



Report of External Evaluation and Review

Whenua Iti Trust Incorporated
Outdoors Pursuits Centre

Confident in educational performance

Confident in capability in self-assessment

Date of report: 5 July 2011

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MoE Number: 9858
NZQA Reference: C04644
Date of EER visit: 5 and 6 May, 2011

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

Location:	RD2, Moutere Highway, Upper Moutere, Nelson/Tasman
Type:	Private Training Establishment
First registered:	1992
Number of students:	<ul style="list-style-type: none">• One-day courses (LEOTC¹): 1,000 primary-school students (Ministry of Education-funded)• One-day courses: 150 (corporate activity)• Challenge (12 weeks): 48 (Tertiary Education Commission (TEC)-funded)• True North (eight weeks): 20 (Ministry of Youth Development (MYD)-funded)• Leadership (short course): 40 (MYD-funded)• Mentoring (over ten weeks): ten• International: n/a
Number of staff:	16 part-time (casual) tutors, one part-time manager, two additional part-time management team staff, part-time financial administrator
Scope of active accreditation:	Whenua Iti Trust Incorporated Outdoor Pursuits Centre (Whenua Iti Trust) delivers courses in outdoor recreation, environment, leadership, and employment skills in a number of fields, including:

¹ LEOTC: Learning Experiences Outside the Classroom

- Communications (to level 4)
- Core generic (to level 2)
- Outdoor Recreation (to level 4)
- Recreation and sport (to level 4)
- Community Development (to level 6)

Sites: Single site: Moutere Highway, RD2, Upper Moutere, Nelson/Tasman

Distinctive characteristics: Whenua Iti Trust has been delivering outdoor education to youth at risk, schoolchildren, and adults in the Nelson/Tasman region for 25 years. More recently, the organisation has also been delivering short courses for the corporate market, as it has sought to diversify from its specialisation in delivery of education and training for primarily at-risk young people.

The organisation's special character and purpose is to empower people to make new choices. This is done primarily through managed experiences in the outdoors, enabling individuals to build new relationships with the land and with each other. Students who have given feedback to Whenua Iti have also talked about how their own lives and well-being have been improved.

Most courses are funded by the TEC, MYD, or the Ministry of Education, which funds the Learning Experiences Outside the Classroom (LEOTC) scheme. The outdoor experiences that are part of each course provide a link with literacy, numeracy, and communication skills, and give the motivation for young people to achieve outcomes in these areas.

Recent significant changes: Recent changes have been made to include literacy, numeracy and language outcomes in funded courses. A recent change has also been made to the LEOTC courses to enable environmental education to be included, with an environmental restoration plan in place to restore an area of native bush to enhance the community and better facilitate the delivery of environmental education.

The senior management structure has recently changed, with a new general manager and operations manager appointed in late 2010.

Previous quality assurance At the last NZQA quality assurance visit, an audit in

history: October 2008, Whenua Iti Trust met all but two requirements of the then-standard, both relating to governance and management. Since then, the organisation has revised its management structure, new board members have been appointed, and lines of reporting have been established.

2. Scope of external evaluation and review

The agreed scope of the external evaluation and review of Whenua Iti Trust Incorporated Outdoor Pursuits Centre included the mandatory focus area:

- Governance, management, and strategy.

The following focus area was selected because it was, at the time of the EER visit, one of the primary courses being delivered. It is also the longest course delivered by Whenua Iti Trust, and the only one funded by the TEC.

- Challenge course.

Whenua Iti Trust is a small training provider, and the two focus areas above were sufficient to give the evaluators an accurate representation of the whole organisation.

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 document Policy and Guidelines for the Conduct of External Evaluation and Review available at: <http://www.nzqa.govt.nz/for-providers/docs/eer-policy-conduct.pdf>

The external evaluation and review team spent two days (13 hours on site) conducting the EER at the organisation's main training site at Lower Moutere, near Motueka. During the visit the evaluation team met with the managing director, operations manager, two tutors, financial administrator, business development manager, and seven students from the Challenge course. A meeting was held with the chair of the board of trustees and another board member, and telephone conversations were held with representatives of Work and Income New Zealand (WINZ) (Motueka office), Ministry of Youth Development (MYD) (relationships manager, Wellington), Adult Learning Support (Nelson), Alcohol and Drug Clinic (Nelson), Child, Youth and Family (CYF) (auditor).

