

# Report of External Evaluation and Review

Industry Skills Limited  
(formerly Macquarie Training Limited)

Highly Confident in educational performance

Highly Confident in capability in self-assessment

Date of report: 15 August 2014

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*Final Report*

# 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:	Industry Skills Limited (formerly Macquarie Training Limited)
Type:	Private training establishment (PTE)
Location:	89 Domain Road, Palm Beach, Papamoa
Delivery sites:	Training takes place in the workplace or at temporary training venues.
First registered:	8 October 2001
Courses currently delivered:	<u>Business</u> <ul style="list-style-type: none"><li>• National Certificate in Business Administration and Computing (Level 3 and Level 4)</li><li>• National Diploma in Project Management (Level 5)</li><li>• National Certificate in Project Management (Level 4)</li><li>• National Diploma in Business (Level 5)</li><li>• National Diploma in Business Administration (Level 5)</li></ul> <u>Technical</u> <ul style="list-style-type: none"><li>• National Certificate in Electricity Supply (Field Switcher) (Level 4)</li><li>• National Certificate in Electricity Supply (Network Operator) (Level 4)</li><li>• Elevated Work Platforms</li></ul>

- Working at heights
- Network Operator Training

#### Adult Education

- National Certificate in Adult Education and Training (Level 4)
- Workplace Assessor programme (level 4)
- Train the Trainer

Code of Practice signatory:	No
Number of students:	Domestic: 313 part-time students in employment (Māori 11 per cent and Pasifika 5 per cent)  International: nil
Number of staff:	Eight full-time equivalents
Scope of active accreditation:	See: <a href="http://www.nzqa.govt.nz/providers/nqf-accreditations.do?providerId=743671001">http://www.nzqa.govt.nz/providers/nqf-accreditations.do?providerId=743671001</a>
Distinctive characteristics:	The PTE has three major methods of delivering training: short-duration workshops, distance learning, and coached workplace development, the latter being where the assessor visits and supports the trainee in the workplace. Some courses are partially funded by the industry training organisations (ITOs).
Recent significant changes:	The PTE has a contract with an Australian registered training organisation to co-ordinate and manage their delivery of training.
Previous quality assurance history:	Macquarie Training (now trading as Industry Skills Limited) was quality assured by NZQA on 29 June 2010 and received the following statements from NZQA: <ul style="list-style-type: none"> <li>• Educational performance: <b>Highly Confident</b></li> <li>• Capability in self-assessment: <b>Confident</b></li> </ul>

The ratings for the two focus areas were:

Governance, management and strategy

- Educational performance: **Excellent**
- Capability in self-assessment: **Good**

National Certificate in Business First Line

#### Management (Level 4)

- Educational performance: **Excellent**
- Capability in self-assessment: **Good**

## 2. Scope of external evaluation and review

Governance, management and strategy is a mandatory focus area. The other two focus areas selected were guided by a review of Industry Skills Limited documents and NZQA data. Discussions were held with the PTE through an online scoping meeting. The two programmes and the rationale for their selection were:

1. Working at Heights. Individuals are trained to work safely at heights. This is technical training, a key content area that is experiencing considerable growth. A workshop delivery approach is used, and involves a significant number of trainees (110 in 2013).
2. Project Management including the National Diploma in Project Management (Level 5) and National Certificate in Project Management (Level 4). Individuals are trained to contribute to or manage a business project. This is a business subject that is one of the key training content areas for the PTE. The programme uses a coached workplace development approach. Even though a very low number of trainees (seven learners in 2013) have enrolled, significant expansion will take place because of a new training contract, and the PTE requested that this programme be a focus area.

## 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.*

The team consisted of two evaluators who spent two days on site where they:

- Reviewed a wide range of documentation and data related to the two focus area programmes
- Interviewed the directors, management team and trainers of the two focus area programmes
- Engaged with a range of stakeholders, including organisations that contract Industry Skills Limited to undertake training, various ITO representatives, and current and past trainees of both programmes under review.

# Summary of Results

## Statement of confidence on educational performance

NZQA is **Highly Confident** in the educational performance of **Industry Skills Limited**.

