

Report of External Evaluation and Review

McGirr Associates (1996) Limited
trading as McGirr Training

Not Yet Confident in educational performance

Not Yet Confident in capability in self-assessment

Date of report: 6 December 2013

Contents

Purpose of this Report.....	3
Introduction	3
1. TEO in context.....	3
2. Scope of external evaluation and review	4
3. Conduct of external evaluation and review.....	5
Summary of Results	6
Findings	9
Recommendations	17
Appendix	18

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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:	McGirr Associates (1996) Limited trading as McGirr Training
Type:	Private training establishment (PTE)
Location:	Wellington
Delivery sites:	Wellington and Upper Hutt
First registered:	1997
Courses currently delivered:	<ul style="list-style-type: none">• Worklink/TOPS (until 2011) – subsequently split into Foundation-Focused Training Opportunities and Training for Work programmes, funded for 100 and 144 learners respectively by the Tertiary Education Commission and the Ministry of Social Development• Youth Training – all courses delivered internally; funded for 87 learners• Workplace Literacy (2011, 2012) with National Certificate in Educational Achievement (NCEA) credits; funded for 245 learners
Code of Practice signatory:	Not applicable
Number of students:	Domestic – see details above. Approximately 30 per cent of learners are Māori, 21 per cent Pasifika,

	49 per cent other
Number of staff:	14 full-time equivalents
Scope of active accreditation:	NCEA levels 1 and 2, Computing level 2, leading to National Certificates in Computing and Business Administration
Distinctive characteristics:	McGirr Training focuses on preparing those with low to no qualifications, and often low literacy, for employment.
Recent significant changes:	Major reorganisation of PTE. McGirr Associates (1966) Limited changed its name to Capital Training Limited, effective 1 July 2013.
Previous quality assurance history:	At the previous NZQA quality assurance visit, a quality audit in 2008, McGirr Training met all but one requirement of the quality standard. The requirement not met related to lack of evidence of staff appraisal.
Other:	This external evaluation and review (EER) was conducted while McGirr Training was in the midst of a comprehensive restructure, which aimed to redefine management, teaching and pastoral care roles, and to introduce a new and expanded curriculum. As a result, much of the information revealed in the course of the EER reflects an environment that McGirr Training's senior management and board had already decided was in urgent need of change.

2. Scope of external evaluation and review

The EER focused on the following programmes:

- Training for Work – this course for McGirr Training started in July 2012 and it will be using a new curriculum model in 2013. The organisation was keen for an external review of the programme's structure and process to date. Restructuring had brought new stresses and expectations, with as-yet unpredictable outcomes.
- Youth Training – 2013 will bring a significant increase in numbers for this programme, and close attention will be given to issues of attrition and retention.

Training for Work is one of the two programmes whose recent performance has been a major incentive for organisational change. Another programme included in the EER was Foundation-Focused Training Opportunities (FFTO), which, along with Workplace Literacy programmes, was not a specific focus area of the EER.

- Governance, management and strategy

This is a mandatory focus area. Governance and management is a critically important function at a time of restructuring and renewal.

3. Conduct of external evaluation and review

All external evaluation and reviews are conducted in accordance with NZQA's published policies and procedures. The methodology used is described fully in the web document Policy and Guidelines for the Conduct of External Evaluation and Review available at: <http://www.nzqa.govt.nz/providers-partners/registration-and-accreditation/external-evaluation-and-review/policy-and-guidelines-eer/introduction>. The TEO has an opportunity to comment on the accuracy of this report, and any submissions received are fully considered by NZQA before finalising the report.

The EER was conducted by a team of two evaluators. Interviews were held with the managing director and owner of the PTE, two board members, an adviser, tutors (eight), students (60) and the infrastructure manager. Letters and reports from stakeholders commenting on the value of external programmes were viewed. State funder outcomes, benchmarks and PTE documents relating to the current reorganisation were viewed.

