New Zealand Institute of Skills and Technology Establishment Board

Mobilising the New World
Report of the Work-based Learning (WBL) Workstream

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Executive Summary

Workstream Approach

The Working Group was tasked to develop the framework and approach for how the Institute supports work-based learning (WBL), including planning for the transfer of trainees and apprenticeships currently supported by ITOs.

From the beginning the group saw that their work involved two quite distinct tasks – the development of the future framework and approach that the NZIST Board would consider and, secondly, to consider the transition arrangements that would be required for the trainees and apprentices currently supported by the ITOs. This report discusses and presents these two separate tasks.

Summary of Recommendations/Options

The Working Group has outlined nine substantive recommendations in Section 6 of the report as follows:

For 2020 and 2021

1. *Build capability and capacity for WBL into NZIST by bringing a first tranche of the current ITO capability and provision of WBL into NZIST.*
2. *Ensure the ITO Training Adviser capabilities of, business development, product knowledge, WBL assessment support systems pastoral care and learning support are retained to ensure apprentice, trainee and employer progression, trust and confidence.*
3. *Develop the personas for employers as a key customer for NZIST*
4. *Design a WBL component into all/most NZIST programmes that can be delivered through the high and low touch options outlined in Section 3.*
5. *Consolidate the organisational structure for WBL of NZIST (and subsidiaries) in line with WDC Groupings.*
6. *Develop a National organisational structure of provision, supporting work-based, provider-based and online learning If required, complete the transfer into NZIST of current ITO capability and WBL provision*

For 2022 (operational 2023)

7. *If required, complete the transfer of TITO capability and provision.*
8. *Provide clarity on transitional funding arrangements as soon as possible while the unified funding system is under development*

Two recommendations that are dependent on WDC formation and IT infrastructure developments

9. *Bring together the unity, shared vision and values of NZIST and the WDCs through the development of a core suite of 'Master Programmes' that are aligned to a national qualification structure. – and growing programme offerings, aligned with nationally-consistent support models*
10. *Ensure there are unified systems to manage, track and monitor apprentices and trainees, provide 27/4 access and support – including learning management and student management systems.*

Further details of each of the recommendations and the risks identified are included in Section 6. This detail provides the rationale for the recommendations.

The recommendations have been allocated across the transition period (2020-2023) recognising the broad scope of work for NZIST and that parallel work across the Reforms, for example on the unified funding system, is also needed so the Group's recommendations can be implemented. A set of operational recommendations that support the substantive recommendations is also provided in Section 6.1. Much of the work on these recommendations can begin immediately.

Proposal

Section 3 of the report outlines a range of delivery options for WBL. The role of providers differ across the different models. For Provider-led training, NZIST would be providing all services to students to ensure their success in the programme whereas in an Apprentice model the role of the employer as partner in the delivery is more prevalent. In the apprenticeship models the employer is effectively the trainer for the skills that are developed in the workplace. NZIST tutors then deliver off the job components. It is important that the employer and provider work in a way that makes transition from one delivery mode to another as seamless as possible for the learner. In the Corporate Model all skills are developed in the workplace with the employer as the primary trainer.

This section of the report highlights the importance of having a range of options for WBL so employers and leaners can access arrangements that best suit their needs. As WBL expands to more workplaces NZIST will need to consider the scalability of some of the models and in particular how a much larger group of SME-based learning can be supported.

Risks

A critical risk to be managed during the transition period is that employers and learners lose confidence in the system and choose to withdraw or not participate until the picture is clear. It will be important for NZIST to work alongside the TITOs and TEC during this period to ensure NZIST has the capacity and capability to continue arrangements for employers, apprentices and trainees as seamlessly as possible.

Next Steps

The recommendations from the Working Group have been prioritised over three years with two further recommendations that require linkages to the wider work programme for the reforms.

NZIST can begin some supporting or underpinning work that will support the key recommendations immediately. Other recommendations will need to be part of a broader plan.

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1.   Background

This section of the report provides the context for the recommendations made by the Work-based Learning (WBL) Working Group.

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> 1.3 Context – Future of work
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1.1 Scope of the work

The Working Group was tasked to develop the framework and approach for how NZIST will support work-based learning (WBL), including planning for the transfer of trainees and apprenticeships currently supported by ITOs.