Industry Skills Limited is achieving a high standard of educational performance across a range of programmes. Nearly all trainees complete their programme and develop their knowledge, skills and attitudes. For instance, the supervisors of the project management graduates saw a 'vast improvement' in their performance, and their feedback resulted in a review of the project management systems in their place of employment. This training programme has been approved for a major expansion. There are signs that some graduates are progressing into more senior roles. Graduates of the Working at Heights certification programme also had an almost 100 per cent completion rate. Workplace supervisors and ITO representatives expressed high levels of confidence in the competence of graduates from this PTE.

Industry Skills Limited has comprehensive and robust processes in place to achieve high-quality outcomes. The organisation has developed a reputation among industry stakeholders for consistently delivering rigorous and relevant training that is responsive to industry training needs. The organisation has long-term client relationships, repeat business and referrals to new business opportunities. The trainers are passionate about their work and have a consistent focus on ensuring successful outcomes for trainees. They are respected by their trainees and industry representatives. The trainers have a comprehensive range of organisational procedures to ensure consistent delivery of training. Systematic needs identification ensures the needs of the organisation and the individual trainee are well met. Training is delivered in the workplace at a time, location and in a manner that best meets the key stakeholders' needs. Learner progress is monitored and supported at all levels of the organisation, to ensure completion of the training programme.

## Statement of confidence on capability in self-assessment

NZQA is **Highly Confident** in the capability in self-assessment of **Industry Skills Limited**.

A strong culture of self-assessment drives ongoing improvements. Individual learning progress is systematically, regularly and effectively tracked, and actions are reviewed to bring about improvement. Regular audits of all operations assess gaps in operational procedures, and modifications are made as required. The organisation meets with key clients to review the success of training contracts, and changes are introduced from this review process. Feedback processes are reviewed regularly to ensure that improvements are guided by evidence from both trainees and clients. An example is the recent change from an online feedback survey to individual contact with business clients to improve the response rate.

A formal continuous improvement process identifies any problems, recommends changes in procedures and actions to be implemented, and confirms that these actions have been undertaken. There are numerous examples of changes taking place on an ongoing basis. A 'traffic light' system for moderation results has been created, which flags potential issues to management that may require action. An integrated training development process has been implemented to ensure a consistent standard of training service is delivered, and a more evaluative trainer observation checklist was being developed at the time of the site visit.

As outlined above, a strong evaluative approach is being taken by the organisation. However, in some areas this procedure is simply a check on actions taken. This does not judge the extent to which the actions have brought about the desired impact in performance.

# 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**.

The achievement of Industry Skills Limited trainees is very strong across a range of programmes. Nearly all of the trainees, who are often selected by their employers, complete their training (196 out of the total 201 completions in 2013 – 97 per cent). There was clear evidence of the trainees' developing their knowledge, skills and attitudes. For instance, the supervisors of the project management trainees saw a 'vast improvement' in the graduates who were 'a lot more methodical' and 'accurate'. Graduate feedback has resulted in client organisations substantially reviewing their own project management systems. There are some signs of these graduates progressing into more senior roles, and this is also the case for the adult education and business administration trainees.

Graduates of the Working at Heights certification programme also had strong levels of achievement – close to a 100 per cent completion rate. Their supervisors expressed high levels of confidence in the competence of the certified graduates to be able to work safely. This was supported by no reported safety incidents involving the graduates. The feedback from trainees is positive to very positive. The PTE's training materials have been used as exemplars for other industry sectors.

Self-assessment of the achievement of trainees is robust. The core process is a monthly management meeting where individual trainee results are reviewed. Any non-completions are investigated and remedial actions are proposed to ensure completion including: follow-up emails, phone calls, oral instead of written assessments, worksite visits and extensions provided for submitting assessments. The PTE often has an ongoing, long-term relationship with the client organisation, so there is a high level of motivation to deliver results. Formal monthly progress reports are sent to both the employer and the trainees outlining results and any actions proposed. A qualification review report was trialled and discontinued as it did not add value to the review process. In one isolated case where a workshop was not successful, the procedures were changed to ensure similar experiences would not be repeated.

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<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.