The evaluation took place at the Wellington and Upper Hutt sites over four and a half-days. An NZQA external observer attended the first three days but was not a member of the evaluation team and did not participate in synthesis ratings and outcomes decisions. Some weeks after the site visit, the lead evaluator also held some short meetings with the managing director to confirm some details of the evidence presented.

Summary of Results

Statement of confidence on educational performance

NZQA is **Not Yet Confident** in the educational performance of **McGirr Associates (1996) Limited trading as McGirr Training**.

- Youth Training and Workplace Literacy programmes, with a total of 87 and 245 students in 2012, have been performing well, and have clearly demonstrated their relevance and value to the stakeholders.
- However, two years of deteriorating graduate outcomes for two important programmes, FFTO and Training for Work (comprising 100 students in total) led the PTE to conclude that remedial action was needed, and a major restructuring plan was undertaken.
- The decision to restructure, made in September 2012, was outlined to staff in October 2012, and implementation begun immediately, with staff appraisal and selection for the new structure. Senior management had rejected a more incremental approach on the grounds that improvements might be less effective if introduced piecemeal.
- The rapidity of the process met with a mixed response from staff and students, especially those in the most affected programmes. Some who were interviewed by the EER team were enthusiastic about the new direction, while others expressed frustration and uncertainty about the future.
- At time of the evaluation, McGirr Training was very much in a period of transition. New staff appointments have since been made, and the first steps of the organisational change have been completed, but evidence of longer-term improvements was not yet available.

Statement of confidence on capability in self-assessment

NZQA is **Not Yet Confident** in the capability in self-assessment of **McGirr Associates (1996) Limited trading as McGirr Training**.

- McGirr Training has developed a range of self-assessment policies, covering matters such as student interviews, learning plans, moderation, professional development, course reviews and student surveys.
- Some of these policies have been meticulously carried out, others less so. One-to-one enrolment conversations have in some cases diminished into very brief interviews, or in others, into group sessions, giving little time for individual attention.
- Tutors interviewed at the EER were unable to recall peer observation and mentoring. There is a mass of completion, moderation and progress data in the student management system, but no record of systematic analysis for planning or improvement.
- One useful comparison of curriculum with other PTEs exists, but seems to be an exception. Consultation with community groups, especially Māori and Pasifika, who by numbers alone must be acknowledged as key stakeholders, has been absent, a lapse that the managing director plans to resolve.
- The perceptions that prompted the radical organisational change were therefore less informed than they might have been. The reorganisation plan is partly guided by a model of earlier programmes and contracts, which, according to the managing director, were superior in scope and relevance to the existing curriculum. The plan for restructuring is clearly stated, and excellent features of the quality management system are to be reinforced, such as the extended enrolment interview and the staff appraisal with peer observation and mentoring.
- For the present, the indifferent performance of some self-assessment policies, especially the lack of an organisation-wide strategy for analysis of performance data for planning and improvement, means it is too soon to express confidence in the PTE's self-assessment capability.

Findings¹

1.1 How well do learners achieve?

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**.

Youth Training and Workplace Literacy have consistently recorded the most successful outcomes of the programmes delivered by McGirr Training. There has been strong positive feedback from participant organisations, and existing memoranda of understanding have been renewed. These programmes demonstrate the value of close and proactive relationships with employers, the use of ingenious methods of delivery (for example, the use of NCEA credits relevant to the workplace as vehicles for teaching literacy and numeracy), and of 'naturally occurring evidence' for assessment. While credit achievement targets are met in the Youth Training programme, the managing director has some concern about the attrition rate of students who have left, whether to employment, further study, or from dissatisfaction with the course. No analysis of the causes of this attrition rate has yet been undertaken, and as a result no specific need or area for mitigation has been identified.

Student completion numbers in all programmes between 2009 and 2012 have remained fairly constant, and credit achievement has more than equalled contracted targets.

