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# Report of External Evaluation and Review

Career Matrix NZ Limited  
trading as Abacus Institute of Studies

Highly Confident in educational performance

Highly Confident in capability in self-assessment

Date of report: 19 April 2016

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# Purpose of this Report

*The purpose of this external evaluation and review report is to provide a public statement about the Tertiary Education Organisation's (TEO) educational performance and capability in self-assessment. It forms part of the accountability process required by Government to inform investors, the public, students, prospective students, communities, employers, and other interested parties. It is also intended to be used by the TEO itself for quality improvement purposes.*

## Introduction

### 1. TEO in context

Name of TEO:	Career Matrix NZ Limited trading as Abacus Institute of Studies
Type:	Private training establishment (PTE)
First registered:	2010
Location:	9A, 166 Moorhouse Avenue, Christchurch
Delivery sites:	Level 5, 3 Wakefield Street, Auckland 204 Warren Street, Hastings
Courses currently delivered:	<ul style="list-style-type: none"><li>• National Diploma in Business (Level 5)</li><li>• National Diploma in Business (Level 6)</li><li>• Diploma in Business and Enterprise Management (Level 7)</li></ul>
Code of Practice signatory:	Yes
Number of students:	Domestic: nil International: 265 students during 2015 (355 in 2014) – 209 students were enrolled at the time of the external evaluation and review (EER)
Number of staff:	Seven full-time and five part-time teaching staff; nine full-time and two part-time management and support staff
Scope of active accreditation:	In addition to the programmes listed above, Abacus Institute of Studies (Abacus) is accredited for New Zealand Certificates in English Language

(Levels 1 and 2, and Level 4 (Academic)).

- Distinctive characteristics:** Most of the students are from India. At the time of the EER, 51 per cent of students were studying in Christchurch, 35 per cent in Auckland, and 14 per cent in Hastings.
- Recent significant changes:** Abacus has experienced significant growth in student numbers since the previous EER (72 students in 2012). Abacus reports that it opted to suspend the issuing of new offers for June 2014-February 2015 to ensure adequate resources were available.
- Abacus opened a new site in Auckland in April 2013, and additional space was established in Auckland during 2014. In February 2015 the Christchurch head office and delivery site relocated to new premises.
- The Diploma in Business and Enterprise Management was approved by NZQA for delivery in 2013. Abacus has been developing programmes for the New Zealand Certificate in English Language, and at the time of the EER had received approval for levels 1 and 2, and level 4 (Academic). Other programme development is also currently underway, including programmes towards the new New Zealand Diplomas in Business.
- The head of business role is currently vacant and recruitment is underway.
- Previous quality assurance history:** At the EER in 2012, NZQA was Highly Confident in Abacus's educational performance and capability in self-assessment.
- Abacus met all the requirements of NZQA's national external moderation for 2012-2014, and was exempt from moderation for 2015.
- External moderation for Abacus's Diploma in Business and Enterprise Management is undertaken by an external advisor.
- Other:** Abacus has a formal agreement with an institute of technology for students completing the diplomas in business, to enable admission with credit to an

applied management Bachelor's degree.

## 2. Scope of external evaluation and review

Mandatory focus areas were:

- Governance, management and strategy

The other focus areas selected were:

- International students – all students are international and Abacus has experienced significant growth in student numbers over recent years.
- National Diploma in Business (Level 5) – this is expected to be the largest programme in 2016; many students progress from this programme to the level 6 programme; this programme was reviewed at the previous EER, thus providing opportunities for comparison.
- Diploma in Business and Enterprise Management (Level 7) – this is a new programme developed by Abacus (delivered since 2013).

