

THE ROLE OF INDEPENDENT,
NON-GOVERNMENTAL QUALITY
ASSURANCE SPECIALISTS FOR
THE ENGLISH LANGUAGE TEACHING (ELT)
COMMUNITY IN AUSTRALIA

Research and Results from
NEAS Global Stakeholder
Engagement in 2020

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NEAS VISION AND MISSION

Since 1990, NEAS has advanced quality education through its quality assurance services and continues to lead the way in developing, supporting and promoting continuous improvement throughout the education community. NEAS Vision and Mission provided grounding to the purpose of this Global Stakeholder Engagement Project.

VISION – NEAS IS THE GLOBAL LEADER IN QUALITY ASSURANCE FOR THE ENGLISH LANGUAGE TEACHING COMMUNITY.

MISSION – NEAS ADVANCES EDUCATION BY PROVIDING QUALITY ASSURANCE SERVICES FOR EVERYONE IN THE ENGLISH LANGUAGE TEACHING COMMUNITY.



PURPOSE OF THE REPORT

This report's purpose is to better understand the role that NEAS plays within the ELT community in Australia and across the region. The mission of NEAS has evolved as regulations governing the English language sector have been iteratively mandated by the Australian government over the last two decades. A role was created for an independent, non-governmental quality assurance specialist to bridge specific gaps for the ELT community and to provide mechanisms for continuous improvement in the quality and provision of English language teaching in Australia.

The widespread disruption to the ELT community due to the pandemic should be acknowledged upfront. From the migration of teaching content online, to the adoption of safe and effective teaching practices for face to face delivery, the uncertainty wrought by the disruption to travel and our borders has significantly distracted and impacted the education sector. Quality assurance was relevant before the pandemic and will remain a critical element as the ELT community evolves and adopts new methods of student-teacher engagement in the years to come. The role of independent, non-governmental quality assurance specialists in Australia and around the globe will evolve to meet the challenges and needs of their ELT communities in the years ahead.

EXECUTIVE SUMMARY

The impact of COVID-19 has been dynamic and significant, affecting the entire international education industry and its inter-connected ecosystem. This unique ecosystem of agents, providers, peak bodies, regulators, advocates and quality assurance specialists each have their own role to play, yet work together in a community of mutual support. The English Language Teaching (ELT) community has been significantly impacted by the rapid spread of the outbreak, necessitating border closures and responding through remote and hybrid learning and teaching solutions. Whilst adept at weathering storms of the past, our ELT community is now facing a perfect storm of challenges ranging from uncertainty and continued sustainability to survival of education providers.

As the Australian ELT community grapples with these complex issues and challenges, we remain committed to maintaining the quality and standards that have been developed and embedded over several decades. It is these quality measures and standards that have propelled Australia's ELT community to global excellence and have cemented Australia as a destination of choice for ELICOS and pathway students.

To better quantify the current and near-term needs of the ELT community in Australia, the role of independent, non-governmental quality assurance specialists has been looked at in greater depth. NEAS engaged Edified, an Australian education industry specialist consultancy, to undertake a global stakeholder engagement project. Commencing in early August, this project has been informed through stakeholder surveys, in-depth interviews, and focus groups leading to the convening of an Expert Panel in late September 2020.

NEAS continues to pro-actively engage with its stakeholders through active listening and soliciting constructive feedback in a process of continuous improvement for the sector. By doing so, NEAS will meet the complex challenges of 2020 and will inspire future quality assurance advocacy and engagement for the ELT community and ecosystem.

Across the surveys, interviews, focus groups and expert panels convened, it is increasingly evident that the role of independent, non-governmental quality assurance specialists for the ELT community in Australia has never been more critical. NEAS is positioned to take a more robust and active role not only in quality assurance but in pro-actively advocating in concert with peak bodies and sectoral leaders to propel the Australian and regional ELT community to higher standards and achievements.

NEAS is the global leader in quality assurance for the ELT community, quality assuring English language teaching provision across higher education, vocational education and training, high school and independent ELICOS providers.

NEAS has proven expertise in independent quality assurance that is being embraced throughout the wider education community. Providers of ELT qualifications, education agents and a range of other service providers have engaged NEAS Australia as their independent quality assurer of choice.

Quality Assurance is broadly seen as vital for the long-term sustainability of the ELICOS industry. A step-change in the adoption of quality frameworks more broadly will be essential as the industry recovers, repositions and rebuilds. The role of independent, non-governmental quality assurance specialists will become an important pillar in Australia's recovery efforts to grow sustainably and will enable NEAS to forge new paths of quality learning and teaching frameworks for the region in the years ahead.



178 Survey Responses

to an August survey of current and former NEAS Members, Agents, Government entities and Peak Bodies



18 Qualitative Interviews

with on and offshore ELT Community Stakeholders



1 Focus Group

consisting of NEAS Advisory Council Members



1 Expert Panel

consisting of key Stakeholders across the ELT Community and Ecosystem

THEMES AND FINDINGS

The purpose of this global stakeholder engagement was to answer the fundamental question of: What is the role of independent, non-governmental quality assurance specialists to the English Language Teaching (ELT) community?

Themes and findings come directly from stakeholders engaged for this paper and are grouped into thematic areas of perceived importance and relevance to the ELT community. This summary of findings provides NEAS with greater clarity regarding its role, the impact that it has, the needs of the ELT community and the direction in which it is headed.



Quality Assurance provides reassurance to government regulators.



Quality education is vital for Australia's attractiveness as an education destination of choice.



Quality Assurance matters to Australia and the greater Asian region.



The support and guidance provided to Education Providers is valued.



Quality teaching and education improve the student experience.



Innovation and positive disruption will refocus the ELT community.

RECOMMENDATIONS

1. NEAS should remain at the forefront of innovation and positive disruption that will benefit the Australian ELT Community.
2. NEAS can highlight and leverage best practice and standards development in English Language Teaching for online delivery, offshore and transnational education, education agents, products, services and professionals.
3. Brand, reputation and role are largely to do with perception. The perception of NEAS as the independent, non-governmental quality assurance specialist in the ELT Community in Australia is strong and opportunities exist to clarify and strengthen this role across the industry through collaboration with complementary organisations.
4. NEAS has demonstrated its agility and ability to transform for the needs of the ELT Community. However, with limited resources and an unstable environment for international education and training in Australia and beyond, NEAS and its members should further consider diversification without losing sight of their core purpose and goals supporting a high quality international student experience.
5. Regulations mandated by the Australian Government will evolve to meet new challenges and opportunities created by the COVID disruption. NEAS should be at the forefront of guiding and educating its members and the broader ELT community through change so that providers can survive, adapt and thrive. Value is added by partnering and guiding the industry through change and acting as a vital source of truth for information and the go-to resource for expert guidance.

GLOBAL STAKEHOLDER ENGAGEMENT ALIGNS WITH NEAS PRINCIPLES AND GOALS

NEAS Principles and Goals cover four main pillars across Quality Assurance, Scope and Recognition, Partnerships, and People and Culture. These Principles are directly relevant and informed the lines of enquiry across surveys, interviews, focus groups and expert panels conducted.

Quality Assurance:

Quality is at the centre of everything that NEAS does and defines its DNA. Industry capacity is increased by actively engaging with members, stakeholders, advocates, regulators and with similar QA organisations offshore. Over 200 unique individuals provided relevant and timely feedback and input into the criticality of independent quality assurance.

Principle: Quality is at the heart of everything we do.

Goal: Build industry capacity through strategic interventions that foster growth, sustainability, innovation and best practice in English Language Teaching.

Goal: Deliver a total customer satisfaction promise through a member oriented service culture.

Goal: Enhance service quality to ensure competitive advantage and complementary positioning with other Quality Assurance organisations.

Scope and Recognition:

NEAS is the global leader in quality assurance innovation. The pandemic has forced member and non-member institutions to act quickly to migrate content online and develop learning and teaching strategies to bridge the digital divide. Education providers are realising that remote, digital and hybrid modes of teaching will inevitably feature as a core offering for specific market segments. NEAS is well positioned to provide quality assurance frameworks for online delivery and remote teaching standards.

Principle: We are the global leaders and innovators in quality assurance.

Goal: Grow and maintain membership globally.

Goal: Grow and maintain the NEAS brand portfolio to encompass a depth and breadth of products and services, thereby increasing recognition, reputation and global awareness of NEAS.

Goal: Take a global leadership role in the driving of quality in teaching and learning.

Principle: Strategic engagement underpins our services. We position for purpose.

Goal: Engage in complementary relationships with Commonwealth and other government regulators for the benefit of learners and providers.

Goal: Achieve productive working relationships with complementary peak bodies.

Goal: Lead global network of quality assurance organisations.

Partnerships:

NEAS is committed to engaging with key stakeholders, thought leaders, and advocates to ensure the ecosystem is working for the benefit of the sector. This project canvassed the opinions and ideas of on and offshore stakeholders, including regulators, peak bodies, education providers, agents and QALEN (Quality Assurance in Language Education Network) members. Maintaining productive working relationships and partnerships through active engagement makes NEAS a stronger organisation.

Principle: We strive for excellence, we listen, we learn. We are here to make a difference.

Goal: Ensure all assets and resources within NEAS are aligned and support NEAS mission.

Goal: Empower stakeholders through professional development, continuous engagement, reflective practice and open communication.

Goal: Communicate and demonstrate international leadership in a culture of quality.

People and Culture:

NEAS engages with members, partners and stakeholders through continuous engagement and transparent open communication. NEAS demonstrates thought leadership for the international quality assurance community through continuous improvement and reflective practices such as through surveys and convening expert panels.



STAKEHOLDER SURVEY

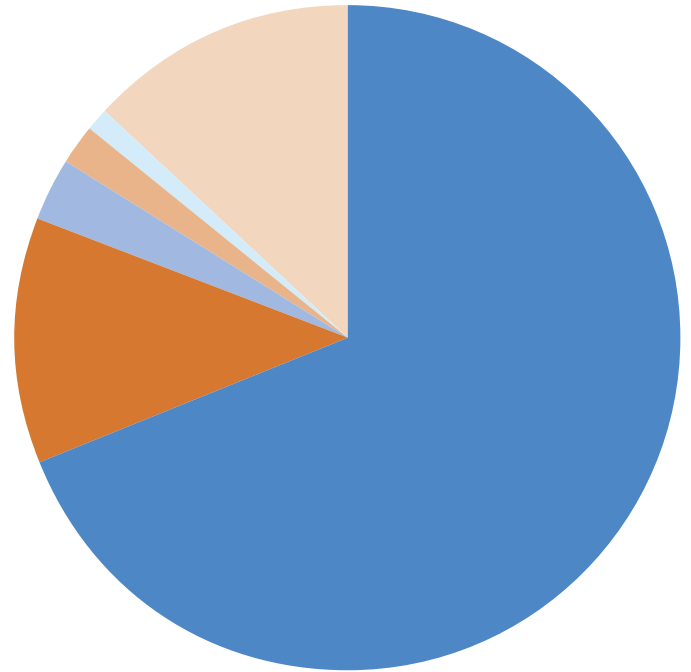
178 survey responses to an August survey of current and former NEAS Members, Agents, Government entities and Peak Bodies. A solid 25% response rate to the survey was recorded.

