

Volte Draft CSO

[REDACTED]

Fri 7/12/2024 3:36 PM

To: Rob Heaney [REDACTED]; Richmond Tait [REDACTED] > [REDACTED]
Cc: John Tramoundanas-Can [REDACTED]; ITP Project <itpproject@tepukenga.ac.nz>

1 attachments (118 KB)

Te Pūkenga - Regional ITP Viability programme - Provider CSO - 12 July 2024 - Volte.docx;

Dear Rob, Richmond and [REDACTED],

Please find attached a Draft CSO for your **review, completion and return by close of business Wednesday 17th July**. If there are any issues with this timeframe, please let me know.

The Project outline is as was discussed last week, and is initially focused on discovery and information gathering. A Phase 2 CSO will be confirmed subsequently based on this Phase 1 Project.

Som initial organisation wide and ITP specific information is currently being collated relating to financial current state and forecasts, HR resources, Assets, and current and forecast enrolments. This information will be shared as it becomes available from early next week. **Can you provide the key contact (email address) who will be provided access to Sharepoint folders with the aforementioned information, and (if different) Analyst names nominated to analyse Financial Forecasts and Tribal Benchmarking (in Power BI).**

Volte has been assigned the Open Polytech, Unitec, MIT, NMIT, Ara and Tai Poutini Polytech's for review as part of this contract. In addition to the Project Team consisting of Phil O'Callaghan, Johnny Tramoundanas-Can and myself, you details will be shared today to the Regional Executive Directors and their EA's. The REDs relevant to your Project are shown below to enable to you to make contact and arrange initial engagements:

Northtec, Unitec and MIT

RED	EA
Toa Faneva [REDACTED]	[REDACTED]
Peseta Sam Lotu-liga [REDACTED]	[REDACTED]

NMIT

RED	EA
Mark Oldershaw [REDACTED]	[REDACTED]
Olivia Hall [REDACTED]	[REDACTED]

Ara and Tai Poutini

RED	EA
Darren Mitchell [REDACTED]	[REDACTED]
Megan Pōtiki [REDACTED]	[REDACTED]

Open Polytech

RED	EA
Alan Cadwallader [REDACTED]	[REDACTED]

If there are any issues, please dont hesitate to get in touch. An ITP Project email account has been established for this at (itpproject@tepukenga.ac.nz), which is cc'

Ngā mihi

[REDACTED]

Kairuruku Matua, Whakatinanatanga me ngā Kawengā| Principal Advisor, Performance & Accountability



[REDACTED]

RE: Calibre Partners Draft CSO

[REDACTED]

Fri 7/19/2024 3:19 PM

To: Neale Jackson [REDACTED] >

Cc: Johnny Tramoundanas-Can <johnny.tramoundanas-can@tepukenqa.ac.nz>; ITP Project <itpproject@tepukenqa.ac.nz>; [REDACTED]

[REDACTED] Daniel Stoneman [REDACTED] >

Hi Neale, we have reviewed the CSO and are generally OK with it I believe, but haven't actually got it approved yet, which looks like It might be Monday now. s 9(2)(b)(ii) [REDACTED]

I will let you know if we need anything further.

Have a good weekend.

[REDACTED]

From: Neale Jackson [REDACTED] >

Sent: Friday, July 19, 2024 3:15 PM

To: [REDACTED]

Cc: Johnny Tramoundanas-Can [REDACTED]; ITP Project <itpproject@tepukenqa.ac.nz>; [REDACTED]

[REDACTED]; Daniel Stoneman [REDACTED] >

Subject: Re: Calibre Partners Draft CSO

Hi [REDACTED]

We're well underway with the project now. The information you have been uploading is very helpful thanks.

Please let us know if you need anything further from us regarding the draft CSO.

regards



Neale Jackson

Partner

Advisory | Restructuring

[REDACTED] calibrepartners.co.nz

Notice: This email is intended solely for the use of the addressee and may contain information that is confidential or subject to legal professional privilege. If you receive this email in error please immediately notify the sender and delete the email.

From: Neale Jackson <[REDACTED]>

Sent: Wednesday, 17 July 2024 4:41 pm

To: [REDACTED] >

Cc: Johnny Tramoundanas-Can <[REDACTED]>; ITP Project <itpproject@tepukenqa.ac.nz>; [REDACTED]

[REDACTED]; Daniel Stoneman <[REDACTED]>

Subject: Re: Calibre Partners Draft CSO

Hi [REDACTED]

The updated CSO is attached, with our changes marked up.

