

Report of External Evaluation and Review

P A C T Limited trading as PACT

Confident in educational performance

Confident in capability in self-assessment

Date of report: 30 October 2014

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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:	P A C T Limited, trading as PACT
Type:	Private training establishment (PTE)
Location:	485 Waitarere Beach Road, RD 4, Levin
Delivery sites:	In the workplace and online
First registered:	13 August 1997
Courses currently delivered:	Online delivery – Assessor Training comprising unit standards 4098 <i>Use standards to assess candidate performance</i> ; 11281 <i>Prepare candidate(s) for assessment against standards</i> ; 18203 <i>Verify evidence for assessment</i>
Code of Practice signatory	No
Number of students:	Domestic: in 2013, 160 part-time online learners International: nil
Number of staff:	Two FTE (full-time equivalent) trainers (who are also the directors) as well as two contractors
Scope of active accreditation:	Refer: http://www.nzqa.govt.nz/providers/details.do?providerId=843029001
Distinctive characteristics:	PACT is a small PTE with two service areas: training design and delivery for larger corporates, and online training (principally Assessor Training).

Recent significant changes:	Training Scheme – Assessor Training – approved 2012.
Previous quality assurance history:	<p>The previous external evaluation and review (EER) was conducted in 2010. NZQA was Highly Confident in both the educational performance and capability in self-assessment of PACT. The two focus areas were governance, management and strategy, and training needs analysis, design and delivery.</p> <p>PACT's national external moderation record shows an exemption for 2011; requirements met in 2012 for unit standard 18203; and in 2013 requirements met for unit standard 4098, and modification required for unit standard 11281.</p>

2. Scope of external evaluation and review

The scope of this EER included the mandatory focus area:

- Governance, management and strategy

The other focus area was:

- Online training

Online training was selected as a focus area because it represents the Training Scheme – Assessor Training – approved since the last EER and is linked to unit standards assessment.

Learners are from two main groups – employees required by their employers to hold unit standards 4098, 11281 and 18203 to be a workplace assessor, and individual learners who need these assessor training unit standards. These learners choose to study online because their employer has recommended this, and/or because of their remote location. The provider requested online training as a focus area because it is a growing and strategic area of the organisation. The evaluators included the PTE's management training in the mandatory focus area as it represents 90 per cent of the business and the online training historically grew out of the consultancy service.

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.*

PACT submitted a self-assessment summary prior to the EER and a pre-scoping telephone meeting was held with the director.

The evaluation team of two visited the Waiterere Beach (Levin) office for one day. Interviews were conducted with both directors, and telephone interviews were held with one contractor, online learners and employers. A range of documentation was reviewed including learner achievement data, meeting minutes, review reports, strategic plan, learner evaluations, presentations and email communications.

Summary of Results

Statement of confidence on educational performance

NZQA is **Confident** in the educational performance of **P A C T Limited**.

Overall, completion data is good, with 60 per cent of learners completing the online Assessor Training for unit standards 4098, 11281 and 18203, and undertaking assessor roles in their workplace. Almost all employees successfully complete the consultancy training.

PACT has very strong business relationships with a small number of businesses and organisations across New Zealand. These stakeholders value PACT's training highly for its focus on improving workplace performance and for its robust needs analysis and training review process. The content of the training is adjusted to reflect current developments and to better meet the needs of client companies and their employees.

The development of the online Assessor Training programme is a response to the needs of a range of businesses, organisations, industry training organisations and their employees. Most learners are from remote areas and value being able to access this training online from their own location and workplace. Individual progress is monitored and learning and technical support is accessible and supportive.

PACT's strategic plan, annual review and goal-setting are clear, well understood and shared across the organisation. The two highly experienced directors are fully engaged in all aspects of the business, including managing the two service areas to ensure that the PTE delivers quality training courses.

Statement of confidence on capability in self-assessment

NZQA is **Confident** in the capability in self-assessment of **P A C T Limited**.

There is good evidence that self-assessment practice is authentic and transparent, is integrated across the PTE, and has been used to inform worthwhile changes and improvements.

PACT has a number of processes that inform the organisation about the key areas that support educational performance:

- Integration of review processes at all stages of management training, from needs analysis to training delivery and the impact in the workplace
- Effective training and performance review
- Learner support for individuals and groups
- Building of key business relationships with relevant client companies for both consultancy and online learning
- Gathering good data from learner evaluations and responding to feedback.

Self-assessment could be strengthened by:

- Systematic collection and analysis of data, including Māori and Pasifika achievement
- Extension of feedback and evaluation processes to all learners including enquiry about reasons for non-completion.

Findings¹

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 **Good**.

There is strong evidence of high achievement by both online learners and corporate participants. A range of client feedback stated that the training led to changed performance. For example, at one client company, pre- and post-training surveys indicated positive improvement in all five leadership dimensions as a direct result of the PACT leadership training. Consultants actively review results with corporate clients to identify improvements and the impact of the training on their employees. In corporate management training, all participants are in employment and meet employer expectations for the outcomes of that training.