Whenua Iti Trust has had an opportunity to comment on the accuracy of this report, and any submissions received have been fully considered by NZQA before finalising the report.

Summary of Results

Statement of confidence on educational performance

NZQA is **Confident** in the educational performance of **Whenua Iti Trust Incorporated Outdoor Pursuits Centre**.

Learners who are referred by WINZ into the Challenge course are classified by WINZ as being of the highest risk category. These people are generally long-term unemployed, many also with drug and alcohol dependencies and/or mental health/general poor health issues. The cohort within the Challenge course, which was finishing on the day of the evaluation visit, spoke very positively of the benefits they had received. Feedback from the MYD representatives who were interviewed reflected the confidence that the organisation has regarding the capability of Whenua Iti Trust to work with its high-risk clients and to begin changing their attitudes and behaviours. The positive outcomes, as reflected by the learners, include growth in confidence, better health and fitness, ability to work in a team, and preparedness to apply for a job or enrol in another course. The group of learners within the Challenge course, the board of trustees representatives, and the other external stakeholders who were interviewed were all very satisfied with the TEO's performance.

Whenua Iti Trust is achieving the Tertiary Education Commission's expectation for 80 per cent course completion and significantly exceeding three unit standards for the learners. The current group has achieved six to nine unit standards each on average. Mandatory performance commitments of Whenua Iti Trust for the Challenge course learners had not yet been assessed, as they are measured at the point of the three-month, post-course follow-up. At the evaluation visit, however, most of the learners spoke of their readiness to either seek a full-time or part-time job, or to enrol in another course. They were proud of their achievements while enrolled at Whenua Iti Trust, one of which was writing a newspaper article about the course. This article has been accepted for publication by a local paper.

The evaluators found that areas outside the focus area were also operating at a strong or exemplary level. For example, the CYF auditor who was interviewed spoke of the TEO's credibility, reputation, and ability to follow through on its strategic plan. The CYF contract has recently been extended. The Ministry of Education contract to deliver LEOTC courses has also recently been widened to allow for courses to address more of the national curriculum than outdoor education.

Statement of confidence on capability in self-assessment

NZQA is **Confident** in the capability in self-assessment of **Whenua Iti Trust Incorporated Outdoor Pursuits Centre**.

Whenua Iti Trust has effective procedures in place for self-assessment and for coordinating evaluation activities of all of its programmes and activities on an ongoing basis. The evaluators saw examples of evaluation activities, including the seeking of feedback from learners, staff, and the community, course reports, the general manager's reports to the board, and achievement data for individual courses, over time. The findings of self-evaluation activities have been used to make improvements to resources and course delivery. The annual Triple Bottom Line Report (People, Planet, Profit) provides a summary self-assessment, in line with the philosophy of Whenua Iti Trust, to its community of interest.

Self-assessment could be improved by the recording of feedback at an organisational level rather than at course-by-course level. Although achievement data is well recorded, and the records are kept over time for each course, there has not yet been systematic analysis across courses to seek any common patterns or trends.

Findings²

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**.

As noted above, part of the special character of Whenua Iti Trust is its delivery of courses for at-risk youth. The evaluators confirmed that the learners who are referred by WINZ are at the high end of risk – many have been unemployed for a long time, and many have alcohol or drug dependencies and/or mental health/general poor health issues. The achievements of learners in terms of meeting either employment outcomes or completing qualifications, or gaining more than three unit standards on average, are always going to be a challenge for the TEO. The current learner group has achieved six to nine unit standards each.

Whenua Iti takes all reasonable steps to maximise learner achievement. The learners who were interviewed spoke very positively of their personal achievements and were proud of their writing achievements in their personal journals. They had been challenged to achieve in physical terms, such as in overnight expeditions, rafting, caving, and climbing, and were also proud of their achievements in these respects. The external stakeholders spoke highly of the ability of tutors at Whenua Iti Trust to teach and extend the abilities of young people.