This work was commissioned to:

- Support NZIST to understand what this new business means for its operating model, how to integrate it and enhance it in line with charter expectations.
- Provide initial thinking on how NZIST can position itself to deliver this important business effectively, with strong focus on support needed for transfer of trainees, apprentices and employers.
- Consider how to bring this new group of students and employers on board without loss of participation, while addressing concerns, and building trust.
- Consider what existing system capabilities needs to be captured and maintained, and what needs to be adapted to be ready? Potential of transfer to show 'new world' identity and brand of NZIST.

From the beginning the group saw that their work involved two quite distinct tasks – the development of the future framework and approach that the NZIST Board would consider and, secondly, to consider the transition arrangements that would be required for the trainees and apprentices currently supported by the ITOs. This report discusses and presents these two separate tasks.

The group also identified the interdependencies between their work and of those in other workstreams – in particular the Learner Journey Map, Education Products and Services and Employer and Community Engagement workstreams.

The proposed work ahead is not without challenges and importantly the group spent time identifying the key risks the NZIST needs to be aware of as the transition to the WBL model envisaged occurs. The Working Group identified five top risks and issues for the Board to consider:

1. **People and culture shift**: Moving people and cultural embeddedness from the previous structures and ways of working through a clear narrative and shared vision for NZ Inc. A change management programme is essential.

2. **Unified organisational structure:** Until all parts of the VET system are brought together, it will be difficult to design and evolve to build a future-focused model.

3. **Significant policy change is required by NZQA and TEC** to enable the flexibility within programme structures / support models required for WBL and secure funding guarantees/continuity agreement from TEC.

4. **Coherent, compelling brand narrative** will be required to ensure the brand of NZIST is not viewed as the existing models under a 'mega-Polytechnic,' but as a new national organisation with an extensive regional network that builds national capability through a range of learning opportunities delivered in multiple ways that adapt and respond to industry, learner and community need.

5. **Building engagement and trust**: Ensuring NZIST engages from Day 1 with Industry/Employer, Māori, Pacific and Disabled Peoples Strategy will ensure they are actively involved in designing the future.

1.2 Work-based Learning (WBL) defined

Work based learning occurs in a range of settings, for a range of industries with graduates employed in many occupations including semi skill trades roles and those in professional and tertiary level occupations.

The working definition of WBL developed by the Working Group is:

> *Work-based learning describes learning that takes place at work, through work, for the purpose of work. It comprises varying proportions of on and off-job learning developed via a tripartite employer-learner-provider partnership.*

> *It includes paid full-time/part-time or unpaid/voluntary/in-care work experience, and those in the workforce who may be transitioning into WBL from school, pre-employment, progressing their learning, or career changers. However, WBL is not confined to learning post-secondary school, but can be delivered to those in senior secondary school. Throughout its deliberations the Working Group agreed that term " employer" includes volunteer organisations.*

The definition is inclusive of Workbased Training that replaces the term "Industry Training" in the current system and is defined in the Education Act as follows:

> *"Work-based training means systematic training and assessment (including apprenticeship training) in the skills characteristic of, or likely to be valuable to persons engaged in an industry (or 2 or more industries) that is provided to, person engaged in that industry (or those industries)*

> *(a) by or on behalf of employers in that industry (or those industries); or*

> *(b) for the benefit of employers and employees in that industry (or those industries)"*

Work-based training is currently concentrated in the ITO arrangements – for apprentices (undertaking programmes of over 120 credits leading to Level 4 qualifications over approximately 3-4 years of work and study) and trainees (undertaking programmes at Level 2-5 with varying credit values and durations). The learning is supported through subsidies from the Industry Training Fund.

Another term widely used, and part of the group's considerations is *work-integrated learning* – a term used more widely in academic environments.