Of the 178 NEAS stakeholder survey responses, the majority believe NEAS is a key service offering for the ELT community, with 71% (126/178) rating it on the 'essential' end of the scale (7 and above out of 10).

Stakeholders rate NEAS' quality assurance and endorsement the most valuable of its services. Expert guidance, online professional development and the opportunity for continuous improvement assist the ELT community to overcome challenges.

Over 75% of stakeholders currently use services such as quality endorsement and attend the NEAS annual conference and periodic webinars, whereas nearly a quarter of stakeholders are not aware of other services such as regular health checks and advocacy work for quality assurance. QLS Workshops were the least valued service offering.

45% of surveyed stakeholders believe that all or some of NEAS' current quality assurance frameworks should be prescribed and mandated. 33% are generally supportive of the notion of mandated frameworks, depending on the context and what is covered. 10% believe this would be counterproductive.



FOCUS GROUP

A focus group with participants consisting of NEAS Advisory Council Members was convened in August.



The NEAS Advisory Council offered frank and direct feedback from the perspective of education providers who have a first-hand perspective on the purpose, rationale and benefits of quality assurance and supportive frameworks. Advisory Council members expressed some concern that QA is likely slipping from the essential to the desirable end of the spectrum as providers are forced to make pragmatic decisions regarding their sustainability and survival, which has caused their priorities to shift.

Staff need to be supported to learn to teach effectively through online mediums and platforms and to identify students at risk and in need of targeted learning, emotional, financial and specialist welfare support. Students that are on shore need to be supported with greater care given their acute vulnerabilities, whilst those studying online must be actively encouraged and provided with a variety of tasks to keep them engaged.

What constitutes QA will likely evolve the longer remote learning and online platforms are replacing face to face engagement. Quality will remain important during this period of change,

with a shifting landscape in need of empathy and leadership to pro-actively advocate for the ELT community. Being a good teacher in a face to face setting doesn't automatically translate to effective learning online. Training teachers on their role in helping and supporting students inside and outside the classroom is paramount.

Advisory Council members see opportunities for better coordination of events, webinars, professional development, advocacy and joint membership and registration fees across the advocacy and regulatory ecosystem.

“IT’S OUR RESPONSE NOW THAT WILL MAKE A DIFFERENCE.”

NEAS ADVISORY COUNCIL MEMBER



QUALITATIVE INTERVIEWS

18 Qualitative Interviews with on and offshore ELT Community Stakeholders were held in August. Interviewed stakeholders hailed from across the ELT ecosystem, including regulators, peak bodies, advocates, agents and education providers.





FINDINGS IN FOCUS



INDUSTRY REGULATORS AND QUALITY ASSURANCE

An independent, non-governmental QA specialist provides the regulator with a level of reassurance and further confidence that the education provider has a culture of continuous improvement and a demonstrated commitment to exceeding the standards which have been set.

Independent QA is a resource for providers to ensure they are running to standard and ensures they are putting in place the steps they need to deliver a sustainable business.

Aspirational standards that sit above regulatory standards are vital and regulators see that as a positive flag of quality and commitment by the provider.

New providers need aspiration to meet and exceed regulatory requirements that are in place and to ensure their own benchmarks are met and they are up to scratch.

To run a successful ELICOS business, the commitment to quality teaching and services cannot occur in isolation. It takes a strong community of practice and support. This community of practice keeps the ecosystem strong.

NEAS has a role to play in nurturing new providers as well as those that don't have the experience or don't have the structures in place to meet regulatory requirements.

There are multiple layers of where the role of an independent quality review can reach, from quality teaching, to premises to the adequacy of support services.



THE IMPACT OF QUALITY ON DESTINATION AUSTRALIA

Australia's reputation and student propensity to recommend Australia to prospective students hinges on quality, a positive experience and outcomes.

A benefit of comprehensive, non-governmental quality assurance is Australia's ability to deploy and demonstrate its reputation for high quality education that is consistent globally and at scale.

NEAS has helped to define Australia's ELICOS selling points, from its quality of teaching, to the student experience as well as defining the wider Australian quality education experience. As Australian providers pivot towards a new online world there will be different quality factors that will need to be assessed that are distinct from physical, face to face quality factors.



THE NEEDS OF EDUCATION PROVIDERS

NEAS has a role to play in managing the needs of providers as they balance corporate interests whilst keeping their eye on having long term sustainable quality delivery which provides Australia a stable platform in the global market.

NEAS provides members with the ability to independently check their governance systems and to ensure that things that are presumed to be operating correctly actually are. Therefore, independent quality assurance specialists bring peace of mind. This check and balance component is invaluable.

Independent QA specialists can assist education providers to demonstrate their commitment to quality as they go forward in an environment that is complex and changing.

Online quality assurance frameworks give providers the possibility to navigate a brave new hybrid world, underpinned by quality standards.

Independent quality assurance will lead Australia through uncertain times and prepare the industry for a new set of potentially revised standards that will cover key areas like remote assessment.

NEAS and regulators can help individual teachers and providers continue to deliver a quality product and be innovative as they manage their operations with fewer resources in the coming years.



AUSTRALIA AND THE ROLE OF QUALITY IN THE REGION

Australia should capitalise on quality assurance frameworks established to help shape other regional education systems and jurisdictions. Genuine interest and demand exists for assistance in quality assurance across many of Australia's closest neighbours.

There are mixed levels of familiarity with online and blended learning in other countries, and Australia can provide leadership and expertise across the region through stronger partnerships in the provision and quality assurance of delivery modes.

Many parts of the Asian region are hungry for leadership in quality assurance. If Australia does not adequately provide this leadership, competitor Commonwealth countries may come in to take charge with quality assurance in partnerships and establishing best practice. There is a crucial need for Australia to maintain its competitive advantage in sharing best practice in quality assurance.

Transnational delivery capability will become extremely important for education providers. Expert guidance is needed on regional regulatory systems and how they apply to offshore programs. NEAS is well-placed to provide this expertise.

NEAS has a role in looking after best practice in centre management and minimum ELT qualifications in the region which in turn will assist with staff mobility across borders.

Opportunities exist for NEAS to help Australian education providers manage the complex mesh of diverse regulations in the delivery of TNE across the region. Experts are needed to bridge the gap in how to operate legally and effectively and ensure onshore and offshore admissions and teaching standards have equivalency.



THE STUDENT EXPERIENCE

QA specialists raise the benchmark for ELT service for students.

Quality education delivery is paramount to ensure the student experience is positive for those that are here onshore and that positivity will last a lifetime because it hinges on a quality experience.

The student experience is critical and positioning quality from beginning to end requires the ELT community to consider aspects of quality assurance in every point of the life cycle of the journey of the student. Therefore, all touchpoints from Agents, to teachers, to education centres and the curriculum need to be carefully maintained.

NEAS can ensure that there is consistency to quality assurance across the onshore and online ecosystem so that students have a seamless experience.

Better support mechanisms are needed to support students both onshore and offshore to ensure that as they transition from online to in person and from offshore pathway to onshore degree there is a wholistic support framework in place.



POSITIVE DISRUPTION AND INNOVATION

Effective digital delivery of programs requires specialist professional development and frameworks for CPD recognition for industry professionals.

Standards will need to evolve and change to adapt to the environment as we move to digital and hybrid learning engagement. There is a lack of guidance for the ELT community in relation to technology requirements. As providers increasingly move online, enrolment ratios may need to change and providers will need upgraded systems in place. This will require critical thinking and innovation.

Established English language testing companies providing at home test proctoring and the advent of new entrants in this space will be a disrupter and present opportunities for quality assurance and testing integrity.

Digital technologies and other learning methodologies will increasingly be utilised in English language teaching and will disrupt the norm. Promising practice and lessons learned from the first half of 2020 are already sinking in.

Australia should shift focus to the quality of its technical platforms, teaching skills and capabilities to support students via remote learning and act as a leader in this space. NEAS can ensure pragmatic quality standards are maintained so that innovation is not detrimental to quality.

“WE HAD 10 YEARS OF
INNOVATION IN 10 DAYS.”

BRETT BLACKER, ENGLISH AUSTRALIA

POSITIVE STAKEHOLDER VIEWS ON NEAS

NEAS is a strong advocate
and voice for the industry.
Recognised as a quality
endorsement body
worldwide

NEAS possesses tremendous
experience in the ELT sector in
Australia and the world, and
plays a critical role in assisting
providers in the delivery of high
quality ELICOS teaching and
management to international
students

I FEEL THERE IS A
NEED FOR A BODY
THAT CAN PROVIDE
QUALITY ASSURANCE
ENDORSEMENTS
FOR PRODUCTS/
SERVICES

NEAS is recognised in
the English Language
Teaching community for
their commitment to quality
outcomes

It is important to have an
independent voice in the sector
related to Quality Assurance –
separate from compliance

IT'S VERY
IMPORTANT
TO BE ABLE TO
IDENTIFY AS BEING
ACCREDITED BY A
REPUTABLE BODY

NEAS PROVIDES
RELEVANT SUPPORT
AND A BENCHMARKING
FOR ALL FACETS OF
THE ELICOS INDUSTRY

We need an organisation that is
au fait with our business – an ally,
a mentor and a positive governing
body

It is the only body
which underpins the
quality of the ELICOS
industry in Australia

Not only does NEAS offer
assurance with compliance
and quality, it also supports the
industry with opportunities of
development, improvement and
being available at all levels of
support.

NEAS ENHANCES THE DEPLOYMENT OF AUSTRALIA'S INTERNATIONAL EDUCATION SERVICES INTERNATIONALLY, BY RAISING THE QUALITY OF STAKEHOLDERS SUPPORTING THE SECTOR AND PROMOTING AUSTRALIA'S SOFT POWER GLOBALLY.

Because NEAS has been a leader, a guide and a supporter of industry best practice for many years and without NEAS we don't have an industry developed supporter of quality.

Centres rely on NEAS to set and uphold the standard. People in our industry see the NEAS tick as a sign of quality and should be assured NEAS accredited centres are doing the best they can do.

I think that an independent agency dedicated to quality in the sector is vital for professional behaviour and to reassure the student market about study with Australian providers.

NEAS provides guidance which is very helpful for the participants in this industry. During the outbreak of COVID, NEAS also acts as a bridge to communicate with participants and the government.

NEAS' BEST PRACTICES FOR ONLINE DELIVERY HAVE BEEN USEFUL AS ARE THE LETTERS OF ENDORSEMENT AND NEW SITE APPROVAL, WHICH DEFINITELY SPEEDS UP CRICOS REGISTRATIONS WITH THE REGULATOR

Some might say NEAS isn't as necessary since regulators have taken over some of the regulation of courses, but as an advocate for the sector, it's absolutely essential right now.

