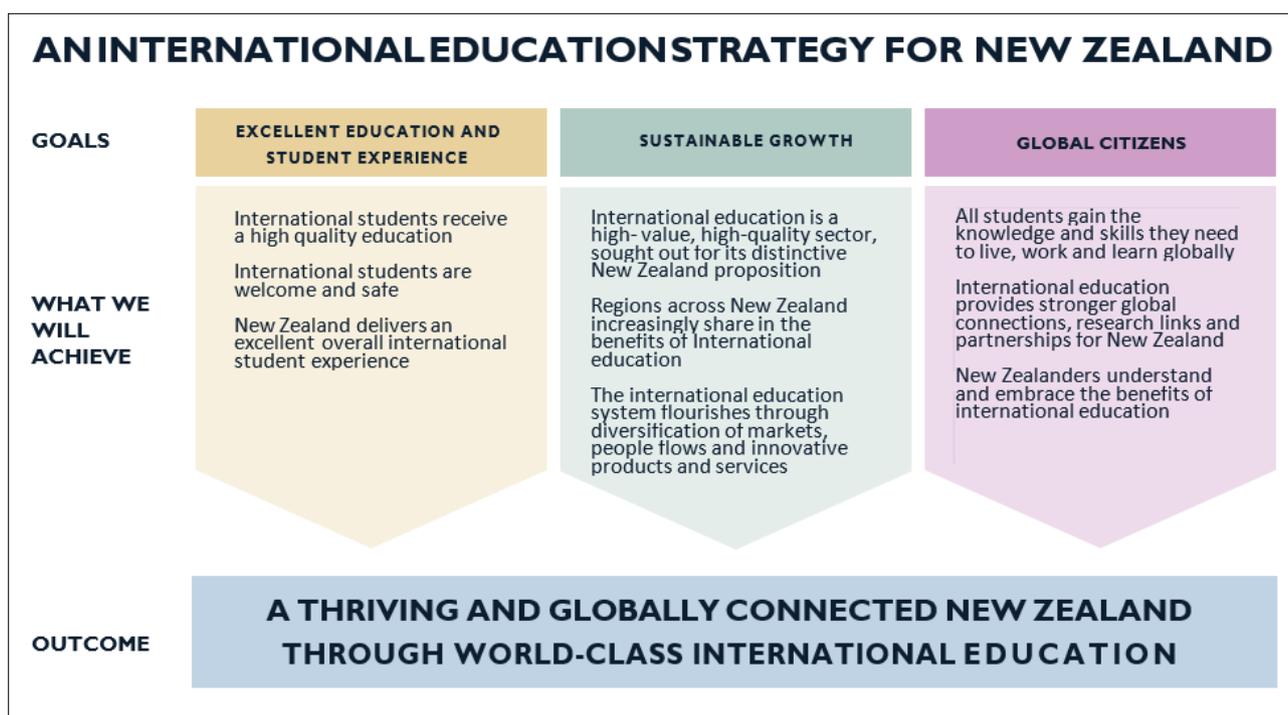
We are also keen to promote a collaborative model by supporting the collective tool box with initiatives that are "repeatable" for others to adapt to their own context. This means initiatives that can be repeated by *you*, but can also be scaled up or down and delivered by other schools, tertiary providers, organisations or agencies. This will not be possible with all funded initiatives.

Where appropriate, we will work with funded organisations who have delivered successful initiatives to plan and implement repeatable and scalable projects. This will build a community of support for International Students, create linkages between organisations, and increase the reach of these initiatives, geographically, and with the number of International Students who benefit.

## Policy context

### The International Education Strategy (2018)

The IES launched by Minister Hipkins at the International Education Conference in August 2018, sets out the Government’s direction for the sector. The diagram below shows the three goals of the International Education Strategy.