There has been significant growth in the numbers of learners enrolling in online training at PACT, as demonstrated in Table 1. From 2010-2014, enrolment in online Assessor Training increased by 290 per cent, and there is some indication that this upward trend will continue through referrals and an increase in website hits. Successful course completions over the same period averaged 62.4 per cent. A decrease to 54 per cent in 2013 resulted in the introduction of additional follow-up strategies, which appear to be having an impact, with an increase to 60 per cent completions for the first half of 2014.

Table 1: PACT online Assessor Training learner achievement				
	Number enrolled	Withdrawal/ refund	Number completions	% successful completions
2010	55	2	38	72%
2011	137	5	79	60%
2012	147	11	90	66%
2013	160	1	87	54%
2014 (half year)	101	1	60	60%

In 2011, PACT benchmarked against two other online providers whose course completion rates were below 50 per cent, and similar benchmarking is proposed for 2014. During the PTE's follow-up telephone calls with non-completers, learners indicated that they were too busy, or otherwise disengaged, to complete. However, there is a lack of formal analysis of learners who do not complete.

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

In 2014, a pre-course assessment for a corporate client showed Māori and Pasifika learner achievement of 78 per cent (seven of nine learners), and non-Māori achievement of 75 per cent (six of eight learners). Post-course completions increased to 90 per cent for both groups of learners. This was a marked improvement on the 15 per cent completion for Māori learners for a similar course in 2012.

While PACT is progressively reviewing the performance of Māori and Pasifika students in the consultancy courses, Māori and Pasifika achievement data is not yet systematically collected and analysed for the online courses.

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**.

PACT learners are all in employment and apply their learning in their own workplaces. Online learners indicated to the evaluators that they highly value the outcomes because the successful achievement of the Assessor Training course enables them to take on assessor roles and open up new employment opportunities.

PACT engages with client companies to provide workplace-focused capability training for corporate clients to enable the staff to take on new roles and improve their performance in the workplace. An example of this is the niche training for restorative justice facilitators who are not able to undertake the role until they have successfully completed the PACT training. Another example involved the survey results at one company which indicated positive improvement in leadership areas of health and safety, communication and giving direction, performance management and performance development, coaching and team-building. Almost all PACT training for the four to five key corporate clients is long-term repeat business by organisations choosing the PTE as their preferred service provider. There have also been referrals and recommendations from these clients to other companies. The evaluation team is confident that PACT actively engages with these companies to provide consultancy and training that is of high value to both the companies and their employees.

The evaluators heard that the Assessor Training offers significant value to a range of motivated learners who are mostly located in remote areas. Recent examples of enquiries include one from a bakery in Hawera with three staff, and another from a Timaru learner who had been recommended to enrol in the online learning with PACT by the relevant industry training organisation. It is a distinct value that PACT provides this online training for learners for whom this training is not accessible in their area. One organisation indicated that PACT's training is considered to be

cost-effective, very good quality, responsive to learner needs, with flexible timeframes and compares favourably with other providers used. Learners indicated that they value the opportunity to complete the training in their own time and place so they can progress to assessor roles in their workplace.

Systematic and purposeful feedback and evaluation processes are embedded in PACT's training, although not all online learners are included. Feedback is analysed and used to make improvements to training materials and support strategies. For example, in response to identifying that some learners were missing some key instructions when reading text on screen, a short explanatory video clip was included in the online material which also introduced the director to the learners. This received favourable comments from online learners.

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 **Good**.

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

PACT engages effectively with clients to establish and identify training needs, followed by development and regular review processes to confirm that final training meets corporate client requirements. Post-training review and feedback processes are used to monitor the effectiveness of the training and the impact on the workplace performance of participants. In one instance, a formal external review was used by the client company to determine the effectiveness of the training.

Another example of responsiveness to identified needs related to feedback from participants and clients involved in facilitator training, who indicated a preference for a Māori trainer. A participant from a previous course was identified as having the relevant skills and is now a regular contractor for PACT.

Students told the evaluators that the online assessor training met their needs through being able to work when they wanted to, to finish quickly if they wanted to, using materials that enabled the acquisition of underpinning theoretical knowledge leading to practical assessments. The PTE's 2013 self-assessment confirms that 52 per cent of learners take 0-2 months from enrolment to assessment completion, with a further 38 per cent completing in 2-4 months. Company representatives interviewed by the evaluators said the learning materials were clear and appropriate, employees were not removed from the workplace, and their practical assessment was of units that are directly relevant to the workplace. Learners are required to use registered assessors for their practical observation and assessment, and these are approved by PACT. In some cases, the assessor could be the employer or a colleague who had relevant qualifications. In one case, PACT did not approve the learner's selected assessor and required the practical assessment to be retaken with a more experienced assessor.

