



March 2009

PBRF Sector Update

PBRF User Guide

The Tertiary Education Commission (TEC) is developing a PBRF User Guide. The User Guide will outline what drives PBRF funding and will assist tertiary education organisations (TEOs) to provide PBRF data.

A draft copy of the PBRF User Guide will be circulated to key PBRF contacts at each TEO during April. TEOs are encouraged to provide us with feedback on the draft copy. Please take this opportunity to identify any information gaps before the official version is published on the TEC website.

2008 PBRF Wash-up Adjustment

The 2008 PBRF wash-up process will commence on 1 April 2009. The purpose of the wash-up is to finalise your 2008 PBRF payments by making any necessary adjustments. This takes into account any changes in both the pool size and revised individual allocations.

Individual TEOs will be asked on 1 April to verify the information held by the TEC pertaining to Research Degree Completion (RDC) and External Research Income (ERI) for the years 2004, 2005 and 2006.

The Quality Evaluation ratios used for the 2008 wash-up will be the same ratios used for the 2007 wash-up. These ratios incorporate all the final amendments that were made after the 2006 Quality Evaluation.

Validation and Verification of External Research Income

TEOs' [External Research Income Declarations](#) (ERI Declarations) are due with the TEC on 31 May 2009.

The TEC will validate the ERI Declarations by checking to ensure that independent audit certificates have been received.

TEOs that receive PBRF eligible ERI worth less than \$200,000 are not required to submit an independent audit opinion. These TEOs, however, must supply the TEC with independent verification of their PBRF eligible ERI in the form of either an annual report or copies of the working papers used to calculate the income.

When TEOs submit their ERI Declarations, each CEO will be required to attach a signed declaration confirming that the ERI data is accurate. An ERI Declaration form is attached as Appendix One.

Information explaining the requirements of ERI can be found in the PBRF 2006 Guidelines (www.tec.govt.nz) on pages 191-199 and 220-221.

It is important to note that ERI Declarations (including audit certificates) must now be sent to:

Donna Boot
The Tertiary Education Commission
P O Box 27048
WELLINGTON

2008 PBRF Annual Report

The TEC intends to have the 2008 PBRF Annual Report available on the TEC website before the end July. Hard copy publications will be available shortly thereafter.

PBRF Sector Reference Group

The PBRF Sector Reference Group (SRG) was set up in February 2008 to develop recommendations to the TEC on the redesign of the 2012 Quality Evaluation.

A number of consultation papers have been produced and the sector's responses to these have been considered by the SRG while preparing their recommendations. Consultation with the sector will continue throughout 2009. The [consultation papers](#) are published on the TEC website.

Contact Us

If you have any questions regarding the PBRF please contact us at:
pbrfinfo@tec.govt.nz