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# Report of External Evaluation and Review

Aperfield Montessori Trust

Confident in educational performance

Confident in capability in self-assessment

Date of report: 17 July 2018

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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:	Aperfield Montessori Trust
Type:	Private training establishment (PTE)
First registered:	1 February 1993
Location:	74 Halswell Road, Hillmorton, Christchurch
Delivery sites:	As above
Courses currently delivered:	Aperfield Montessori Diploma in Early Childhood Education (Level 5) (Expiring)
Code of Practice signatory:	No
Number of students:	Domestic: 70 students 10 per cent Māori, 1 per cent Pasifika
Number of staff:	15 part-time staff made up of 13 tutors, one administrator, one co-ordinator; plus three contractors
Distinctive characteristics:	Aperfield Montessori Trust is a provider of early childhood education based on the Montessori philosophy and method. The Trust delivers a blended learning model called direct distance learning in Christchurch, and distance learning across New Zealand. The teaching material is the same for both cohorts of students. Workshops are held in the North and South Island over long weekends.

The programme is delivered in five books covering: practical living and sensorial activities; core curriculum; environmental studies; the arts, school, classroom diversity and management; and modules on the practical life and Ministerial Requirements and Expectations. Each book involves approximately six months full-time study. For the distance students, the programme also includes four two-day practical workshops throughout the year. It is preferable that students are working in a Montessori preschool at the time of study.

Recent significant changes: The Targeted Review of Qualifications has led to the development of a new qualification called New Zealand Diploma in Early Childhood Education and Care (Level 5). Aperfield Montessori Trust has not applied to deliver this new qualification but has developed a relationship with a Category 1 TEO to ensure that Montessori principles are well represented in the level 5 programme.

Following the on-site visit, the PTE provided a press release from Aperfield Montessori Trust and Te Rito Maioha Early Childhood New Zealand indicating that from approximately February 2019, Te Rito Maioha will deliver the New Zealand Diploma in Early Childhood Education and Care. In the interim, Aperfield Montessori Trust will actively support current enrolees to complete their qualification before this time. Following this, Aperfield Montessori Trust will apply to NZQA to deregister as a PTE.

Previous quality assurance history: NZQA undertook an external evaluation and review (EER) of Aperfield Montessori Trust in August 2016. The EER resulted in judgements of:

- Confident in educational performance
- Not Yet Confident in capability in self-assessment.

The following recommendations were given:

1. Develop and implement an internal post-assessment moderation process that is consistent across the organisation and informs

monitored action plans (if required) that are relevant to tutors.

2. Improve the performance appraisal process to ensure it is regularly and consistently undertaken with all staff and informs monitored action plans (if required) towards improved performance and practice that is relevant to staff.
3. Develop a mechanism to regularly monitor progress of developed action plans for staff and the organisation.
4. Ensure that future professional development plans reflect the requirements of the emerging New Zealand qualification by upskilling staff in standards-based assessment.
5. Develop internal capability of staff to accurately input, manage, analyse and report participation and performance data that is reflective of all student cohorts.

In response to the above recommendations, the Trust submitted an action plan that was accepted by NZQA. The action plan goals included:

- Improve moderation processes to meet standards
- Improve the human resource management systems in relation to appraisal and professional learning and development
- Develop mechanisms to regularly monitor progress of developed action plans for staff and the organisation
- Improve all staff and board members' knowledge about standards-based assessment
- Improve student data reporting processes.

The Trust has made progress in response to these recommendations, including successfully completing and reviewing the actions above. Refer to the body of this report for details.

Other: The Montessori component of the Diploma in Early Childhood Education was developed by personnel who were trained under Dr Maria Montessori. The Montessori philosophy has been supported and maintained by the current members of the Trust and the key advisors who are currently engaged with the organisation. Aperfield Montessori is the only provider of a Montessori Diploma in Early Childhood Education across New Zealand, with the integration of the Aotearoa context adding to the uniqueness of the Montessori programme.

## 2. Scope of external evaluation and review

A scoping meeting was held by phone in February 2018 with the chairperson of the Trust. The EER process and the potential focus areas were identified from this meeting. Additionally, a draft agenda was developed. A self-assessment summary and a range of other documents were made available to NZQA prior to the EER visit.

The scope of the EER included two focus areas:

- Aperfield Montessori Diploma in Early Childhood Education (Level 5) – this is the only programme currently being delivered by the Trust. This qualification expires in December 2019. (No new enrolments have been taken since December 2017.)
- Assessment and moderation – it was identified at the 2016 EER that assessment and moderation was below standard and needed improving.

## 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 in April 2018 over one and a half days. The evaluation team reviewed a range of documentation and spoke with the Trust chairperson, the co-ordinator, trustees and employers in childcare centres and several graduates of the diploma.