### The International Student Wellbeing Strategy (2017)

The Wellbeing Strategy, launched in June 2017, is focused on the first goal above: International Students receive an excellent education and have an excellent overall student experience. The vision for the Wellbeing Strategy is that *International Students feel welcome, safe and well, enjoy a high-quality education and are valued for their contribution to New Zealand.*

The Strategy is structured by four pillars—economic wellbeing, education, health and wellbeing, and inclusion—each of which includes a set of outcomes, as shown in the diagram on the next page.

# INTERNATIONAL STUDENT WELLBEING STRATEGY

## Overarching strategy outcome

International students are welcome, safe and well, enjoy a high quality education and are valued for their contribution to New Zealand

### ECONOMIC WELLBEING

#### International students are able to support themselves

- International students have accurate information about the costs of living and studying, including regional variations in costs
- International students understand their rights to work in New Zealand, their rights as employees and do not experience exploitation in the workplace
- International students know their rights relating to accommodation and how to access services to resolve accommodation disputes
- International students understand the pathways to employment and residency that are available to them
- International students can access services that provide financial advice

### EDUCATION

#### International students achieve educational outcomes that support their future pathways and choices

- International students know that the providers and courses they enrol in are high quality
- International students have appropriate English language skills to undertake their planned study
- International students achieve good educational outcomes and can access services to support pathways to further study
- International students experience culturally responsive services from education providers

### HEALTH AND WELLBEING

#### International students are safe and well

- International students are aware of and can access effective healthcare that is culturally appropriate
- International students know how to keep safe in New Zealand
- International students understand New Zealand laws relating to crime and violence, their legal rights, rights to services and how to report crime
- International students can access safe and reliable transport

### INCLUSION

#### International students are welcome, valued and socially connected

- International students feel welcomed in New Zealand and know that their contribution is valued
- International student voices are heard and considered when relevant government policies and strategies are developed
- International students have access to information about social, cultural and religious services available to them
- International students feel integrated into their communities and their diversity is celebrated

## All outcomes are underpinned by the following:

Government provides trusted information for international students that underpins the delivery of services to support the outcomes of the strategy

Government ensures education providers meet their Code of Practice obligations for the pastoral care of international students to support the outcomes of the strategy

The governance structure for the Wellbeing Strategy is comprised of the following:

- International Student Wellbeing Collaborative Working Group (members include international education leaders, students, communities, education providers and government agencies).

## Priority areas for 2019/2020

To be considered for funding, projects must align with the strategic priorities and theme. This year the Ministry is inviting projects that address the following areas of diversity and inclusion along with the associated evaluation criteria. Note, initiatives do not have to fit all categories but will likely meet several of them. The table below provides further description of what we are looking to fund.

Category	Description
<b>Being inclusive of the diversity of International Students</b>	Initiatives that promote genuine diversity of International Students including: gender, family and marital status, sexual orientation, education, race, colour, ethnicity, national origins, languages, political opinion, religious and ethical beliefs, religious harmony, age, socio-economic status, disability or impairment.
<b>Welcoming and belonging</b>	Initiatives that enable International Students to experience more inclusion, welcoming and belonging in New Zealand. Breaking down the concept of 'other'.
<b>Valuing and celebrating</b>	Initiatives which enhance International Students' feelings of being valued including valuing of their contributions.

<b>International Students</b>	Initiatives that celebrate the diversity of International Students.
<b>Promoting collaboration and understanding</b>	<p>Initiatives that enable:</p> <ul style="list-style-type: none"> <li>• friendship, connection, collaboration and inclusion between domestic and International Students, both inside and outside institutions and within communities</li> <li>• communities to be more inclusive of International Students, and transform community attitudes</li> <li>• more understanding and tolerance resulting in International Students feeling an increased sense of belonging in their communities</li> <li>• breaking down barriers/ reducing silos between domestic and International Students</li> </ul>
<b>Listening to input and perspectives from International Students</b>	<p>Initiatives that highlight and enhance how International Students' voices are heard and considered.</p> <p>Co-design with International Students at all stages: design, implementation and publication. These could be representative or non-representative student voices.</p>
<b>Mutual sharing</b>	Initiatives that enhance mutual sharing and learning between cultures, including Māori, Pacific peoples, pakeha and other ethnic/cultural groups in New Zealand. Promotion of collaboration between groups.
<b>Equity and access to information and service provision</b>	<p>Initiatives that increase the equity of access to and use of mainstream services and the quality of service experience and provision.</p> <p>Initiatives that improve how International Students access information about social, cultural and religious services available to them</p>
<b>From the ISWS, International Students are welcome, valued and socially connected</b>	<p>Initiatives that enhance the wellbeing of International Students in New Zealand and support the outcomes of the Wellbeing Strategy:</p> <ul style="list-style-type: none"> <li>• International Students feel welcomed in New Zealand and know that their contribution is valued</li> <li>• International student voices are heard and considered when relevant government policies and strategies are developed</li> <li>• International Students have access to information about social, cultural and religious services available to them</li> <li>• International Students feel integrated into their communities and their diversity is celebrated</li> </ul>