NEAS IS THE MOST ACCESSIBLE WAY OF BEING INFORMED AND GETTING FEEDBACK REGARDING OUR PERFORMANCE AND MEETING EXPECTATIONS IN ELICOS.

It's important to have someone with oversight in our industry. It may not be absolutely essential, but the quality endorsement process along with expertise in PD is really important.



EXPERT PANEL

An Expert Panel consisting of key Stakeholders across the ELT community was convened on September 24, 2020. This event, originally conceived as a face to face summit of key government and industry leaders, was repurposed into an online expert panel. The panel was purposefully selected to provide perspectives and input from thought leaders across the ELT community in Australia.

Regulatory Stakeholders

Greg Simmons, TEQSA

Francisco Meza, ASQA

Advocacy and Promotion Stakeholders

Phil Honeywood, IEAA

Emmet O'Sullivan, Austrade

Peter Mackey, StudyNSW

Brett Blacker, English Australia

Simon Winetroube, UECA

Education Providers

Janelle Chapman,
TAFE Queensland

Heather Thomas, UoW College

Global Partnerships

Michael Fay, AFG Ventures

Quality Assurance Specialists

Tanya Buchanan, NEAS

Dr Patrick Pheasant, NEAS

What is the role of independent, non-governmental quality assurance specialists for the ELT community?

QA specialists raise the benchmark for ELT service for students as they holistically cover the curriculum, facilities and student services. Therefore, NEAS' role is considered useful from a regulator point of view. An independent, non-governmental QA specialist may provide regulators with a level of reassurance and further confidence that the education provider has a culture of continuous improvement and is demonstrating its commitment to exceeding the standards which have been set. NEAS has a role to play in managing the needs of providers as they balance corporate interests whilst keeping their eye on having long term sustainable quality delivery, which in turn provides Australia a stable platform in the global market.

From a regulatory perspective, the ELICOS sector is stable and well-run and adverse regulatory decisions appear to be rare. Education businesses need to maintain quality and have a clear strategic vision for their business. Independent quality assurance is viewed as a resource to ensure they are running to standard. Aspirational standards that sit above regulatory stands are vital for Australia and regulators view that as a positive flag of quality and commitment by the provider.

Independent quality assurance is a resource for providers to ensure they are putting in place the steps they need to have in order to deliver a sustainable business. To run a successful ELICOS business, the commitment to quality teaching and services should never occur in isolation, as it takes a strong community of practice and support. This community of practice keeps the ecosystem current and strong.

Historically, the role of quality assurance in Australia's English language sector from inception demonstrates that there was a long history of quality standards in place even before regulations were established and set up the industry to have the global reputation it maintains to this day. There have been over 30 years of quality standards adopted by providers and NEAS has a role to play in nurturing new providers as well as those that don't have the experience or don't have the structures in place to meet regulatory requirements. New providers need aspiration to meet and exceed regulatory requirements that are in place and to ensure their own benchmarks are met.

For long term providers, NEAS provides them with the ability to independently check their governance systems and to ensure what is presumed to be operating correctly actually is. Independent quality assurance specialists bring peace of mind. This check and balance component is seen as invaluable to Australia's reputation as its brand and profile hinges on quality. Quality education delivery is paramount to ensure the student experience is positive for those that are onshore and that positivity will last a lifetime because it hinges on a quality experience.

How is this crisis impacting QA and the capacity of providers to meet and exceed minimum regulatory standards and continuously improve?

Australia has a strong brand and reputation underpinned by quality. It has been able to move quickly despite significant disruption and ongoing competition. One of the real benefits of comprehensive, non-governmental QA is Australia's ability to deploy and demonstrate that it has a reputation for high quality education that's consistent globally at scale. Independent QA specialists can assist education providers as they go forward in an environment that is complex and changing. NEAS contributes to ongoing professional development for industry players and there may be further PD opportunities to assist quality assurance in other segments of the landscape such as through digital delivery of programs, not just the actual delivery of ELICOS programs.

Providers may be struggling to maintain a connection with their students through remote engagement. Ensuring students are engaged in an online environment from speaking to listening comprehension and how they gauge that in a F2F environment vs an online is critical. It's likely the standards will need to change to adapt to the dynamic nature of the online education environment. There's minimal guidance at the moment regarding technology requirements. If a provider goes online and the enrolment ratios change, the systems that are in place may need to be reviewed.

Online delivery doesn't lend itself well to intensive style learning as it's more self-paced and there are challenges for English instruction in that way. Providers have done a tremendous job to pivot and adapt their pedagogy. Regulators would like to see providers establish a learning culture that mimics the previous face to face learning culture, which is still being cultivated and developed. The industry has witnessed an extraordinary disruption to education and international education in particular. The industry will come out of this and there will be a new normal, but it will be different from before COVID. What sort of blend of face to face, online and offshore delivery will represent ELICOS delivery in Australia after COVID remains to be seen. The regulators will expect that providers are meeting standards once a new normal emerges.

Key Takeaways

An independent, non-governmental QA specialist can provide regulators with a level of reassurance and further confidence that the education provider has a culture of continuous improvement and is demonstrating its commitment to exceeding the standards which have been set.

Independent quality assurance specialists bring peace of mind. This check and balance component is seen as invaluable.

Independent QA specialists can assist education providers as they go forward in an environment that is complex and changing.

It is likely that standards will need to change to adapt to the dynamic nature of an online education environment.

The industry will come out of this and there will be a new normal, but it will be different to pre-COVID days.



Many people believe we had 10 years of innovation in 10 days.

There is an air of optimism emerging.

NEAS can help us define what is quality in this new environment and ensure that we are delivering quality outcomes and experiences.

NEAS quality assurance frameworks give providers the possibility to navigate into a new world. We need new quality standards for hybrid delivery.

What is most relevant to the ELT community right now and what interventions or support will resonate most?

The advent of other English language testing companies is a disrupter that should be acknowledged as there are new players that may be considered down the track and this will be a disruptive element if the pool is widened. Undoubtedly, Home Affairs will be quite interested in the security of at home testing and proctoring as this becomes a standard feature. As an industry, we are still recovering from the negativity generated by past television reports and the impact these had on the reputation of the sector. The government understands that we are a high-quality industry, but we need to keep breaking down and working through real and perceived barriers across the wider community and at all levels of government, from Federal to State to Local levels.

Recent industry conference themes have been focused on resilience and reinvention and sharing of best practice. The industry will not see the future normal look the same as before, yet this is not a bad outcome either. Many people believe we had 10 years of innovation in 10 days and this has forced the industry to change the ways in which digital technologies and other learning methodologies could be utilised in English language teaching. Therefore, it has disrupted the norm, but not necessarily for the worst. Best practice and lessons learned are sinking in which will be invaluable as the sector improves its approach. Circumstances are dire for cash flow for providers, but there is an undercurrent and commitment to getting through the other side and coming out stronger. There is an air of optimism emerging.

It will be a priority to open the borders as quickly as possible and be heading in the right direction. Managing the social license of international students re-entering whilst Australian residents are returning will require some effort, but there are signs for optimism. We have to give people hope so they can start planning and moving forward to some sense of normality for the day that a new normal does arrive.



Given the challenges facing the ELT community, how can quality assurance specialists best support education providers?

The industry is in a completely new environment of online learning, virtual learning, hybrid and blended learning. NEAS can help the industry define what is 'quality' in this new environment and ensure that we are delivering quality outcomes and experiences. NEAS has helped to define Australian ELICOS selling points from quality of teaching, to the student experience and the wider Australian quality education experience. Now that Australia is moving into a brave online world there may be different quality factors from a physical learning environment to be considered. We need to shift to quality of our technical platforms, teaching skills and capabilities to support students via remote learning and lead in this space. NEAS can ensure quality standards are in line and consistent onshore, offshore, online and across face to face modalities. Ultimately, Australian providers need help to be pragmatic without losing quality. Education providers do not want to cut corners that are fundamental to quality.

Quality is part of the DNA of long-term providers and Australia needs quality education in a variety of forms for the new world. The industry is not going back to the way it was as it has fundamentally changed forever. NEAS quality assurance frameworks give providers the possibility to navigate into a new world and the industry needs new quality standards for hybrid delivery. Providers are moving into a space that's not bound by the ESOS Act as they are delivering to students who are primarily offshore. What was previously understood to be true is now somewhat grey with some uncertainty as to what does and does not apply. The notion of independent QA that leads the industry through into a new set of possibly revised standards is what will be needed. A new set of revised standards will be needed to cover the broader space we're shifting towards, in relation to assessments.

Australia's ELICOS teachers have been quite innovative in learning delivery, particularly in relation to delivering virtual classes. Teachers have made students feel engaged and there's interaction taking place. In this environment of minimal numbers of students, loss of great teachers, and less income across the sector, the focus has been on changing delivery methods and understanding what will work in this current environment to keep students engaged. ELICOS is a strong pipeline into not only Higher Ed but VET and high school providers as well. It is important that we are looking at the standards and what they need to be for the future rather than just for face to face and onshore. This is a new way of delivering ELICOS, whether we like it or not. How the regulators and NEAS can help individual teachers and providers still deliver a quality product, be innovative and do more with less with resources is where providers would see benefit.

This crisis is impacting the entire ELT community and ecosystem. If there is no 'normal' to go back to, how can we get to 'better'?

Tension exists between commercial expectations of the organisation and the role of QA. NEAS has grown and risen from the industry itself as early industry participants wanted to have quality that was in the DNA of everything they sought to accomplish. Ultimately, it is up to NEAS and the members of the ELICOS sector to maintain standards and quality at all costs. Quality needs to be protected and not lost during this pandemic environment when there are enormous pressures on education providers. If we don't maintain our standards, we won't have an industry. The role of the regulator in an international context will be the next consideration as providers will have to work with regulators in other countries as TNE becomes more popular.

Australia needs to consider the student experience. It is not just one moment in a classroom, but it's the whole student journey, from when they are considering during their early teens to come to Australia to study, to their course graduation and seeking work. All of these moments need to be thought out and considered, along with how the experiences interrelate. How we, as providers, position quality from beginning to end will enable a focus on the future. Providers need to consider quality in every point of the life cycle of the journey of the student and the stakeholders involved from education agents, to teachers, to education centres and the curriculum. The student experience is critical even before they arrive, from pipeline to enrolment to graduation.

Students are the best advocates of the education sector and with the current pandemic, the experience of students is even more important as is how we address their needs during and after the crisis. In order to get to 'better', we need to consider how we can capitalise on QA initiatives to date that can help shape other education systems and jurisdictions as well. There is real interest and demand for assistance in quality assurance in online education and the pivot to online and blended learning. There are mixed levels of familiarity with blended learning in other countries though and Australia can help lead the region to a better state through stronger partnerships in the provision and quality assurance of delivery.