Please let us know if you have any comments or queries, otherwise we can finalise it and send you a signed copy for you to sign.

regards



Neale Jackson

Partner

Advisory | Restructuring

[REDACTED] calibrepartners.co.nz

Notice: This email is intended solely for the use of the addressee and may contain information that is confidential or subject to legal professional privilege. If you receive this email in error please immediately notify the sender and delete the email.

From: [REDACTED]
Sent: Friday, 12 July 2024 3:47 pm
To: Neale Jackson <[REDACTED]>; Daniel Stoneman <[REDACTED]>
Cc: Johnny Tramoundanas-Can <[REDACTED]>; ITP Project <itpproject@tepukenga.ac.nz>
Subject: Calibre Partners Draft CSO

Dear Neale and Daniel,

Please find attached a Draft CSO for your **review, completion and return by close of business Wednesday 17th July**. If there are any issues with this timeframe, please let me know.

The Project outline is as was discussed last week, and is initially focused on discovery and information gathering. A Phase 2 CSO will be confirmed subsequently based on this Phase 1 Project.

Some initial organisation wide and ITP specific information is currently being collated relating to financial current state and forecasts, HR resources, Assets, and current and forecast enrolments. This information will be shared as it becomes available from early next week. **Can you provide the key contact (email address) who will be provided access to Sharepoint folders with the aforementioned information, and (if different) Analyst names nominated to analyse Financial Forecasts and Tribal Benchmarking (in Power BI).**

Calibre has been assigned the Northtec, Wintec and Toi Ohomai Polytech's for review as part of this contract. In addition to the Project Team consisting of Phil O'Callaghan, Johnny Tramoundanas-Can and myself, you details will be shared today to the Regional Executive Directors and their EA's. The REDs relevant to your Project are shown below to enable to you to make contact and arrange initial engagements:

Northtec

RED	EA
Toa Faneva [REDACTED]	[REDACTED]
Peseta Sam Lotu-liga [REDACTED]	[REDACTED]

Wintec and Toi Ohomai

RED	EA
Kieran Hewitson [REDACTED]	[REDACTED]
Huia Haeata [REDACTED]	[REDACTED]

If there are any issues, please don't hesitate to get in touch. An ITP Project email account has been established for this at (itpproject@tepukenga.ac.nz), which is cc'd to this email.

Ngā mihi

[REDACTED]

Kairuruku Matua, Whakatinanatanga me ngā Kawenga | Principal Advisor, Performance & Accountability



[REDACTED]

Important Notice: This is an e-mail from Te Pūkenga. Any opinions stated reflect those of the individual and not necessarily the view of Te Pūkenga. We do not accept responsibility for any changes to this email or its attachments made by others after we have transmitted it.

Unauthorised Use: The contents of this e-mail (including any attachments) may be subject to copyright, legal privilege and/or be confidential. Any unauthorised use, distribution or copying of the contents is expressly prohibited. If you have received this e-mail in error, please advise us by return e-mail or telephone and then delete this e-mail together with all attachments.

Viruses: Te Pūkenga does not represent or warrant that this e-mail or files attached to this e-mail are free from computer viruses or other defects. Any attached files are provided, and may only be used, on the basis that the user assumes all responsibility for any loss, damage or consequence resulting directly or indirectly from their use.

Signed CSO

[REDACTED]

Mon 7/22/2024 11:27 AM

To: Neale Jackson [REDACTED]

Cc: John Tramoundanas-Can [REDACTED]; ITP Project <itpproject@tepukenka.ac.nz>

📎 1 attachments (695 KB)

Te Pūkenga Regional ITP Viability programme Provider CSO 12 July 2024 Calibre CP comments 170724 signed GG.pdf;

Dear Neale, please find attached the CSO Signed by Gus Gilmore for your signature.

If there are any questions, please don't hesitate to contact me.

Kind regards

[REDACTED]

Ngā mihi

[REDACTED]

Kairuruku Matua, Whakatinanatanga me ngā Kawenga | Principal Advisor, Performance & Accountability



[REDACTED]
tepukenka.ac.nz

Released under the Official Information Act 1982

FW: Deloitte Draft CSO

[REDACTED]

Fri 7/12/2024 4:05 PM

To: Bailey, Richard [REDACTED] >; Bennett, Nichola [REDACTED]
Cc: John Tramoundanas-Can [REDACTED] >; ITP Project <itpproject@tepukenga.ac.nz>

📎 1 attachments (113 KB)

Te Pūkenga Regional ITP Viability programme Provider CSO 12 July 2024 Deloitte.docx;

Dear Neale and Daniel,

Please find attached a Draft CSO for your **review, completion and return by close of business Wednesday 17th July**. If there are any issues with this timeframe, please let me know.