## General eligibility criteria

Applicants and applications (EOIs and proposals) must fulfil all of the following criteria:

### Applicants | Eligible organisations

To be eligible to apply for funding, applicants must:

- Have working relationships with International Students.
- Work in collaboration with other organisations on your initiative:

For small projects, there is more flexibility and there may be collaboration with larger organisations or with two or more organisations e.g. schools and iwi.	For large projects, there will be collaboration or partnering opportunities identified (government and/or non-government) e.g. there could be a collaboration of three or more organisations.
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- Have an understanding or experience in the subject area and demonstrate the capability and capacity to successfully deliver intended outcomes:

For small projects, there is more flexibility. Applicants will have good ideas, a good team, and an understanding, experience or success in the subject area of the project. For some projects, there will be an expectation that the project will involve learning. This could involve mentoring from an established organisation.	For large projects, applicants must have a record of experience and success in the subject area of the project.
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- Applicants must demonstrate due diligence:
  - Have the resources to sustain the delivery of the programme.
  - Will bear all other expenses for carrying out the proposed activity.
  - Must adhere to New Zealand legislation i.e. Health and Safety Act and Children's Act.

For small projects, have an understanding of effectively managing funding.	For large projects, be a group or organisation (including NGOs, charities, iwi, businesses, social enterprises, trusts etc.) with legal status. Have a track record of effectively managing funding. We may ask for evidence of indemnity insurance.
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Applicants:

- Cannot be central government agencies.
- Must be based in New Zealand.

For small projects, the Ministry could contract with a club or organisation to whom the funding would be paid. If you are unsure, please contact the Ministry to discuss.	For large projects, the Ministry must contract with a legal entity to whom the funding will be paid.
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**Expectations of Applications**

The proposed activity must meet the following criteria (more information is within the assessment criteria section):

**Relevance**

For small and large projects:

- Directly address the 2019/20 funding themes of international student diversity and inclusion and potentially contribute to other outcomes of the Wellbeing Strategy.
- Include International Students and be inclusive of the diversity of International Students.

**Effectiveness**

For small and large projects:

- Identify a clear problem, gap, or opportunity related to international student support.
- Include well-designed implementation plans including some targeted evaluation activities.

**Efficiency**

For small and large projects:

- Be cost-effective or good “value for money” (considering outcomes relative to investment).
- Include a well thought out timeline.

**Impact**

For small and large projects:

- Be likely to achieve the outcomes and positive long-term effects, at the international student / community level (i.e. there is a good logical flow between outputs and outcomes).

**Sustainability**

For small projects, where possible have an enduring impact on international student wellbeing.  Where possible, have the potential to continue to operate beyond the funded year e.g. through co-funding, sponsorship, and/or fee-for-service.	For large projects, have an enduring impact on international student wellbeing.  Have the potential to continue to operate beyond the funded year e.g. through co-funding, sponsorship, and/or fee-for-service.
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**Collaboration**

For small and large projects:

- Not duplicate or crowd out existing services provided to International Students.
- Involve International Students in the design, implementation and evaluation of initiatives.