Work-integrated learning is an umbrella term which includes a range of approaches that can include anything from guest speakers from workplaces through to full immersion in work-based learning experiences. This simple graphic below indicates that the global concept of 'Learning' encompasses multiple specialisations and subsets, including WiL which is itself a very broad term for learning about and for work. Work-based learning (WBL), that is learning in work, is a subset of WiL.
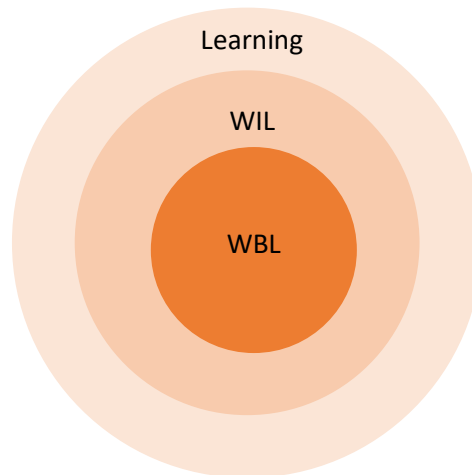
All definitions of workbased training, work-based learning and work-integrated learning have at the heart a tripartite partnership between the learner, the employer and the provider and it is an increase in learning of this type that is one of the key recommendations of RoVE. This is further emphasised in the subsequent setting of the Charter for NZIST.

An emphasis of the Working Group was to ensure this partnership concept was at the centre of its proposals for the future and for the transitional arrangements over the coming three years. The following diagram draws up the relationships between the various partners and stakeholders in WBL placing the learner and the employer together as central to the success of the learning.
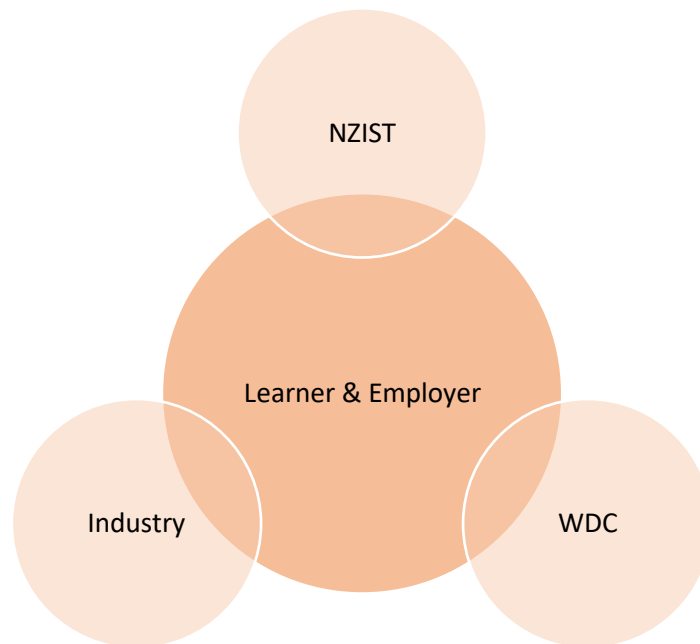
This importance of this "view of the world" was referred to often in the deliberations of the Working Group. One member of the Group, Craig Pomare, Chief Executive, Motor Trade Association put this best:

> "*We must move the employer from being seen as simply a 'player' in work-based learning to that of **an equal partner with the learner** at the heart of work-based learning. With a business to run, the employer also wears the hats of teacher, mentor, counsellor and assessor, often with little or no formal skills in these areas, and little support. Success requires we understand the needs of and provide tangible support for the employer (technical; educational; financial) from day 1 of the new NZIST*"

1.3 Context – Future of work

The first lens applied by the workstream was to look at what we know about the changing world of work and answer the question "what do we know about the world of work 10 years out from now?".

> *Employers are challenged to understand their current skills needs, as well as planning for future skills needs in an ever-increasing dynamic job market. We need a system and approach to work based learning that can quickly adjust to the needs of employers and the changing needs of learners. It needs to be flexible and agile to keep pace with the changing world and it needs to promote and develop pathways to upskill and reskill when demand arises. – Sue Hope, Learning Specialist Global Learning Experience Team, XERO*

Information from the following sources was referenced for this part of the work:

https://www.digitalskillsforum.nz/wp-content/uploads/2018/01/digital-skills-for-a-digital-nation-online.pdf
https://www.tec.govt.nz/assets/Reports/49efa6f071/Hidden-Links-New-Opportunities-Report.pdf

https://www.mbie.govt.nz/dmsdocument/5866-growing-innovative-industries-in-new-zealand-from-the-knowledge-wave-to-the-digital-age

The following high-level analysis is provided:

- Within the next ten years the World Economic Forum predict that more than 75 million jobs may be lost as companies shift to automation, but they also predict 133 million new jobs will emerge during this period. The upskilling and reskilling required for many people will be significant
- Forrester Research predicts that today's youngest workers will hold up to fifteen jobs in their lifetime. The rise of the gig economy where contracting for no more than one to two years will lead to a need for continuous life-long learning that is work integrated and accessible 24/7. It also lends itself to rethinking how workers gain qualifications and recognition of their learning on-the-job.
- There is a growing need to re-train and up-skill in the workplace and an increasing reliance on the ability of firms to undertake that training well. This upskilling may include degree level education and closer employer/education provider partnerships to ensure quality outcomes that deliver enhanced productivity and profitability.
- There is greater emphasis on skill recognition and on accessing the right skills/knowledge as and when needed, and a more flexible qualifications framework is required to accommodate that.
- Significant technological change (e.g. impact of AI, industry 4.0) will mean greater demand from employers and employees for education and training that allows them to use and respond to these changes in the workplace and for all employees to be digitally literate. Personalisation of learning will be a key component of the modern working environment.
- There will be an increased importance placed on corporate social responsibility and the impact of climate change as businesses plan for the future. There will be a shift in emphasis from economic growth (and attendant resource consumption) as the primary driver, to sustainable business practices that protect and conserve global resources and the environment.
- There is an increasing driver for volunteers to have qualifications to meet compliance requirements and to be able to access funding for their training. For some, lives depend on these qualifications eg search and rescue, fire crews, ambulance, surf life savers, outdoor recreation instructors or trip leaders, youth group leaders or adults accompanying youth on outdoor recreational activities. Sometimes this training adds value to paid employment concurrently or at another time in the volunteer's life it is independent of paid employment. There are currently limiting factors to accessing this training eg volunteers attracting TEC funding must have "regular or rostered hours of duty", how does this fit with, for example, a search and rescue volunteer?
- Talent shortages and NZ's demographic changes including an aging population will also impact on business decisions. The working population will become more diverse requiring education providers and employers to have the ability to respond to this diversity.

- The rise of Maori-led industry and economy; Te Ao Maori will influence the way NZ organisations engage with their work force.
- Policy and funding shifts will have occurred. Policy and funding supporting "learn-and-earn", training in the workplace, digitally enabled access to training, skills development and assessment.
- Policy, funding and systems will be designed for income security rather than for job security.
- Pre-employment learning needs to be shorter rather than longer, with a greater focus on employability/"soft" skills such as critical thinking, creativity, communication and collaboration. Technical knowledge will be delivered more and more in-employment.

The trends identified above will impact how NZIST operates and on the support it will need to address the issues. The following table briefly describes this impact.

Expected trend/state 2030	Impact for NZIST
Rates of technology-driven change increased over a decade.	• Greater engagement by employers investing in skills training and retraining. Integrated models combining workplace-based learning, online and classroom support.
Increased demand from employers and employees for reskilling to support shifts and changes in workplace technologies and associated occupations.	• Increase in the number of employers 'clients' to engage with. • Increase the quality of work-based learning by providing greater employer support. • Increase in numbers of learners in the workforce. • Workbased learning includes semi skill trades through to professional and tertiary level.
Maori-led business and industry organisations influence the culture of workforce engagement.	• Authentically partnered approaches to workforce development.
SMEs cooperate to establish collaborative industry-based grouping for work-based training requirements. Increased number of SME's engaged in workbased learning.	• Provision of work-based training managed with groups of employers. • Support models in place for employers including developing their training/mentoring and assessment capability. • Group apprenticeship schemes providing employment opportunities and support for employers.
Just-in-time, as required, bite sized work-based training requirements.	• More responsive and adaptive training options e.g. Micro-credentials - Micro-sized, stackable learning • Agile development of training and assessment resources. • Assessment that uses naturally occurring evidence. • RPL systems that are accessible and cost effective.
Schools integrated with, and transitions into workbased learning.	• School based apprenticeships, Advanced Apprenticeships, internships and work experience placements.

Increasing driver for volunteers to have qualifications to meet compliance requirements and to access funding.	• Ensuring volunteers can access training within their volunteer workplaces. Access needs to be just in time, available when and where the volunteer needs it and either bite sized or modular.
Policy and funding shifts to ensure support models are in place for employers and learners.	• Collaboration and partnership across agencies (MOE, NZQA, TEC, MSD, MBIE, WDC, NZIST) to support employers and employees nationally, regionally and locally.
Access to learning 24/7.	• Single point 24/7 learner service– tiered information and 'help' systems for learners and employers, offering access to training and learning activity that is responsive to and designed for engagement with diverse learner, trainee and employer groups; through to infield workplace based support, coaching and training by training advisors.
Consistency of outcomes while ensuring regional and local responsiveness.	• Review and alignment of all programmes across NZIST through a 'Master Programme' approach to development.