## *Disclaimer*

*The findings in this report have been reached by means of a standard evaluative process: <http://www.nzqa.govt.nz/providers-partners/external-evaluation-and-review/policy-and-guidelines-eer/introduction/>. They are based on a representative selection of focus areas, and a sample of supporting information provided by the TEO under review or independently accessed by NZQA. As such, the report's findings offer a guide to the relative quality of the TEO at the time of the EER, in the light of the known evidence, and the likelihood that this level of quality will continue.*

*For the same reason, these findings are always limited in scope. They are derived from selections and samples evaluated at a point in time. The supporting methodology is not designed to:*

- *Identify organisational fraud<sup>1</sup>*
- *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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<sup>1</sup> 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.

# Summary of Results

## Statement of confidence on educational performance

NZQA is **Confident** in the educational performance and **Confident** in the capability in self-assessment of **Aperfield Montessori Trust**.

- Course completion rates have been consistently at 90 per cent over the last three years. This is significant as all learners are part-timers who are managing jobs and personal commitments while studying. It also indicates the effectiveness of the support offered to learners by the Trust's staff.
- Most students are already early childhood education graduates. They gain additional knowledge and skills relating to Montessori early childhood education practice, which are regularly applied to the workplace and shared with whānau and communities.
- Programme delivery meets learner needs well. Resources are comprehensive and the material supports learning. Tutors are longstanding, well-qualified and highly experienced practitioners.
- Face-to-face and distance learning offers access to the programme across New Zealand. Previous issues identified regarding the effectiveness of some face-to-face learning have been addressed by long weekend workshops across the North and South Islands and closer tracking of learner progress by the co-ordinator.
- The programme has grown the numbers of Montessori-trained and qualified staff with theoretical and technical knowledge. This meets the requirement of some early childhood centres to have a reasonable ratio of qualified Montessori and early childhood education trained staff.
- The purpose and direction of Aperfield Montessori is clear and aligns to the need across New Zealand for trained Montessori early childhood teachers. Regular reporting informs the trustees of enrolments, learner progress and activities.
- The effectiveness of governance has been shown by the extensive and thorough due diligence undertaken prior to developing the recently finalised arrangement with Te Rito Maioha – to deliver the Montessori curriculum into the new early childhood education programme.
- While the Trust has addressed most of the issues identified by NZQA at the 2106 EER, it has not fully embedded these initiatives. Understandably, its main focus is on supporting current students to complete the diploma before its expiry date.

# Findings<sup>2</sup>

## 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**.

The programme is largely made up of distance learners and a smaller cohort of face-to-face learners in Christchurch. Most already have an early childhood education qualification. While the Trust does not benchmark itself against other providers of similar programmes, it has maintained high course completion rates, as identified in Table 1.

**Table 1. Aperfield Montessori course completion rates for 2015-2017**

Overall	2015	2016	2017
Course completion	96%	92%	96%

The training equips graduates for a range of employment options, mostly within Montessori early childhood centres. Some graduates move into generic or home-based centres, or a placement in a related field, while some are full time parents.

Learners, graduates and tutors spoke of the comprehensiveness of the textbook, and particularly its usefulness at the completion of the course or qualification, and in the workplace. Pre- and post-assessment moderation is undertaken annually by external independent contractors who have an extensive background in Montessori education and are closely connected with the Trust. All face-to-face and distance tutors participate in external post-assessment moderation, and feedback is comprehensive.

The Trust has developed internal moderation processes that encourage staff to critique assessments and marking as a way to support each other and assure validity and consistency for students and across tutors. Where a need for development is identified in moderation feedback, action plans are developed and reviewed.

Aperfield Montessori has developed a close relationship with Te Rito Maioha, a Category 1 TEO, to assist and inform assessment practice. More effective and systematic processes (including moderation systems) developed in response to recommendations made at the last EER assures NZQA that learner achievement is valid and aligns appropriately to course material. However, due to the changed

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

focus (intention to deregister as a PTE), these systems have not had the opportunity to be fully embedded.

## 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 **Good**.

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

Learners gain the ability to articulate the Montessori philosophy and align their understanding to their practice. Graduates' knowledge and experience enables workplace opportunities, including promotion to supervisory roles. The programme increases the knowledge and technical skills of the learners, which are specific to the use of Montessori equipment. Through the programme, students learn new concepts and develop Montessori resources that are shared within the early childhood workplace environment.

Learner feedback indicates that the Ministerial requirements and expectations focusing on New Zealand, self-review, and neuroscience modules are of high value in understanding the licensing criteria and alignment to Te Whāriki, the Ministry of Education's early childhood education policy.

The commitment and passion of the Aperfield Montessori Trust has motivated and enabled them to form a strong partnership arrangement with Te Rito Maoiha. This arrangement ensures that the Montessori philosophy and practices will be embedded in the training of all early childhood education graduates undertaking the new qualification.

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

Students' reasons for study are identified at enrolment through the collection of information to understand learner academic and pastoral needs. Enrolment documentation in student files sampled showed that the gathering of information was comprehensive and consistent. As part of the enrolment process, students receive a timetable of workshops and learning resources, including well-designed textbooks to support learning.