### Scalability/repeatability

For small projects, this could be a new initiative or a repeatable/ scalable initiative that would be further enhanced by Ministry funding. There may be a plan or recommendations for scalability and repeatability.	For large projects, be a new initiative or a repeatable/ scalable initiative that would be further enhanced by Ministry funding. Contains a plan or recommendations for scalability and repeatability.
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### Resource development

For small and large projects:

- Resources developed during the project must be shared with the Ministry so they can be utilised to benefit other International Students.

For small projects, the project may be innovative, taking advantage of new technologies to maximise reach and impact.	For large projects, be innovative, taking advantage of new technologies to maximise reach and impact.
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Projects must be completed within 12 months. Exceptions may be sought where a large project would be constrained by such a deadline. These applicants should make this request as part of their EOI stating an alternative completion date with appropriate milestones. Such major projects may apply for further funding in subsequent years.

The Ministry will not accept applications for:

- Service provision, particularly where the services should be delivered by institutions.
- From government agencies or organisations for which the proposed activity is core business. The Ministry acknowledges that some projects can only be funded in partnership with central or local government. In this case exceptions may be made where the case is sound.
- Completed projects, recurrent projects or funding to go towards an organisation's ongoing operational costs.
- For the cost of employees of organisations including salaries and honoraria. However, when International Students submit applications, their budgets may allow costs for their time.
- From start-ups seeking to establish or grow their organisation.
- Projects seeking to promote political or religious objectives.
- The purchase of capital items, or the purchase or renovation of buildings.
- Funding can only be used to cover costs identified at the time of application.

Can we apply for funding?

- If you have checked that you are eligible under the general eligibility criteria, please read the specific requirements relating to applying for the Wellbeing Strategy Funding in the EOI and Proposal templates.
- If an application is incomplete, illegible, or mandatory documentation has not been included, your application will not be considered.
- Matching these criteria is no guarantee of funding

### Wellbeing Strategy Funding Process

There are two types of Wellbeing Strategy Funding with two slightly different processes. This guideline is for those applying for both levels of funding.

- **Small Projects.** For those applying for Funding up to \$15,000, there is a one step process where you need only submit a project proposal.
- **Large projects.** For those applying for Funding over \$15,000, there is a two-step process with:
  - Submission of an Expression of Interest (EOI)
  - Once the EOI has been assessed, you may be invited to prepare a more detailed proposal for funding. Some organisations may be partnered with a government agency for assistance in completing your proposal. However, there is no guarantee that any organisation submitting a full proposal will receive funding.

### For applications for funding under \$15,000

The table below shows the steps in the funding allocation process from the proposal stage.

<b>Proposals</b>	1. Organisations develop proposals and sends to the Ministry for assessment by 13 September 2019.
	2. Proposals are assessed.
	3. Decisions.
<b>Announcement of decisions &amp; distribution of funding</b>	4. Announcement of successful applicants by 6 December 2019.
	5. The Ministry distributes the funding in December / January.

<b>Reporting</b>	6. Final report is submitted to the Ministry by the 15 January 2021
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**For applications for funding over \$15,000**

The table below shows the steps in the funding allocation process from the EOI stage.

<b>EOI stage</b>	1. Organisations develop an EOI and sends to the Ministry for assessment by the 13 September.
	2. EOIs are assessed.
<b>Proposal stage</b>	3. On the 8 October 2019 Invitations are made to submit a project proposal by 28 October 2019.
	4. Decisions.
<b>Announcement of decisions &amp; distribution of funding</b>	5. Announcement of successful applicants by 6 December 2019.
	6. The Ministry distributes the funding in December / January.
<b>Reporting</b>	7. Mid-term report to be submitted to the Ministry by 31 July 2020
	8. Final report to be submitted to the Ministry by 15 January 2021

**Expression of interest and proposal forms**

Both forms have clear and specific questions embedded within them that should guide your answers.

**Quality and Assessment criteria**

The following funding criteria is to help select and prioritise initiatives.