1.4 Context – Current data – participation and achievement

Most data on participation and achievement of learners in Industry Training is found through the collection of information from the ITOs by TEC through the Industry Training Register (ITR). It is also reported more broadly through Education Counts

https://www.educationcounts.govt.nz/statistics/tertiary-education/new-zealands-workplace-based-learners

For the purpose of this report data is used from both sources (TEC and Education Counts) and identified as such. TEC data for 2018 shows a total of 128,875 learners, Education Counts, that includes Managed Apprenticeships and the schools programmes, 138,000.

In addition, it is acknowledged that there will be programmes currently operating within the ITP and PTE sectors with considerable work-based training components. It is not possible to quantify these arrangements as the data is not collected in formal reporting systems.

A large amount of data was analysed and presented in background papers for the Reforms and not repeated. The analysis presented below is mostly links to the requirements of the NZIST Charter and the future direction for WBL.

Education Counts shows the number of trainees decreased in 2018, but there was an increase in apprentices. The number of trainees decreased by 12 percent to 88,000, while apprenticeship numbers increased by 9 percent to 50,000. Overall, the total number of industry training learners decreased by 5 percent to 138,000.

Learners by Ethnicity (TEC) - 2018

Ethnicity	Trainees and Apprentices	% of Total	2018 Census
European	77,500	60.1%	70.2%
Maori	22,890	17.8%	16.5%
Pacific Peoples	10,715	8.3%	8.1%
Asian	15,335	11.9%	15.1%

Maori learners participate in industry training at a rate higher than their representation in the population. European and Asian participation is lower and Pacific Peoples participate at a rate close to their representation in the population.

Achievement by apprentices and trainees is reported through the TEC EPI indicators. These indicators are shown by ethnicity in the table below.

Achievement data from TEC EPI reporting 2018

Programme Completion	
Māori	61%
Pacific Peoples	73%
Non-Māori and non-Pacific Peoples	68%
Grand Total	**67%**
Credit Achievement	
Māori	71%
Pacific Peoples	69%
Non-Māori and non-Pacific Peoples	79%
Grand Total	**77%**
First year apprentice retention rate	
Māori	72%
Pacific Peoples	72%
Non-Māori and non-Pacific Peoples	77%
Grand Total	**76%**

These indicators show a disparity in the performance indicators for Maori and Pacific Peoples against Non-Maori and Non- Pacific Peoples and against the whole population.

Learners by Age Group (TEC)

Age group	2018	
17 Years and Under	4,050	3.1%
18 - 19	13,180	10.2%
20 - 24	33,220	25.8%
25 - 39	52,290	40.6%
40 Years and Over	35,030	27.2%
Grand Total	**128,875**	**100.0%**

Just over 14% of learners are 19 or younger indicating most people engaged in industry training have been engaged in training or the labour market prior to formally beginning industry training. The most common age-group for industry-based learners is 25-39 at 40.6% with the second highest group being over 40 (27.2%).

Education Counts reported prior attainment of post-school qualifications continues to be common for new entrants to industry training. For 2018 57% of trainees and 47% of apprentices had a prior tertiary qualification.

Disabled Learners

TEC, as part of the ITR data, reports one indicator of disability. This is based on an assessment by the learner of whether they have a disability that has an impact on their ability to complete the programmes they are enrolled on. For 2018 this was 3.5%.

It is noted this indicator does not equate to the population-based data on disability and the costs to the NZ economy of excluding disabled people from participation in training and work.

Volunteers

Another key group that has little visibility in formal reporting is the volunteer sector. A report by Infometrics for the Industry Training Federation estimated in 2018 there were 820,000 New Zealanders volunteering for an organisation – 90% of whom volunteer for organisations in the Creative and Cultural or Health, Community and Public Services organisations.

People in volunteer positions increasingly are required to have formal skills to meet safety and compliance requirements. Most of these people are not able to access funding for the training.

Learners by Industry (TEC)

The following table shows the five industries with the greatest numbers of trainees and apprentices.