Positive labour market outcomes for FFTO have fallen in the last two years from a peak of around 55 and 45 per cent respectively in 2010 and 2011, still well below the required level. In 2012 this dropped even lower to 23 per cent (see Table 1 below). McGirr Training has rightly seen this as a trend that needs to be reversed. In Training for Work and Youth Training, however, the organisation generally has met its targets (see table).

Data gathering and analysis is a work in progress. Information on learner achievement lacks attention to some valued outcomes, such as enhancement of learner confidence and well-being and improved learning skills. Existing data has not been systematically 'mined' to reveal developing trends and their causes, for example to identify the reasons for the decline in labour market outcomes, or the attrition of student numbers in the Youth Training programme, and nor has the data been benchmarked effectively against other PTEs offering similar programmes.

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

Table 1: Key learner outcomes at McGirr Training			
	2010	2011	2012
Training for Work (required 64%)			
1 st Intake			63%
2 nd Intake			63%
3 rd Intake			54%
FFTO destinalional outcomes			
Actual	55%	45%	23%
Required	64%	64%	64%
FFTO credit achievement			
Actual	30.82	29.64	19.24
Required	25	25	25
Youth Training destinalional outcomes			
Actual	62%	71%	36%
Required	60%	60%	60%
Youth Training credit achievement			
Actual	26.25	26.92	39.0
Required	20	20	40

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 **Adequate**.

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

McGirr Training has positive long-term relationships with some stakeholders. Students are referred from some local schools and from state employment and welfare agencies. Nine secondary schools have asked for STAR (Secondary Tertiary Alignment Resource) training for their senior students, and there have been requests to provide training for other tertiary providers. There is an understanding with one tertiary provider to staircase McGirr Training's graduates to higher education. McGirr Training's Workplace Literacy programmes are popular and successful with graduates and employers. Agreements with large local employers – for example with a taxi company and a call centre to provide study guides for NCEA credits, with embedded literacy and numeracy – underpin the continuation of the achievement of useful outcomes such as improved literacy and

communication skills, which benefit both graduates and employers. McGirr Training also had an agreement to deliver training to a shipping company through an industry training organisation. These relationships undoubtedly signal awareness of the needs of the market and the PTE's capacity to meet them. McGirr Training has not, however, consistently tracked the needs of other stakeholders.

A substantial schedule of stakeholder contacts is maintained, with brief notes on transactions and placements, but there is no record of extensive consultation about the value, or otherwise, of the learning offered. McGirr Training identified the restoration and further development of links with stakeholders, and better analysis of the value of the learning offered in the workplace, as priorities for 2013.

Few opportunities for community involvement have until now been taken up. Contact with Māori and Pasifika communities, whose students have achieved disproportionately low labour market outcomes with McGirr Training, has until now been negligible. A first positive move is a recent approach from a Samoan church for literacy and numeracy courses.

PTE staff were identified by the managing director as key stakeholders. As reflected in the mid-2012 staff review, McGirr Training has been proud of its strongly collegial culture. But the least-approved factors in a recent independent review were company information, teamwork and corporate communication. Supporting that finding was the division of views on the restructuring programme. While some of the teachers interviewed at the EER were positive, others were confused, and uncertain about the content of the new curriculum and their role in its delivery.

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 **Adequate**.

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

As mentioned, McGirr Training has a range of policies to adapt delivery and outcomes to learners' abilities and expectations, and to ensure that the student is suited for the chosen course. Applicants who meet the minimum requirement of level 2 literacy are expected to be interviewed for aims and expectations, and a first draft of an individual learning plan is made. Within two months, the student is encouraged to assume ownership of this document. It is monitored and reviewed fortnightly throughout the course and is the primary check on the match between learner and learning. It may be modified or radically changed if persistent difficulties emerge, or the student may be moved to another course. This Plan and Review phase is an excellent instrument for recording and analysing the match between students and courses, and has been well conducted by staff. On the other

hand, the PTE acknowledges that the gradual erosion of the enrolment process from 35 minutes to a much shorter interview may have been one factor in the decline of the labour market outcomes in Worklink programmes, and possibly in the retention concerns around the Youth Training programme.