- 1. Relevance.** The extent to which the proposal aligns and remains consistent with international student priorities, the priority theme for 2019/20 and Wellbeing Strategy outcomes.

Consider the extent to which the EOI/Proposal:

- Directly addresses the 2019/20 funding theme of international student diversity and inclusion.
- Describes the context of the problem, need or opportunity and rationale for involvement.
- Demonstrates engagement with International Students, and reflects their views and participation.

- 2. Effectiveness.** The extent to which the Proposal's intended results (outputs and outcomes) are expected to be / are being / were achieved.

Consider the extent to which the EOI/Proposal:

- Links the specific need(s) to be addressed, to the inputs and approaches to address those needs.
- Includes well-designed implementation plans including some targeted evaluation activities.
- Has a strong logic diagram with logical flow between key outputs, outcomes, and these reflect the need(s) identified.
- Barriers to success should be signalled and addressed appropriately.
- The Proposal summarises other similar activities already underway (e.g. by other agencies) and shows coordination with other agencies.

- 3. Efficiency.** Resources (funds, expertise, time, etc.) are expected to be converted to results (outputs and outcomes).

Consider the extent to which the EOI/Proposal:

- Is cost-effective/value for money (considering impact relative to costs).
- Does not duplicate or crowd out existing services provided to International Students.
- Provides a clear implementation period, approach, and reflects capacities of proposed partner(s) to deliver and account for the Project.
- Demonstrates the capability and capacity required to successfully deliver on its intended outcomes.
- Contains sufficient detail of M&E and how that would be undertaken.

- 4. Impact.** The long-term changes resulting from the Proposal.

Consider the extent to which the EOI/Proposal:

- Discusses the long-term changes resulting from the Proposal including positive and negative, intended and unintended effects.
- Shows the extent to which the intended long-term effect(s) (direct and indirect) of the Initiative are expected to be / are being / were achieved.
- Is likely to achieve the Outcomes and positive long-term effects, at the international student / community level (e.g. due to a good logical flow between outputs and outcomes).
- Shows a contribution to significant issues/s for International Students at local, national or regional level.

- e. Shows innovation, how the project plans to do something new – such as a new practice or approach – to achieve its goal/s. The proposal takes advantage of new technologies to maximise reach and impact.

**5. Sustainability.** The likelihood of continued long-term benefits after funding has been completed.

Consider the extent to which the EOI/Proposal:

- a. Demonstrates sustainability - the likelihood of continued long-term benefits after funding has been completed.
- b. Has potential for impact beyond the project itself in supporting one or more Wellbeing Strategy goals e.g. as a model initiative that other organisations can deliver.
- c. Contains a description of transition or exit planning when support ends.

**6. Resource development.** The contribution to a collective toolbox of International student wellbeing programmes, events, initiatives and resources.

Consider the extent to which the EOI/Proposal:

- a. Has potential for resource development which contributes to the collective toolbox.
- b. Shows opportunity for people to be actively involved in sharing and exchanging knowledge and ideas.
- c. Develops innovative approaches, sharing knowledge and fostering:
  - the way knowledge will be built and shared; and
  - opportunities for people to be actively involved in sharing and exchanging knowledge and ideas.

**7. Collaboration.** The extent of collaboration with International Students and other organisations.

Consider the extent to which the EOI/Proposal:

- a. Shows involvement with International Students in the planning, implementation and monitoring (co-design)
- b. Identifies collaboration/partnering opportunities and interdisciplinary connections.
- c. Demonstrates collaboration and ability to complement/co-ordinate with other organisations and activities.

**8. Scalability/ Repeatability.** The design of the initiative can be scaled up, repeated and implemented by other organisations.

Consider the extent to which the EOI/Proposal:

- a. Contains a plan or recommendations for scalability and repeatability.
- b. Proposes how the initiative is “repeatable” for others to adapt to their own context. This means initiatives that can be repeated by you, and also be scaled up or down and delivered by other schools, tertiary providers, organisations or agencies. This will not be possible with all funded initiatives.
- c. Shows Innovation. Does the proposal have the potential to be a flagship?
- d. Considers opportunities / potential to leverage the initiative towards other actions and outputs.