In response to stakeholder feedback, changes were made to the distance programme block structure. The annual 11-day workshop was too long for students

to be absent from work and families. This was changed to four workshops a year, in both North and South Islands, each lasting three to four days. This change better meets employer needs as employers do not have to employ relieving teachers for long periods while students are away at training. This change has encouraged some employers to send several employees simultaneously, providing support for trainees both at the training and post-training. Another benefit is that trainees develop Montessori resources to use at their centres, adding to the centre's collective resources.

Regular learner feedback collected at the completion of each textbook indicates that learners are satisfied with the programme and delivery. Learner support is provided in one-to-one sessions to increase the likelihood of success, and is readily available to all students. Regular newsletters each term keep tutors and students well informed about programme developments and changes.

The programme enables current early childhood education teachers to progress their careers by becoming professional leaders of Montessori philosophy and theory within their preschool centre. This was demonstrated by some graduates who became owners or managers of their respective childhood centres. Similarly, some Montessori early childhood centres require a ratio of qualified Montessori staff and qualified early childhood education staff; the programme enables the centres to meet this requirement.

The face-to-face or distance learning option provides a flexible and supportive learning environment for a range of learners' circumstances. Distance tutors are flexible, easy to contact and highly responsive to student needs. Distance learning meets the needs of learners located in different parts of the country, who are interested, employed or invested in Montessori education for themselves or their children.

Through the national reach of the organisation across New Zealand, Aperfield Montessori increases the membership of Montessori Aotearoa New Zealand. The Trust supports innovation in teaching which is encouraged through national forums and informed by research.

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

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**.

The learning environment is inclusive and minimises barriers to learning. Learners have positive relationships with the tutors and are regularly kept abreast of organisational updates by newsletters and emails. Distance learners predominantly make contact with tutors through email, while face-to-face learners will go direct to tutors during class. Tutors give feedback to learners promptly after assessment, which is helpful and constructive for subsequent assessments.

Comprehensive and timely study information and advice is provided to facilitate learning pathways. Expectations and processes are clearly outlined to learners in the student guide, and additional readings are sent to students when required. Extra support is also available after hours to all learners, both face-to-face and distance.

The programme is supported by longstanding, qualified tutors who are appropriately experienced in early childhood education and have Montessori backgrounds and capabilities. Tutor understanding of learner progress is reported regularly to the co-ordinator, who has a good understanding of each student's progress at any point in time and follows up quickly if a learner is falling behind. Feedback from learners indicates that stimulating environments are created by the tutors, who are well prepared, approachable, enthusiastic and knowledgeable.

Learners are informed of programme requirements and expectations such as timetables, assignments and necessary readings for the workshops, which helps consolidate the theory-based learning. Assessments align with the programme material and learners were confident about the value of the content for their roles in early childhood education centres. Feedback is regularly collected from learners at the end of each learning component and used to make changes and improvements.

Tutors are supported by the organisation to offer additional assistance to learners. This is particularly important in 2018 as the last cohort of students complete the Montessori diploma. To enhance student success, the Trust intends to offer extra tutorials to students over this time.

## 1.5 How effective are governance and management at supporting educational achievement?

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**.

The Trust promotes the success of learners through relevant resources, retention of effective teaching staff, and delivery of additional support to learners. Tutors are recruited on their knowledge, experience and commitment to the Montessori philosophy and knowledge of the qualification. The Trust supports staff in their roles and values the contribution they make to learner success and feedback on material and programme design. Staff are financially supported and encouraged by the Trust to provide additional help and teaching time for learners who require extra assistance. Internal capability has been improved, particularly around moderation, programme design and data reporting.

An effective mechanism exists where all tutors receive feedback on their practice annually, which is also informed by learner feedback, and is largely based around individual professional development plans. Professional development is linked with the performance appraisal process, currently undertaken with external expertise.

Attendance at events such as the Montessori Aotearoa New Zealand conference is offered to some staff. There is good evidence of succession planning with the recent collaboration with Te Rito Maioha. This relationship has also assisted with and informed assessment practice. Once the final cohort of students graduate with the Montessori diploma in December 2019 the Trust will apply to NZQA to deregister as a PTE.

## 1.6 How effectively are important compliance accountabilities managed?

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**.

Reporting mechanisms have been improved and trustees are now more actively engaged in the management of the organisation. Regular reporting by the education co-ordinator and administrator keeps the trustees informed of enrolments, learner progress and activities. Trustees meet regularly, and minutes reflect a system to track progress of actions, responsible personnel and expected completion dates.

Internal capability, particularly around moderation, programme design and data reporting has improved with two key appointments, one to coordinate educational management, the other for data management. The Trust has developed internal

moderation processes that encourage staff to critique assessments and marking as a way to support each other and assure validity and consistency for students.

Pre- and post-assessment moderation is undertaken annually by external independent contractors who have an extensive background in Montessori education and are closely connected with the Trust. All face-to-face and distance tutors participate in external post-assessment moderation, and feedback is comprehensive. Where moderation feedback identifies gaps, action plans are developed and reviewed systematically.

# Focus Areas

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

## 2.1 Focus area: Assessment and moderation

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

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

## 2.2 Focus area: Aperiafield Montessori Diploma in Early Childhood Education (Level 5)

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

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.

# 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](http://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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