

Report of External Evaluation and Review

BETAA Consultants Limited

Confident in educational performance

Confident in capability in self-assessment

Date of report: 5 December 2012

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MoE Number: 8256
NZQA Reference: C08345
Date of EER visit: 27 and 28 September 2012

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:	BETAA Consultants Limited (BETAA)
Type:	Private training establishment (PTE)
Location:	33A St Andrews Terrace, Hamilton
Delivery sites:	On site at stakeholders' premises and worksites
First registered:	16 June 1999
Courses currently delivered	Hot Stick – Load Bearing and Non Load Bearing; Glove and Barrier Live Work
Code of Practice signatory	Not a signatory to the Code of Practice
Number of students:	Domestic: 32 learners enrolled for 2012 International: nil
Number of staff:	Two full-time equivalents and three subcontract trainers
Scope of active accreditation:	BETAA has a range of active accreditations in the following domains: Electricity Networks to level 4 and Electricity Supply to level 5
Distinctive characteristics:	BETAA provides work-based training on site at client company premises throughout New Zealand using clients' networks. The majority of learners are men, all of whom are registered line mechanics with a minimum of two years work experience post-EWRB (Electrical Workers Registration Board) registration.

Previous quality assurance history: At the previous NZQA quality assurance visit, an audit in 2008, one requirement was not met due to late submission of a financial monitoring statement.

A Validation of Annual Returns occurred in 2010; one requirement was not met. No risk plan was in place.

BETAA participates in external moderation with the Electricity Supply Industry Training Organisation (ESITO) which reports that BETAA assessments and assessing are consistently meeting the national standard.

2. Scope of external evaluation and review

A scoping telephone call was held between one of the directors and the lead evaluator. As a result of these discussions and a review of information provided by the PTE, the following areas were included as focus areas for the external evaluation and review.

- Governance, management, and strategy

This is a mandatory focus area.

- All programmes

All courses that BETAA offers include Hot Stick – Non Load bearing and Load Bearing training which is a prerequisite for Glove and Barrier training. These two courses contribute to the achievement of the National Certificate in Electricity Supply (Line Mechanic Distribution Live Work) (Level 5) (60 credits), and are required alongside the annual Glove and Barrier refresher courses for continued competence in live line work.

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 visited BETAA over two days. Interviews were held and included both directors and ESITO. A subcontractor, trainees, and company managers were interviewed via telephone. A range of documents was reviewed, including the learner database and achievement records, in-house reports, surveys, and the programme folder.

Summary of Results

Statement of confidence on educational performance

NZQA is **Confident** in the educational performance of **BETAA Consultants Limited**.

BETAA has been delivering Hot Stick and Glove and Barrier training for twelve years, and to date over 99 per cent of all trainees have achieved these unit standards. The courses are highly relevant to the industry and, following successful completion, companies assess and then issue a competency card to the trainee which permits the EWRB registered line mechanic to work on high voltage live lines. Successful completion also meets the requirements for the level 5, 60 credit National Certificate in Electricity Supply (Line Mechanic Distribution Live Work) qualification awarded by ESITO.

Line mechanics competent to maintain and repair live lines are very important to the electricity supply industry as they enable companies to ensure the uninterrupted supply of electricity to the electricity networks. The training addresses the shortage of skilled and qualified line mechanics in New Zealand competent to work on live lines.

Trainees gain valuable skills that are sought after in New Zealand and overseas, and in addition to a possible increase in remuneration, line mechanics develop confidence and safe working practices that meet the requirements of the New Zealand Electrical Code of Practice for High Voltage Live Line Work (Electrical Code of Practice), which is important in this high-risk area.

Statement of confidence on capability in self-assessment

NZQA is **Confident** in the capability in self-assessment of **BETAA Consultants Limited**.

Self-assessment within BETAA is mostly informal and occurs reliably with interactions, both formal and informal, between BETAA directors and subcontracted trainers, company managers, trainees, and other stakeholders such as ESITO and the Electrical Engineers Association.

Courses are delivered to a small niche market. There are 20 companies nationwide requiring this training, and long-established good relationships with the companies ensure that the same line mechanics return for refresher courses annually for their competency renewal. BETAA is able to reliably gather relevant and current industry information to use in the training through its ongoing relationships with the regulating industry bodies, such as the Electrical Engineers Association and ESITO. The director's active participation in standard-setting and reviews of the Electrical Code of Practice, and other assessing and auditing practices within the industry provide BETAA with up-to-date information on industry needs, standards, and trends.

