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# Report of External Evaluation and Review

## Chivalry Training Providers

Confident in educational performance

Confident in capability in self-assessment

Date of report: 29 September 2016

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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:	Chivalry Training Providers (Chivalry)
Type:	Private training establishment (PTE)
First registered:	21 December 2007
Location:	4/9 Kellow Place, Manukau, Auckland
Delivery sites:	35 Boston Road, Mt Eden, Auckland
Courses currently delivered:	<ul style="list-style-type: none"><li>• Licence Controller Qualification</li><li>• Forklift Operator</li><li>• Forklift Operator Driver Licence Endorsement – Forklift (F)</li><li>• Driver Licence Class 2 (Medium Rigid)</li><li>• Driver Licence Class 3 (Medium Combination)</li><li>• Driver Licence Class 4 (Heavy Rigid)</li><li>• Driver Licence Class 5 (Heavy Combination)</li><li>• Driver Licence Dangerous Goods (D) Endorsement</li><li>• Driver Licence Wheels (W), Rollers (R),</li><li>• Tracks (T) Endorsements</li><li>• Class 2 driver licence training - Training Scheme</li></ul>
Code of Practice signatory:	Not a signatory

Number of students:	Domestic: 1,067 (48 equivalent full-time students) in 2015 – Māori 178/17 per cent and Pasifika 168/16 per cent
Number of staff:	Five full-time equivalents
Scope of active accreditation:	<ul style="list-style-type: none"> <li>• Security Staff Services (level 4)</li> <li>• Manufacturing Skills/Competitive Systems and Practices (level 5)</li> <li>• National Certificate in Security (level 3)</li> <li>• Class 2 driver licence training – Training Scheme (approved July 2016)</li> </ul>
Distinctive characteristics:	Chivalry courses are of short duration, usually one or two days or fewer. Completion of the courses provides the trainees with the knowledge and skills to meet service industry regulatory requirements to operate a type of vehicle or a liquor outlet. Around 80 per cent of the 2015 trainees attended the transport-related training, and 20 per cent attended the liquor licensing training. Some courses offer assessment against relevant NZQA unit standards. Training is delivered on an as-needs basis, on site or at client premises, most of them in the Auckland region. Generally business clients pay the fees for their employees or, at times, the individual trainees pay. Gateway funding pays for secondary school students to receive forklift training.
Recent significant changes:	The Ministry of Social Development (MSD) has contracted Chivalry (in association with On Demand Logistics) to provide driver licence training to their clients, nationwide in 2016. Chivalry has appointed the long-term senior transport trainer as general manager, as well as employing an administration manager and a second transport course trainer, all in early 2016.
Previous quality assurance history:	Chivalry's NZQA registration lapsed in May 2016 because it had not delivered an approved programme for over 18 months. The PTE's re-registration and training scheme were approved on 6 July 2016. The issuing of the final external evaluation and review (EER) report was conditional on the PTE meeting NZQA registration

requirements.

Other external quality assurance included:

- Competenz (April 2016) industry training organisation verified that the assessed work for one unit standard met the national standard. A model answer was incorrect.
- ServiceIQ (February 2016) verified that the assessed work for one unit standard met the national standard.
- A New Zealand Transport Agency audit (November 2015) authorised Chivalry to continue to conduct approved driver licensing courses.
- Chivalry participated in an external moderation cluster meeting with Connexis (August 2015) and the Motor Industry Training Organisation (April 2014), where their assessments and materials were reviewed.

The previous EER of Chivalry took place in April 2015. NZQA was Not Yet Confident in Chivalry's educational performance and Not Yet Confident in Chivalry's capability in self-assessment.

## 2. Scope of external evaluation and review

Following a scoping meeting between the lead evaluator and Chivalry's operations manager and administrator and reviewing documents, the following EER focus areas were selected:

- Governance, management and strategy, as a mandatory focus area
- All training, as this covers all the training delivery of the PTE.

### 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.*

A team of two evaluators undertook the EER at the Manukau City site over two days. They interviewed the managing director, general manager/senior transport trainer, administration manager, another senior transport trainer and the Licence Controller Qualification trainer/Mount Eden site office manager, a representative of a recruitment agency that partners with the PTE in delivering the MSD contract, and seven students on a class 2 driver licence course. Phone interviews were conducted with two key business clients, one Gateway coordinator and a representative of Auckland Transport.

