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# External Evaluation and Review Report

Bernard & Ya Holdings Limited

Date of report: 8 June 2021

# About Bernard & Ya Holdings Limited

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*Bernard and Ya Holdings Limited (trading as Tree House) focuses on learners gaining the key knowledge, skills, confidence and attitude they need to secure and retain sustainable employment.*

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Type of organisation:	Private training establishment
Location:	5 Nelson Street, Auckland
Code of Practice signatory:	No
Number of students:	Domestic: 20 EFTS <sup>1</sup> – Youth Guarantee 500+ Ministry of Social Development (MSD) contracted participants per year on various employment-related programmes. These include approximately: <ul style="list-style-type: none"><li>• 30 per cent Māori</li><li>• 35 per cent Pasifika</li><li>• 10 per cent Asian</li></ul> International: nil
Number of staff:	Eight full-time staff
TEO profile:	See <a href="#">Tree House</a> on the NZQA website.
Last EER outcome:	The previous external evaluation and review (EER) of Tree House, held in May 2016, resulted in summative judgements of Highly Confident in educational performance and Highly Confident in capability in self-assessment.
Scope of evaluation:	All training design and delivery
MoE number:	7851
NZQA reference:	C45308
Dates of EER visit:	14 and 15 April 2021

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<sup>1</sup> Equivalent full-time students

# Summary of Results

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*There is clear evidence that Tree House is delivering quality education and training. Tree House has strong achievement, and the outcomes are highly valued by students and employers.*

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## **Highly Confident in educational performance**

- Tree House has high course completions, along with positive employer and student satisfaction with the training. Long-term relationships with government agencies and employers signify that the outcomes for trainees are valued.
- Programmes are taught by experienced, qualified staff who use their industry and educational experience to ensure the education is relevant and engaging. Staff are involved in regular reflection and review, leading to continuous improvement of teaching.

## **Confident in capability in self- assessment**

- Tree House is using its industry and community connections and relationships effectively to develop and deliver programmes that match individual and employer needs.
- The PTE has a clear and established long-term philosophy and purpose that is reflected throughout the organisation. Activities are appropriately resourced.
- Tree House has met a number of its compliance responsibilities. However, their ad hoc approach to managing compliance matters has caused one identified error. A more centralised oversight would mitigate this risk.
- Tree House has effective self-assessment that evaluates the programmes and learning activities on an ongoing basis. However, much of this self-assessment is informal and some gaps were evident in relation to monitoring of compliance. The challenge is to formalise and deepen self-assessment processes, to sustain and improve on current levels of achievement.

# Key evaluation question findings<sup>2</sup>

1.1 How well do students achieve?

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

Performance:	<b>Excellent</b>
Self-assessment:	<b>Excellent</b>
Findings and supporting evidence:	<p>The core business of Tree House is contracted MSD job placement programmes. This means that the primary focus of both the organisation and its staff is on job placement for sustained employment. As well as achieving credits against unit standards (refer Appendix 1 for details), students are coached to gain employment, including gaining educational soft skills such as improved literacy, computer skills, self-confidence and interview skills. Other credentials like food safety, barista skills, driving and site safety are attained by individual students depending on their needs and aspirations. Completion rates for students enrolled in the New Zealand Certificate in Foundation Studies (Level 2) were 60 per cent in 2019 and 80 per cent in 2020.</p> <p>Tree House is strongly employment focussed and committed to ensuring that students and employers receive high value from the training and services they deliver. Interviews with external stakeholders indicate that the students are acquiring useful skills and knowledge appropriate to entry-level employment. This enables the graduates to apply their learning and work more safely and effectively immediately upon employment.</p> <p>Tree House also views repeat business with employer organisations as a key measure of the value of the outcomes. The core of Tree House’s activity revolves around a number of clients, most of whom have had a relationship with the PTE over several years. The fact that several employers repeatedly employ graduates from Tree House over several years is evidence of the perceived value of the training.</p> <p>Tree House has benchmarked itself against other organisations contracting to MSD and compares very well. For</p>

<sup>2</sup> The findings in this report are derived using a standard process and are based on a targeted sample of the organisation’s activities.

	instance, MSD rates Tree House in the top three providers in two of the three regions in which they operate.
Conclusion:	Tree House students are achieving well across the programmes it delivers. Achievement data is regularly monitored and analysed to identify areas of potential improvement. Tree House is strongly employment focussed and committed to ensuring that students and employers receive value from the programmes and services delivered.

### 1.3 How well do programme design and delivery, including learning and assessment activities, match the needs of students and other relevant stakeholders?