The need for formal processes is a function of the size and context of the PTE. Formalising some processes to occur in a systematic way would serve to validate BETAA's anecdotal perception about the quality of the training provided. This is important to ensure the organisations continued ability to deliver quality education in this high-risk area and to reduce any vulnerability or impact from future changes internal or external to BETAA.

Findings¹

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 **Good**.

BETAA delivers two courses: Hot Stick and Glove and Barrier. Hot Stick training contains five unit standards at levels 4 and 5 and is a prerequisite to the sought-after Glove and Barrier training, which contains three unit standards at levels 4 and 5.

Over 99 per cent of all trainees have achieved these unit standards since BETAA began delivering over twelve years ago. Other than BETAA's own very good contribution toward this excellent outcome, such as the small learner groups of three to six trainees, this outcome can also in part be attributed to the level of knowledge and experience that line mechanics have on enrolment, the required criteria for training set out in the Electrical Code of Practice, and the employer selection process which is based on experience, motivation, and the probability of success.

BETAA is proactive in informally setting its own standards and benchmarks for the trainees and the training delivered. This includes consideration of the attitude and capability of the trainee, reflecting the employer's needs, and, as BETAA has a sound knowledge of the Electrical Code of Practice, there is a focus on ensuring that the intention and not just the technical requirements of the code are understood and reinforced in the training.

Successfully completing unit standards during the training comprises the only formal monitoring of achievement progress. There are a number of inherent practices that trainers use to gauge the progress of each trainee. These are based on the trainer's extensive expertise and knowledge. Trainee progress is able to be monitored as the trainer is literally standing alongside the trainee over the weeks of training. Formalising some of these very good practices will support BETAA to validate that these standards are maintained consistently between all trainers.

At the completion of the training, credits are reported to NZQA and the client company receives a report detailing the achievement of the trainee. The employer can at this point issue a competency card to the line mechanic which reflects the ability to work on high voltage live lines. Completion also qualifies the trainee to be awarded the level 5, 60-credit National Certificate in Electricity Supply (Line Mechanic Distribution Live Work). Whether this complete qualification is subsequently awarded to trainees cannot be ascertained by BETAA because this

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

process is outside of BETAA's control, requiring the trainee and employer to be in a training agreement with ESITO for the award of the qualification. As BETAA does not award the qualification, it does not record enrolment or achievement, and some trainees, who were uncertain whether they were in a training agreement or not, were nevertheless expecting to be awarded the certificate. However, while the national certificate is not the main criterion for live line work, the BETAA courses contribute to its completion, and may provide another career pathway for trainees. Verifying and recording ESITO trainees on the BETAA database may reduce some confusion for trainees.

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**.

Live line work is the way of the future due to the huge reliance by industry and the country on a guaranteed, uninterrupted electricity supply. This is a high growth area in New Zealand and dependence on electricity as a power source is not reducing. There is a real skill shortage of line mechanics who are qualified and competent to work on live lines, which is of concern to service providers who require the capability to maintain and repair lines while live. This is an area recognised as high stakes for both the service provider responsible for the maintenance and repair of network lines and for the line mechanics working on live lines.

The personal satisfaction and challenge of gaining additional competency and skills are highly valued by line mechanics. Once training is successfully completed and competency is verified, the issuing of a competency card can lead to an increase in remuneration and eventual promotion. The training is highly sought after and all trainees interviewed were very motivated to achieve. Skills and competency and a recognised industry qualification ensure employment not only in New Zealand but also in Australia because of the compatibility of the qualification and its associated competencies.

Client companies also highly value this training for their selected line mechanic employees. The company will have already invested significantly in these line mechanics by providing a minimum five-year lead-in time of training and financial support to meet the eligibility criteria for enrolment. Having sufficient line mechanics competent to work on live lines enhances the client company's ability to continue to provide service to its networks.

There are approximately 20 companies within New Zealand that require the training offered by BETAA. Relationships with each have developed over the years as BETAA has continuously delivered training to the same companies and to the same trainees who attend annual refresher courses. BETAA gauges the value of the training provided through informal indicators such as repeat business and the

increase in training requests which have led to the use of subcontracted trainers to meet the training demand. Considering the high level of industry engagement and the size and context of this PTE, these informal processes are satisfactory.