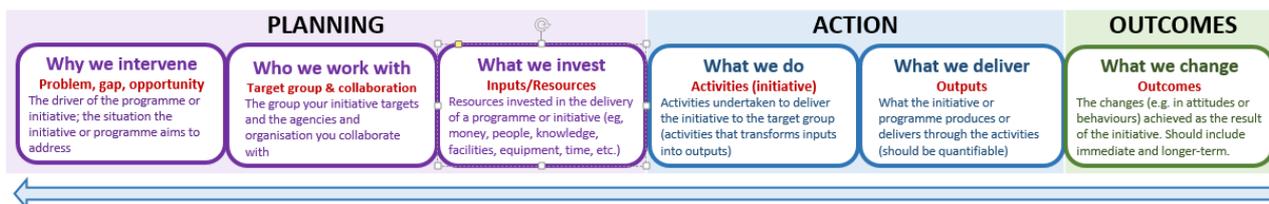
## Intervention logic model

This intervention logic model structures the planning, proposal form and the monitoring and evaluation of the initiatives.

It is called an “intervention” model because it maps why and how an initiative will intervene in a specific context to address a problem or need and produce a desired change or impact. It is called a “logic” model because it reveals an understanding of the way the components of the initiative work together and where the links or causal relationships between the different components are. Logic models can assist you (and other stakeholders such as funders, managers, etc.) to consider whether each component in your proposed initiative makes sense in the context of the entire logic model, and to assess whether the initiative is a good solution to the problem you have identified.

The diagram below shows the logic model we would like you to have in mind when planning your initiative. This model structures the questions on the proposal form. The words in red are the jargon words used in research and by social policy professionals. They can be very useful once you grasp the *inputs > activity > outputs > outcomes* logic. If you aren’t comfortable with the jargon, focus on the phrase at the top of each rounded box. The proposal form steps through these components, and we also ask you to enter some high-level details of your initiative into the logic model template provided at the end of the proposal form.

### Intervention logic model for initiatives



You may have submitted an Expression of Interest or a proposal because you thought of something you wanted to *do*. However, it is sometimes helpful to start by focussing on a desired outcome, and work back from there to think about the most effective deliverables (outputs—such as events, training sessions, written materials, apps, etc.) to deliver the change you are aiming for. From there, you can think about what activities and resources (inputs) you need to deliver those outputs.

Your proposal should not vary greatly from the initiative you discussed in your Expression of Interest. However, this proposal process gives you the opportunity to fine-tune the logic of your proposed initiative and define more of the details. Any changes from what you initially proposed should be made clear in the proposal form.

### Problem, gap or opportunity

We would like to see evidence behind your identification of the problem, gap or opportunity your initiative is designed to address. For example, if your initiative is around developing information for International Students, you need to make sure you are aware of other similar information and have explored options for adding to other information rather than producing a whole new set of resources. Too much information can be as ineffective as too little information. We’d also like to see that you have discussed your idea with International Students to ensure you have correctly identified the gap.

**Why we will intervene**  
**Problem, gap, opportunity**  
The driver of the programme or initiative; the situation the initiative or programme aims to address

## **Target group and collaboration**

The target group for almost all of the funded initiatives will be International Students (some may address staff working with International Students). Be as specific as possible about your target group (which International Students) and how you are going to ensure you reach the target group. Some interventions tend to attract people who are already competent in the focus of the initiative (for example, diversity workshops might attract those who are already comfortable with diversity). How will you ensure you are reaching some of the students most likely to benefit from your initiative? Are there sub-groups in your target group that may have special needs (e.g., you may hold a safety workshop for all International Students, but look out for students who are new to New Zealand, whose needs may be greater). We would also like to know how many International Students you think your initiative will reach—both directly (as participants) and indirectly (for example, flow-on effects to other contexts).