Documentation reviewed included: the post-EER (2015) quality improvement plan, a self-assessment summary, communications from various standard-setting bodies regarding external moderation, internal moderation documents, a list of recent clients, meeting minutes, student and client feedback and the provider's website.

# Summary of Results

## Statement of confidence on educational performance

NZQA is **Confident** in the educational performance of **Chivalry Training Providers**.

Chivalry is meeting most of the key needs of its business clients, trainees and other stakeholders. Any gaps this report identifies are not serious and are being progressively addressed.

- Chivalry has a generally strong understanding of the key training needs of its hospitality and transport business clients and trainees. They consistently meet these needs through their three experienced and reputable trainers delivering short-duration prescribed courses in a manner well suited to their trainees and the industry context. Effectively, all trainees achieve the relevant unit standards. There is regularly complimentary feedback from trainees that they learning or maintaining applicable skills, knowledge and attitudes. Nearly all trainees go on to gain industry certification which enables them to gain or maintain employment in their industries. Business clients and other stakeholder are positive about how Chivalry responds to their requirements. The PTE has some long-term repeat business, as well as current service contracts with two government agencies.
- The trainers effectively employ a range of appropriate teaching approaches using materials developed by industry bodies. They create a friendly safe environment for the trainees that supports learning. Assessment and moderation practices are sound. Observation of trainers and staff appraisals are now taking place.
- Chivalry has put in place roles, staff and management procedures and systems that are generally effectively in supporting educational achievement and overall performance. However in the recent past, some key compliance requirements were not met, the administration is now better resourced and organised and progressively managing this issue. The quality management system does not reflect well current practice. Chivalry needs to maintain an improved level of governance and management performance.

## Statement of confidence on capability in self-assessment

NZQA is **Confident** in the capability in self-assessment of **Chivalry Training Providers**.

Chivalry has a good understanding of stakeholder needs and now more regularly reviews its training. The quality of self-assessment is generally sound, and the gaps are being progressively addressed. There have been a number of quite recent improvements.

- Chivalry has restructured its governance and management and employed new staff which has strengthened overall self-assessment capability and supported improved performance. Trainee achievement is better recorded and there is some monitoring of Māori and Pasifika achievement. The PTE now collects formal trainee and business client feedback providing reliable evidence of its performance. However, this information needs to be regularly and effectively used to support improved performance.
- The performance of the training staff is now more formally reviewed through business client and trainee feedback, performance appraisals, internal moderation and peer observations. There is some evidence of the trainers reflecting on teaching practice to support improvements.
- The changes implemented, while significant, have been mostly recent and the evidence of their effectiveness is somewhat limited at this stage. The provider is still developing a culture of self-assessing trainee achievement and performance as part of regular business practice. Chivalry needs to explore feasible and sustainable self-assessment methods that support ongoing quality improvement.

# Findings<sup>1</sup>

## 1.1 How well do learners achieve?

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

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

Chivalry courses, typically of one or two days' duration, support their trainees to meet industry regulatory and performance requirements. Chivalry trainees gain or maintain the relevant skills, knowledge and attitudes to work in hospitality or transport industries and meet the industry compliance requirements. Consistently close to 100 per cent of trainees meet the required NZQA unit standards; though a very high level of achievement is typical for this training context. The very small number of non-completions are seen as due to non-attendance. The provider needs to record and explain any non-completions. The PTE has scoped the features of a student data management system to provide better quality information. Chivalry was able to demonstrate that Māori made up 17 per cent and Pasifika 16 per cent of the more than 1,000 trainees in 2015. Their academic achievement was similar to other trainees and their participation has been tracked since March 2016. The educational results are viewed as reliable, as Chivalry has generally positive external moderation and strengthened its internal moderation procedures.

The stakeholder feedback collected since the last EER also supports the judgment that achievement of Chivalry trainees is generally strong. The trainee feedback sighted consistently indicates that they have learnt useful and often significant knowledge and skills. Business client feedback and interviews conducted during the EER provides some confirmation that their personnel are learning at Chivalry courses. There are some signs that Chivalry trainees may gain some distinctive and additional capability through receiving training from trainers with strong industry reputations. Identifying these possible attributes is worth further investigation. Chivalry believes that some trainees are gaining their first certification; this could be captured on the feedback form, to better show the added value of the training.

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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 **Good**.

