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External Evaluation and Review Report

Wellcare Education Limited

Date of report: 10 January 2019

About Wellcare Education Limited

Wellcare Training (Wellcare) is part of HealthCare NZ Ltd. HealthCare NZ is New Zealand's largest provider of home and community-based health, disability and behavioural support services.

Type of organisation:	Private training establishment (PTE)
Location:	Head Office: Level 3, 13-27 Manners Street, Wellington Delivery sites: Auckland, Christchurch, Dunedin, Hamilton, Kapiti, Levin, Palmerston North, Wellington
Code of Practice signatory:	No
Number of students:	Domestic: level 2, 1,201; level 3, 356; total 1,557; Māori level 2, 136; level 3, 40; total 176; Pasifika level 2, 38, level 3,17; total 55
Number of staff:	14 full-time equivalents, five part-time
TEO profile:	See: NZQA – Wellcare Education Ltd

Wellcare has had a significant change in its strategic purpose since the last external evaluation and review (EER) in 2015. It was agreed that Wellcare would not sell qualification training to learners who were not employees of HealthCare NZ. This means that WellCare is an internally focused PTE providing quality training to HealthCare NZ support workers at level 2 and level 3.

Within HealthCare NZ, Wellcare is referred to as Learning and Development. Learning and Development has three teams – the coordination team (direct learner support through 0800 number), the facilitation team (supports learners face to face as well as by e-learning), and the leadership team which provides strategic planning and leadership to ensure coordinators and facilitators have the resources to undertake

their core roles.

The home and community sector has had two legislative changes which have impacted the way Wellcare delivers training and the volume of training provided.

Guaranteed hours legislation (1 April 2016) – the sector moved from assignment-based (paid for hours worked only) to guaranteed hours (paid a minimum number of hours per week no matter if work is available).

Equal pay legislation (1 July 2017) – pay rates were raised based on qualification level and enforcing timeframes for qualification completion via legislation (i.e. level 2 within 12 months, level 3 within three years). This has increased the volume of training at level 3 and above. More than 8,000 staff deliver services to 20,000 people across HealthCare NZ's six divisions. The majority of staff are in 'front line' support worker roles, backed up by nurses and clinical specialists, other specialist staff and office-based support teams. Most learners are female, over 40 years of age, have had minimal formal learning, have low computer literacy, and have English as a second language.

Last EER outcome:	At the last EER in 2015, Wellcare was found to be Confident in educational performance and Confident in capability in self-assessment.
Scope of evaluation:	National Certificate in Health, Disability and Aged Support (Foundation Skills) (Level 2); National Certificate in Health, Disability and Aged Support (Core Competencies) (Level 3)
MoE number:	8265
NZQA reference:	C31832
Dates of EER visit:	23 and 24 October 2018

Summary of Results

Wellcare offers effective training to meet employers' needs and statutory requirements. Workers in employment gain a level 2 or 3 qualification which is flexibly delivered, transferable, may lead to pay increases, and contributes to an emerging career path for support workers.

Confident in educational performance

- Students complete qualifications that are legally mandated, meet HealthCare NZ business needs, and contribute to improved physical and emotional wellbeing for clients.
- Successful qualification completion formalises students' current expertise and work experience and further enhances their knowledge, skills and personal wellbeing.

Confident in capability in self-assessment

- Systematic analysis of feedback from internal and external stakeholders is used to make improvements to qualification content, learning resources, delivery modes and the support offered to students.
- Learning and Development's contribution to the quality of care offered to HealthCare NZ's clients is evidenced by strong management support, resourcing, and inclusion in key decision-making forums.
- Robust audits undertaken by HealthCare NZ's funders and rigorous internal self-assessment assure NZQA that compliance accountabilities are effectively managed.
- Learning and Development has clear purpose, direction and leadership. This has led to greater visibility and acknowledgment of Wellcare's contribution to HealthCare NZ's operational capability. However, educational achievement and self-assessment are not yet exceptional.