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**.

BETAA has a clear understanding of industry needs, legislation, and the Electrical Code of Practice which regulates and guides the industry, as a result of its active and invited involvement with key New Zealand electricity industry bodies. They include ESITO, the Electricity Engineers Association, and the National Committee for Live Work (a part of the Electrical Engineers Association and responsible for reviewing the Electrical Code of Practice for the industry), and service providers who provide maintenance and repair to live lines. BETAA's understanding of the New Zealand context is enhanced through these close relationships, active participation, and contribution and this knowledge is directly utilised to inform the training BETAA provides.

Prerequisite requirements and the rigorous selection process by the employer ensure that it is rare that unsuitable line mechanics are selected for training. To be certain, BETAA also checks that the necessary unit standards have been awarded, and it validates the compulsory two years of post-registration experience of each trainee selected by the client company to attend training.

Each course has small groups of trainees, which allows for an individual and safe learning experience. The courses are designed to have a logical progression from theory to applying knowledge and skills on deadlines, culminating in live line work. The majority of training is delivered on site at the client company's premises or on the job, where BETAA and the trainee are able to utilise the client company's resources such as the network, equipment, and gear as well as follow company processes for each job. As the trainee progresses, real maintenance and repair work required by the client company is incorporated and provides a genuine and authentic experience for the trainee, with the trainer literally working alongside the trainee in the live line bucket on each job. Trainees who are competent at completion are able to implement skills and work on live lines, meeting the immediate needs of company and trainees.

BETAA gathers feedback about the training via a survey which each trainee completes at the end of the course. The usefulness of this as a self-assessment tool is uncertain as no meaningful feedback has been gathered that has provided insights or opportunities for development or improvement. Informal review occurs 'in the moment' during training, and this ongoing analysis of trainee competency determines the pace at which each individual progresses. Attempts by BETAA in the past to formally gather feedback from companies have not met with success.

BETAA may benefit from revisiting strategies to gather useful feedback on the quality and value of the training offered.

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**.

BETAA's director and subcontracted trainers all have extensive industry live line experience. The trainers all started out in the industry together, first working on networks and live lines, and have progressed in their understanding and working with live lines over the past three decades. Stakeholders report that BETAA's directors and current subcontracted trainers are highly regarded in the industry; all are also registered workplace assessors with ESITO.

The director and trainers keep up to date through working on live lines as they continually deliver training, and through the various industry groups the director belongs to and participates in. Another aspect of BETAA's business is conducting audits on behalf of electricity networks. BETAA is able to utilise these information sources to inform themselves of current practices in the industry.

BETAA develops its own teaching and assessment resources for Hot Stick and Glove and Barrier unit standards which are moderated by ESITO, and utilises ESITO's assessments for other standards delivered. ESITO externally moderates all BETAA assessments for courses quarterly, and pre- and post-assessment. For the past several years BETAA has consistently met the national standard required.

BETAA tracks the effectiveness of subcontracted trainers through the trainee surveys and informal communications via phone. The 99 per cent successful achievement rate, and the continuation of repeat business in the form of the compulsory refresher courses and further training requests, are the indicators BETAA uses to gauge satisfaction. BETAA subcontractors are delivering around the country and on rare occasions deliver training with the director present. There is no reliable review of subcontractors by BETAA or follow-up with client companies; there is an inherent trust in the knowledge and abilities of subcontractors.

Trainee feedback indicated a high level of satisfaction with the training materials, delivery, and assessment practice, some describing the training as the best they had ever undertaken. Continued informal contact with employers provides BETAA with good information about the performance of line mechanics following training.

However, a more formalised process to gather feedback on the effectiveness of the teaching on an annual basis would validate this perception of having highly effective trainers in these high-risk courses. This is important as BETAA looks to the future to expand and engage further subcontractors and develop trainers within organisations who are newer to the industry and do not have the personal history and experience of current subcontractors.

1.5 How well are learners guided and supported?

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**.

BETAA trainers get to know trainees very well over the full-time, three-week Hot Stick course, and subsequently on the Glove and Barrier four-week courses. BETAA trainers are able to develop a relationship and understanding with trainees that supports them to successfully demonstrate competency and achieve the associated credits.