### **Who we will work with**

#### **Target group & collaboration**

This is the group of people the activities in your initiative will target and the agencies and organisations you will work with

It is also important that you identify the right government and/or non-government agencies and organisations to collaborate with. This may include groups with particular expertise in relation to your target group. This can also be other groups attempting to serve your target group, perhaps with a different initiative or support. Or you could team up with a similar organisation to offer the same initiative (for example, a group of providers).

## **Inputs into your initiative**

Your inputs will include all the tangible and intangible resources you need to invest in order to deliver your initiative, including money, people, expertise, venues, equipment, time, technology, etc. The proposal form asks you to specify the inputs you are requesting funding for.

### **What we will invest**

#### **Resources/Inputs**

Resources invested in the delivery of a programme or initiative (e.g., money, people, knowledge, facilities, equipment, time, etc.)

You may also be contributing resources from within your organisation's budget, and you may be using resources from the organisations you are collaborating with. Precision on your needed inputs or resources will assist you to deliver to a high-quality initiative, and to meet value-for-money expectations. We are keen to fund initiatives that provide sustainable support for International Students, so the proposal form also asks if your organisation has the means to continue offering the programme after the year of funding, or some other plan to sustain the initiative.

## **Activities (initiatives)**

The activities you are proposing are the heart and soul of your initiative (and the longest section of the proposal form). As mentioned above, you will need to think about the outcomes and outputs first, and then identify which activities you need to deliver them. It is important to ensure that the activities you plan will deliver high-quality outputs, which greatly increases your chance of delivering outcomes.

### **What we will do**

#### **Activities (initiative)**

Activities undertaken to deliver the initiative to the target group (transform inputs into outputs)

## **Outputs**

Your outputs are what you deliver or produce (an event, 3 training sessions, 200 brochures, a series of videos, etc.). Outputs are usually countable, but the assessment of their success will include qualitative detail. For example, you don't just want to deliver an event; you want to deliver a high-quality, well-attended event where participants felt welcome and comfortable participating. This is all part of your outputs, as it does not relate directly to any change resulting

### **What we will deliver**

#### **Outputs**

What the initiative or programme produces or delivers through the activities (should be quantifiable)

from your initiative (these are outcomes). While these details are not outcomes, they do contribute to the likelihood of your target outcomes being achieved. Details about the quality of your outputs will be asked for in the Final Report and Evaluation form.

## **Outcomes**

An outcome, in contrast to an output, is something that has changed as a result of your initiative (behaviours, knowledge, beliefs, feelings of wellbeing, etc.). It is best, with this size of initiative, to aim for a handful of outcomes that will challenge you, but that you are confident you have the ability to deliver. For example, if your output is a beach safety video for International Students, your target outcomes may include the viewers' understanding of danger zones on New Zealand beaches, how to recognise when someone is in trouble, and how to react in an emergency. If you show your video to 60 students, but 80% of them come away confused about water safety on New Zealand beaches, then you have met your outputs (you produced a video), but you have not delivered your intended outcomes. You would need to show in your evaluation where the problem was. For example, you may have delivered a poor quality output (bad video) resulting from insufficient inputs (you didn't hire proper video producing and editing technology), or perhaps the activity wasn't well-suited to the outcome (simply watching a video isn't sufficient to meet the learning outcomes you intended—you needed to go to the beach).

### **What we will change**

#### **Outcomes**

The changes (e.g. in attitudes or behaviours) achieved as the result of the initiative. Should include immediate and longer-term.

A helpful acronym to use when identifying outcomes for your initiative is to look for SMART outcomes:

- **Specific.** Your outcome must target the issue you are concerned with precisely.
- **Measurable.** Measurable outcomes are easier to manage and evaluate. However, so-called “soft” or qualitative outcomes are also valid. Some outcomes can be measured immediately, while others may only become evident over time. The proposal form asks you to identify both immediate outcomes and longer-term outcomes.
- **Achievable.** You need to set an outcome that can be achieved (in most cases) immediately, though it may also be sustainable into longer-term impacts.
- **Realistic.** You need to set outcomes that you have the experience and expertise to deliver, or that you intend to contract someone to deliver for you. Don't set yourself (or your participants, target group) an impossible task.
- **Time bound.** You must make clear by when the objective is to be achieved.