Key evaluation question findings¹

1.1 How well do students achieve?	
Performance:	Good
Self-assessment:	Good
Findings and supporting evidence:	<p>Student qualification completion rates averaged 70 per cent until 2017, when they dropped slightly due to the face-to-face delivery for level 2 finishing and the start of the New Zealand Certificate in Health and Wellbeing (Level 2) via e-learning. There was also an added focus on workplace observations and verifications. As a result, students and operational managers were confused about how level 2 was to be completed.</p> <p>Changes were quickly made to address these barriers. These included extra resources, revamping the online system to show students the overall volume of learning required, providing verification support to managers, identifying poor performing locations, and providing support workers with laptops and IT training and a 0800 number for student inquiries. These changes led to an increase in student activity and improved completion rates. An 80 per cent qualification completion rate is the goal for 2018; early indications are that this will be met.</p> <p>HealthCare NZ operational leaders were identified as the key people to lead and manage students' learning. They are on the job with students and in charge of rostering suitable observers to verify students' practical skills. For this reason, operational leaders now have performance goals for student completion rates, withdrawal rates and face-to-face attendance levels.</p>
Conclusion:	<p>Student achievement is well understood and closely tracked across regions, operational managers and students. Changes in achievement rates are noted and interventions actioned. Barriers around e-learning have been addressed and achievement rates are tracking upwards. Māori and Pasifika achieve at similar rates to all students.</p>

¹ 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 students?

Performance:	Excellent
Self-assessment:	Excellent
Findings and supporting evidence:	<p>HealthCare NZ has contracts with a range of funders in the health and social services area. Wellcare adds value to funders, clients and the wider community by supporting people to remain independent and active in their homes. Communities benefit through the decreased costs of home care over hospital care.</p> <p>The 2017 Care and Support Worker (Pay Equity) legislation required employers to enable support workers to gain the New Zealand Certificate in Health and Wellbeing over prescribed timeframes. This provided an incentive for support workers to gain these qualifications to achieve a higher level of pay, to improve their quality of life, and to gain recognition of transferrable skills within the sector.</p> <p>Support workers' feedback indicates an increase in confidence in their work and personal lives. Wellcare progression rates from level 2 to level 3 compare well with those of all PTEs.</p> <p>Wellcare provides value to the HealthCare NZ board by developing learning programmes that involve subject matter industry experts, and by providing training that learners can easily access, and clear processes that operational leaders are able to implement consistently. Wellcare reports to the board on qualification completions against contractual requirements. Governance decisions are based on data and training costs. The board is assured of Wellcare's efficiency.</p>
Conclusion:	Wellcare provides high value to stakeholders through robust data analysis and systematic reporting against contractual obligations. Wellcare has transitioned effectively into HealthCare NZ and has added significant value to the understanding and quality of provision of HealthCare NZ.

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

Performance:	Excellent
Self-assessment:	Excellent
Findings and supporting evidence:	<p>HealthCare NZ policy guides Wellcare and the need for a whole-of-organisation approach to developing learning materials. Learning content can be used across all divisions supporting disability, rehabilitation and the health of the older person. This helps to build a capable workforce to provide person-centred support within the community. Learners can also transfer their skills and widen their scope of work across different services, for example disability to rehabilitation.</p> <p>Literacy and language needs have been addressed through extra guidance to the operational team, additional laptops, and one-to-one tuition. Wellcare facilitators can also assist with verifications. Graduate outcomes and appropriate unit standards have been developed by the industry training organisation, Careerforce. Programme content is reviewed each year. Robust internal moderation ensures materials and assessment meet requirements. Interactive teacher forums foster discussion around assessment practice, to build capability in assessment and ensure learning activities are aligned with learning outcomes.</p> <p>Regular surveys show that support worker training is closely linked to client satisfaction in key areas: the quality of the support provided, good communication, reliable and flexible support, being treated with dignity compassion and respect, meeting physical and emotional needs, and involvement in decisions around goals and care and the coordination of a client's support. These areas are ranked and tracked to ensure issues are identified and improvements made.</p>
Conclusion:	Wellcare has developed materials, systems and support structures that are relevant, accessible, flexible and sufficiently resourced to enable students to access learning that builds knowledge and skills, meets client needs, and contributes to HealthCare NZ's reputation.