Performance:	<b>Excellent</b>
Self-assessment:	<b>Good</b>
Findings and supporting evidence:	<p>Tree House's efforts to meet the personal and academic goals of every student, while also understanding and meeting the needs of industries and employers, is a compelling feature of the organisation. The 'rolling entry' and 'coaching' style of Tree House's delivery means that the individual needs of each student are assessed and addressed. Programme design enables students to progress, then exit at an individually appropriate point.</p> <p>Every potential student is interviewed prior to committing to study, and from that discussion individual goals are set with the student and reviewed at intervals throughout the programme. Students regularly complete surveys to provide feedback on the learning methods, course delivery and their learning environment. The results of this feedback are analysed and used effectively to inform improvements to course delivery.</p> <p>Tree House teaching staff have extensive industry and professional experience, and an obvious natural passion and ability to engage with a range of students. Staff are participating in formal professional development relating to teaching, and there are regular opportunities for staff to discuss teaching practice. Teaching staff either hold an adult teaching qualification and/or are studying towards adult teaching qualifications. Ongoing professional development for teaching staff helps them to keep their teaching strategies current and ultimately leads to an improved experience for students.</p>

	Quality assessment practice is supported by internal moderation processes. However, external moderation results have at times highlighted fundamental gaps in assessment practice. While Tree House has acted quickly and meticulously to address issues raised, a more rigorous internal focus should have prevented these gaps in the first instance. A greater emphasis on improving assessment capability is desirable, as is a more formalised and documented approach to programme review.
Conclusion:	The very positive verbal and written feedback by stakeholders, the repeated engagement with employers, and the retention of Tree House by MSD as a preferred provider affirm that the organisation is identifying and responding well to student and stakeholder needs.

#### 1.4 How effectively are students supported and involved in their learning?

Performance:	<b>Excellent</b>
Self-assessment:	<b>Good</b>
Findings and supporting evidence:	<p>Tree House staff and management are highly client and student-centred and committed to their success and well-being. Students are strongly engaged. Student learning goals are well understood. The My SMART Career Plan is a reflective tool that is effectively used by students – examples presented indicate a comprehensive process.</p> <p>Students at Tree House receive active, integrated and ongoing social and academic support from staff at all levels of the organisation. Teaching staff and students described numerous activities and initiatives that motivate, engage and encourage students to get the full benefit from their time at Tree House.</p> <p>Staff are available to students outside of timetabled sessions, and students report that staff are always helpful and supportive. Tree House has a 24-hour 0800 number for students to contact staff if needed, and staff across the three sites have rostered responsibility to staff this service.</p> <p>Students are well guided into courses appropriate to their aspirations and capabilities. Staff teach small groups of students which enables them to have a good understanding of both progress and learning barriers and to provide individual support when needed. From experience, staff have developed a</p>

	<p>comprehensive appreciation of the needs of students and have developed strategies to address those needs.</p> <p>Tree House submitted an attestation to NZQA that they had completed a self-review of their implementation of the Interim Domestic Code<sup>3</sup> as a requirement for all PTEs by 1 March 2021. However, investigation at this EER found the self-review to have been cursory and undocumented.</p>
Conclusion:	From initial enrolment through to and beyond course completion, students receive high quality and appropriate learning and social support from Tree House teaching and administrative staff.

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

Performance:	<b>Good</b>
Self-assessment:	<b>Good</b>
Findings and supporting evidence:	<p>Tree House is a privately owned and operated training provider which employs and retains qualified and experienced staff whose experience and know-how are valued. Monitoring of staff performance is transparent and open and systematically applied. A planned approach is taken to staff professional development, linked to a comprehensive staff skill matrix.</p> <p>The organisation has sound leadership and a clear vision and understanding of its core business. The business model is sustainable, evident in nearly two decades of successful operation and growth. Treehouse management's long-term commitment to its staff is evidenced in the way all staff were retained through the COVID-19 lockdowns in 2020. Tree House has developed and embedded effective systems for monitoring student achievement and supporting staff to improve outcomes.</p> <p>As discussed in the next section, a more systematic approach to meeting NZQA compliance requirements is needed.</p> <p>The organisation encourages reflection on its role and how to continue to make ongoing and continuous improvements to how it meets the needs of students and other stakeholders. Self-</p>

<sup>3</sup> The Education (Pastoral Care of Domestic Tertiary Students) Interim Code of Practice 2019

	assessment is being well led by management and is understood and adopted throughout the organisation.
Conclusion:	Tree House has a clear vision and understanding of its enterprise, and strong leadership committed to providing effective support for educational achievement. Monitoring of performance within Tree House is regular, transparent and effective, although a more reliable process for compliance management is needed.

### 1.6 How effectively are important compliance accountabilities managed?

Performance:	<b>Marginal</b>
Self-assessment:	<b>Marginal</b>
Findings and supporting evidence:	<p>Tree House's compliance management responsibility sits primarily with the two working directors who share compliance tasks and obligations between them as appropriate. The management of compliance is largely ad hoc rather than part of a scheduled process, which has led to some oversights. Most seriously, Tree House recently made an incorrect attestation to NZQA with regard to self-review of their implementation of the Interim Domestic Code. While this did not present an immediate risk to students per se, and was quickly corrected by Tree House, it was still a non-compliance with NZQA's requirements.</p> <p>Courses are delivered as per programme approvals and unit standard consent and moderation requirements. Regular communication is maintained with NZQA and relevant industry training organisations to ensure that teaching and resources remain current.</p> <p>Tree House also manages compliance requirements with other agencies such as: criminal history vetting of all staff to meet the requirements of the Children's Act 2014; and continuing to meet requirements for MSD accreditation.</p>
Conclusion:	Tree House's effectiveness in managing its compliance accountabilities has been variable. A more methodical approach to meeting its statutory requirements is called for.