There's increasing interest for Australian providers to look closely at TNE outside of China and across the region, particularly across ASEAN, which is a region of increasing interest to Australia. Austrade now references Australian education with the region, rather than just to Australia. Institutions are investing greatly in the region, which means Australia should find ways to work with the architecture of the region. The region is hungry for leadership and if Australia doesn't provide it, others will come in to take charge with quality assurance in partnerships and best practice. Our approach to partnerships in the region is of benefit to everybody.

If we don't maintain our standards, we won't have an industry.

Students are the best advocates of the education sector and with the current pandemic, the experience of students is even more important as is how we address their needs during and after the crisis.

Australia needs to be able to compete to be relevant with competitor organisations that may come to the region as we want students to view Australia as their preferred ELT study location.



What needs to be considered with and across our advocacy, promotion and regulatory ecosystem as we chart a course towards new realities?

Prior to COVID, the ecosystem between NEAS, English Australia, UECA, advocates and regulators was seen to be working relatively well and the system was not broken, which strengthened Australia's position when the crisis did hit. Lessons are being learned in regards to how we improve as individuals and collectively and what are we doing that resonates. The student needs to be at the centre of the work that we do.

We need to look beyond Australia. British Council and others are going to be active in online delivery and TNE. Transnational delivery capability is extremely important. But determining what regulatory systems will apply to offshore programs requires strong partnerships with education bodies across the region. Australia needs to be able to compete to be relevant with competitor organisations that may come to the region as we want students to view Australia as their preferred ELT study location.

There are some similarities between education and other sectors like Health. The sector should be asking itself, "Who are we here for? What are we working to achieve?" The answer should be that the sector is here for its staff as well as its students. A robust regulatory framework will ensure that both staff and students can get what they need, when they need it, and how they need it. The view likens students, teachers and providers to patients, doctors and hospitals. Both should be student / patient centred.

To ensure there is QA across the onshore and offshore ecosystem, we have to enhance and build robust relationships to ensure we have a competitive advantage for Australia, not just attracting people here but also in the online environment. Hybrid models are here to stay, such as micro-credentialing and virtual learning approaches. Australia needs to work on the points that attract students to an online learning course. To compete effectively, we need to partner up with our region to maintain our competitive advantage globally and build relationships with other critical industries like Tourism.



What role and outreach should Australia consider across the greater Southeast/East Asian and Pacific regions in quality assurance as the broader ELT ecosystem recovers?

COVID has accelerated the process of TNE and partnerships and borderless initiatives that were starting to take hold, with students staying in their home country and undertaking a degree offered by or through a partnership. Education needs to become borderless and we need to accept this is only going to continue. In the not too distant future, Western English-speaking nations won't be able to position themselves as the only 'educational experts' that they have traditionally viewed themselves as. We need to work together and strongly position ourselves in the sector but collaborate with other nations and shed any colonialist point of view as we are not the only experts. We should stop positioning ourselves as the only experts in ELT as we may not be in the future, and there are other locations getting stronger in this space in our region.

Strength can be derived through partnerships. A harmonisation of teacher qualifications across the Australasian region is important if we are going to move people across borders and align ourselves with regional agreements. To move people across borders and allow them to teach without significant barriers, we need to have economic arrangements and agreements in place so that qualifications are recognised across borders. NEAS has a role for best practice in centre management and teacher qualifications, but there's also a role for partnerships and frameworks for the region for minimum ELT teaching qualification recognition. This is not just for Australians, but for individuals who are from the region and have been educated in Australia with TESOL qualifications, which would facilitate educators moving across borders. NEAS can play a leadership role in this space because it can talk to the instruments of ASEAN, such as regional Ministers of Education, relevant organisations and peak bodies and to work with them to set minimum standards. NEAS is in a good position to work with willing partners across the region.

TNE providers need to ensure their admissions standards are equivalent, whether via ELICOS or via other methods. There are local regulations set by other countries, and Australia's regulators would be cautious about trying to impose our regulations on a foreign industry as this cuts both ways. There is an opportunity for NEAS and others to help providers manage the complex mesh of regulations. It can be very difficult to do business in the region and there can be plenty of traps for newer entrants. Local regulatory systems across ASEAN are diverse. Education providers need experts that can help bridge the gap in how to operate legally and effectively. There is a real opportunity for our industry bodies such as NEAS to assist providers in what will be the new normal, where TNE will be a core component.



From ‘Black Swan to Phoenix Rising’... How can the Australian ELT community and ecosystem shift from disruption to brilliance?

A diversity strategy is needed to ensure Australia has the ability to have a strong underpinning foundation that we can escalate or deescalate assuming on events. Past success has been achieved by having a robust QA framework and innovative delivery. Providers could look at modernising and modifying its approach to cover virtual engagement and be mindful not to remove the core elements of what it does best. Promoting and engaging offshore is critical as well as supporting students from onshore and offshore and through the pipeline. Further leveraging virtual engagement is needed if we want to keep students engaged if they can't get here. We need to consider how we can be supporting students both on and offshore with better support mechanisms so there is a level of consistency. We should also consider soft-diplomacy such as reactivating the study abroad experience by having Australian students go offshore to elevate Australia as a study location. It brings students to the region and generates motivation for future students to want to study in Australia.

It is also important to consider the international student experience is not in a vacuum. The Australian student who hasn't travelled internationally and is sitting next to an international student should benefit from international student engagement or our industry will remain within a deficit model of how we improve the student experience and local to international two-way engagement.

Ultimately, innovation will be key. There has been a huge shift due to the pandemic, but change is constant, and it is difficult to look too far ahead to accurately consider what the future might be like. The sector needs to build its capacity for innovation and remain nimble. Quality may be in our DNA but there can also be a tension between being innovative and fast moving with being highly regulated and focussed on quality standards. Navigating our path through quality innovation will be important moving forward.

NEAS has a role for best practice in centre management and teacher qualifications, but there's also a role for partnerships and frameworks across the region for minimum ELT teaching qualification recognition.

We need to consider how we can be supporting students both on and offshore with better support mechanisms so there is a level of consistency.

Navigating our path through quality innovation will be important moving forward.

IN SUMMARY

Several themes emerged from the surveys, interviews, focus groups and expert panel conducted for this report. Themes and findings came directly from stakeholders engaged for this paper and were grouped into thematic areas of perceived importance and relevance to the ELT community. This summary of findings provides NEAS with greater clarity regarding its role, the impact that it has, the needs of the ELT community and the direction in which it is headed.



Quality assurance provides reassurance to government regulators.

An independent, non-governmental QA specialist can provide the regulator with a level of reassurance and further confidence that the education provider has a culture of continuous improvement and is demonstrating its commitment to exceeding the standards which have been set. NEAS has a role to play in nurturing new providers as well as those that don't have the experience or don't have the structures in place to meet regulatory requirements.



Quality education is vital for Australia's attractiveness as an education destination of choice.

A benefit of comprehensive, non-governmental quality assurance is Australia's ability to deploy and demonstrate its reputation for high quality education that is consistent globally and at scale. NEAS has helped to define Australia's ELICOS selling points, from its quality of teaching, to the student experience as well as defining the wider Australian quality education experience. As Australian providers pivot towards a new online world there will be different quality factors that will need to be assessed that are distinct from physical, face to face quality factors and clarity will help strengthen Australia's attractiveness.



Quality Assurance matters to Australia and the greater Asian region.

Australia should capitalise on quality assurance frameworks established by NEAS to help shape other regional education systems and jurisdictions. Genuine interest and demand exist for assistance in quality assurance across many of Australia's closest neighbours. NEAS has a role in looking after best practice in centre management and minimum ELT qualifications in the region which in turn will assist with staff mobility across borders. Experts are needed to bridge the gap in how to operate legally and effectively and ensure onshore and offshore admissions and teaching standards have equivalency.



The support and guidance provided to Education Providers is valued.

Independent quality assurance specialists can assist education providers to demonstrate their commitment to quality as they go forward in an environment that is complex and changing. NEAS will lead Australia through uncertain times and prepare the industry for a new set of potentially revised standards that will cover key areas like remote assessment. Online quality assurance frameworks give providers the possibility to navigate a brave new hybrid world, underpinned by quality standards. There are multiple sources of guidance and NEAS can help cut through the noise to provide clarity.



Quality teaching and education improve the student experience.

The student experience is critical and positioning quality from beginning to end requires the ELT community to consider aspects of quality assurance in every point of the life cycle of the journey of the student. Therefore, all touchpoints from education agents, to teachers, to education centres and the curriculum need to be carefully maintained. NEAS has a role to ensure that there is consistency to quality assurance across the onshore, offshore and online ecosystem so that students have a seamless experience from end to end.



Innovation and positive disruption will refocus the ELT community.

Digital technologies and other learning methodologies will increasingly be utilised in English language teaching and will disrupt the norm. Promising practice and lessons learned from the first half of 2020 are already sinking in. Effective digital delivery of programs requires specialist professional development and frameworks for CPD recognition for industry professionals. Australia will need a shift in focus to the quality of its technical platforms, teaching skills and capabilities to support students via remote learning and act as a leader in this space. NEAS can ensure pragmatic quality standards are maintained so that innovation is not detrimental to quality.



ACTIONS AND RECOMMENDATIONS FOR NEAS

There are five key actions and recommendations for NEAS to consider arising from stakeholder engagement conducted in 2020. Taken together, these actions will position NEAS for success and assist the ELT community as it transitions to a post-COVID era.

1. NEAS should remain at the forefront of innovation and positive disruption that will benefit the Australian ELT Community.
2. NEAS can highlight and leverage best practice and standards development in English Language Teaching for online delivery, offshore and transnational education, education agents, products, services and professionals.
3. Brand, reputation and role are largely to do with perception. The perception of NEAS as the independent, non-governmental quality assurance specialist in the ELT Community in Australia is strong and opportunities exist to clarify and strengthen this role across the industry through collaboration with complementary organisations.
4. NEAS has demonstrated its agility and ability to transform for the needs of the ELT Community. However, with limited resources and an unstable environment for international education and training in Australia and beyond, NEAS and its members should further consider diversification without losing sight of their core purpose and goals supporting a high quality international student experience.
5. Regulations mandated by the Australian Government will evolve to meet new challenges and opportunities created by the COVID disruption. NEAS should be at the forefront of guiding and educating its members and the broader ELT community through change so that providers can survive, adapt and thrive. Value is added by partnering and guiding the industry through change and acting as a vital source of truth for information and the go-to resource for expert guidance.



APPENDIX – STAKEHOLDER ENGAGEMENT IN DEPTH

NEAS 2020

30 years celebrating independent and specialist Quality Assurance in ELT in Australia.

Globally Benchmarked Quality Assurance Framework required for all NEAS members.

167 member centres in Australia in all states and territories (except ACT).

Members in all international education sectors (ELICOS, Higher Education, VET, High School and Online).