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

Employers need certified and capable personnel to carry out transport-related and hospitality workplace roles. Chivalry provides robust short course training that effectively upskills individuals to gain the required certification to work in these two sectors. Nearly all Chivalry trainees go on to gain the relevant hospitality or transport certification. As a result, their employers become compliant with appropriate regulations and avoid the increasingly negative consequences from being non-compliant in health and safety requirements. There is evidence that certification – such as classes of transport licences – are demanded in the industry and improve a trainee's employability. For instance, the trainees the EER team interviewed spoke of job advertisements that require a particular class of transport licence. A Gateway coordinator told of trainees gaining work after gaining a forklift licence. There is some evidence of Chivalry having a reputation for safety on their training courses and that their training therefore have improved the safety of workers and their working environment.

There are signs that Chivalry is providing additional value to some of their clients and trainees. Some business clients pay the additional cost of flying a Chivalry trainer around the country to instruct their personnel, indicating some extra that Chivalry's training provides to these clients. Clarifying the specific needs that are being met would be useful. Chivalry has repeat business from both hospitality and transport clients, which along with sighted feedback from business clients indicates that key client needs are being met. Other evidence of needs being met include: a large business client recently engaging Chivalry to assess the performance of drivers on the job who they had previously trained; Auckland Transport, and more recently MSD, have contracted Chivalry to provide training to their clients or stakeholders. The trainee feedback sighted was consistently positive about the value of the training they received. Interviews the EER team undertook with some trainees and businesses support this viewpoint.

Chivalry has recently re-instituted written trainee feedback, as well as follow-up phone interviews with some graduates and business clients, to better evidence what they gain from their training. The provider should explore alternative cost-effective feedback methods to gather and analyse better-quality stakeholder feedback to improve training and related services to better meet needs. For instance, a non-trainer periodically interviewing the trainees at the end of a training, helping them answer a questionnaire.

### 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 **Good**.

Chivalry programmes and activities match well the needs of business clients, trainees and other key stakeholders. Chivalry delivers compliance-focused programmes that use teaching and assessment materials prescribed by the appropriate industry standard-setting bodies.<sup>2</sup> These resources meet legal and sector requirements and have been specifically designed for this industry context. The feedback from the trainees and trainers and the materials that the EER team reviewed indicate that these resources are of a high standard.

The PTE responds in various ways to the needs of clients. The PTE provides a range of training options for employees or contractors to learn or refresh their statutory certification or gain additional classes of driver licensing. Tracking the different kinds of activity would demonstrate the needs being met. Chivalry has most influence over the non-content based activity. Chivalry chooses times to suit the clients. This includes providing transport training early or late in the day, or on weekends, and offering Licence Controller Qualification training every Monday, so that clients already know they can book staff for that time. Transport training is delivered on the Chivalry site using their (or hired if necessary) forklifts, or on client premises, including the option of flying the trainer to locations outside of Auckland. Consistently positive client feedback sighted and clear cases of significant repeat business are sound evidence that key client needs are being met. The previously noted new training and on-the-job assessment contracts are further signs of matched needs. The transport training facilities and the equipment used are fit for purpose. There was good evidence of transport licence classes being often under the maximum class size of 10. Small class size was a significant factor for a Gateway coordinator selecting this provider, as was their safety record.

Chivalry began in early 2016 to collect written end-of-course trainee feedback and make follow-up phone calls with some trainees. These comments are consistently positive about the programme meeting their needs. The seven MSD clients on site during the EER – who were studying for a Class 2 licence – said the programme met their expectations and they all would, and one had, recommend the course to others.

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<sup>2</sup> The standard-setting bodies include four industry training organisations as well as the New Zealand Transport Association.

## 1.4 How effective is the teaching?

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

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

The PTE is effective in supporting significant and measurable learning for the trainees. Effectively, all Chivalry trainees meet the required transport or hospitality assessment standards. The assessment and moderation practice is reliable. The feedback received from the trainees and business clients is consistently positive about the trainers and the training provided.