The evaluators found ample evidence that learners improve their well-being and enhance their abilities and self-confidence. An example of this improvement is provided by a newspaper article, written by the cohort of the recent (2011) Challenge course, and now confirmed as being accepted by a local newspaper. “This course challenges you to change and improve fitness and confidence while having fun with new friends.....You’ll discover working as a team in a big way and come out with positive attitudes whilst learning to trust others and yourself.” (Challenge course, May 2011)

The teaching of literacy, numeracy, and language or communication skills is a relatively new activity for Whenua Iti Trust. An external adult literacy specialist tutor has been contracted to work with the Challenge course, and all tutors are currently undergoing further professional development in this area. Learners were positive about the improvements they had each made with their literacy. Some learners, who stated that they had not written anything for a long time, were very proud of their personal journals, written during the 12 weeks of the course.

With respect to self-assessment, individual learner files are kept, tracking completion of unit standards and recording information about individual learning or action plans and achievements with respect to these plans. Further work could be done to track trends over time with respect to learner achievement, as well as across the organisation, although the

² The findings in this report are derived using a standard process and are based on a targeted sample of the organisation’s activities.

evaluators found that, anecdotally, management and tutors do have this information. Whenua Iti Trust is at an early stage of comparing early and course-end literacy testing results.

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 **excellent**.

Whenua Iti Trust is comprehensively meeting the needs of the learners and other stakeholders. The learners value their increased communication skills, confidence, and personal well-being. The most recent Challenge course students had worked together to write a newspaper article which describes the value they have gained from the course. Each student speaks at their graduation ceremony about the value they have gained from the course, thereby also demonstrating their increased confidence and communication skills.

Stakeholders who were interviewed all spoke very positively of the value of the outcomes for their organisations, the students, or the community. The representative from the Alcohol and Drug Clinic in Nelson, for example, told of one student who was now enrolled in a business course, with a career plan and the motivation to follow it, which “wouldn’t have been possible without attending Whenua Iti”. The CYF stakeholder representative spoke of that organisation’s high level of confidence in the results being attained by the TEO and informed the evaluators that CYF has now given “preferred provider status” to Whenua Iti Trust.

Stakeholders are surveyed annually, with a description of the results published in the annual Triple Bottom Line Report, an example of which was seen by the evaluators. There has been very positive feedback from recent corporate team-building days. For example, following a recent Chamber of Commerce senior managers’ course, feedback was provided by email, and two further course requests were made.

Whenua Iti Trust provides valuable outcomes to enhance the community. For example, school holiday programmes are now provided for the local community, and further courses will follow for local school children. Whenua Iti works closely with Te Awhina marae in Motueka and is further building a relationship with the marae, with the True North course having a marae-based component. Within the Challenge course, students undertake community service, such as assisting with planting, weed control, or building tracks for the Department of Conservation. Community groups are invited to Whenua Iti Trust several times a year, usually while a course is running, in order to be better informed about the work being done by the TEO.

Student evaluations, tutor evaluations following each course, and feedback sought from stakeholders are all valuable self-assessment strategies. With respect to the two focus areas, Whenua Iti Trust has effective methods for gathering feedback and using it to make improvements. The business development manager described how needs analysis for any

new LEOTC course is undertaken with the school and teachers involved, and how post-course evaluations inform action plans for the future.

The board of trustees receives the managers' report at each meeting, as well as the minutes of staff meetings and the safety committee meetings. The board has a "clear picture" of outcomes as they are occurring. The board members who were interviewed acknowledged that, for the usual Whenua Iti Trust client base, it is difficult to forecast successful labour market outcomes. The lower-than-ideal rate of learner achievement with respect to employment or further education is exacerbated by the current economic climate, with a high local unemployment rate, particularly for youth. The board is very supportive of the TEO's activities with respect to achieving valuable personal outcomes for learners, as described above, and to giving value to the local community.

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 **excellent**.

Whenua Iti incorporates ongoing needs analysis into course design. The needs analysis that is undertaken prior to a Challenge course begins with an initial interview with each learner, which identifies individual literacy needs and personal goals. These goals, which lead to an action plan which is compiled towards the end of the course, are tracked through mid-course and end-of-course interviews. Finally, three months after the course ends, each learner is interviewed by the tutor, usually by telephone, to establish the extent to which the employment or further education outcomes have been achieved with respect to the type of benefit they have been receiving. This is consistent with the investment plan of the TEO and the stated TEC funding requirements. For some learners, this might mean full-time or part-time employment or voluntary work; for others, an outcome could be enrolment in another course.