## 3. Conduct of external evaluation and review

*All external evaluation and reviews are conducted in accordance with NZQA's published policies and procedures. The methodology used is described fully in the web document Policy and Guidelines for the Conduct of External Evaluation and Review available at: <http://www.nzqa.govt.nz/providers-partners/registration-and-accreditation/external-evaluation-and-review/policy-and-guidelines-eer/introduction>. The TEO has an opportunity to comment on the accuracy of this report, and any submissions received are fully considered by NZQA before finalising the report.*

Two evaluators visited two of Abacus's sites (Christchurch and Auckland) over two and a half days. The evaluation team met with two shareholders (managing director and director, marketing); the director (teaching and learning); eight academic staff and four support staff; and 20 students studying in the focus area programmes. Phone interviews were conducted with two academic staff from the Hastings site, three employers, two members of the local advisory committee, one member of the academic committee (also the external moderator for the level 7 programme), and one representative of the Christchurch Indian community.

The evaluation team reviewed management, academic and support services documentation (including planning and review documents), achievement and graduate destination data, survey feedback, teaching-related materials (including samples of assessment and moderation reports), staff and student information, the quality management system, and meeting minutes. In addition, the evaluators sighted the learner management system (Moodle) and student management system (Wise.net).

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# Summary of Results

## Statement of confidence on educational performance

NZQA is **Highly Confident** in the educational performance of **Career Matrix NZ Limited trading as Abacus Institute of Studies**.

The reasons for this judgement are as follows:

- Abacus is clearly meeting the most important needs of learners, who are acquiring useful skills and knowledge and relevant qualifications, and are very satisfied with their study experience. Evidence of this is found in consistently high rates of retention, qualification completion, graduate employment and student satisfaction since the previous EER and across the three delivery sites.
- Abacus has highly effective processes which contribute to excellent educational performance. These processes reflect the organisational emphasis on setting clear expectations for staff and students and maintaining high standards of compliance and monitoring, as well as a collaborative approach to problem-solving and improvement. There is a high level of support for, and oversight of, teacher effectiveness. Learner progress is closely monitored and achievement data is underpinned by robust and transparent assessment and moderation processes. There is good evidence that key policies, such as those relating to entry requirements, academic misconduct and student attendance, are also effective, which provides further assurance of the validity of achievement data.
- Governance and management at Abacus provide clear direction and leadership, through transparent and consultative processes for strategic and business planning and day-to-day decision-making. Recent significant growth has been deliberately and carefully managed to ensure adequate resourcing and to maintain organisational standards for academic quality and support services. External advice is sought on programme development and academic quality systems. Effective organisational communication and practical processes ensure consistency in programme delivery and administrative systems across the three sites.

## Statement of confidence on capability in self-assessment

NZQA is **Highly Confident** in the capability in self-assessment of **Career Matrix NZ Limited trading as Abacus Institute of Studies**.

Reasons for this judgement are as follows:

- Abacus has a systematic and organisation-wide approach to review and improvement, which includes regular processes for gathering and analysing information, sharing and discussing ideas for improvement, and monitoring the effectiveness of changes. This approach is informed by data and other information relating to student achievement (retention and qualification completion), administration (such as attendance rates) and survey findings (student satisfaction and graduate destination). Abacus reviews this information against organisational targets (some of which increase annually) and previous years to identify trends and to determine responses.
- In addition to empirical evidence, Abacus draws on staff and student feedback gathered through regular meetings and activities (including teaching observations and moderation processes, student meetings and surveys) to identify areas for improvement. A wide range of specific and accurate data is gathered in annual programme reviews and business plan reviews which are widely shared and discussed, and inform future planning.
- A variety of minor and more significant changes have been implemented since the previous EER. These include the introduction of a course to provide new students with essential skills and knowledge to position them for success in their study, and a clinic option for students requiring additional time to complete their qualification. New technology has been introduced to support teaching and learning across the three sites, including a learner management system and student database. More recently, there has been a focus on enhancing teacher performance and reflective practice, through enhanced monitoring of lesson planning and targeted professional development. There is good evidence that these and other initiatives have contributed to Abacus maintaining high levels of educational performance in the face of significant growth and expansion.

# Findings<sup>1</sup>

## 1.1 How well do learners achieve?

The rating for performance in relation to this key evaluation question is **Excellent**.

The rating for capability in self-assessment for this key evaluation question is **Excellent**.

