External Evaluation and Review Report

Abacus Counselling, Training and Supervision Limited

Date of report: 24 May 2022

About Abacus Counselling, Training and Supervision Limited

Abacus Counselling, Training and Supervision Limited (Abacus) provides developmental training and workforce development, specifically in mental health support, addiction and gambling harm intervention. Courses are delivered to students who are in employment, and are contextualised to suit client, professional and individual requirements.

Type of organisation:	Private training establishment
Location:	8 Pompallier Terrace, Ponsonby, Auckland
Code of Practice signatory:	Yes
Number of students:	Domestic: 1500-plus students per year in short courses ranging from two to seven hours duration
	International: nil
Number of staff:	Eight full-time equivalents plus 30 or more contract supervisors and facilitators
TEO profile:	See Abacus on the NZQA website.
	Abacus has a range of contracts for research and workforce development training, specifically in mental health, addiction and gambling intervention. Abacus also provides professional supervision services to many other organisations.
Last EER outcome:	The previous external evaluation and review (EER) of Abacus, held in April 2016[1], resulted in summative judgements of Highly Confident in educational performance and Highly Confident in capability in self-assessment.
Scope of evaluation:	• Certificate of Addiction and Mental Health Supervision (Level 6) (Training Scheme)
	• Short course delivery (non-NZQA approved)
MoE number:	7639

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[1] This EER was originally scheduled for 2020 but rescheduled twice due to COVID-19 lockdowns in Auckland.

NZQA reference: C46505

Dates of EER visit: 22 and 23 March 2022

Summary of Results

There is clear and comprehensive evidence that Abacus is delivering quality education and training. Abacus has strong achievement, and the outcomes are highly valued by students in their respective workplaces and professional bodies.

Highly Confident in educational performance

Highly Confident in capability in self-assessment

- Abacus has high course completions, along with very positive client and student satisfaction with the training. Long-term relationships with clients signify that the outcomes for students are valued.

- All students enrolled in the Certificate of Addiction and Mental Health Supervision have completed successfully. Short course completions and feedback on the training also show high rates of satisfaction and success.

- Programmes are taught by experienced, qualified staff who use their significant professional and educational experience to ensure the training is relevant and engaging. Staff are involved in regular reflection and review, leading to continuous improvement of teaching.

- Abacus has strong relationships with its major stakeholders, which include several district health boards; the Drug and Alcohol Practitioners Association of Aotearoa-New Zealand (DAPAANZ); local and central government agencies; and non-governmental organisations that require trained supervisors. This is helping to increase the capability of workers in this area to provide specialist supervision in the alcohol, drug and gambling addiction fields.

- Students who have completed the Certificate of Addiction and Mental Health Supervision can apply to become a registered practitioner with DAPAANZ. Short courses enable people to gain points towards renewal of membership or registration.

- Abacus tutors also provide professional supervision services for clients in the workplace. This also helps to keep staff current and inform course reviews to

enable the organisation to cater to the changing needs of the sector.

- The organisation is well managed and has a clear philosophy and purpose which is reflected throughout. Educational delivery is well planned and resourced. Important compliance accountabilities are generally being effectively managed.

- The practice of self-assessment is not new at Abacus. Records and discussions indicate that self-assessment is well embedded and has been practised for many years.

- Self-assessment at Abacus is comprehensive, authentic and transparent. NZQA is highly confident that Abacus will continue to use findings insightfully to bring about worthwhile and ongoing improvements.

Key evaluation question findings[2]

1.1   How well do students achieve?

1.2   What is the value of the outcomes for key stakeholders, including students?

Performance:	**Excellent**
Self-assessment:	**Excellent**
Findings and supporting evidence:	In the period 2016-21, 117 students were enrolled in the Certificate of Addiction and Mental Health Supervision. All students successfully completed the six modules, corresponding assessments and workshop attendance. Māori students comprised 13 per cent and Pasifika 9 per cent of 2021 students.
	Short courses are not assessed, but feedback on workshops shows nearly 100 per cent of the students were highly satisfied or satisfied with both the course delivery and the skills and knowledge they attained from the workshops.
	Students and client organisations receive high value from the training and services that Abacus delivers. Interviews with external stakeholders, and employer survey results, indicate that the students are acquiring useful skills and knowledge contextualised to their professional setting. This enables the students to apply their learning and work more effectively and immediately in their employment.
	Feedback from graduates about the course outcomes is gathered individually from each student and from their manager, by survey and/or during workplace supervisory contacts. The feedback shows that the training enhances workplace supervision skills in the addiction field and confirms that students are improving skills through the techniques taught.
	Abacus also views repeat business with client organisations as a key measure of the value of the outcomes. The core of Abacus's business revolves around a small but steadily growing number of key clients, most of whom have had a

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

	relationship with the PTE over several years. The year-on-year purchase of services from Abacus is evidence of the perceived value of the training.
Conclusion:	Students are achieving well at Abacus. Ongoing relationships and involvement in the sector provide evidence that the training, both the tailored short courses and the training scheme certificate course, are very relevant and are helping those working in supervisory positions or within the addiction field.