57 Australian member or member-affiliated offshore centres in ASEAN and UAE.

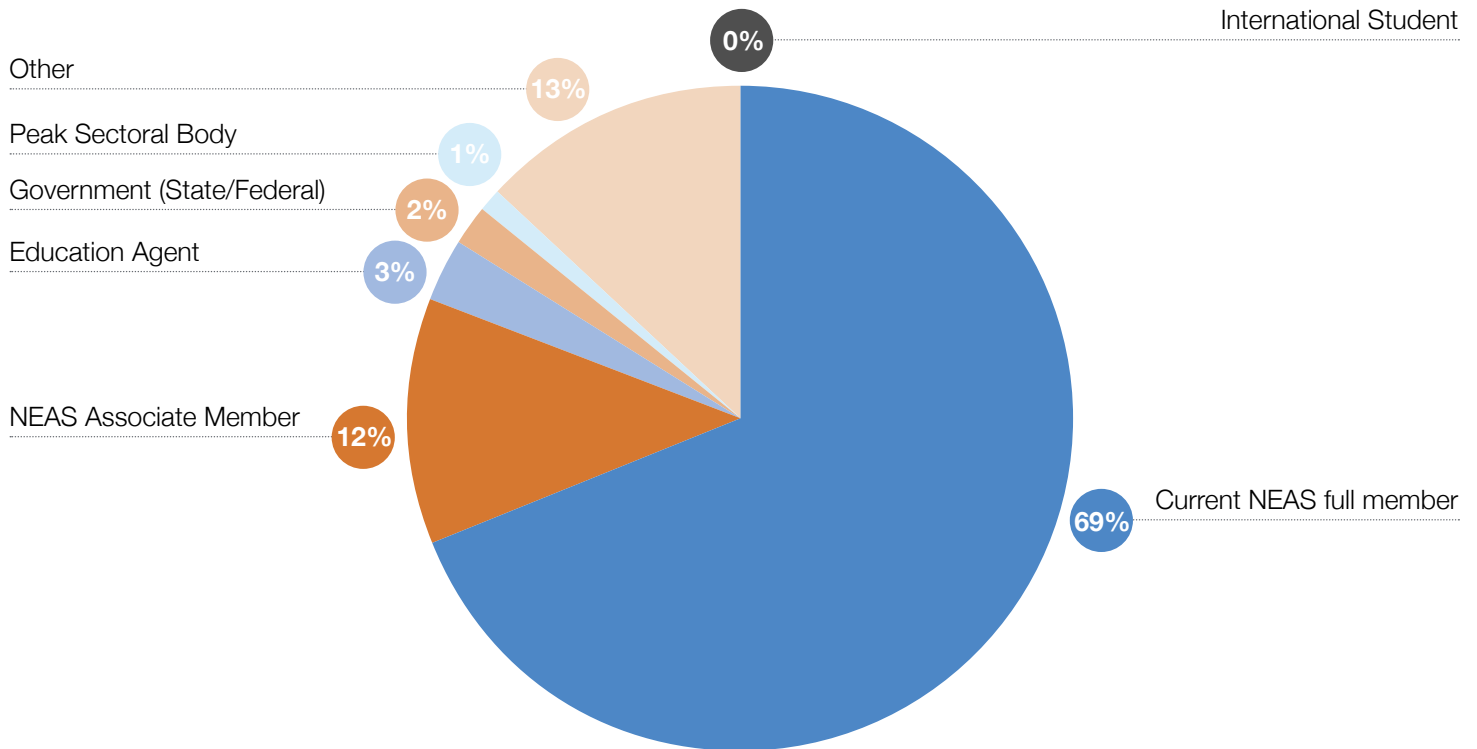
50+ events, workshops, webinars and online courses available



STAKEHOLDER SURVEY – IN DEPTH

178 survey responses to an August survey of current and former NEAS Members, Agents, Government entities and Peak Bodies was recorded, representing a solid 25% response rate from the 700 individuals who were engaged. The majority of responses were from NEAS members (Full and Associates). Those in the 'Other' category were largely quality assessors and former NEAS members. Whilst International students were not part of this survey, as questions posed were more industry specific, the views of CISA and international students were considered as part of the qualitative interview process.

My current role best fits into the following category



Of the 178 NEAS stakeholders survey responses, the majority believe NEAS is a key service offering for the ELT community, with 71% (126/178) rating it on the 'essential' end of the scale (7 and above out of 10) versus 6% (12 / 178) rating it on the 'less essential' end of the scale. This is a strong and positive validation of the role NEAS plays and the impact it has on the sector.

Some general comments about NEAS and the value it brings included:

“Having an independent body that maintains a set of quality standards, ensures the education quality in Australia. This is what attracts students to Australia. NEAS plays an important role in this.”

“NEAS accreditation is a proof for training and service quality of an educational institution.”

“NEAS provides relevant support and a benchmarking for all facets of the ELICOS industry.”

“NEAS is recognised in the English Language Teaching community for their commitment to quality outcomes.”

“NEAS provides practical and useful tools for running an ELICOS school.”

Comments that tended to be neutral or less positive focussed on the well-known issue that NEAS is not a regulator, that ASQA and TEQSA set standards, and that frameworks are not mandated across the sector. ASQA and TEQSA do not own the ELICOS Standards or ESOS Framework. They use the Standards to make sure the quality of the sector is maintained through the effective regulation of providers on the Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS), including those delivering English Language Intensive Courses to Overseas Students (ELICOS).

“It may not be absolutely essential, but I think the quality endorsement process, along with expertise in PD is important.”

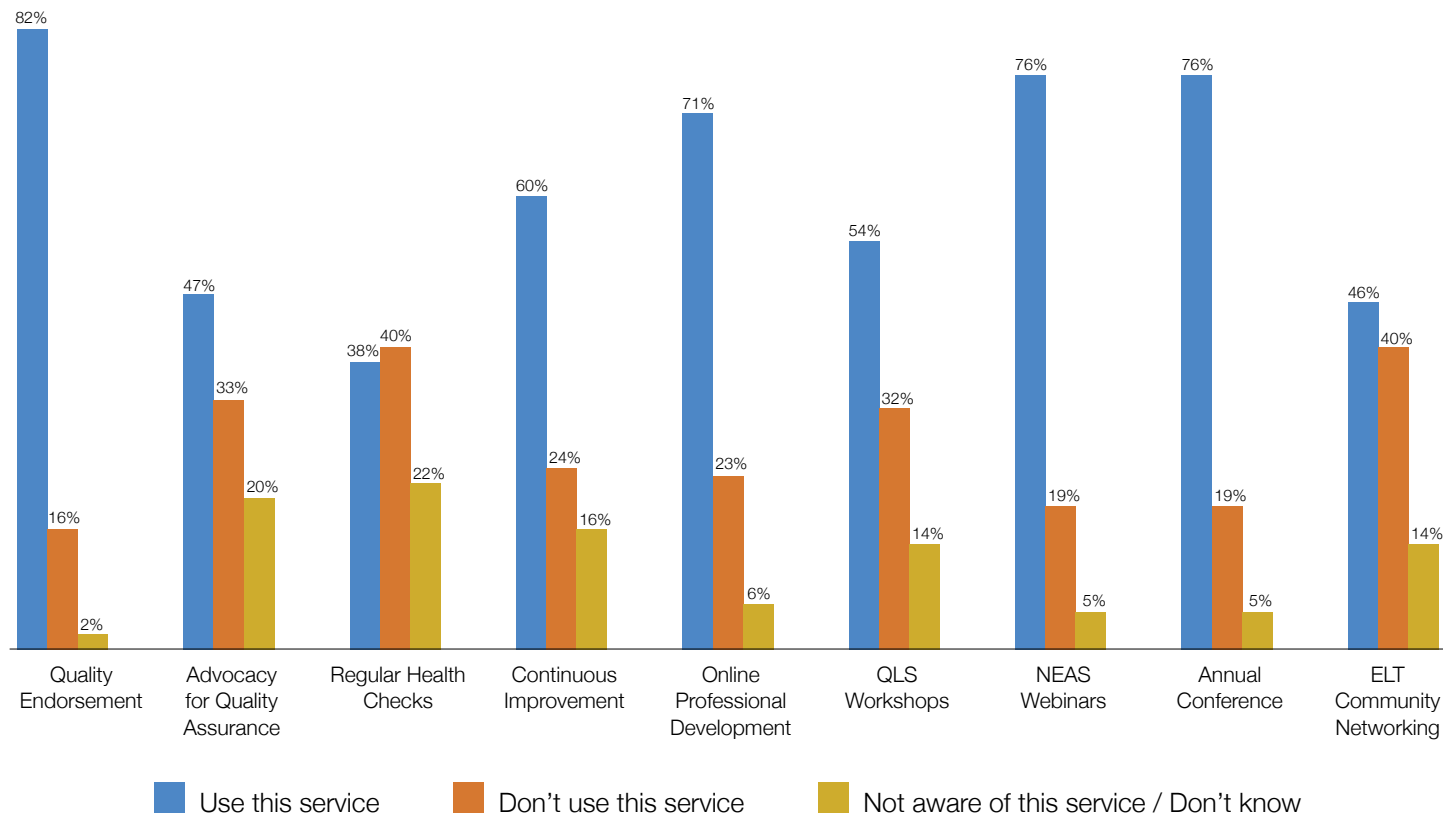
“Because it is not required by the regulator. As an education provider with a highly reputable brand, to be honest, NEAS is even less essential for us.”

“I think NEAS’s profile and effectiveness have slipped as the role of the government regulators has expanded.”

“It’s voluntary to join and not a regulatory body.”

Over three-quarters of survey respondents regularly use Quality Endorsement (82%) or attend the Annual Conference (76%) and Webinars (76%). Whereas nearly a quarter of stakeholders are not aware of other services such as Regular Health Checks. Further promotion of under-represented services may be warranted for members.