Learner achievement at Abacus has continued to be very strong since the previous EER. The organisation has consistently achieved or exceeded organisational targets for overall retention and qualification completion (90 per cent and 80 per cent respectively).<sup>2</sup> Performance is broadly consistent over the period 2012-2015 across the three programmes and each of the three sites (refer Table 1). This is a very satisfactory outcome, particularly in the context of significant growth in student numbers. It reflects a clear focus on robust and transparent processes for assessment (including close monitoring to ensure the authenticity of student work) and moderation (both internal and external).

**Table 1. Abacus retention (Ret) and qualification completion (QC) rates (%) by programme and delivery site and overall for 2012-2015\***

Qualification and delivery site		2012 (#=71)		2013 (#=169)		2014 (#=346)		2015*(#=264)	
		Ret	QC	Ret	QC	Ret	QC	Ret	QC*
NatDipBus (L5)	All sites:	91	91	93	91	97	91	100	N/A
NatDipBus (L6)	All sites:	86	86	93	93	96	94	99	N/A
DipBus and Ent Mgt (L7)	Chch /Auck:	-	-	97	93	99	97	100	N/A
All qualifications:	Overall	90	90	93	92	97	93	100	N/A
	Chch:	92	92	95	93	96	93	100	N/A
	Auck:	-	-	91	91	98	95	99	N/A
	Hast:	88	88	88	88	98	90	100	N/A

\*At the time of the EER, qualification completion data for 2015 was not available; as Abacus has rolling intakes, some students enrolled during that year were yet to complete.

<sup>1</sup> The findings in this report are derived using a standard process and are based on a targeted sample of the organisation's activities.

<sup>2</sup> Abacus has established increasing targets for retention and qualification completions over the period 2015-2017.

Abacus understands the key drivers of its high rates of learner achievement, including the recruitment of students with appropriate educational backgrounds and English language skills. Abacus has a coherent approach to ensuring students understand and comply with the PTE's expectations (in particular, those relating to assessment and attendance) which are documented, discussed and closely monitored. Reasons for withdrawals are analysed, and since 2012 a small number of students have had their enrolments terminated for non-compliance (13 out of 46 withdrawals).

During 2013 a course was developed in response to feedback from staff and students, which encompasses key skills and knowledge necessary for successful completion of the level 5 business programme, particularly formal written and oral presentations of business information. Feedback from staff indicates that this has been a useful development, providing students with a strong foundation for future study. The progress of individual students is monitored by tutors and the director (teaching and learning).

Abacus has also begun to provide additional tuition support, either one-to-one or via a clinic, for those students who have not been able to complete within the normal enrolment period. Through this ongoing focus on review and improvement, evidenced by these and other examples, Abacus has been able to maintain and enhance levels of learner achievement across the organisation.

## 1.2 What is the value of the outcomes for key stakeholders, including learners?

The rating for performance in relation to this key evaluation question is **Excellent**.

The rating for capability in self-assessment for this key evaluation question is **Good**.

The evaluators found that learners enrol at Abacus for a variety of purposes, including experiencing international education, gaining useful skills and knowledge – particularly applied business skills – and acquiring relevant qualifications for future employment (in New Zealand and/or in their home country) or further study. There is good quantitative and qualitative evidence (gathered through targeted survey data and social media activity) that Abacus is effective in delivering these valued outcomes for most of the learners.

Data available from annual surveys shows that many students achieve employment within three months of graduation (85 per cent of 2015 graduates). The majority of these roles are entry-level positions in hospitality, retail and trades/service sectors. During 2015 Abacus also sought to better understand the medium-term outcomes for the graduates and conducted a survey of all graduates.<sup>3</sup> An analysis of

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<sup>3</sup> A total of 508 graduates since 2010 were surveyed and a 51 per cent response rate was achieved.

responses shows that 96 per cent of respondents were employed and that the proportion of supervisory and management roles increased over time, regardless of the level or qualification completed. For example, 85 per cent of 2012 graduates reported holding managerial or supervisory roles, compared with 56 per cent of 2015 graduates. Thirteen per cent of respondents had progressed to further education in New Zealand or overseas. In both surveys, graduates report very high rates of satisfaction with their experience at Abacus and the usefulness of their study and qualification for employment. Abacus plans to repeat the survey of all graduates annually and to extend the range of information gathered. It also plans to introduce processes for verifying data and engaging more directly with employers, to build further evidence and understanding of learner outcomes.