Chivalry employs two senior trainers with appropriate trades qualifications to deliver the transport licensing courses. Both came with extensive experience of delivering similar hands-on training in the army to a broad range of students. The newer staff member also had experience designing a substantial and complex training programme. The EER team noted that the established senior trainer and the Licence Controller Qualification trainer have developed an industry reputation as effective instructors. All three trainers have received consistent positive feedback from the students and business clients. Trainee feedback stated that the trainer and teaching were the reasons for success, including well-planned lessons and varied teaching methods and useful teaching resources. One important method was offering trainees specific and real stories of learning being applied in the workplace, such as actual fines that bar managers have received when not complying with liquor regulations. Role-playing in how to respond to on-the-job scenarios was also useful. The transport course provides trainees with applied learning using trucks and forklifts. Chivalry needs to explore innovative ways to gain useful feedback to support improved teaching, including identifying what potentially distinctive learning that the tutors are helping to produce.

External moderation results confirm that Chivalry has met the required national standard. Following a recommendation from the last EER, Chivalry recently pre- and post-moderated three unit standards. The PTE developed a moderation schedule during the EER visit when the EER team identified this gap. The next step is to formalise this procedure in the quality management system and periodically review to what extent any changes have helped improve teaching practice and support learning. A similar ongoing and systematic approach is required for supporting and reviewing performance across all key operating areas of the PTE. An example of improved teaching was the provision of online, real-time translation of key terms to assist trainees whose first language is not English. Formal peer observation of training has been conducted with one tutor. Chivalry needs to have a clear and relevant professional development plan for the trainers and managers; these plans were not clearly evident.

## 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 **Good**.

The support and guidance Chivalry provides on the high-frequency, short-duration courses is working well, as nearly every Chivalry trainee completes the training to the required assessment standard. The PTE's website clearly explains the content and purpose of each course. However, the PTE has not updated the website as it no longer provides first aid courses; a management system is required to keep information current. Trainees the EER team interviewed said the driver licence course was accurately described to them beforehand. The provider employs trainers who have strong interpersonal skills. Student written feedback and those interviewed and a business client who had observed a forklift class consistently described the trainers as effectively engaging their students. 'Friendly', 'patient', 'respectful', 'approachable', 'pays attention' were typical comments to describe the approach of the trainers. Students liked the small classes, 'being able work at their own pace' and the 'one-on-one attention'. Tutors said they offered extra time to students who found the content challenging. This seems more common in the hospitality course where for a significant proportion of students English is not their first language. Students can be assessed orally and there are opportunities for reassessment as required, but this procedure needs to be clearly detailed and recorded. Chivalry needs to track the common challenges their trainees face, the strategies trainers use to address these challenges and the effectiveness of these strategies.

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

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

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

Chivalry has developed a clear niche providing transport and hospitality-related short-duration courses. The PTE has in the last few months improved both its capability and capacity, to better support educational performance and some increased training activity. There are however still some gaps that Chivalry are progressively addressing.

Chivalry has made some significant changes which have addressed to varying degrees all the governance and management gaps identified in the last EER. In early 2016, the senior transport trainer was appointed to the additional role of general manager, and an experienced full-time administration manager was employed. A second, capable transport trainer was employed, removing the previous need to regularly contract-in extra capacity. There is some evidence of recently improved management performance resulting from these changes, such as

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improved stakeholder feedback, teacher observation and some internal moderation. Chivalry has conducted formal performance appraisals and needs to ensure staff have the training and capability and resources to effectively carry out their role. Meetings are now minuted, identifying key actions being taken. However there were recent instances of compliance requirements not being met. This gap is being progressively addressed mostly by the administration manager. In addition, the quality management system does not reflect well the current organisational practice and needs to be progressively revised.

Self-assessment is another area where changes are occurring and are required. The PTE is investigating a new student management system as they need to better track trainee learning and achievement and produce periodic reports. Chivalry now formally collects stakeholder feedback. It is important that the PTE also develops and sustains a strong and comprehensive self-assessment system that collects and analyses performance information and stakeholder feedback to support sound decision making. The impact of key decisions on educational achievement and key business outcomes needs to be followed up and identified, to support ongoing improved performance.

## 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 **Adequate**.

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

### 2.2 Focus area: All training programmes

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

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

# Recommendations

NZQA recommends that Chivalry Training Providers:

- Track and analyse the reasons for and/or trends of any non-completions.
- Fully implement the new moderation policy.
- Explore effective and feasible ways to collect and analyse internal and external feedback to support ongoing improved performance.
- Assess the impact of actions being implemented on educational achievement and overall performance.
- Conduct a systematic and substantive annual review of performance.
- Progressively revise the quality management system to better reflect organisational practice.

# 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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