The student database includes an electronic file for each learner, including the records of each interview, to ensure that each learner's progress through the course is monitored and that the course is continuing to address their stated needs.

The stakeholders whom the evaluators interviewed each spoke positively of Whenua Iti Trust in terms of the extent to which the TEO is meeting learners' needs, and thus the stakeholders' needs. The CYF representatives, for example, spoke of their confidence in the TEO to continue to meet learners' needs. CYF will shortly be referring even more at-risk learners to Whenua Iti, those that are referred by the courts, and the CYF representative who was interviewed expressed her confidence that Whenua Iti Trust tutors would also be able to meet the needs of these learners. WINZ case managers receive reports outlining the progress of individual learners. WINZ case managers interviewed at this evaluation were very supportive of how their organisation's needs were being met: "Whenua Iti are great at building our clients' motivation, enthusiasm and building their work-readiness skills".

Community collaborations are being developed between Whenua Iti Trust and Te Awhina marae, local businesses, other TEOs, and community groups to determine and meet their needs.

The Whenua Iti Trust Board members with whom the evaluators met described how the board has undertaken strategic analyses over past years to ensure that the board supports the management and staff to continue to meet the needs of learners and the community.

Self-assessment strategies that are in place to determine the extent to which learners' and stakeholders' needs are being met include the one-to-one interviews with students, the record-keeping systems, and the online TEC literacy tool and progressions booklets for measuring progress. Audits are undertaken regularly on safety aspects on site, including ropes and other equipment, to ensure that the learning environment is as safe as possible. Audit reports are reviewed by the safety committee, which reports to the board and which also carries out regular internal audits of equipment.

1.4 How effective is the teaching?

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 **excellent**.

Whenua Iti has some effective strategies in place to ensure that its staff of 16 casual and part-time tutors are able to work as a coherent team. All tutors attend staff meetings, and all are expected to write a course report for each course taught as well as to read the course reports for other courses. Written course reports include learner feedback, and they are also tabled at staff meetings. New staff are observed and are able to co-teach before teaching their own course. Staff are all offered external supervision. Most have taken this up, and the rest will be offered group supervision.

At the end of each course there is a review of the credits gained by learners, with staff all discussing the assessment of units. There have been no issues with external moderation reports, either from Skills Active or from the NZQA Tertiary Assessment and Moderation unit. Learners on the Challenge course are currently achieving an average of six to nine unit standards, which is more than the three in the TEC Investment Plan for the 12-week course.

The needs analyses that are conducted through interviews with individual learners at the beginning, middle, and end of each course contribute to effective teaching. Any relevant issues affecting learning, such as health or literacy, are placed in the learner's electronic file in the database. Each course has a file, with hard copy of interview records and learners' statements of goals, as well as all course notes, assessment guidelines, and marking schedules. Consideration is given to course balance, including gender and particular learner needs, before all places are confirmed on a course.

Whenua Iti Trust works closely with Skills Active as well as with the New Zealand Outdoor Instructors Association. The evaluators verified that all staff are well qualified, both academically and with relevant outdoor instruction qualifications. All are also engaged in

professional development activities, for example in a Train the Trainers course that will be delivered by an external specialist later in 2011. Other professional development events have focussed on time management, literacy, and marae-based training. All staff have now been welcomed onto Te Awhina marae and work closely with the marae in the delivery of courses. Individual professional development plans are agreed through the performance review process.

In 2011, the Challenge course has included literacy and numeracy teaching. An external specialist literacy teacher has also been contracted. Learners who were interviewed spoke positively about the quality of the literacy teaching and how proud they were of the writing they had done in their personal journals.

The monitoring and review schedule specifies self-assessment activities for the year. Staff meetings include course reporting, assessment and review activities, as well as safety and quality reviews. All self-assessment and review activities contribute to the effectiveness of the teaching by Whenua Iti Trust.

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 **excellent**.

Learners are provided with a range of support to assist them to meet their goals. As stated above, learners enrolled in the Challenge courses are generally young, and all are deemed by WINZ to be at-risk. The initial learner interviews identify their support needs, for example literacy or mental health.