## 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 **Excellent**.

Industry Skills Limited produces outcomes that are consistently rated highly by key stakeholders. The key stakeholders are client companies, individual trainees, ITOs and various industry bodies. The primary outcomes are competent graduates being produced by high-quality training tailored to the needs of the business and the individual trainee. The indicators of high value are a very good industry reputation, significant repeat business, and a number of referrals for new business. The ITO representatives interviewed rated the PTE highly based on their observations of the training and feedback from businesses and individual trainees. One said the PTE is seen as 'extremely professional within the industry'. Another sign of value is that three of the ITO representatives, familiar with a variety of training organisations, had chosen to undertake training with Industry Skills Limited, and their expectations were met. Trainee feedback is consistently strong.

The Working at Heights programme offers significant value. There is a high level of confidence that the PTE offers robust training, particularly in regard to working safely. One business said the PTE was 'highly polished', and another, 'it's a better service, but not the cheapest'. Learners valued the knowledge and practice gained in pole safety. An ITO representative viewed Industry Skills Limited as a 'leading edge' training organisation and has provided a formal attestation to support the PTE's accreditation to deliver training in a related area. Another sign of significant value is repeat business and increasing income from the Working at Heights programme. The PTE was invited in 2013 to develop a training programme for the Australian electrical transmission industry. The reputation of one of the owners was a key factor in this.

The project management programme is highly rated. Businesses and trainees value that they can apply their knowledge and skills while using the workplace project management software to enhance individual and organisational performance. As a result of feedback from the trainees, one organisation has engaged an external consultant to strengthen project management. This has been a pilot project for one large corporation, whose managers are seeking approval to expand trainee numbers tenfold.

The PTE has strong review systems in place to ensure that key stakeholders are receiving high value. The PTE tried a 'tell us what you think' section in the monthly report and in an online survey to gain employer feedback, but the response rate was low and so the feature was discontinued. The PTE has continued using the more effective and direct process of a face-to-face or phone meeting with key managers to review the success of the training contracts. This has recently been made more systematic with a standardised programme evaluation report. Changes

are made based on these meetings. Similarly, individual trainees provide feedback on the programmes and how they might be improved.

### 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**.

The needs of the key stakeholders are being well met by the programmes that Industry Skills Limited offers. The PTE has a reputation for sound training adapted to the particular needs of the businesses concerned, and so has developed long-term relationships with many of these businesses. The PTE's approach to training is to develop programmes that incorporate recognised industry standards. The programmes are contextualised to meet the needs of business and employees in a specific workplace. The training is customised to include appropriate materials, timing, location and delivery. Three key delivery methods are offered to clients: workshops with or without follow-up assessment, distance learning, and coached workplace development. ITOs, businesses and trainees have a high level of confidence in the integrity of the outcomes of the training. Industry Skills Limited is responsive to the needs of businesses and is progressively drawing on its experience in Australia of developing recognised training for an organisation working in the electricity sector.

The Working at Heights workshops consistently meet the needs of industries for certified graduates who can safely work at heights. Customised training workshops are developed that meet legislative requirements and are tailored to the needs of the electricity supply industry. The workshop delivers the required knowledge in the morning sessions, followed by trainers demonstrating the appropriate behaviour and all trainees performing the required tasks to demonstrate they are competent. Industry feedback expresses a high level of confidence that Industry Skills Limited is producing competent workers and being flexible in meeting the varying needs of businesses and their timeframes. The PTE receives very positive feedback from learners on the relevance and delivery of the training.

The project management training programme is strongly meeting the needs of the businesses and trainees involved. Organisational needs are systematically established at initial contact and a proposal developed. The training uses internationally recognised project management software adapted for the specific systems used by the client. The trainee learns by managing or participating in a workplace project, and they are able to achieve either a level 4 or 5 qualification depending on their level of responsibility. A coached workplace development approach is offered, where a trainer visits the trainee in the workplace as well as offering support via email and phone. The two key corporations involved say their

needs are being well met. The trainees, while acknowledging the amount of work involved, confirm that they are gaining considerable knowledge and skills.