The Project outline is as was discussed last week, and is initially focused on discovery and information gathering. A Phase 2 CSO will be confirmed subsequently based on this Phase 1 Project.

Some initial organisation wide and ITP specific information is currently being collated relating to financial current state and forecasts, HR resources, Assets, and current and forecast enrolments. This information will be shared as it becomes available from early next week. **Can you provide the key contact (email address) who will be provided access to Sharepoint folders with the aforementioned information, and (if different) Analyst names nominated to analyse Financial Forecasts and Tribal Benchmarking (in Power BI).**

Deloitte has been assigned the Otago and SIT Polytech's for review as part of this contract. In addition to the Project Team consisting of Phil O'Callaghan, Johnny Tramoundanas-Can and myself, you details will be shared today to the Regional Executive Directors and their EA's. The REDs relevant to your Project are shown below to enable to you to make contact and arrange initial engagements:

Otago and SIT

	RED	EA
Darren Mitchell	[REDACTED]	[REDACTED]
Megan Pötiki	[REDACTED]	[REDACTED]

If there are any issues, please don't hesitate to get in touch. An ITP Project email account has been established for this at (itpproject@tepukenga.ac.nz), which is cc'd to this email.

Ngā mihi

[REDACTED]
Kairuruku Matua, Whakatinanatanga me ngā Kawenga | Principal Advisor, Performance & Accountability



Released under the
Official Information Act 1982

PwC Draft CSO

[REDACTED]

Fri 7/12/2024 4:00 PM

To:john.fisk [REDACTED];Richard Nacey (NZ) [REDACTED] >

Cc:John Tramoundanas-Can <johnny.tramoundanas-can@tepukenga.ac.nz>;ITP Project <itpproject@tepukenga.ac.nz>

📎 1 attachments (117 KB)

Te Pūkenga Regional ITP Viability programme Provider CSO 12 July 2024 PwC.docx;

Dear John and Richard,

Please find attached a Draft CSO for your **review, completion and return by close of business Wednesday 17th July**. If there are any issues with this timeframe, please let me know.

The Project outline is as was discussed last week, and is initially focused on discovery and information gathering. A Phase 2 CSO will be confirmed subsequently based on this Phase 1 Project.

Some initial organisation wide and ITP specific information is currently being collated relating to financial current state and forecasts, HR resources, Assets, and current and forecast enrolments. This information will be shared as it becomes available from early next week. **Can you provide the key contact (email address) who will be provided access to Sharepoint folders with the aforementioned information, and (if different) Analyst names nominated to analyse Financial Forecasts and Tribal Benchmarking (in Power BI).**

PwC has been assigned the EIT, WITT, Weltec, Whitireia and UCOL Polytech's for review as part of this contract. In addition to the Project Team consisting of Phil O'Callaghan, Johnny Tramoundanas-Can and myself, you details will be shared today to the Regional Executive Directors and their EA's. The REDs relevant to your Project are shown below to enable to you to make contact and arrange initial engagements:

EIT

RED	EA
Kieran Hewitson [REDACTED]	[REDACTED]
Huia Haeata [REDACTED]	[REDACTED]

WITT, UCOL, Weltec and Whitireia

RED	EA
Mark Oldershaw [REDACTED]	[REDACTED]
Olivia Hall [REDACTED]	[REDACTED]
Darren Mitchell [REDACTED]	[REDACTED]
Megan Pötiki [REDACTED]	[REDACTED]
Alan Cadwallader [REDACTED]	[REDACTED]

If there are any issues, please don't hesitate to get in touch. An ITP Project email account has been established for this at (itpproject@tepukenga.ac.nz), which is cc'd to this email.

Ngā mihi

[REDACTED]

Kairuruku Matua, Whakatinanatanga me ngā Kawenga | Principal Advisor, Performance & Accountability



[REDACTED]

Released under the
Official Information Act 1982

Signed CSO

[REDACTED]

Mon 7/22/2024 11:22 AM

To:john.fisk [REDACTED]

Cc:John Tramoundanas-Can [REDACTED];ITP Project <itpproject@tepukenga.ac.nz>;Phil

O'Callaghan [REDACTED]

📎 1 attachments (668 KB)

Te Pūkenga Regional ITP Viability programme Provider CSO 12 July 2024 PwC (2) signed GG.pdf;

Dear John, please find attached the CSO Signed by Gus Gilmore for your signature.