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:	**Good**
Findings and supporting evidence:	Abacus is strongly engaged with, and highly respected by, its industry and profession. The regular and ongoing interaction with its stakeholders is a strong feature of the organisation. Mechanisms employed include ongoing contact with clients and students, student and supervisor satisfaction surveys, client surveys, end-of-training discussions, and participation with professional organisations such as DAPAANZ.
	Abacus's client focus is typified in the way the PTE schedules the training around the needs of clients and delivers training where and when it is needed. Facilitators also work with students and client organisations to develop teaching scenarios contextualised to their situation.
	Abacus's teaching staff have extensive industry and professional experience, and an obvious natural passion and ability to engage with a range of students. Staff are participating in formal professional development and there are regular structured opportunities for staff to discuss teaching practice. Peer observation of teaching is regular, and there were examples of its effectiveness in the way it has led to improvements.
	Internal moderation is sound and regularly conducted. All assessments are cross-marked by at least one other teacher, and a sample of up to four assessments are internally moderated by an independent panel of Abacus staff. External moderation, however, has lagged somewhat over the past few

	years. Abacus has recently identified a new external moderator who will be moderating assessment for the level 5 assessments over the next few months.
	Abacus has very thorough systems to gather feedback from students and client organisations. This involves both a systematic approach to gathering feedback and the less formal approaches such as asking students every day: 'How is it going?'; 'Did you understand that?'; 'Did you enjoy that session?' This dual approach is useful for both identifying improvement and engaging students. There were convincing examples of how practice has continuously improved as a result of feedback. However, the process for ensuring that student feedback is shared with teaching staff may benefit from a more systematic approach.
Conclusion:	Abacus's courses are effectively designed and delivered to match the needs of the students, their workplaces and the professional community. Regular and scheduled external moderation will improve the integrity of Abacus's assessment processes.

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

Performance:	**Excellent**
Self-assessment:	**Excellent**
Findings and supporting evidence:	Students at Abacus receive active, appropriate and immediate support from staff throughout the organisation. Intending students are well guided into courses appropriate to their aspirations and capabilities, and pre-course materials ensure that they come prepared.
	Part of the ethos of the supervision field is to provide a safe environment, which is reflected in the support provided by Abacus. There is a strong focus on personal relationships, beginning with tutors getting to know every student and taking time to ascertain and understand individual learning styles, needs and goals. This ensures that the students are engaged in their learning and have opportunities to learn in contexts that are relevant to their needs.
	Tutors teach small groups of students which enables them to have a good understanding of both progress and learning

	barriers and to provide individual support when needed. From experience, staff have developed a comprehensive appreciation of the needs of students and have developed strategies to address those needs.
	The COVID-19 pandemic had led to an acceleration of Abacus's move to online delivery and assessment which, based on student and client feedback, has been largely successful. Tutors described how they have used online platforms effectively to maintain interactivity and keep students engaged.
Conclusion:	From initial enrolment, through to and beyond course completion, students receive high quality and appropriate learning support from Abacus tutors and administrative staff. Abacus's pivot to online delivery in response to COVID-19 has minimised disruptions to the student experience.

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

Performance:	**Excellent**
Self-assessment:	**Good**
Findings and supporting evidence:	Abacus is a privately owned company, governed by a board of four directors who between them have strong educational, financial and governance expertise, and two decades of successfully leading this organisation. All of the directors are actively involved in the operations of Abacus, and between them have a distributed portfolio of key responsibilities.
	The organisation is well managed and has a clear philosophy, purpose and values which are formalised through strategic and business plans and evident throughout the organisation. Abacus uses its resources effectively and sustainably to support educational achievement. Staff are valued for their expertise and are provided with support and opportunities for professional development to assist them in their roles.
	Although teaching staff are highly qualified in their respective fields, few hold an adult teaching qualification or are studying towards adult teaching qualifications. Ongoing teaching-related professional development for teaching staff may help them to keep their teaching strategies current and ultimately lead to an

	improved experience for students. An example of this is skills development relating to online delivery and assessment.
	Abacus has well-established administration and management systems and procedures in place, with ethical practices.
	The organisation encourages reflection on its role and how to continue to make ongoing and continuous improvements to how it meets the needs of students and other stakeholders. Self-assessment is being well led by management and is comprehensively understood and adopted throughout the organisation.
Conclusion:	Abacus has a clear vision and understanding of its enterprise, and strong leadership committed to providing effective support for educational achievement. Monitoring of performance within Abacus is regular, transparent and effective.