## **Monitoring and evaluation**

**How well did we do?  
Is anyone better off?**

There is a two tier process for monitoring reports.

- For small projects, an evaluation report is due at the end of the project
- For large projects, a mid term report is required in addition to the end of project evaluation report.

Monitoring and evaluation are essential tools to support and assess the effectiveness of an initiative, and also for the agency administering the funding (in this case the Ministry) to be confident that the funding is well-invested, and that International Students wellbeing will improve as a result.

**Monitoring** is the activity of “keeping an eye on” your initiative to ensure that it is progressing as planned, and to identify any risks to success, ideally before they occur. This isn't a casual activity—you will need planning documents, budgeting systems, communications and meetings, etc. Monitoring should be ongoing, and should involve the routine collection of information and data as

you work with different groups and plan your implementation. This information and data will support the evaluation process.

**Evaluation** is the collection and analysis of information and data to assess the effectiveness, quality and value-for-money of your initiative. Your evaluation will make judgements about how good or effective your initiative was, and offer some explanation about why you have made these judgements. It might also offer recommendations, such as ways to improve the activity to enhance its outcomes in cases where the initiative could be repeated by others.

Funded initiatives will be asked to complete an Update Report half-way through their funded period, and a Final Report and Evaluation upon completion. We will send out a template for these, both of which will step you back through the logic model to assess progress and evaluate delivery and outcomes. A common guideline for initiatives of this size is to spend 5% of your budget on evaluation. We do not require this, as we are providing much of the evaluation material, but we do expect significant time and effort to go into your part of the evaluation, including the forms we distribute.

### **Your role in evaluation**

You need to plan how you will evaluate your activity and output on or around the day of delivery, through direct feedback from participants and those who worked with you on the initiative. You will need a mechanism for doing this that will generate feedback both on the quality of the delivery or product (the outputs) and on whether or not you have achieved the outcomes you were aiming for.

Here are some ways you can gather information for your evaluation:

- **Questionnaire**

Written questionnaires enable you to get feedback from each individual who has participated in your initiative. They are most effective when they include some “closed questions” (tick boxes or yes-or-no answers to provide quantitative information) and some open questions (to provide qualitative or descriptive answers).

One way to ensure you’re getting both types of information is to use scaled questions (variations on the “on a scale of x to y” formula using words, numbers, symbols, etc.), and then follow that up with an open question so that the respondent can elaborate on their scaled response. An example of a useful scale to use when asking participants to evaluate an initiative might be: *How well did the [seminar, video, etc.] meet your expectations?* And the responses could be: *Fully met, Mostly met, Partially met, Not met.* You could then provide participants with the option of elaborating on or explaining their reply.

- **Interviews**

Interviews can be held with individuals and/or with group or sub-groups to complement individual responses, or when they are less important. Interviews may be used to gather more information about topics or questions already gathered using other methods.

- **Participatory methods**

Participatory methods build the participant feedback into the activity itself. For example, as part of a round of introductions people could be asked to talk about their reasons for participating, and with the consent of participants this information can be recorded (written down). This will help you know if what you deliver (your output) meets the outcomes you are aiming for. Another example of participatory methods is posting “stickie” notes with comments on a wall or poster, which makes them more anonymous. Participatory methods do not work well for gaining individual feedback.

There is a wealth of information available on the internet to guide the development of evaluative questionnaires and other methods of feedback, including the following two resources:

- <https://www.cdc.gov/healthyyouth/evaluation/pdf/brief14.pdf>
- <https://knowhownonprofit.org/organisatin/impact/measuring-your-impact/questionnaires>



We **shape** an **education** system that delivers  
**equitable** and **excellent outcomes**

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He mea **tārai** e mātou te **mātauranga**  
kia **rangatira** ai, kia **mana taurite** ai ōna **huanga**