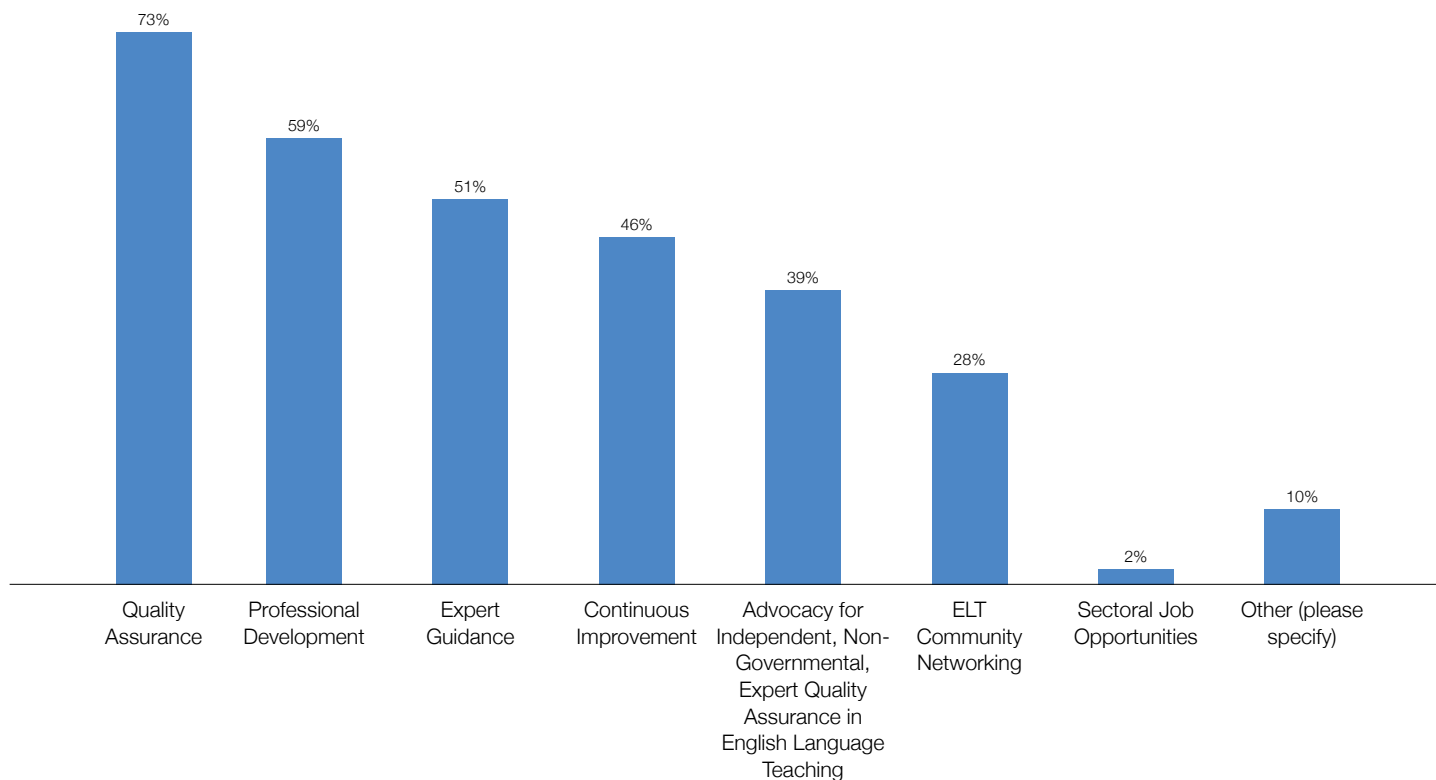
Which of NEAS' current services and offerings does your organisation use?



Of the services that NEAS offers to education providers that meet their needs as an organisation, the majority of services are rated at 4 and above out of 5, with Quality Endorsement the highest (4.4). QLS Workshops and NEAS Webinars trail other service provisions (3.8).

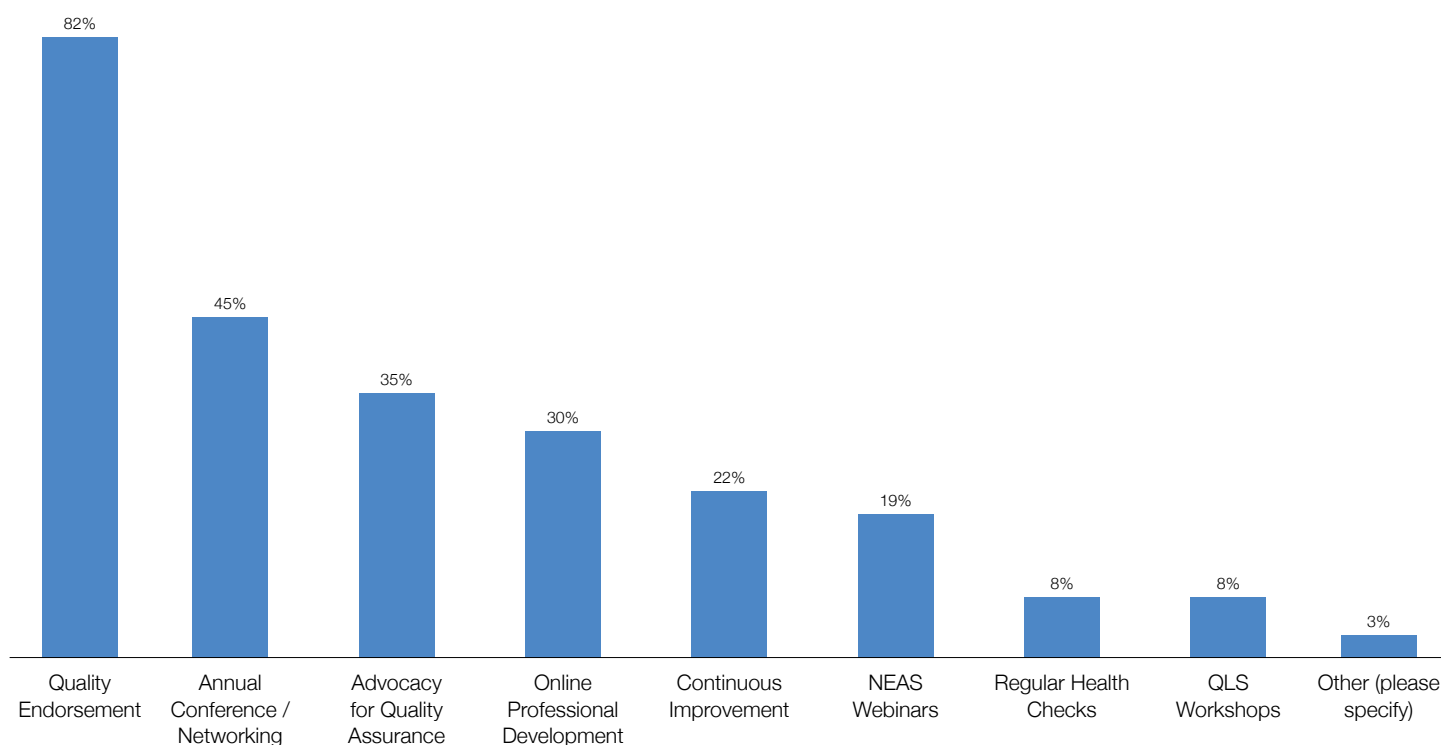
Stakeholders rate NEAS' quality assurance and endorsement the most valuable of its services. Expert guidance, online professional development and the opportunity for continuous improvement assist the ELT community to overcome challenges.

What challenges or problems does NEAS solve for you? Choose all that are relevant



NEAS provides the most value to the ELT community through independent, specialist ELT Quality Endorsement. The Annual Conference is also viewed as valuable to members and the community. Of service offerings, over 60% of survey respondents rated the Annual Conference, Workshops and Webinars as ‘Effective or Very Effective’.

NEAS provides the most value to the industry through: Choose up to 3 options

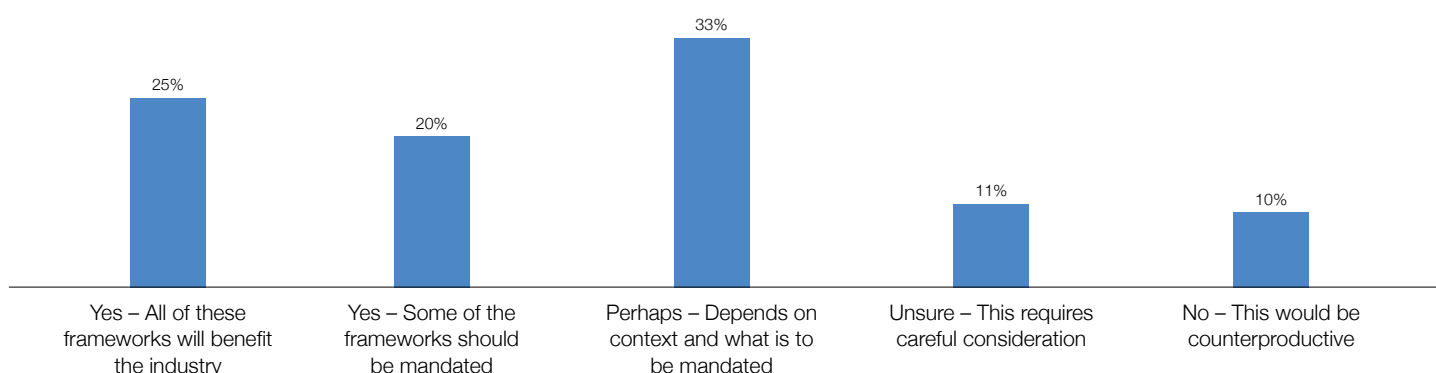


Survey respondents were asked to rate the impact NEAS has made to their organisation. 77% of respondents believe that NEAS has spearheaded standards that benefit the industry, and have very positive views on the Professional Development programs and opportunities for providers to continuously improve.

	1. Strongly disagree		2. Disagree		3. Neither		4. Agree		5. Strongly agree		N/A or Don't know		Total
	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	
It has spearheaded standards that benefit the industry	2%	3	1%	2	11%	18	46%	72	33%	52	6%	10	157
The Professional Development programs are valuable	1%	2	3%	4	12%	19	46%	72	29%	45	10%	15	157
It has allowed us to continuously improve	1%	2	3%	4	15%	24	43%	68	30%	47	8%	12	157
It has provided us with greater focus	1%	2	3%	5	15%	24	47%	73	25%	39	9%	14	157
It provides networking for ELT professionals	2%	3	3%	4	13%	21	50%	79	20%	32	11%	18	157

45% of surveyed stakeholders believe that all or some of NEAS' current quality assurance frameworks should be prescribed and mandated. 33% are potentially supportive of the notion of mandated frameworks, depending on the context and what is covered. 10% believe this would be counterproductive.

Do you think NEAS Quality Assurance Frameworks should be mandated?



Surveyed stakeholders were asked how NEAS can best support their organisation, with suggestions crossing a range of issues, including more Professional Development, border corridor lobbying, providing guidance to RTOs, advocacy for flexible class sizes and contact hours, lowering or waiving of fees, and increased support and development opportunities for professionals that have lost their jobs.

In summary, surveyed stakeholders view Quality Assurance as very important and value the positive influence and impact QA has on the reputation of the sector. These views and opinions on the importance of quality assurance strengthen the need for independent specialists in this space.

SURVEYED STAKEHOLDER VIEWS ON SPECIALIST ELT QUALITY ASSURANCE

"It's vital for the long-term sustainability of the industry in Australia."

"It's an essential factor in being able to provide external evidence of organisational and sectoral quality."

"Quality Assurance makes us better."

"QA ensures the integrity of the industry and makes sure there is accountability around ESL courses, teachers, staff and establishments."

"It is vital to have quality standards in the industry."

"QA is the essence of our existence and recovery."

"Quality assurance for prospective students equates to greater customer trust."

"Quality and ensuring the industry is of a high standard is very important."

"Quality assurance and representation of our industry are vital particularly in times of crisis."

"Quality assurance is essential for Australia to be a compelling destination country in an extremely competitive market - best practice must be strictly adhered to throughout the industry."

"QA frameworks are essential for the sector."

"It's very difficult to focus on quality assurance when we're not even sure we will survive as a business."