1.6 How effectively are important compliance accountabilities managed?

Performance:	**Good**
Self-assessment:	**Good**
Findings and supporting evidence:	Abacus has a culture that includes an appropriate emphasis on being compliant. Compliance management responsibility sits primarily with the director who holds responsibility for quality assurance, with compliance tasks and obligations distributed to other directors and staff as appropriate.
	The management of compliance is in places informal rather than part of a scheduled process, which has led to some oversights of obligations. The most palpable is Abacus's failure to enrol students on, or to deliver a training scheme approved since 2018. Although explanations of how this came to be and Abacus's intention to deliver the training scheme – albeit in an amended format in future – were plausible, this is a breach of NZQA's rules relating to training scheme delivery. This breach does not present a risk to students or stakeholders.
	The Certificate of Addiction and Mental Health Supervision is being delivered in line with the approved document. A system is in place to review courses and assessment resources on a regular basis.

	Abacus completed a self-review of its implementation of the interim domestic Code[3], and submitted an attestation to this effect to NZQA before 1 March 2021 as required. The self-review was a team effort involving a range of staff, and identified that all requirements were well met.
	NZQA attestations and returns have been submitted within required timeframes. There is no recent 'risk' history with NZQA.
	The organisation has a number of funding partners, all of whom require regular evaluation and reporting. Abacus has effective systems to ensure that these reporting accountabilities are met in a timely and accurate manner.
Conclusion:	Abacus has a good understanding of its compliance accountabilities and manages these to ensure that the most important obligations are met. However, a more proactive and demonstrable compliance monitoring process would help ensure continued compliance.

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[3] The Education (Pastoral Care of Domestic Tertiary Students) Interim Code of Practice 2019

Focus Areas

This section reports significant findings in each focus area, not already covered in Part 1.

2.1 Focus area: Certificate of Addiction and Mental Health Supervision (Level 6) (Training Scheme)

Performance:	**Excellent**
Self-assessment:	**Excellent**

2.2 Focus area: Short course delivery (non-NZQA approved)

Performance:	**Excellent**
Self-assessment:	**Excellent**

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 Abacus Counselling, Training and Supervision Limited:

- Ensure that all assessment material is externally moderated in line with Abacus's Assessment and Moderation Policy [Policy 20].

- Consider providing opportunities for staff to participate in adult teaching training and development, either internally or externally. An example of this may be in skills for facilitating on-line teaching and assessment.

- Add structures such as a compliance calendar and bring-up system, to enable proactive and demonstrable compliance monitoring processes.

- Consider improvements to the ways in which feedback from students is communicated back to teaching staff.

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

Conduct of external evaluation and review

All external evaluation and reviews are conducted in accordance with NZQA's published rules. The methodology used is described in the web document https://www.nzqa.govt.nz/providers-partners/external-evaluation-and-review/. 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. 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 fraud[4]*

- *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.*

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[4] 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 under the Quality Assurance (including External Evaluation and Review (EER)) Rules 2016, which are made by NZQA under section 253(1)(pa) of the Education Act 1989 and approved by the NZQA Board and the Minister authorised as responsible for Part 20 of the Education Act.

Self-assessment and participation and cooperation in external evaluation and review are requirements for:

- *maintaining accreditation to provide an approved programme for all TEOs other than universities, and*

- *maintaining consent to assess against standards on the Directory of Assessment Standards for all TEOs including ITOs but excluding universities, and*

- *maintaining training scheme approval for all TEOs other than universities.*

The requirements for participation and cooperation are set through the Programme Approval and Accreditation Rules 2018, the Consent to Assess Against Standards Rules 2011 and the Training Scheme Rules 2012 respectively. These rules were also made by NZQA under section 253 of the Education Act 1989 and approved by the NZQA Board and the Minister.

In addition, the Private Training Establishment Rules 2018 require registered private training establishments to undertake self-assessment and participate in external evaluation and review as a condition of maintaining registration. The Private Training Establishment Registration Rules 2018 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, training schemes and consents to assess and 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 Quality Assurance (including External Evaluation and Review (EER)) Rules 2016. 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). All rules cited above are available at https://www.nzqa.govt.nz/about-us/our-role/legislation/nzqa-rules/, while information about the conduct and methodology for external evaluation and review can be found at https://www.nzqa.govt.nz/providers-partners/external-evaluation-and-review/.

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