If there are any questions, please don't hesitate to contact me.

Kind regards

[REDACTED]

Ngā mihi

[REDACTED]

Kairuruku Matua, Whakatinanatanga me ngā Kawenga | Principal Advisor, Performance & Accountability



[REDACTED]

tepukenza.ac.nz

Released under the Official Information Act 1982

Volte Initial ITP Information Download

[REDACTED]
Tue 7/16/2024 11:46 AM

To: Rob Heaney [REDACTED] Richmond Tait [REDACTED] >
Cc: Toa Faneva [REDACTED] >; Peseta Sam Lotu-liqa [REDACTED] >; Megan Pötiki [REDACTED] >; Darren Mitchell [REDACTED] >; Alan Cadwallader (Open Polytech) [REDACTED] >; Olivia Hall [REDACTED] >; Mark Oldershaw [REDACTED] >; ITP Project <itpproject@tepukenga.ac.nz>; John Tramoundanas-Can [REDACTED]

Kia Ora all,

Please find attached a link to the initial folders of information relating to the Volte ITP portfolio (Unitec, MIT, Open, Ara, TPP and NMIT).

Primary Consultants and Regional Executive Directors have been given access to a General Folder and a ITP Specific one that is relevant to them – e.g. Alan from Open Polytech has been given access to the Open Polytech folder, but not NMIT etc.)

The link is below:

[TP RSV Programme Link](#)

The General Folder contains:

- 240212_Financial Briefing Pack.pptx – a Financial Briefing Pack on Historical and future prospects for the group and individual ITPs prepared in February 24 for the SAG group.
- 240408_Specialist Advisory Group Agenda.pdf – containing links to Financial Deep Dives for ITP, across the 4 Rohe
- Draft Competition Analysis 24042024v2.pptx – A review of regional competitiveness across different ITPs within their region
- Draft Summary ITP Financial Slides 24042024.pptx – A forecast of financial performance from May moderated by the SAG Group
- FY2324 Procurement Savings.xlsx – an overview of potential procurement savings that could be achieved including by collaboration in a disaggregated model
- Te Pūkenga CFO 2022 NZBT + Results (Presented).pdf – an overview of Tribal benchmarking per ITP.

Each Institution Link includes (titles and numbers change, these are example titles):

- E.g. 6006 – Ara.xlsx – An excel model of enrolment data by Institution, Programme and Delivery Site for 2019 – 2023
- Ara (6006) Response to Te Pūkenga Division Response to TEC Plan Guidance.pdf – overview of narrative for Ara's Investment Plan/ Mix of Provision for 2025
- DRAFT Ara Forecast Packv2 09052024.pptx – The assumptions made in forecasting Ara's Financial position in conjunction with the SAG in May 2024
- Draft Te Pūkenga Model 090524v2 – ARA.xlsm – The Forecast model, using the above assumptions, undertaken in May 24 with the SAG.

Please let me know if there are any issues accessing these links.

Ngā mihi

[REDACTED]
Kairuruku Matua, Whakatinanatanga me ngā Kawenga | Principal Advisor, Performance & Accountability



[REDACTED]
tepukena.ac.nz

Released under the
Official Information Act 1982

Calibre Initial ITP Information Download

[REDACTED]
Tue 7/16/2024 12:04 PM

To: Neale Jackson [REDACTED] >; Daniel Stoneman [REDACTED] [REDACTED] z>
Cc: Toa Faneva <[REDACTED]>; Peseta Sam Lotu-liqa <[REDACTED]>; Huia Haeata [REDACTED]
>; Kieran Hewitson <[REDACTED]>; John Tramoundanas-Can [REDACTED]
[REDACTED]; ITP Project <itpproject@tepukenga.ac.nz>

Kia Ora all,

Please find attached a link to the initial folders of information relating to the Calibre Partners ITP portfolio (Northtec, Wintec, Toi Ohomai).

Primary Consultants and Regional Executive Directors have been given access to a General Folder and a ITP Specific one that is relevant to them – e.g. Huia has access to Wintec and Toi, but not Northtec etc.)