Industry (ANSIC Level 1)	Learners	% Learners
Construction	23,105	17.9%
Health Care and Social Assistance	19,510	15.1%
Manufacturing	18,840	14.6%
Agriculture, Forestry and Fishing	12,650	9.8%
Retail Trade	11,300	8.8%
Total participants - five largest industries	**85,405**	**66.3%**

The industries with the highest numbers of trainees and apprentices have been consistent for many years. Further analysis of the industries with low numbers of trainees such as Transport, Postal and Warehousing and Financial and Insurance Services may be areas where the potential for greater participation could be exploited by NZIST. Likewise, there are industries such as ICT who are not currently engaged in formal industry training arrangements but involved in ITP programmes and credentialised and non-credentialised non-formal training. It will be important to identify these industries and gain an understanding of their needs as another potential market for growth.

Learners by Region (TEC)

The average participation rate by region is 3.04% (= Apprentices and trainees/Regional population). 61% of the apprentices and trainees are located in the four metropolitan regions that have 67% of the population. Auckland has the lowest participation rate of all regions at 2.3%. The region with the highest rate of participation is Marlborough with a rate of 5.33%.

Regional differences will be something that the newly established Regional Skills Leadership Groups will examine, and it is hoped they will provide input to NZIST as it makes decisions about where future programmes can be developed.

Participation by Size of Enterprise

Formal statistics on industry training do not include data on the size of the enterprises that are engaged in the system. NZ Statistics report there are just on 567,000 business units in NZ. Just over 415,000 – approximately 70% of the total - are business units without employees – ie for self-employed people. A further 20% have 1-5 employees. There are just under 3000 businesses (less than one percent) with more than 100 employees.

An example of the sizes of companies involved in industry training be BCITO is as follows:

"We have about 10% of firms training at any one time. There are some 60,000+ construction firms (95% have 10 staff or less, 91% have 5 staff or less and 65% are sole traders").We engage with about 6,000 firms per annum. Over a 4-year period that extends to about 12,000 (as an apprentice gets close to finishing, they might

take on another). Most of our growth in BCITO over recent times is from firms that traditionally train with the number climbing from 1.1 apprentices per firm a few years ago to 1.96 today." Warwick Quin, CEO, BCITO

Work-based Learning and Schools Programmes

Gateway and Trades Academies aim to assist school students to gain employment or further training. There were approximately 13,000 students in Gateway and 7400 in Trade Academies in 2018 (Education Counts).

The schools programmes were not primarily established as pathways into ITO managed industry training arrangements but rather in response to the need to lift the NCEA Level 2 achievement rates for all school students. There may be future changes to these programmes become more focussed on the pathway into more work-based training such as apprenticeships. Programmes such as the 3 + 2 (school to work) programmes piloted through ITO's such as MarineITO over the past three years is another opportunity to explore for NZIST. Most ITO's also have school-based programmes in place to support teachers with practical projects and competitions for students, for example BCats, Brightsparks, Tools4Work etc. ITPs also have a range of ways they interact with schools.

Comment

As already noted, what is reported about industry training is largely concentrated on information collected by TEC from ITOs through the ITR. Some of the key areas that link to the NZIST Charter have been highlight above. Standing back though we know that this "reported" industry training is heavily focussed on Levels 2-5, and that the range of industries involved do not include many emerging industries nor volunteers and disabled learners.

While formal data on the participation of employers is not collected it is estimated that approximately 30-35,000 employers currently participate. This represents approximately 5% of the business units in NZ. Employers report the difficulties they have in engaging in the VET system and the low level of support for the key part they play in assisting trainees and apprentices to gain NZ qualifications. This is particularly highlighted when we consider the in the high percentage of self-employed and SME businesses in NZ. For RoVE to be successful the number of employers will need to grow. Working with employers who are not currently engaged to "look under the hood" to see what would get them involved will be an important part of the future work for NZIST.

The poorer performance of Maori and Pacific People in the industry training system to a large extent mirrors the failure of the vocational education system to achieve parity among ethnic and disabled groups in society.