The summary analysis of learner surveys shows the average satisfaction scores are between 8 and 9 (on a 10-point scale) across all dimensions, with feedback comments including 'very well-run series of workshops', 'very relevant', 'our input and feedback taken on board, building confidence and very self-explanatory', 'I enjoyed it and have recommended to others'. Where any evaluation feedback has a low score, immediate actions are taken to improve that area. Where course improvements are suggested, these are recorded and actioned at six-monthly intervals, unless improvement can be implemented earlier. A recent learner suggestion that the instructions to candidates were confusing and could be improved resulted in immediate amendment.

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**.

PACT's teaching is highly effective. The organisation engages experienced consultants who are well qualified, with professional expertise in the specialist areas required by the corporate clients. For instance, one of the contractors was supported to complete a postgraduate certificate in executive coaching from an Australian university. There is clear evidence of the training being rated highly in an external independent review of the restorative justice facilitator training. Constant review and reflection is part of the PTE's consultancy activities, and the design of courses often changes after initial delivery. For example, in a pilot of training to improve telephone customer service, it was noted that the training material needed to be less formal to meet the language needs of the participants. Changes were made and, at the next delivery, participants commented that the training served their needs well.

Online learners commented on the clarity of the learning materials and the timely and positive support provided to the learners. The learning materials are prepared using relevant instructional design skills, and changes are made in response to feedback from learners. Recently, student feedback indicated that instructions for different roles in the assessment process would be helpful in the online material. This material has now been included. Assessment materials are internally and externally moderated to maintain a high standard.

There is good evidence that evaluations inform improvements, peer observations provide feedback on improved practice, and a strong collaborative practice model is in place. Consultants reflect on their practice in response to participant feedback and regular peer observations. The evaluators heard stakeholder feedback to the effect that the PACT directors set a very high standard and were very thorough in their development of and support for the training. Review of teaching and training is fully embedded within the organisation to support learner achievement.

During the development of the online learning materials, PACT investigated the use of commercial software as a learning management system for the online courses. However, PACT developed its own materials specific to its learner profile.

A key goal in the PTE's strategic plan is to develop consultant expertise. This is done through personal development plans with a focus on building existing strengths and developing new skills to increase effectiveness in delivery. A comprehensive peer review process is embedded in the delivery of corporate training. This is used to inform professional development, moderation of delivery and ongoing improvement.

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**.

There is a strong and comprehensive strategy for guidance and support of online learners. Students commented on the follow-up emails to remind learners of deadlines, follow-up phone calls, timely responses to learner queries and clarifications, and feedback on assessments within five working days. Where relevant, communications are copied to employers so that they can support learners to complete coursework. Learners commented that this had effectively supported them to keep on track and complete assessments.

The online course information provides guidance on who is best suited to undertake online training. PACT evaluates the assessment material provided by the student to confirm that it enables the unit standard requirements to be met.

PACT has demonstrated through a range of individual and group approaches that learners are supported to become assessors and/or gain worthwhile skills and knowledge to be used in their workplace. Self-assessment is based on learner and stakeholder feedback as well as some analysis of results and other relevant indicators, such as the time a learner takes to complete. However, follow-up evaluations with all learners and those who do not complete could be implemented in a more systematic way to inform further worthwhile improvements.

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

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**.

PACT has very effective governance and management practices for a PTE of this size. There was strong evidence of highly experienced and capable directors understanding all aspects of this niche business and maintaining relevant systems and processes to support the achievement of outcomes for both learners and stakeholders. A strongly collaborative style of management results in shared goal-setting and decision-making, with individual responsibilities and accountabilities clearly understood.

It is evident that the directors have built strong relationships with key businesses and organisations to support ongoing training opportunities for repeat clients as well as referrals and recommendations for existing and new developments. This is a strength of the PTE and is used to inform the annual review of the strategic plan and goals.

There is good evidence that the organisation understands its niche training areas and is effective at managing change. There is a clear strategy for performance review and professional development to support the high expectations of quality delivery and continuous improvement.

Reflection and self-assessment take place at the level of each training activity. Self-assessment could be strengthened through the collection and analysis of data, including Māori and Pasifika achievement, and clearer defining of success criteria for each training initiative to enable more systematic evaluation and learning to take place at an organisational level.

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 **Excellent**.

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

2.2 Focus area: Online training

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

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

There is good evidence that online training learners completing the course are exceeding the achievement of learners at comparable education providers. There is some analysis of the results achieved and signs of improving educational achievement. However, there is limited enquiry about the reasons for non-completion.

Recommendations

NZQA recommends that PACT:

- Strengthen the collection and analysis of educational achievement data for Māori and Pasifika learners across the organisation
- Develop systematic feedback processes to include all learners, including those who do not complete.

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/>.

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