The link is below:

[TP RSV Programme Link](#)

The General Folder contains:

- 240212_Financial Briefing Pack.pptx – a Financial Briefing Pack on Historical and future prospects for the group and individual ITPs prepared in February 24 for the SAG group.
- 240408_Specialist Advisory Group Agenda.pdf – containing links to Financial Deep Dives for ITP, across the 4 Rohe
- Draft Competition Analysis 24042024v2.pptx – A review of regional competitiveness across different ITPs within their region
- Draft Summary ITP Financial Slides 24042024.pptx – A forecast of financial performance from May moderated by the SAG Group
- FY2324 Procurement Savings.xlsx – an overview of potential procurement savings that could be achieved including by collaboration in a disaggregated model
- Te Pūkenga CFO 2022 NZBT + Results (Presented).pdf – an overview of Tribal benchmarking per ITP.

Each Institution Link includes (titles and numbers change, these are example titles):

- E.g. 6006 – Ara.xlsx – An excel model of enrolment data by Institution, Programme and Delivery Site for 2019 – 2023
- Ara (6006) Response to Te Pūkenga Division Response to TEC Plan Guidance.pdf – overview of narrative for Ara's Investment Plan/ Mix of Provision for 2025
- DRAFT Ara Forecast Packv2 09052024.pptx – The assumptions made in forecasting Ara's Financial position in conjunction with the SAG in May 2024
- Draft Te Pūkenga Model 090524v2 – ARA.xlsm – The Forecast model, using the above assumptions, undertaken in May 24 with the SAG.

Please let me know if there are any issues accessing these links.

Ngā mihi

[REDACTED]
Kairuruku Matua, Whakatinanatanga me ngā Kawenga | Principal Advisor, Performance & Accountability



[REDACTED]
tepukena.ac.nz

Released under the
Official Information Act 1982

Deloitte Initial Information Download

[REDACTED]
Tue 7/16/2024 2:16 PM

To: Bailey, Richard [REDACTED]; Bennett, Nichola [REDACTED]
Cc: Darren Mitchell [REDACTED]; Megan Pōtiki [REDACTED]; John Tramoundanas-Can [REDACTED]; ITP Project <itpproject@tepukenga.ac.nz>

Kia Ora all,

Please find attached a link to the initial folders of information relating to the Deloitte ITP portfolio (Otago Polytech and SIT).

Primary Consultants and Regional Executive Directors have been given access to a General Folder and a ITP Specific one that is relevant to them – e.g. Alan from Open Polytech has been given access to the Open Polytech folder, but not NMIT etc.). Note, the additional consultants requested to have access to these folders (pethompson etc.) will be added by COP today.

The link is below:

[TP RSV Programme Link](#)

The General Folder contains:

- 240212_Financial Briefing Pack.pptx – a Financial Briefing Pack on Historical and future prospects for the group and individual ITPs prepared in February 24 for the SAG group.
- 240408_Specialist Advisory Group Agenda.pdf – containing links to Financial Deep Dives for ITP, across the 4 Rohe
- Draft Competition Analysis 24042024v2.pptx – A review of regional competitiveness across different ITPs within their region
- Draft Summary ITP Financial Slides 24042024.pptx – A forecast of financial performance from May moderated by the SAG Group
- FY2324 Procurement Savings.xlsx – an overview of potential procurement savings that could be achieved including by collaboration in a disaggregated model
- Te Pūkenga CFO 2022 NZBT + Results (Presented).pdf – an overview of Tribal benchmarking per ITP.

Each Institution Link includes (titles and numbers change, these are example titles):

- E.g. 6006 – Ara.xlsx – An excel model of enrolment data by Institution, Programme and Delivery Site for 2019 – 2023
- Ara (6006) Response to Te Pūkenga Division Response to TEC Plan Guidance.pdf – overview of narrative for Ara's Investment Plan/ Mix of Provision for 2025
- DRAFT Ara Forecast Packv2 09052024.pptx – The assumptions made in forecasting Ara's Financial position in conjunction with the SAG in May 2024
- Draft Te Pūkenga Model 090524v2 – ARA.xlsm – The Forecast model, using the above assumptions, undertaken in May 24 with the SAG.

Please let me know if there are any issues accessing these links.

Ngā mihi

[REDACTED]
Kairuruku Matua, Whakatinanatanga me ngā Kawenga | Principal Advisor, Performance & Accountability



[REDACTED]
tepukena.ac.nz

Released under the
Official Information Act 1982

PwC Initial Information Download

[REDACTED]
Tue 7/16/2024 2:07 PM

To: john.fisk [REDACTED]; Richard Nacey (NZ) [REDACTED]

Cc: Huia Haeata <[REDACTED]>; Kieran Hewitson [REDACTED]; Olivia Hall [REDACTED]; Mark Oldershaw [REDACTED]; John Tramoundanas-Can [REDACTED]; ITP Project <itpproject@tepukenga.ac.nz>

Kia Ora all,

Please find attached a link to the initial folders of information relating to the PwC ITP portfolio (EIT, WITT, UCOL, Whitireia and Weltec).