There was clear evidence of the ongoing review of the needs of business and trainees. The monthly management meeting reviews the achievement of learners and develops actions to support the training. The PTE has a core ethos of reviewing and adapting existing materials to meet needs. For instance, the process for developing training programmes has recently been formalised and standardised to improve the overall quality of the service. Early indications are that this change has clarified the process for the staff involved and is improving quality. Another example is the project management programme unit standard assessment materials developed by the relevant ITO, which were modified to better follow a project life-cycle. Evidence was collected during the project and a portfolio presented at the end of the project for a final assessment. The trainee feedback was positive about the new approach.

#### 1.4 How effective is the teaching?

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 training is highly effective and robust. A wide range of evidence supports this overall conclusion. The most obvious sign of quality teaching is the already-noted high level of educational achievement. Trainees, ITOs, tutors and management consistently state that the assessment is rigorous; as one said, 'if you get it, you earned it'. Another indication of teaching quality is the ITO representatives choosing to enrol in training with this PTE.

The trainers and the systems that support them are of a high standard. The PTE engages individuals with strong industry backgrounds who are respected by industry representatives. Trainee feedback also is generally very positive about the broad knowledge, experience and empathetic approach of the trainers. There is a robust induction process for trainers, which in many ways mirrors the organisation's overall approach to training. Current competency is assessed and internal training in adult education is provided, followed by observation by an experienced trainer, co-delivery of a course and individual delivery supported by the experienced trainer. Similarly for external training, the trainees' current competency is assessed, and then an individual training plan is developed with clear goals that are carefully tracked by trainers and management to ensure the trainees' success.

The internal moderation system is effective in producing robust outcomes; a recent improvement is a 'traffic light' system that promptly informs management of any issues arising. There is a planned approach to professional development for the whole organisation as well as the individual development plans for the trainers; for instance, all teaching staff participated in the Train the Trainer programme.

Similarly, there is a sound moderation review system in place to produce training materials that are consistent and of good quality and appropriate for the needs of the trainees.

The delivery approach is adapted for the different contexts in which the training takes place. The Working at Heights compliance training is delivered in a workshop by credible trainers with relevant industry backgrounds and expertise. Trainees valued the storytelling approach to training, where real situations are discussed to illustrate theory and practice. The trainers know the profile of the trainees as they have worked in the industry for many years and are passionate about the critical importance of working safely, knowing the very real consequences of safety standards not being met. The approach is to deliver the required theory in the morning and in the afternoon move on to practical demonstration, followed by all trainees being required to demonstrate their competence.

Real-time formative and summative assessment takes place during the practice sessions. Trainees who have literacy difficulties can be orally assessed. The project management programme is delivered by a trainer experienced in managing projects, with good people and coaching skills, who is currently undertaking postgraduate studies in business. The trainees spoke highly of the one-to-one workplace support and the flexibility to fit training around their workplace commitments, such as the project management portfolio being formally submitted at the end of the project. This assessment approach is more accessible and uses a live example, and trainees can achieve the level 4 or 5 qualification depending on the degree of responsibility they have for the project. The feedback from the trainees has been positive.

There is ongoing review of training taking place which brings about improvements, some of which have been noted above. Other instances were a quality check of new trainers (under development during the evaluation site visit) and improved procedures to confirm that training groups have broadly similar needs. The in-house adult education trainer has delivered a Train the Trainer course, which was valued by staff as an opportunity to share teaching and learning strategies to improve delivery.

## 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**.

There is compelling evidence of very effective support and guidance to ensure trainees not only remain engaged but complete their learning. One ITO said there was 'excellent follow-up', and the trainers are 'engaged and empathetic'. Trainees said their trainers understood their workplace, knew what was important, and clearly cared for the safety of the trainees.

Some key principles underlie the approach Industry Skills Limited takes to supporting its trainees. First, there is a whole-of-organisation approach to ensure the trainee succeeds at completing the programme. For instance, for the longer-duration programmes, a formal monthly progress report is forwarded to the trainee, the customer/supervisor and the Industry Skills Limited programme team. Every two months the management team reviews completion and withdrawal figures. In each case, follow-up actions are developed and monitored at subsequent review meetings to see whether there has been a successful outcome.