QUALITATIVE INTERVIEWS – IN DEPTH

Qualitative interviews were conducted with:

Regulatory Stakeholders

Greg Simmons, TEQSA
Francisco Meza, ASQA

Advocacy and Promotion Stakeholders

Phil Honeywood, IEAA
Megan Gupta, Austrade
Peter Mackey, StudyNSW
Brett Blacker, English Australia
Cynthia Kralik, English Australia
Simon Winetroube, UECA
Troy Williams, ITECA
Felix Pirie, ITECA
Junyi Zhao, CISA
Thomson Ch'ng,
ASEAN-Australia Education
Dialogue (AAED)

Education Providers

Janelle Chapman,
TAFE Queensland

Global Partnerships

Elizabeth McLaren,
British Council
Darren Conway,
English New Zealand
James Perry,
Feltom Malta / qalen
Michael Fay, AFG Ventures
Robert Parsonon, ISEAA

18 qualitative interviews with on and offshore ELT Community Stakeholders were held in August. Interviewed stakeholders hailed from across the ELT ecosystem, including regulators, peak bodies, advocates, agents and education providers.

The breadth of stakeholders interviewed provided valuable perspectives, insights and feedback on how ELICOS providers will weather this unprecedented turn of events to how quality can be controlled when the standard way of operating is in flux. The opinions and views on the following pages represent contributions by stakeholders interviewed.

The new normal won't be the old normal. It is a question of survival for so many providers looking ahead to 2021 and it is vital that providers consider their strategies and operations. Providers will need to be in a defensible position when regulators start to look closely at what occurred in 2020 and how they reacted, responded and implemented process and policy to manage the challenge. To move quality assurance from desirable back to essential, providers will need to endeavour to return to a previous aspirational mindset. This aspiration will be critical and aspirational providers will be those that want to be seen as high-quality providers.

In Australia, quality assurance has been at the forefront of how we've organised, promoted, governed and regulated ourselves. NEAS, alongside peak bodies and regulators, has provided inspiration at home and across the region due to hard work and effort over the years.

However, as the volume of international student mobility is sharply curtailed, massification of providers and quantity of student flows will force providers to reassess the fundamentals of their offerings for quality, particularly as alternative, remote and hybrid modes of education delivery arise and challenge traditional face to face teaching modes. Students and parents as consumers will still be looking for an independent sense of confidence that their investment is safe and that they are getting what the provider's brochure said they would. From a government perspective, it's all about reputation and what and where that weak link may be.

The industry will be losing some of the best teachers due to the impact on casuals and the inevitable downsizing of providers impacting permanent teaching staff as well. The need for benchmarking the quality of teachers, the quality of combined offshore and on shore provision and the impact hybrid modes have on learning outcomes will become even more acute in the coming years. Quality assurance specialists can educate providers and strengthen the ecosystem in preparation for when a sense of normality starts to return, allowing the regulators to focus on the task of assessing and grounding the industry back on solid footing.

**“QUALITY AND QUALITY ASSURANCE
MUST BE IN THE DNA OF THE INSTITUTION!”**

MICHAEL FAY – AFG VENTURE GROUP



What were the challenges facing the English Language Teaching (ELT) community / ecosystem prior to COVID? And how have those challenges for this community/ecosystem shifted in 2020?

Prior to COVID, delivering on quality and ROI were issues for a majority of providers. Enrolment conversion was an issue before COVID hit and the rampant fee discounting and student poaching by some providers were flagged, with many quality providers seeing this as a race to the bottom. Concerns were being raised that quality would inevitably decline if a price war developed widely.

There were market challenges already such as in China, even before COVID hit, with contractions from other markets in length of time in ELICOS as well. Waves of recruitment appeared to be changing for large and small providers alike. English-only colleges were dwindling in numbers as the margins in English-only provision were challenged. Moreover, the cost of recruitment through agents was rising year on year which was a difficult environment for small margin businesses.

During COVID, ELICOS students were considered most 'at risk' at the beginning of the pandemic as their English and communication skills were lower. Some education providers realised they needed to simplify their messaging to get the most useful and important points across.

Brand and value remain key components moving forward. It's vital for institutions to have an imperative to remain relevant to students with a strong value proposition. English learning is a different experience to Higher Education courses in the eyes of students. They undertake it as they want to learn to communicate and face to face interaction is important, which poses challenges for creating stimulating and dynamic remote learning environments that meet student expectations.

Has quality assurance moved from the essential to the desirable end of the spectrum for ELICOS providers in 2020? What might swing providers back into the essential end when borders reopen?

Providers need to be in a defensible position when regulators start to look closely at what occurred in 2020 and how they reacted. Regulators will inevitably get back on top of their case load and start to crack down on those that have allowed their quality to slip. The new normal won't necessarily be the old normal for providers, however. It will be vital that education providers consider their strategies and operations. It will be a question of survival for many providers. It can be hard for some providers to think above the baseline of QA standards. These baseline standards, however, are there for the protection of students and anything that goes against those standards is not good practice for the industry or for the brand of Australia. Quality impacts reputation and can impact future pipelines.

A visual analogy of the current situation is in relation to people swimming at the beach. The vast majority of beachgoers swim between the designated flags. Not all do, however, and some may unintentionally drift. It is those swimmers that persist on swimming outside the designated flags where attention needs to be paid. To move education providers back into the quality assurance goalposts, the sector will need to get back closer to where it was before where there were goals and aspirations. Where there is aspiration, providers will want to be seen as high-quality providers and that will help refocus provider's energy and enthusiasm for quality assurance and associated frameworks.



From your point of view, how does Australia's ELT quality compare to that of other major English-speaking destination competitors? And what are the areas of improvement, if any?

On a global scale, Australia is seen as a leading destination, from the quality of our providers, to the lifestyle we deliver to the migration outcomes that are on offer. Australia is at the forefront of how we've organised ourselves. Other countries have looked at Australia due to the hard work of the industry and organisations such as English Australia and NEAS. Canada and NZ are seen as having a more cohesive approach and support from the government and the industry as a whole needs to focus more on employability. To achieve this, there should be more advocacy, dialogue and engagement with employer groups.

Quality assurance and associated frameworks build the reputation of the providers and the market as a whole and Australia has not promoted its frameworks to prospective students and parents as strongly as it could. A NEAS quality tick may not necessarily sway an education agent, particularly younger counsellors, so further outreach and education is warranted. NEAS have a role to play with QA agencies across the broader Asian region as well. These regional QA agencies look to Australia for best practice and this is an opportunity for NEAS and others to take a more pro-active lead in quality frameworks and support. A greater promotional push on Australia's quality assurance frameworks can help with industry recovery efforts and be promoted as a mark of Australia's commitment to quality. The ESOS Act and the Tuition Protection Scheme point to the notion that Australia is likely one of the most regulated destination countries out there, but some stakeholders don't believe Australia pushes that message out enough to its advantage.



What things come to mind when you think of quality assurance in education, particularly in ELT to international students, what are some important facets?

Different providers will have different views on important facets of quality assurance based on their own context. For some, teacher qualifications and outcomes are paramount. For ELICOS providers attached to a higher education institution, there is likely an academic governance framework in place that looks at data and underpins an environment where the provider makes data driven decisions related to teachers, student experience feedback, performance, and conversion transition to the university. These internal governance frameworks allow providers to understand and measure their own performance which feeds into continuous improvement and ensuring the right interventions are in place.

From the student perspective, quality should always be paramount over quantity. International students aren't always aware of who is above minimum quality standards, so students look at what support is provided. Student feedback is critical to ensure providers can continuously improve. To achieve this, quality assurance must be in the DNA of the institution. Students and parents are looking for an independent sense of confidence that their education investment is safe and that they are getting what the provider's brochure said they would. From the government point of view, it boils down to reputation. Australia will only be as good as its weakest link, so the entire chain needs to be stress tested to ensure it is strong and unified.

What are your views on the broader quality assurance, regulatory, advocacy and promotion ecosystem, incorporating Department of Education, Skills and Employment, TEQSA, ASQA, UECA, English Australia, NEAS, IEAA, ITECA?

NEAS meets quite regularly with English Australia, ASQA and TEQSA and there are always opportunities for everyone to be more in sync. As an example, NEAS and ASQA have a Memorandum of Understanding (MOU). Membership organisations cannot be regulators and it is acknowledged that there should be a consistent application of standards as well as a desire for improved alignment across different regulatory frameworks. There is an opportunity for English Australia and NEAS to work together to help rebuild the brand of Australia as a destination. NEAS comes across as pitched above the minimum baseline standards that are set. The fact that NEAS and English Australia have different mission statements is seen as important.

There has been positive dialogue and better understanding of what we all do, but the challenge is how to manage this new future and not to overlap with each other. How do we work together to ensure that X does this and Y does that. Working collaboratively with IEAA on advocacy is also an important component. Some components of this ecosystem are marketing bodies that promote opportunities for all members and they are more focussed about delivery onshore and bringing students to Australia. NEAS is not solely focussed on students onshore as it has an interest in TNE as well.

From your point of view, what role does NEAS play, its relevance, usefulness and/or effectiveness to the ELT community and ecosystem?

NEAS knowledge of the sector is deep. It came from the industry and it understands providers when they make comments as it's evidence based. NEAS could have a more overt advocacy role, aligned with other bodies for a greater cohesive voice, particularly to different layers of government from local, to state and federal. Who is the voice of the sector? Everyone has a voice, but for the time being, English Australia is the voice that represents the sector at government and NEAS is the voice of QA frameworks. Sometimes voices can get a bit crowded and can be confusing for the audience and providers, but components of the ecosystem shouldn't be in competition as there's too much at stake for our industry.

NEAS provides a positive tick as it's a mark of quality for providers. Whilst it may be more expensive to provide a NEAS approved course, it's a differentiator. Even though NEAS is a membership-based organisation, the role NEAS plays is going to be vital – it doesn't play to the bottom of the market. NEAS standards are above minimum standards and this provides confidence to the ecosystem. In recent months, ASQA has expanded its education and engagement function to better support providers in delivering quality education and training outcomes. While ASQA's focus on education and engagement has increased, this work is also a shared responsibility with stakeholders across the sector. NEAS can educate the providers as much as the regulators, therefore supporting ASQA's efforts as part of this shared responsibility.

Not everyone understands the differences between NEAS and English Australia however. That doesn't diminish the value of what either or both do, it's just a noisy environment. Undoubtedly the role that NEAS and English Australia play in advocacy and getting better standards out of the industry are appreciated.

It's not just the delivery of the program, but a tick of approval that the institution has undergone a process of quality assurance for their approach to online or hybrid learning. A new framework may need to be in place as programs evolve and shift. How will they be quality assured? What does it mean to teachers, to students to pathways onto other courses? NEAS can be part of the prospective student journey of understanding QA and where it fits in the broader scheme of things.

NEAS will have a role to play in the recovery phase. Can NEAS consider all of the amazing talent and professionals who are being made redundant and provide complimentary access to professional development training elements. It's the goodwill and collective effort that is made now that will pull us out of this and into a stronger position.