Primary Consultants and Regional Executive Directors have been given access to a General Folder and a ITP Specific one that is relevant to them – e.g. Alan from Open Polytech has been given access to the Open Polytech folder, but not NMIT etc.)

The link is below:

[TP RSV Programme Link](#)

The General Folder contains:

- 240212_Financial Briefing Pack.pptx – a Financial Briefing Pack on Historical and future prospects for the group and individual ITPs prepared in February 24 for the SAG group.
- 240408_Specialist Advisory Group Agenda.pdf – containing links to Financial Deep Dives for ITP, across the 4 Rohe
- Draft Competition Analysis 24042024v2.pptx – A review of regional competitiveness across different ITPs within their region
- Draft Summary ITP Financial Slides 24042024.pptx – A forecast of financial performance from May moderated by the SAG Group
- FY2324 Procurement Savings.xlsx – an overview of potential procurement savings that could be achieved including by collaboration in a disaggregated model
- Te Pūkenga CFO 2022 NZBT + Results (Presented).pdf – an overview of Tribal benchmarking per ITP.

Each Institution Link includes (titles and numbers change, these are example titles):

- E.g. 6006 – Ara.xlsx – An excel model of enrolment data by Institution, Programme and Delivery Site for 2019 – 2023
- Ara (6006) Response to Te Pūkenga Division Response to TEC Plan Guidance.pdf – overview of narrative for Ara's Investment Plan/ Mix of Provision for 2025
- DRAFT Ara Forecast Packv2 09052024.pptx – The assumptions made in forecasting Ara's Financial position in conjunction with the SAG in May 2024
- Draft Te Pūkenga Model 090524v2 – ARA.xlsm – The Forecast model, using the above assumptions, undertaken in May 24 with the SAG.

Please let me know if there are any issues accessing these links.

Ngā mihi

[REDACTED]
Kairuruku Matua, Whakatinanatanga me ngā Kawenga | Principal Advisor, Performance & Accountability



[REDACTED]
tepukena.ac.nz

Released under the
Official Information Act 1982

Discussion with Calibre - Neale Jackson

Gus Gilmore [REDACTED]

Wed 7/17/2024 3:46 PM

To: Phil O'Callaghan [REDACTED]; John Tramoundanas-Can [REDACTED];

Cc: DL Regional Leads [REDACTED]

Kia ora kuotou,

Just keeping everyone in the loop re a call and discussion I have just had with Neale.

1. No expectation from us that the Financial Consultants will engage externally with stakeholders in the first phase (discovery).
2. Resources on the ground are tight, especially Finance, if there are pinch points escalate them to Phil and Gus, they can make a call as to whether they get the data, we resource it from within the network or we ask the Consultants to do the mahi.
3. Our rough budget estimate for phase one of the programme is about **s 9(2)(b)(ii)** [REDACTED] Neale said they will try and work with that, and not having to engage externally would definitely help with that.
4. There is not an expectation that the consultants give advice on how the Govt will invest in the entities going forward. Neale said their job was to present a review/analysis and present opportunities, what we did with that or what the Govt. did was its call.

Best wishes

Gus

Released under the
Official Information Act 1982

Re: Restructuring project at Te Pūkenga New Zealand Institute of Skills and Technology

Gus Gilmore [redacted] >
Wed 7/17/2024 2:25 PM
To: Neale Jackson [redacted]
Cc: Phil O'Callaghan [redacted] >
Hi Neale
[redacted]
Gus

Get [Outlook for iOS](#)

From: Neale Jackson [redacted]
Sent: Wednesday, July 17, 2024 2:02:03 PM
To: Gus Gilmore [redacted]
Cc: Phil O'Callaghan [redacted]
Subject: Re: Restructuring project at Te Pūkenga New Zealand Institute of Skills and Technology

Hi Gus

We've now had a chance to meet Toa, Kieran and Huia to start working through the approach to the project. We've also set up initial kick-off hui with them for next week, for the three ITPs and their leadership teams.

We're working towards responding on the draft CSO today. It would be good to discuss a couple of aspects with you now that we've had these initial discussions.