Trainees report that with the small class groups of three to six trainees, trainers are able to respond to their individual learning or skills and knowledge needs as the course progresses. Trainers are approachable, the course is practical, and trainees who are registered line mechanics, with a minimum of two years post-registration experience and who have been selected by their company, are proactive and able to ask questions and gain feedback immediately as they progress. The same trainer delivering this course may also conduct the annual refresher course, providing an opportunity to further develop these relationships, which are strongly based on mutual trust and reliance on the expert knowledge of the trainers.

Client companies report that on occasion they receive support from BETAA in the form of advice between courses. Advice is usually in the form of BETAA suggesting gear or tool improvements and changes to processes and procedures that guide the practice of line mechanics. Companies also contact BETAA with queries about a job that is to be undertaken. BETAA is in a good position to provide advice through using the companies' networks, processes, and equipment in training. BETAA observes first-hand the realities of the actual live line work.

In both these short but intensive courses the support and guidance of the trainees during the course is informal, consistent, and suitable for the size of the PTE. The small number of trainees being taught at any one time provides a high ratio of trainer to trainee, and the experience of the trainees who are selected ensures they are well prepared to undertake the training. Self-assessment is informal and ongoing, mostly achieved through the close personal relationships BETAA has developed over many years with most of the managers in each client company.

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

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**.

BETAA is operating in a niche market and has been delivering the Hot Stick and Glove and Barrier courses for over twelve years. The success of the business is largely based on the industry experience and reputation of the director, who is also the PTE's trainer. Stakeholder relationships have been established and developed by the PTE over time with company managers and line mechanics who must attend an annual refresher course. ESITO and the Electrical Engineers Association are responsible for ensuring the safe practice of live line work and monitoring within the electrical industry, and they acknowledge the director's industry knowledge, experience, and expertise.

There are a number of systems and processes that reliably support the operation and administration of the PTE. BETAA appropriately utilises external expertise to support the small PTE in areas such as finance, IT, and insurance. There is an obvious reliance on the experience and reputation of one of the directors, and for the context and size of the PTE this currently works well.

The directors are clear that their intention is for BETAA to continue operating as a PTE into the future once the directors retire. However, at this point there is as yet no evidence of succession planning to build capacity and ensure continuation of BETAA. This is important as the training expertise and industry relationships that assure BETAA's market are centred on one person, and the majority of self-assessment activities are informal. Any changes in this two-person organisation, to subcontracted trainers or to management personnel within companies, may leave the PTE vulnerable. Current informal processes are not sufficiently robust to withstand major changes in market share and access to training expertise to ensure the continued quality of educational 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 **Good**.

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

2.2 Focus area: All programmes

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

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

Recommendations

In addition to those recommendations implied or expressed within the report, NZQA recommends that BETAA Consultants Limited:

- Review, and in some areas such as stakeholder feedback formalise, some of the very good existing self-assessment processes to ensure useful information is collected, recorded, and analysed to inform the PTE about the quality of training delivered.
- Develop ways to build capacity within BETAA to ensure continuation of the knowledge, expertise, and standard of training provision currently provided.

Appendix

Regulatory basis for external evaluation and review

Self-assessment and external evaluation and review are requirements of programme approval and accreditation (under sections 249 and 250 of the Education Act 1989) for all TEOs that are entitled to apply. The requirements are set through the Criteria for Approval and Accreditation of Programmes established by NZQA under section 253(1)(d) and (e) of the Act and published in the Gazette of 28 July 2011 at page 3207. These policies and criteria are deemed, by section 44 of the Education Amendment Act 2011, to be rules made under the new section 253.

In addition, for registered private training establishments, the criteria and policies for their registration require self-assessment and external evaluation and review at an organisational level in addition to the individual programmes they own or provide. These criteria and policies are also deemed, by section 44 of the Education Amendment Act 2011, to be rules made under section 253. Section 233B(1) of the Act requires registered PTEs to comply with these rules.

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 EER process approved by the NZQA Board.

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).

Information relevant to the external evaluation and review process, including the publication Policy and Guidelines for the Conduct of External Evaluation and Review, is available at: <http://www.nzqa.govt.nz/providers-partners/registration-and-accreditation/external-evaluation-and-review/policy-and-guidelines-eer/introduction/>

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