# Focus Areas

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

## 2.1 Focus area: All Training Design and Delivery

Performance:	<b>Excellent</b>
Self-assessment:	<b>Good</b>

# Recommendations

*Recommendations are not compulsory but their implementation may improve the quality and effectiveness of the training and education provided by the tertiary education organisation (TEO). They may be referred to in subsequent external evaluation and reviews (EERs) to gauge the effectiveness of the TEO's quality improvements over time.*

NZQA recommends that Bernard & Ya Holdings Limited:

- Add structures such as a compliance calendar and bring-up system, to enable proactive and demonstrable compliance monitoring processes.
- Develop staff capability in assessment practice and ensure that all assessments are internally moderated on a planned rotation.
- Formalise the programme review process.

# Requirements

*Requirements relate to the TEO's statutory obligations under legislation that governs their operation. This include NZQA Rules and relevant regulations promulgated by other agencies.*

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

# Appendix 1

**Table 1. Tree House MSD contracted programme summary data**

<b>Preparation for Work (Auckland)</b>				
	Participation	Completion	%	31 Day Into Employment or Higher education %
2018/2019	148	141	95%	N/A*
2019/2020	180	161	89%	97%
*2018/2019 Preparation for Work (Auckland) was 3-week training only, placement 'Into employment' was not recorded				
<b>Employment Placement Service (Wellington)</b>				
	Participation	Completion	%	31 Day Into Employment or Higher education %
2018/2019	100	85	85%	94%
2019/2020	67	67	100%	71%
<b>Training for Work and Individual Programme (Dunedin)</b>				
	Participation	Completion	%	31 Day Into Employment or Higher education %
2018/2019	80	66	83%	95%
2019/2020	25	23	92%	83%

# Appendix 2

## Conduct of external evaluation and review

*All external evaluation and reviews are conducted in accordance with NZQA's published rules. The methodology used is described in the web document <https://www.nzqa.govt.nz/providers-partners/external-evaluation-and-review/>. 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.*

### *Disclaimer*

*The findings in this report have been reached by means of a standard evaluative process. They are based on a representative selection of focus areas, and a sample of supporting information provided by the TEO under review or independently accessed by NZQA. As such, the report's findings offer a guide to the relative quality of the TEO at the time of the EER, in the light of the known evidence, and the likelihood that this level of quality will continue.*

*For the same reason, these findings are always limited in scope. They are derived from selections and samples evaluated at a point in time. The supporting methodology is not designed to:*

- Identify organisational fraud<sup>4</sup>*
- Provide comprehensive coverage of all programmes within a TEO, or of all relevant evidence sources*
- Predict the outcome of other reviews of the same TEO which, by posing different questions or examining different information, could reasonably arrive at different conclusions.*

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<sup>4</sup> NZQA and the Tertiary Education Commission (TEC) comprehensively monitor risk in the tertiary education sector through a range of other mechanisms. When fraud, or any other serious risk factor, has been confirmed, corrective action is taken as a matter of urgency.

## Regulatory basis for external evaluation and review

*External evaluation and review is conducted under the Quality Assurance (including External Evaluation and Review (EER)) Rules 2016, which are made by NZQA under section 253(1)(pa) of the Education Act 1989 and approved by the NZQA Board and the Minister authorised as responsible for Part 20 of the Education Act.*

*Self-assessment and participation and cooperation in external evaluation and review are requirements for:*

- *maintaining accreditation to provide an approved programme for all TEOs other than universities, and*
- *maintaining consent to assess against standards on the Directory of Assessment Standards for all TEOs including ITOs but excluding universities, and*
- *maintaining training scheme approval for all TEOs other than universities.*

*The requirements for participation and cooperation are set through the Programme Approval and Accreditation Rules 2018, the Consent to Assess Against Standards Rules 2011 and the Training Scheme Rules 2012 respectively. These rules were also made by NZQA under section 253 of the Education Act 1989 and approved by the NZQA Board and the Minister.*

*In addition, the Private Training Establishment Rules 2018 require registered private training establishments to undertake self-assessment and participate in external evaluation and review as a condition of maintaining registration. The Private Training Establishment Registration Rules 2018 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, training schemes and consents to assess and 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 Quality Assurance (including External Evaluation and Review (EER)) Rules 2016. 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)). All rules cited above are available at <https://www.nzqa.govt.nz/about-us/our-role/legislation/nzqa-rules/>, while information about the conduct and methodology for external evaluation and review can be found at <https://www.nzqa.govt.nz/providers-partners/external-evaluation-and-review/>.*

NZQA

Ph 0800 697 296

E [qaadmin@nzqa.govt.nz](mailto:qaadmin@nzqa.govt.nz)

[www.nzqa.govt.nz](http://www.nzqa.govt.nz)