The following table identifies some implications for NZIST based on the current reported information on work-based training:

Information from available data	Implications for NZIST
Parity of achievement for Maori and Pacific Peoples.	Differences in achievement rates need to be examined closely so future arrangements are tailored to suit these learners.
Increasing participation of disabled learners.	Current data collection is weak and for NZIST to meet the requirements of its charter more work will need to be done on the data collection methodologies.
Meeting the needs of volunteers in the VET system.	Reviewing operational policy setting to ensure there are not barriers for participation of this large group.
Increasing engagement in schools.	A review of arrangements in the ITPs and ITOs so best practice can be used for the future.
Lack of information on workbased learning arrangements in current ITP programmes.	A stocktake of arrangements should be completed.
Participation of self-employed and SMEs.	Currently formal reporting of industry training arrangements by size of employers is not gathered centrally. A stocktake of this should be completed.
Capturing growth industries.	Industry training is not reported in industries that may be offering significant economic benefit or opportunities for growth e.g technology.

2. Enablers and Barriers

Part of the design process followed by the Working Group was to identify the top potential enablers and actual barriers to WBL. These are shown in the table below:

Enablers and Barriers to Work-based learning	
Enablers	**Barriers**
1. Do the journey with industry/employers and learners – engage and get their buy in and start designing with them! 2. Recognise the employer as a key customer for WBL and the support they need as the trainer. 3. 'Project 365' approach – flexible training and learning, start at any time, at any level, access to delivery and support 24/7. 4. Need a technology solution that supports the transition of WBL to NZIST that can capture the data on learners, tracking progress and success, etc in both the workplace and the provider. 5. Retain the capability from within the existing ITO/ITP structures. 6. Ensure a National structure is in place to support WBL.	1. Funding and policy settings may prohibit or limit access to WBL, particularly for SME's. It can be hard for these employers to navigate the system to easily access WBL. 2. Programmes don't fit seamlessly into workplaces, lack of micro credentials vs qualifications to adapt to changing future of work 3. Learner readiness / preparedness for WBL may be lacking. Increased pastoral/academic support may be required for priority learners. 4. Employer engagement and commitment – ability and availability of resources. Some employers require professional development, cost benefits of learning on the job, and time to support a learner 5. Learner isolation – not part of a wider community of apprentices and trainees. 6. Not delivering learning in a flexible way – timetabling, time release for learners/employers. 7. Funding of workplace volunteer training attracting TEC funding limited to certain types of volunteers eg those who have "regular or rostered hours of duty".

3. Model for the future NZIST

3.1 Characteristics of WBL in NZIST

In developing the model of WBL for the future the Working Group identified the following characteristics that would need to be built into the model:

1. **WBL has a (lifelong) broad span**: Seamless pathways into WBL for: students while still at school, post-school, pre-employment, while in employment, and while progressing in employment.

2. **WBL recognises and reflects the Future of Work**: It will respond to and reflect the changing nature of work, the impact of technology, mobile/contract workforce and shift the focus from process to experiential learning, to personalised learning and providing stackable micro credentials and pathways.

3. **WBL is flexible and able to be customised to the workplace**: WBL is embedded in the workplace, complemented with online and flexi-campus (e.g. satellite campuses/marae-based delivery) and delivered in Te Reo Māori & other languages.

4. **WBL is inclusive & Supportive:** Funding and policy improves inclusion in WBL for all learners (including priority groups) and employers, including Iwi as employers, Sole Traders, Small-to-Medium Enterprises, volunteers and International/migrant.

5. **Industry is co-located with Education** (e.g. Netherlands model): Industry and employers will be essential to enabling, encouraging and supporting WBL.

3.2 Work-based Learning: A matrix model of 'high touch' and 'low touch' support upheld by 6 'pillars' of success

WBL will, in time, become an integral part of all NZIST learning programmes.

A number of WBL learning models will be developed, depending on employer and learner needs. A proposed high-level framework is outlined in the table below

The table presents the WBL conceptualised models outlining a range of types of delivery that will exist in the system. Each of the five models is briefly described and the range of factors that influence the choice of model such as business type, industry sectors and the suitability for a range of employers is outlined. The role of the training provider (potentially NZIST) in each of the models is also noted. These are high level broad representations of the current models, the reality is there needs to be flexibility to combine elements from each of these models, eg apprenticeship model supported by contract assessors which is determined by the workplace requirements.

These models all currently operate, some inside ITPs and other providers and some for trainees and apprentices in training arranged by the ITOs.