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

Performance:	Good
Self-assessment:	Good
Findings and supporting evidence:	<p>There are no course fees for employees for either the level 2 or 3 certificate. All workers must complete the level 2 HealthCare NZ induction and orientation process. They then complete the New Zealand Certificate in Health and Wellbeing (Level 2) if they do not have an equivalent or higher qualification.</p> <p>On completion of the New Zealand certificate, support workers receive five hours' pay to recognise time spent learning outside rostered hours. At level 3, support workers often have more responsibility within their workplace and work with more complex cases and/or with ACC lifelong clients. People are selected for this training by the operational managers. Support is offered by Wellcare facilitators who assist learners face to face and over the phone. Facilitators have the skills and knowledge to support learners who have literacy challenges or English as a second language. They build content which is clear and easy to understand, using everyday HealthCare NZ examples to contextualise the learning.</p> <p>When the level 2 qualification transitioned from face to face to e-learning, support included half-day workshops for managers in each region, detailed resources, and guides and regular phone meetings.</p> <p>Some support workers are in remote areas of the country. The 2018/2019 budget plan is to hold more focus groups in remote areas to find out the most effective ways to support these workers.</p>
Conclusion:	<p>Students understand their learning goals, can apply theoretical concepts to their work environment, and are well-supported by Wellcare facilitators. The level 3 qualification is at an early stage. The effectiveness of the support offered is yet to be fully realised or analysed.</p>

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

Performance:	Good
Self-assessment:	Good
Findings and supporting evidence:	<p>Since 2016 there has been a shift to shared responsibility for learner support across the company. Local managers provide laptops in each branch, there is more involvement with learners (evidenced by manager verifications/buddy observations), and there is anecdotal feedback from learners that they are having more interactions with and questions from managers.</p> <p>Accountability for achievement was a Wellcare function but is now more company-wide. The chief executive of HealthCare NZ supports joint accountability with Wellcare. Operational leaders are expected to support learners in their workplace learning, including providing daily motivation for completions.</p> <p>A weekly report from Wellcare identifies at-risk learners, suggested actions, focus areas for the following week, and completion rates. Operational managers with high numbers of at-risk learners receive additional support and engagement from Wellcare facilitators.</p> <p>Increased awareness in other parts of the business about the links between educational achievement, service risk and retention means resourcing to support students is seen as fundamental to positive business outcomes.</p>
Conclusion:	Mandated legislative changes and the executive team's increased knowledge and understanding of the components that lead to qualification completion have led to more effective governance and management support. However, this awareness is not sufficiently embedded to be considered exceptional.

1.6 How effectively are important compliance accountabilities managed?

Performance:	Good
Self-assessment:	Good
Findings and supporting evidence:	<p>In 2017, an external review of Wellcare evaluated how well it was delivering to key stakeholders and the value it was providing to HealthCare NZ. As a result, additional members of the executive team were added to the Wellcare management committee.</p> <p>The Wellcare management committee is responsible to the HealthCare NZ board for programme content decisions, methods of delivery, completions, Wellcare compliance, the relationship with Careerforce, and NZQA compliance obligations. Current reporting structures enable close monitoring and effective accountability.</p> <p>Recently, Wellcare has provided more data to the executive team via monthly Wellcare reviews demonstrating the links between educational achievement, service risk, retention and contractual compliance at board level. This has increased the knowledge of the executive team of the many components that lead to qualification completion. This awareness has moved oversight to a more strategic level.</p> <p>The PTE complies with NZQA's PTE registration rules. Any risks that could impact Wellcare's registration and relationships with key stakeholders, or HealthCare NZ's ability to meet its legislative or contractual requirements are identified. Detailed action plans are presented to the relevant governance group that guides and monitors progress.</p> <p>HealthCare NZ is extensively audited by its funders. It is also an ACC-accredited organisation. Wellcare follows guidelines on maintaining a safe environment for staff, particularly for staff who travel and work away often.</p>
Conclusion:	The training of 6,000 support workers is a strategic focus for HealthCare NZ, which has increasing confidence in Wellcare's management of its compliance obligations and how the quality of this management impacts its business.

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 Wellcare Education Limited:

- Review and consolidate recent changes to delivery modes and underpinning processes to further investigate the impact these have on student engagement and successful completion of qualifications.
- Analyse student performance across locations, ethnic diversity, facilitators and operational managers to further show the value that Wellcare provides for students' educational and personal development and the business objectives of HealthCare NZ.

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

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.*

Disclaimer

The findings in this report have been reached by means of a standard evaluative process: <http://www.nzqa.govt.nz/providers-partners/external-evaluation-and-review/policy-and-guidelines-eer/introduction/>. 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 fraud²*
- *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.*

² 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 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). 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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