Abacus staff have established a local advisory committee (based in Christchurch) with appropriate membership, which meets three times a year to provide input and advice on programme developments and useful skills for employment. In addition, Abacus management uses personal networks and memberships of organisations such as Chambers of Commerce to enhance their understanding of employer needs and expectations. Extending their direct engagement with employers at each city where programmes are delivered could provide further useful information.

Abacus has a strong tradition of engaging with the community, particularly Indian community groups. Regular cultural activities provide useful opportunities for students to build relationships and network with a wider range of people, and to build a sense of belonging and contribution.

### 1.3 How well do programmes and activities match the needs of learners and other stakeholders?

The rating for performance in relation to this key evaluation question is **Excellent**.

The rating for capability in self-assessment for this key evaluation question is **Excellent**.

Abacus is highly effective in meeting the needs of its learners through its approach to programme delivery. Students interviewed by the evaluation team reported that they were very satisfied with the variety of teaching and learning activities and New Zealand-based content which supports their learning and preparation for work. This includes gaining confidence in written and oral presentations of business information, and experience in applying key business concepts and tools. High rates of satisfaction with their learning experience is also evident in the results of formal surveys completed at the end of every course (regularly exceeding organisational targets of 90 per cent for overall satisfaction and 85 per cent for satisfaction with teaching and the course).

Abacus's approach to programme development reflects the organisation's strategy for organisational sustainability and commitment to academic quality. Recognised qualifications provide a pathway through levels of study with a particular focus on

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developing applied business skills, which has been further strengthened by ongoing improvements, such as the course development referred to in Findings 1.1 above. Abacus has successfully developed and delivered a level 7 programme since the previous EER in response to market feedback. Abacus has also begun to develop new programmes to meet the graduate profiles set out in the new New Zealand business qualifications which are its core focus.

An academic committee, the membership of which has been expanded to include an external advisor and student representative, provides additional support and oversight of programme development and academic quality. The minutes confirm that this group provides a forum for robust discussion and oversight of a wide range of academic matters, including internal and external moderation. Annual programme reviews are also prepared which bring together a wide range of information and include action plans. There is ample evidence of initiatives, such as changes to assessments (arising from moderation activities and student feedback), more consistent lesson planning, and targeted professional development, which are leading to worthwhile improvements.

Centralised administration of programmes across the three sites is facilitated by online learner management and student management systems. These systems, which have been implemented since the previous EER, together with plagiarism-detection software, have provided a variety of benefits for quality management, particularly in maintaining academic integrity and consistency. For example, online assignment submission has enabled better tracking of student progress, greater assurance of the authenticity of student work, and more timely feedback. The system also provides for teaching resources to be maintained online and regularly augmented by staff from all sites.

#### 1.4 How effective is the teaching?

The rating for performance in relation to this key evaluation questions is **Excellent**.

The rating for capability in self-assessment for this key evaluation question is **Excellent**.

Teaching effectiveness at Abacus is assured through clear structures and processes for academic management and a collegial approach to sharing resources and ideas for improvement. Teachers have relevant business qualifications and teaching experience, and either have, or are working towards, the required unit standards for assessing against unit standards. Clear expectations of teachers are set out in writing and reinforced in regular meetings and through regular oversight by academic managers, for example of lesson planning and moderation activities.