McGirr Training supports opportunities for gaining a qualification, for example a level 1 or level 2 certificate in a relevant subject, which is often a major incentive to learning. The National Certificate in Employment Skills is a planned addition to the 2013 curriculum.

As discussed, the lack of consultation with key stakeholders about the relevance and value of the programmes, and the lack of ongoing collation and analysis of graduate outcomes data are gaps in McGirr Training's self-assessment that hinder how well its programmes and activities match the needs of its learners and stakeholders. In the most recent student survey, there is roughly equal division between medium and high satisfaction with the quality and relevance of course content, and of the teaching activities and resources, with a significant percentage non-committal. But there is no evidence of research into the contributing factors to this range of responses, nor of the fact that among those interviewed at the EER, feedback was generally positive at one delivery site, negative at the other.

In the successful Workplace Literacy programmes, McGirr Training has skilfully embodied literacy and numeracy in the teaching, and used 'naturally occurring evidence' for assessment. Employers' references confirm that these courses are appreciated by students and that their benefits are evident in the workplace.

For other programmes, for example FFTO, the match between learning and needs is less evident, indicating that while some good self-assessment processes exist, the data they have delivered has not been used effectively to address a consecutive two-year fall in labour market outcomes.

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 **Adequate**.

Credit achievement in all funded programmes has exceeded contractual targets. In the Workplace Literacy programmes, funding requirements have been met.

Communication and computing programmes for learners have received strong positive feedback from participants. A range of teaching approaches is used, often mixing youthful and mature students, providing opportunities for mutual mentoring. A Plan and Review schedule provides a cumulative review of individual student progress, and fortnightly tutor meetings are a forum for discussion of teaching challenges and successes. These discussions tend to focus more on the student's progress than on the tutor's contribution and self-assessment.

Records suggest that until at least 2012, teachers were performing well, with solid credit achievement, general approval from students, and warm appreciation of their help and guidance. Student satisfaction with all on-site programmes is independently reviewed, and conclusions summarised for management. The most recent survey (2012) reported a division of opinion on the content and delivery of courses between 'definitely agree' and 'mostly agree'. Mixed levels of satisfaction were expressed by students interviewed by the EER team, with delivery and resources deemed by students and staff to be good at one location, less so at the other. This result may contain useful information about contributing factors that have not been explored.

The PTE has a professional development policy for teaching staff. Targeted training, including literacy and numeracy teaching, is given to newly recruited tutors. A personal development plan is created, with ongoing peer appraisal from a chosen mentor. All tutors can attend conferences and other forums, and internal workshops are conducted by the course moderator. Policy requires six-monthly staff evaluations and an annual formal appraisal by the manager, with a complementary peer review by colleagues. Staff interviewed at the evaluation confirmed that weekly meetings took place at both sites on progress and delivery. However, there is no systematic record of individual self-assessment from session to session or course to course, or of improvements resulting from this process. Prior to the reorganisation, some tutors had a tertiary qualification, while others were experienced in their area of practice. Not all teachers were judged to be equipped for the planned expansion in 2013.

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**.

Care is taken to ensure, as far as possible, a good fit between applicants' wants and needs and the learning offered. Student guidance begins at the enrolment interview, which, as prescribed, should explore aims and expectations and inform a first draft of an individual learning plan. Peer support is assigned to new learners. Special but manageable needs are provided for, or referred for external counselling.

Generous benefits are offered. Driver licence fees may be paid, food vouchers, breakfasts and travel payments provided and, if needed, meetings with parents or other interested persons arranged. Students are encouraged to take part in learner council meetings and activities. Student surveys have recorded strong appreciation for these features, often affirming the vital role of support and guidance in their personal development and learning.