I didn't get your mobile number the other day. Would you mind sending it to me so I can give you a call this afternoon please?

regards

Neale

 **Neale Jackson**
Partner
Advisory | Restructuring

[redacted] calibrepartners.co.nz

Notice: This email is intended solely for the use of the addressee and may contain information that is confidential or subject to legal professional privilege. If you receive this email in error please immediately notify the sender and delete the email.

From: Gus Gilmore [redacted]
Sent: Monday, 24 June 2024 1:28 pm
To: Neale Jackson [redacted]
Cc: Phil O'Callaghan [redacted]
Subject: RE: Restructuring project at Te Pūkenga New Zealand Institute of Skills and Technology

Great thanks Neale,
I have sent a Teams invite and invited our interim CFO Phil.
Best wishes
Gus

From: Neale Jackson [redacted]
Sent: Monday, June 24, 2024 11:59 AM
To: Gus Gilmore [redacted]
Subject: Re: Restructuring project at Te Pūkenga New Zealand Institute of Skills and Technology

Kia ora Gus

Thank you for getting in touch.

This sounds like a very interesting project. It would be great to meet you to start discussing how we might be able to work together.

I am free later tomorrow afternoon if that suits you.

regards



Neale Jackson
Partner
Advisory | Restructuring

calibrepartners.co.nz

Notice: This email is intended solely for the use of the addressee and may contain information that is confidential or subject to legal professional privilege. If you receive this email in error please immediately notify the sender and delete the email.

From: Gus Gilmore [REDACTED]
Sent: Monday, 24 June 2024 11:27 am
To: Neale Jackson <[REDACTED]>
Subject: Restructuring project at Te Pūkenga New Zealand Institute of Skills and Technology

Kia ora Neale,

My name is Gus Gilmore I'm the Chief Executive at Te Pūkenga. We are about to embark on a major restructuring project ahead of implementing the government's vision for Vocational Education.

We were referred to Calibre Partners by Jeremy Morley ex PWC Partner in WLG.

Would you be interested in considering assisting us with this project?

I'd welcome an initial conversation, the work we were considering for Calibre is to restructure our Polytechnic in Northland - NorthTec.

Let me know if you are interested and we can set up a Teams meeting to discuss.

Best wishes

Gus

Important Notice: This is an e-mail from Te Pūkenga. Any opinions stated reflect those of the individual and not necessarily the view of Te Pūkenga. We do not accept responsibility for any changes to this email or its attachments made by others after we have transmitted it.

Unauthorised Use: The contents of this e-mail (including any attachments) may be subject to copyright, legal privilege and/or be confidential. Any unauthorised use, distribution or copying of the contents is expressly prohibited. If you have received this e-mail in error, please advise us by return e-mail or telephone and then delete this e-mail together with all attachments.

Viruses: Te Pūkenga does not represent or warrant that this e-mail or files attached to this e-mail are free from computer viruses or other defects. Any attached files are provided, and may only be used, on the basis that the user assumes all responsibility for any loss, damage or consequence resulting directly or indirectly from their use.

s 9(2)(b)(ii)

[REDACTED]
Fri 7/19/2024 11:41 AM

To: [REDACTED] >; Richmond Tait [REDACTED] >; Rob Heaney [REDACTED]

Hi all, some preliminary work was done s 9(2)(b)(ii)

[REDACTED]
Ngā mihi

[REDACTED]
Kairuruku Matua, Whakatinanatanga me ngā Kawenga | Principal Advisor, Performance & Accountability



[REDACTED]
tepūkenga.ac.nz

Released under the
Official Information Act 1982

Property and EPI Performance Information added to folders.

[redacted]

Thu 7/18/2024 5:15 PM

To: Rob Heaney <[redacted]>; Richmond Tait <[redacted]>; Neale Jackson <[redacted]>; Daniel Stoneman <[redacted]>; john.fisk <[redacted]>; Richard Nacey (NZ) <[redacted]>; Bailey, Richard <[redacted]>; Bennett, Nichola <[redacted]>
Cc: John Tramoundanas-Can <[redacted]>; Phil O'Callaghan <[redacted]>

Kia Ora all,

Today we have added the following files/ Information sources to the ITP RSV Programme folders.

In the General Folder we have added Property asset files:

- 2022 CAMS_DEV_Registers ver31 Property Usage.xslx – Property Asset Information that can be filtered by Campus
- Valuation Comparison Dec 2023.xslx – Property valuations as at the end of 2023

In individual ITP folders (e.g. Ara) we have added Course completion data as the primary EPI or indicator of educational performance across an institution.