'Long-term relationships with the client' is another key influence on the support and guidance provided. These ongoing relationships mean the PTE is highly motivated to achieve success and ensure repeat business. 'Flexibility' is another key principle. A wide range of support and guidance mechanisms is used. The distance learning and coached workplace development courses have a variety of specific support and guidance interventions which have proved effective. Phone calls are a common method to encourage and provide useful advice to the trainees. The coached workplace development approach includes on-site visits to provide more in-depth support and guidance; trainees commented favourably on this approach. Time extensions are another technique used to support completion of training where there is ongoing assessment taking place. The short-duration workshops provide additional one-to-one support, such as oral assessment, to those finding the tasks challenging. In conclusion, additional individualised support is offered when trainees are struggling, the key obstacles are identified, and solutions are negotiated to achieve success which benefits all stakeholders

There is ongoing self-assessment of the support and guidance offered. As noted, there is regular review of the progress the individual trainees are making towards their learning goals, and support and guidance is modified as required. Regular team and management meetings assess the support and guidance being given to individual trainees. An online survey has been trialled to gain more feedback on support and guidance being offered. This has proved successful with business administration trainees working at a desktop, but not for those working in the field who do not have computer access; feedback via face-to-face, phone and email methods has been retained for these groups.

## 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 **Good**.

The governance and management of Industry Skills Limited has been highly effective in supporting educational achievement. The organisation has a clear mission of 'developing and recognising knowledge and skills for individuals within the workplace'. The leadership team has extensive industry and educational knowledge, experience and skills. One sign of exemplary leadership has been managing the organisation through a considerable change in the types of training delivered, types of trainee, and some of the business clients. Yet the organisation has achieved significant growth while developing staff and systems to maintain high-quality outcomes.

Core principles guide decision-making: a focus on robust educational practice, and being highly responsive to the needs of clients and trainees. Some of the key outcomes of this approach have been a reputation for consistently delivering high-quality and relevant training, long-term client relationships, repeat business, and referrals to new business opportunities. Two recent and significant outcomes were the invitation to assist an Australian organisation to register and deliver training, and the major rollout of a project management programme for a large corporate organisation based on a successful pilot initiative. There are some growing benefits for management from delivering adult education in Australia, most notably different perspectives about delivering tertiary education and early exposure to emerging trends in adult education.

The organisation has a range of robust systems and processes to support high-quality, consistent performance. All management procedures are periodically audited to ensure they have been implemented as outlined, and changes are made if warranted. For example, the process for developing a training programme has recently been integrated and formalised to ensure a more consistent standard of delivery. Management has recruited high-quality staff and built teams with diverse expertise to cover more than one training area. There is a strong culture of working together in the 'Industry Skills Limited' way, which includes a social dimension. The staff interviewed feel valued and newer staff appreciate the sound induction and mentoring by an accessible leadership team. Professional development is supported with numerous staff involvement in the training.

Reflective practice and self-assessment is embedded within organisational operations. An open and transparent culture encourages innovation. Some initiatives appear to have been effective, such as the already-mentioned 'traffic light' system for moderation results, and there are early indications of value being gained from the integrated training process programme. However, an overarching programme review report did not add value as the results were already accessed

through existing procedures, and so this report was discontinued. Successes and failures are a feature of an organisation that is learning. There is a formal, continuous improvement process which identifies problems from a range of sources, recommends changes in procedures, the rationale for the changes and the action plan to be implemented, and verifies whether the actions have been implemented.

The final stage of this self-assessment cycle could be strengthened in a number of ways. The success criteria for any changes could be more clearly identified and clear judgements made about the impact of change on performance. There are already instances of an evaluative approach being taken by the organisation in a number of areas. However, it is recommended that a more systematic evaluative approach be adopted to build on the audit-focused systems. For example, success criteria could be developed for the proposed business development role to enable more systematic evaluation of the initiative and any organisational learning that results.

## 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 **Good**.

### 2.2 Focus area: Project Management

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: Working at Heights

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

NZQA recommends that Industry Skills Limited build on its current self-assessment processes with a more systematic evaluative approach. This approach would state the aim of the initiative and define some simple success criteria, including key performance indicators. At a later point, the impact on performance and the degree of success of these initiatives could be identified.

# 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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Final Report