One of the goals of the Challenge course is to encourage learners to think about their needs and how to address them. The learners who were interviewed by the evaluators reported that they feel better both physically and mentally as a result of having completed the course. They also reported that the tutors are “really friendly and safe”, so that the learners feel supported in their learning and are able to work constructively within their class group. The evaluators noted the easy rapport that was obvious between tutors, learners, and management, and the extent to which the learners had responded to this. The learning environment is inclusive of different learning styles and individual needs. Towards the end of the Challenge course, learners are supported to take their next steps through the writing of their action plan. This is followed up with an interview three months after the course ends. Learners are thus provided with continued support to assist them to achieve their goals.

The safety procedures of Whenua Iti Trust are supportive of the students. The evaluators observed a range of standard operating procedures and risk assessment forms. Safety audits are undertaken and all incidents are reported to the operations manager and to the safety committee. All gear, including tramping clothing, is supplied by Whenua Iti Trust.

Tutors reported that they receive support from colleagues, both tutors and management. Because of the challenging nature of some learner cohorts of primarily at-risk youth, support and guidance for both learners and staff are paramount in order that there are

minimal barriers to learning. All reported that Whenua Iti Trust provides a supportive and inclusive learning environment.

The learner feedback provided after each course is the most direct form of self-assessment with respect to the effectiveness and quality of guidance and support. Feedback is filed with the course report. In addition, each tutor has a one-to-one debriefing interview with the operations manager following course completion. Any issues raised from this with respect to the likes of support, guidance, literacy, and any other special needs of learners will be discussed in staff meetings and may be the subject of further professional development events for all staff.

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**.

There was a change in management of Whenua Iti Trust in late 2010. The general manager's role is now more strategic than before, and two new positions – operations manager and development and communications manager – have been created. This change has had positive effects on both course delivery and the diversification of Whenua Iti's range of courses and other activities. Interviews with managers, teaching staff, and board members all confirmed that the change in management structure has been effective in establishing or improving a clear organisational purpose and direction.

The management of Whenua Iti Trust is now working more closely with the board, with clear lines of reporting. A managers' report is presented at each board meeting, and a staff member has a place on the board. The board itself has a strong skill-set, with recent new board members bringing particular strengths to the board. The board also now has a greater emphasis on governance and strategic planning. All senior staff are given annual key performance indicators and an annual review of these by either the board or management.

The newly appointed operations manager has a leadership and senior teaching role. This includes spending time with tutors after each course on self-assessment. The operations manager allocates tutors to courses, organises peer observations of tutors, and manages the course reporting processes.

There are links established with the community through board membership, and management maintains collaborative arrangements with other organisations. For example, the general manager of the TEO works with the Te Awhina marae manager in a managers' peer support group.

The self-assessment and review calendar for 2011 provides a schedule for these activities across all parts of the TEO, including self-assessment activities relating to staff meetings, course reviews, annual reporting, development of professional development plans, staff contract review, and all external review or audit activities. The Whenua Iti Trust Board also has an annual planning calendar including strategic and policy reviews, reporting commitments, and planned collaborative activities with staff of the TEO.

The evaluators found that the staff meeting minutes and the managers' reports to the board focussed largely on current matters such as numbers on the course, bookings, and budget matters, rather than looking at educational progress overall, such as from course to course. If discussed, these overall self-assessment activities are not recorded in the minutes. The board itself demonstrates effective leadership in articulating purpose and direction, both internally and externally. The board undertakes an annual self-review and receives all external and internal review reports. The safety committee reports directly to the board.

There is a clear differentiation at Whenua Iti Trust between governance and management, yet both parts of the organisation work together effectively to improve outcomes for learners and the wider community.

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: Challenge course

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

There are no recommendations arising from the external evaluation and review, other than those implied or expressed within the report.

Further actions

The next external evaluation and review will take place in accordance with NZQA's policy and is likely to occur within four years of the date of this report.

Appendix

Regulatory basis for external evaluation and review

Self-assessment and external evaluation and review are requirements of course approval and accreditation (under sections 258 and 259 of the Education Act 1989) for all TEOs that are entitled to apply. The requirements are set through the course approval and accreditation criteria and policies established by NZQA under section 253(1)(d) and (e) of the Act.

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 courses they own or provide. These criteria and policies are set by NZQA under section 253(1)(ca) of the Act.

NZQA is responsible for ensuring TEOs continue to comply with the policies and criteria after the initial granting of approval and accreditation of courses 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 policies and criteria 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/for-providers/keydocs/index.html>*

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