The Plan and Review process, with concurrent fortnightly tutor meetings, is used as an effective pastoral care instrument, recording and discussing student concerns, and planning appropriate help or intervention. The practice of teaching students

'on their own turf' in the Workplace Literacy programmes enables tutors to meet many challenges where they most need to be dealt with.

In 2013, responsibility for student support and guidance will be entrusted more to the tutors, who, as student surveys indicate, are already effectively involved. Vocational guidance and customer relations advisers, assisted by a part-time recruiter, will monitor more demanding challenges. When those exceed their brief, external services will be used. This is an experimental redistribution of roles, which will no doubt soon be tested by its results.

As reported by students, McGirr Training's student guidance and support is effective in many respects, but improvement is needed in the enrolment interview, and in the use of external agents experienced in student guidance and support, especially in the Youth Training programme. Local community contacts, such as Māori and Pasifika families and support groups, may be contacted and, in some instances, the Ministry of Social Development, WINZ and Ministry of Justice personnel could be important contributors to student support.

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**.

The governing board has three members, sharing wide-ranging knowledge and experience in business and education. They have given support and advice on educational and business matters, for example in the provision of good learning environments and resources, the establishment and management of educational contracts, and in the recruitment, training and professional development of staff. They have offered critical comment on management matters and, where necessary, requested further enquiry and reporting from management on key issues.

In mid-2012, the board expressed unease about the quality of performance reporting and analysis from middle management. A review of the continuous improvement policy was requested. The managing director became concerned about an apparent drift from the needs and interests of trainees in programmes which, while achieving good completion rates, were losing touch with the key constituency. This concern was heightened by a progressive erosion of links with schools and other stakeholders, and the decline of labour market outcomes in FFTO and Training for Work programmes.

A mass of detail existed in the PTE's files, and a report on programmes was submitted, but lack of detailed analysis either of the internal situation or of the market was a hazardous omission in a highly competitive and continually changing environment. McGirr Training had found it difficult to benchmark its performance

against that of other PTEs, and was therefore reliant on summary Tertiary Education Commission targets and reports as the only reliable performance indicators.

After considering the available options for change, the board approved the radical restructuring programme. A plan was conceived by September 2012, and announced to staff in October 2012. The timing of this decision and its plan for implementation carried risks, some of which were immediately realised. Staff were surprised at the abruptness of the announcement and by the lack of early consultation in planning. There had been no prior discussion with or advice from the market, and none from Māori and Pasifika communities or other interested community agents.

Reappointment of some staff and recruitment of new staff were carried out quickly, but a detailed strategy and training awaited the appointment of a new principal in January 2013.

This account demonstrates both strengths and weaknesses in governance and management:

- First, the continuous improvement policy had already lapsed, although the board had asked for an analysis early in the year. Had this policy been active, the growing gap (observed by the managing director) between the curriculum and the essential needs of students and their prospective employers might have been avoided.
- Secondly, although a mass of performance data existed, reporting and critique were seriously lacking, so that change was finally dictated less by evidence-based analysis and planning than by unforeseen events, such as the decline in labour market outcomes for some programmes, and the consequent threat to funding.

Both the board and senior management saw a need to act urgently. As the board is well aware, more consultation with a wide range of stakeholders will now be required, with continual monitoring of its execution and analysis of outcomes, which in due course will measure the success of the venture.

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: Training for Work

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

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

2.3 Focus area: Youth Training

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

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

Recommendations

NZQA recommends that McGirr Associates (1996) Limited trading as McGirr Training ensures that:

- Systems and processes are used both for recording and analysing all internal factors affecting educational performance.
- Processes are used for consultation with key stakeholders, and for recording, analysing and responding to employment and other training needs in a continually changing environment.
- A self-assessment plan is designed to assess each aspect and phase of the reorganisation plan, until all features are fully functional.
- A policy for the engagement of Māori and Pasifika representatives in programme development and evaluation is created and enacted.

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).

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/>.

NZQA

Ph 0800 697 296

E qaadmin@nzqa.govt.nz

www.nzqa.govt.nz