- 6012 – Northtec – Course Completion.xlsx (e.g. for Northtec) – an Excel file showing Course Completion (the Education Performance Indicator that best indicates performance on an annual basis) by Programme and with EFTS value for 2019 – 2023 inclusive.

Ngā mihi

[redacted]

Kairuruku Matua, Whakatinanatanga me ngā Kawenga | Principal Advisor, Performance & Accountability



[redacted]
tepukenga.ac.nz

Released under the Official Information Act 1982

New Financial Information

[REDACTED]

Fri 7/19/2024 1:00 PM

To: Rob Heaney [REDACTED] >; Richmond Tait [REDACTED] >;
Neale Jackson [REDACTED] ; Daniel Stoneman [REDACTED] ; john.fisk [REDACTED]

[REDACTED] ; Richard Nacey (NZ) [REDACTED] ; Bailey, Richard [REDACTED] ; Bennett,
Nichola [REDACTED] ; [REDACTED]

Cc: John Tramoundanas-Can [REDACTED] >; Phil O'Callaghan [REDACTED]

Kia Ora all,

Updated Financial Forecasts for each institution are now available in the ITP Folders. They were developed in May as part of the Cabinet Paper development process and are named in the following format:

Master Te Pūkenga Model – Ara.xlsm (e.g.)

Ngā mihi

[REDACTED]

Kairuruku Matua, Whakatinanatanga me ngā Kawenga | Principal Advisor, Performance & Accountability



[REDACTED]

tepukenza.ac.nz

Released under the Official Information Act 1982

shared "2024-07-19_202406 Calibre Partners Consultation Data - Copy" with you

Mon 7/22/2024 12:02 PM

To: Daniel Stoneman >; Neale Jackson <

Bcc: Te Pūkenga System Monitoring



invited you to edit a file

Hi Neale and Daniel - please find HR information relevant to the Institutions you are studying (Northtec, Wintec etc). This file is in the Northtec folder.

If you have any questions, please don't hesitate to get in touch.



2024-07-19_202406 Calibre Partners Consultation Data - Copy



This invite will only work for you and people with existing access.

Open

Share



[Privacy Statement](#)

This email is generated through Te Pūkenga's use of Microsoft 365 and may contain content that is controlled by Te Pūkenga.

shared "2024-07-19 _202406 PwC Consultation Data - Copy" with you

Mon 7/22/2024 12:04 PM

To
Bcc:Te Pūkenga System Monitoring <SystemMonitoring@tepukenga.ac.nz>



invited you to edit a file

Hi , in part aanswer to your further information request, the general HR Information we have available for each institution is in the EIT folder, but relates to all the Institutions under your purview.

Regards



2024-07-19 _202406 PwC Consultation Data - Copy



This invite will only work for you and people with existing access.

Open

Share



[Privacy Statement](#)

This email is generated through Te Pūkenga's use of Microsoft 365 and may contain content that is controlled by Te Pūkenga.

shared "2024-07-19_202406 Volte Consultation Data - Copy" with you

Mon 7/22/2024 11:59 AM

To >;Richmond Tait >;Rob Heaney

Bcc:Te Pūkenga System Monitoring <SystemMonitoring@tepukenga.ac.nz>



invited you to edit a file

Hi Volte Team, here are the HR information sets for Unitec/ MIT, NMIT, Open etc. - it is in the Unitec folder. If there are any questions re this, please dont hesitate to get in touch.



2024-07-19_202406 Volte Consultation Data - Copy



This invite will only work for you and people with existing access.

Open

Share



[Privacy Statement](#)

This email is generated through Te Pūkenga's use of Microsoft 365 and may contain content that is controlled by Te Pūkenga.

[redacted] shared "WITT Pilot Report_FINAL DRAFT 18 Nov 2022" with you

[redacted]

Mon 7/22/2024 4:46 PM


To [redacted]


Bcc:Te Pūkenga System Monitoring <SystemMonitoring@tepukenga.ac.nz>



[redacted] invited you to edit a file

Hi [redacted], here is a space planning study for WITT with identified buildings that are underutilised, and some suggested for consolidation. It was from a point in time and utilisation and who in what building has changed eg BCITO moved in. FYI

 WITT Pilot Report_FINAL DRAFT 18 Nov 2022

 This invite will only work for you and people with existing access.

Open

Share



[Privacy Statement](#)

This email is generated through Te Pūkenga's use of Microsoft 365 and may contain content that is controlled by Te Pūkenga.