Offshore delivery and the QA in that space is an area of importance for NEAS to focus on. Often minimal teacher standard qualifications laid out by NEAS are used and are considered best practice. It would be best if there are some common standards across the ASEAN region – recognition of teaching qualifications from country to country would be a positive space for NEAS to be involved in.

NEAS can assist us with greater clarity in online learning. The requirements for 20 hours, the need for different kinds of compliance requirements for online and how are online programs quality assured – NEAS can take a lead and provide a voice. Regulators are listening and it's positive. NEAS could work with DHA to provide assurance re online testing and allow govt to then endorse QA programs.

Engagement is key, we don't want our relationship to always feel like it's transactional with NEAS. We should strive to have even better partnerships as there's always learning from both sides, but that can't be unlocked if we are viewed as a key account instead of as a partner.

COVID and the rise of online ELT and hybrid/TNE academic programs. Any thoughts, issues or concerns in relation to quality assurance?

Regulatory change is inherently slow – there will be no fast change in response to the current situation. ESOS doesn't apply offshore, so if the course was taught offshore and the student had no intention to have a packaged program, that's one option in front of us. Those providers that have a footprint offshore may benefit from earlier investment – but are there new regulations needed for offshore TNE English? It's been going on already for years, but will providers substitute what was to be F2F onshore here with online and who will teach it?

Best practice in QA in this area should be shared. But setting standards too early is detrimental. We've spent years trying to understand best practice in F2F. QA bodies should be supportive and facilitative – not regulatory minded. Online Assessments are a difficult space and we need to be careful in our approach.

The last 6 months have been a challenge to quality, but now we can learn from the mistakes and improve. Some providers will need assistance because they got it so wrong, others will want to tweak and continuously improve. To what extent is NEAS engaging with the various EduTech providers that could provide solutions to look at how they can work strategically together. There are going to be aspirational start ups in education that will want to break into China and Vietnam for example and this is an area where NEAS can grow its relevance. When you're a start up, the first questions are the quality and who recognises it.



FOCUS GROUP – IN DEPTH

A focus group of 13 NEAS Advisory Council Members was convened in August.

A 360° approach to Quality Assurance. NEAS Advisory Council.

The NEAS Advisory Council offered frank and direct feedback from the perspective of education providers who have a first-hand perspective on the purpose, rationale and benefits of quality assurance and supportive frameworks. Advisory Council members expressed some concern that QA is likely slipping from the essential to the desirable end of the spectrum as providers are forced to make pragmatic decisions regarding their sustainability and survival, which has caused their priorities to shift.

Staff need to be supported to learn to teach effectively through online mediums and platforms and to identify students at risk and in need of targeted learning, emotional, financial and specialist welfare support. Students that are on shore need to be supported with greater care given their acute vulnerabilities, whilst those studying online must be actively encouraged and provided with a variety of tasks to keep them engaged.

What constitutes QA will likely evolve the longer remote learning and online platforms are replacing face to face engagement. Quality will remain important during this period of change, with a shifting landscape in need of empathy and leadership to pro-actively advocate for the ELT community. Being a good teacher in a face to face setting doesn't automatically translate to effective learning online. Training teachers on their role in helping and supporting students inside and outside the classroom is paramount.

Advisory Council members see opportunities for better coordination of events, webinars, professional development, advocacy and joint membership and registration fees across the advocacy and regulatory ecosystem.

What is the role of Independent, Non-Governmental Quality Assurance Specialists for the ELT Community?

- Establishing guidelines
- Standardisation and frameworks
- They play a mentoring role
- Quality assurance makes us better
- QA specialists support us
- Professional development opportunities
- Self-improvement
- Self-monitoring

In this 'new normal' of COVID, where does QA fit on the spectrum of desirable to essential?

- It has slipped
- It has dropped
- Providers must be pragmatic
- Its moved down from essential somewhat
- Many providers are closing and priorities are shifting
- Less concerned about quality now that our student to staff ratio is so much lower
- Absolutely has moved to the desirable category – student enrolments are the most pressing issue
- Students need to be supported and staff must be supported – that's the priority right now
- It's in the desirable end of the spectrum. We're now in survival mode.

What might influence a provider to change their mind?

- Providers will always find QA to be essential, but what constitutes QA will evolve
- NEAS needs to play a leadership role. I always think "What does NEAS have to say about that?"
- A level of confidence is needed
- Value
- Need to be prepared for this 'new normal' to continue
- Quality has to be there. COVID may be here for the foreseeable future.
- Need more support for online quality. What is QA for online delivery?
- We are falling more on the desirable side, less on the essential side now

**"IT'S OUR RESPONSE NOW
THAT WILL MAKE A DIFFERENCE."**

ADVISORY COUNCIL MEMBER

What is most relevant to the ELT community right now?

- Being a good teacher F2F doesn't translate easily to online
- Fee relief like AQSA has implemented is allowing deferral of some costs
- Consistency is critical. We need definitive answers and different answers seem to be everywhere
- NEAS should be the single source of truth with succinct summaries of what's occurring. We're bombarded by information sources. NEAS should curate this information as a one stop shop
- It's a minefield navigating all the information from ASQA, EA, State Govt's...everyone is trying to help but is not coordinated across the sector. Curation of information is important
- Training for remote teaching
- Student welfare and support for distressed students
- Visas and when will students come back
- Training teachers on their role in helping and supporting students.
- It's our response now that will make a difference.

How should NEAS support providers and teachers?

- A roadmap for support for students - food banks, support for accommodation etc
- For our teachers and other staff - there is support out there - a big article about foodbank helping international students today
- We see providers and teachers as linked, what's good for one is good for all
- NEAS is like a support tree. Information does need to be disseminated down, especially PD opportunities

How could the regulatory, advocacy and promotion ecosystem be improved?

- We are all involved with these. They all play a role.
- There is duplication. Simplification of guidelines
- Duplication of fees is frustrating – could there be a group discount?
- PD and advocacy should be brought together for simplicity – perhaps a joint membership?
- They can be somewhat territorial in nature within this ecosystem
- There needs to be some coordination for events, webinars, etc. It's patchwork
- They can be both real and perceived competitors.
- Duplication of registration – it's a barrier to new players
- Often presenting same information and with separate fees

What's missing and what will help complete the puzzle?

- Unis have a voice, but not ELICOS.
- Where is ELICOS in the discussion on visa corridors for students to return?
- ELICOS is the canary in the coalmine – or at least that's what we've always been told. But it's not getting that level of attention
- Definitely more advocacy is needed – and a voice for ELICOS industry

Is the notion of continuous improvement on hold during COVID?

- Well, it can't be continuous if it's paused – it's continuous and ongoing.
- Budget for certain aspects has moved to desirable. It's about survival.
- I'd recommend a research based approach to the development of a remote teaching framework. Maybe NEAS could offer micro-credential training (either directly or with a partner) that would support the skill development of teachers, to encourage new skills. This could be developed by first developing a 'skills matrix' that outlines the skills that teachers need not only with pedagogy for remote teaching, but also in terms of what technical technology skills they need.
- Continuous improvement - It's more important as we work out the best way to deliver our work.

Can the ELT community in Australia turn this disruption to an advantage?

- Let's move to mixed delivery. More flexibly. Start offshore and continue onshore, or vice versa
- Regulations are restricting innovation that can make us better and more attractive.
- Regulations can change – they were written by people and they need to work for people
- I believe standards are slipping under the radar. More flexibility is needed – yes, but quality and standards can go down quickly if we don't monitor them and that would be a disaster
- 20 hours per week and 4 hours face to face per day is not realistic. Things need to be reframed.

CONSTRUCTIVE FEEDBACK FOR NEAS TO CONSIDER

NEAS provides a valuable service. It would be useful if this were combined with the services provided by peak bodies.

I am not aware of the impact NEAS has on individual companies nor for the industry. However, it does bridge the gap in quality between teaching English and teaching English to those who speak another language.

GET INVOLVED WITH THE REGULATORY CHANGES TO COACH MEMBERS THROUGH CHANGES – THE UMBRELLA PROGRAM CHANGES WERE FRUSTRATING.

The PD offered is sometimes pitched at less experienced ELT professionals.

The industry needs more visibility and advocacy.

Doesn't add much value to school sector – can this be considered?

MORE EXPLICIT GUIDANCE TO SUPPORT SCHOOLS THROUGH COVID. INCLUDING HEALTH AND SAFETY STANDARDS, BEST PRACTICES FOR COVIDSAFE CAMPUS OPERATIONS + CONTEXTUALISING AND PRESENTING GOVERNMENT GUIDELINES IN A TIMELY AND DYNAMIC MANNER.

Professional development in areas of key and timely importance to the industry, for example, 'teacher and staff well-being in the time of COVID'.

THE INDUSTRY NEEDS REPRESENTATION, AND RECENT EVENTS IN 2020 HAVE ONLY REINFORCED THIS.

It would be even better if the NEAS membership/ endorsement was explicitly referred to as a quality indicator in ASQA audits, e.g. a tick on the ASQANet course application.

NEAS REQUIRES MORE COMPREHENSIVE QUALITY ASSURANCE FRAMEWORKS FOR ONLINE TEACHING AND LEARNING DELIVERY. THESE FRAMEWORKS NEED TO BE DISTINCT FROM THE BRICKS AND MORTAR ONES AND NOT JUST AN ADDENDUM; ONLINE T&L REQUIRES ITS OWN IDIOSYNCRATIC SET OF FRAMEWORKS.

It is not required by the regulator. As a provider with a highly reputable brand, NEAS is less essential for us, however, it is an advantage to be able to cite NEAS audits and quality assurance endorsements in conversations about quality standards.

The casualisation of our industry means many teachers in my workplace don't take an interest in attending unpaid sessions on key issues that we need to address, e.g. assessment. But by attending the PD NEAS provides, which fulfills their PD obligations to the organisation, they can learn about these issues.

Professional development in areas of key and timely importance to the industry, for example, 'teacher and staff well-being in the time of COVID'.

The value is determined by the sub-sector. For centres within an established educational setting (independent/government) I don't think it is particularly valuable in terms of 'selling' to parents and agents. However, for non-affiliated centres I think it has significant value. Quality assurance to other businesses in the industry would be good, e.g. teacher training programmes.

NEAS is more developmentally focused. It doesn't seem to be in the advocacy space and does not assist members to meet regulatory requirements. During the changes to Umbrella programs, there were no guidelines on how to work through the substantial changes required.

IT IS NOT ESSENTIAL, AS WE ARE NO LONGER ACCREDITED BY NEAS, BUT IT IS VERY HELPFUL AND A GOOD SOURCE OF INFORMATION AND GUIDANCE FOR QUALITY.

By increasingly becoming a globally recognised quality assurance organisation and "voice" that sets global standards for the delivery of English language courses: onshore and offshore, face to face and online.

MORE EFFORT ON INCREASING THE VALUE OF PREMIUM PRODUCT ENDORSEMENT, SO USERS (E.G. AGENTS, STUDENTS) SEE THE VALUE.

NEAS acknowledges
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