Abacus reports that a greater focus on formative assessment has helped to reduce the number of re-sits, which they consider is a useful indicator of teaching effectiveness. Further monitoring and discussion of this data is planned as part of

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regular teaching reviews. Ongoing improvements in professional practice are also fostered through regular peer observations (and/or manager observations), performance appraisals, and targeted professional development. Teachers interviewed by the evaluators were able to describe the ways in which these activities had contributed to their teaching effectiveness, particularly in engaging with adult learners and maintaining high levels of class participation and motivation. Regular phone calls, emails and visits by academic managers ensure teachers at all sites feel supported, well-informed and connected to the wider organisation. They report that their contribution is valued and ideas for improvement are regularly sought. Very recently, interested teachers have been invited to participate in a focus group on new programme developments.

Assessment and moderation practices are robust and transparent. Currently all assessments are prepared centrally, although it is intended that staff will, as they upskill, contribute to this activity. Staff are expected to ensure students both understand and comply with rules around cheating and plagiarism. Appropriate training and staff discussion regularly take place to ensure consistent practice. Internal moderation (pre- and post-assessment) is systematic and thorough within each site, with overall oversight provided by the director (teaching and learning). An appropriately qualified external advisor has been appointed to conduct external moderation for the level 7 programme, which is providing valuable input into assessment practice. While there is good evidence of ongoing improvement arising from moderation activities, cross-site moderation might provide further opportunities for sharing ideas and best practice.

Students consistently report very high rates of satisfaction with their teachers. Any issues that emerge are promptly followed up and addressed by the academic managers together with the teachers. Students interviewed by the evaluators were very positive about the ways in which they are supported and motivated as adult learners to participate and succeed. Examples include one-to-one tuition during or after class, timely and helpful feedback on assignments, and the use of relevant and engaging course materials and class activities.

## 1.5 How well are learners guided and supported?

The rating for performance in relation to this key evaluation question is **Excellent**.

The rating for capability in self-assessment for this key evaluation question is **Excellent**.

The effectiveness of the guidance and support provided to students at Abacus is underpinned by a commitment to providing good information, setting clear expectations right from the start, and excellent systems for monitoring and supporting students for academic success and enhanced well-being. The evaluators noted ample examples of these processes in operation. Abacus tightly manages entry requirements (both academic and English language levels) and takes care to ensure all new students understand the school's structured approach

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to teaching and learning, as well as its focus on compliance, such as the rigorous monitoring of attendance. Comprehensive information is provided before enrolment and during orientation on academic and pastoral processes. Individual progress is closely monitored and additional support is provided as required by the teachers. The student population is well prepared and supported to adjust to, and succeed in, the New Zealand educational environment, and this is reflected in the organisation's overall strong educational performance. Where there are failures and withdrawals, management understands the specific reasons.

Responsibility for pastoral care is shared among all staff and managers who express a genuine commitment to the well-being of their students and maintain appropriate records in the student database. The primary culture of the student body is well understood, and care is taken to explain and help students understand New Zealand cultural norms and expectations. The effectiveness of this approach is reflected in high retention rates and student feedback in surveys and during interviews. There are also a variety of opportunities for students to engage with management and other staff, through regular student meetings, informal class meetings, and via class representatives, and more recently through a suggestion box. Abacus is responsive to student feedback, implementing improvements to facilities and services.

Abacus maintains compliance with the Code of Practice for the Pastoral Care of International Students through ongoing and annual reviews and improvements to information and processes. Recently the orientation process was revised to ensure new students have ongoing access to key staff and important information over the first few weeks of study. In addition, Abacus provides a friendly and supportive environment for students to facilitate social interaction, such as fostering engagement with local community groups (refer Findings 1.2 above), arranging excursions once a term (for instance, a skiing trip), and specific activities for female students, who are in the minority.

## 1.6 How effective are governance and management in supporting educational achievement?

The rating for performance in relation to this key evaluation question is **Excellent**.

The rating for capability in self-assessment for this key evaluation question is **Excellent**.

Abacus has maintained very strong educational performance during a period of significant growth and change through highly effective governance and management. Considered strategies for balancing enrolment numbers with resources for teaching and learning reflect high levels of responsiveness to indicators of quality, and investment in new sites and technology. There is good evidence in meeting minutes of Abacus anticipating and responding to change, and all planning and decision-making being measured and reviewed against impacts on academic quality and outcomes. Furthermore, investment in programme

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development reflects a long-term plan, and Abacus is positioning itself for continued expansion into existing and new markets through current development activities (English language and information technology).

Excellent leadership and management is not only reflected in strategic and business planning for a sustainable organisation, but also in the collegial culture where staff are valued for their contribution and open communication, formal and informal, at all levels and across all sites. An effective framework for continuous improvement includes regular collation and analysis of key performance and satisfaction data, which is shared and discussed at all levels of the organisation. Excellent record-keeping, including detailed meeting minutes, student and staff records and annual programme reports, provides reliable evidence of these consultation and review processes. In addition to the various improvements noted throughout this report, Abacus has systematically revised the quality management system, to ensure policies and procedures are effective and, in particular, to enhance controls and consistency across the three delivery sites.

## Focus Areas

*This section reports significant findings in each focus area, not already covered in Part 1.*

### 2.1 Focus area: Governance, management and strategy

The rating in this focus area for educational performance is **Excellent**.

The rating for capability in self-assessment for this focus area is **Excellent**.

### 2.2 Focus area: International student support

The rating in this focus area for educational performance is **Excellent**.

The rating for capability in self-assessment for this focus area is **Excellent**.

### 2.3 Focus area: Diploma in Business and Enterprise Management (Level 7)

The rating in this focus area for educational performance is **Excellent**.

The rating for capability in self-assessment for this focus area is **Excellent**.

### 2.4 Focus area: National Diploma in Business (Level 5)

The rating in this focus area for educational performance is **Excellent**.

The rating for capability in self-assessment for this focus area is **Excellent**.

# Recommendations

There are no recommendations arising from the external evaluation and review.

# Appendix

## Regulatory basis for external evaluation and review

*External evaluation and review is conducted according to the External Evaluation and Review (EER) Rules 2013, which are made by NZQA under section 253 of the Education Act 1989 and approved by the NZQA Board and the Minister for Tertiary Education, Skills and Employment.*

*Self-assessment and participation in external evaluation and review are requirements for maintaining accreditation to provide an approved programme for all TEOs other than universities. The requirements are set through the NZQF Programme Approval and Accreditation Rules 2013, which are also made by NZQA under section 253 of the Education Act 1989 and approved by the NZQA Board and the Minister for Tertiary Education, Skills and Employment.*

*In addition, the Private Training Establishment Registration Rules 2013 require registered private training establishments to undertake self-assessment and participate in external evaluation and review, in accordance with the External Evaluation and Review Rules (EER) 2013, as a condition of maintaining registration. The Private Training Establishment Registration Rules 2013 are also made by NZQA under section 253 of the Education Act 1989 and approved by the NZQA Board and the Minister for Tertiary Education, Skills and Employment.*

*NZQA is responsible for ensuring non-university TEOs continue to comply with the rules after the initial granting of approval and accreditation of programmes and/or registration. The New Zealand Vice-Chancellors' Committee (NZVCC) has statutory responsibility for compliance by universities.*

*This report reflects the findings and conclusions of the external evaluation and review process, conducted according to the External Evaluation and Review (EER) Rules 2013.*

*The report identifies strengths and areas for improvement in terms of the organisation's educational performance and capability in self-assessment.*

*External evaluation and review reports are one contributing piece of information in determining future funding decisions where the organisation is a funded TEO subject to an investment plan agreed with the Tertiary Education Commission.*

*External evaluation and review reports are public information and are available from the NZQA website ([www.nzqa.govt.nz](http://www.nzqa.govt.nz)).*

*The External Evaluation and Review (EER) Rules 2013 are available at <http://www.nzqa.govt.nz/assets/About-us/Our-role/Rules/EER-Rules.pdf>, while information about the conduct and methodology for external evaluation and review can be found at <http://www.nzqa.govt.nz/providers-partners/external-evaluation-and-review/policy-and-guidelines-eer/introduction/>.*

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