More detailed understanding of these models will need to be developed as the NZIST makes preparations for the 16 subsidiary organisations on April 1, 2020 and as the transition phase for trainees and apprentices of the ITOs begin to be transferred to NZIST subsidiaries.

The Group is aware of the different cost structures associated with the models noting there will be challenges scaling up the models particularly as WBL is expanded to include many more SMEs.

Factors	Delivery type				
	Provider-led training	*Apprenticeship/Technical*	*Corporate*	*Contractor Assessor*	*Self-directed*

Description of model	• Provider funded to complete training and assessment
	• Learner support, including completion tracking by education/training provider (**EP**)
	• EP awards Qualification
	• Workforce development support for employer, assessment of literacy and numeracy support by EP
	• Compliance with TEC/NZQA requirements managed by EP.
		• Employer hires, trains, and develops apprentices
		• EP Training advisor conducts workplace visit for apprentice support, tracking and monitoring progress
		• EP Training advisor may complete learner assessment
		• Engage PTE/EPs for off-job learning where relevant
		• EP provides learning and assessment material.
			May involve 2 aspects:
			• Mapping internal training to qualification outcomes (partial design and delivery)
			  o Learning & Assessment material offered to employers
			  o Determining the mix of unit standards, training programme roll-out, etc.
			• Full service of design of training and assessment solutions (full design and delivery).
				• EP source a contract assessor to confirm competencies that the employer's in-house training delivers	Learner undertakes training and learning for various reasons, e.g.
					• Progression, promotion
					• Change to work availability – e.g. through restructure
					• Change to work capability requirements
					• Other motivating factor.

Business size, learner numbers	• Medium to large (e.g. 50+ staff). • Cohort-based, more than one employee, a 1-to-many relationship.	• Any business size, may be more typically found within businesses ranging from 2 – 50 staff • Typically 1:1 relationship between learner and training advisor.	• Medium to large (50+ staff) • Cohort-based • Usually is supported via an internal L&D support function and infrastructure	• Any business size • Cohort based and 1:1.	• Independent of business size • Learner numbers dependent on cost to the learner, ability to learn while managing work/life boundaries.
Sectors supported	Broken down by Industry Groupings – e.g. along ITO current lines, WDCs, and/or Centres of Vocational Excellence.	Broken down by Industry Groupings – e.g. along ITO current lines, WDCs, and/or Centres of Vocational Excellence	Broken down by Industry Groupings – e.g. along ITO current lines, WDCs, and/or Centres of Vocational Excellence	Broken down by Industry Groupings – e.g. along ITO current lines, WDCs, and/or Centres of Vocational Excellence	Broken down by Industry Groupings, but may be limited by deliver model and access that will not impact current work.
Suitability of model	For employers without capacity or capability to train staff. Levels 1-9 on the QF.	Where employers develop staff via pathway into apprenticeship & technical qualifications. L1-9 on the QF.	Where employers have existing WBL they wish to align with the NZQF and/or for cohort-based training.	Where employers have appropriate technical skills / knowledge, but not the desire, capacity, or capability to assess.	Dependent on resource – time, cost, and flexibility.
Training provider	Provider delivers training via PTEs or non-accredited providers/technical experts who use consent to assess accreditation. All delivered in the workplace either as facilitated workshops or online delivery.	• Employer main trainer on the job (~70% - 100% on job). • ITPs and PTEs engaged to provide specialist, off job training, usually block course and/or theory based.	• Employer primary trainer, training is specifically aligned to organisational processes. Some instances of specialist training provided via PTE/specialist trainer • Normally 100% on job training.	• Employer primary trainer, specialist training provided as needed • 100% on job training.	Usually provider led/based, unless employer approves inclusion of some work-related learning practical elements or access to workplace as a case study, etc.

3.3 Essential Work Priorities to Enhance WBL

The Working Group noted the following work areas that will need to be examined more deeply as NZIST makes the models for WBL operational:

Flexible delivery models
The future of WBL will need to be more flexible to meet future employer and learner needs. Technology will enable this flexibility through expansion of current online learning provision that will be complemented by consideration over learning contexts and delivery models that suit the learner and their own socio-cultural context.

For example, marae-based learning can suit Māori learners to receive learning within an environment conducive to productive learning. Moreover, delivery of instruction in Te Reo Māori may also enhance the learning experience within a culturally responsive environment. Given Iwi themselves are employers, there is an opportunity to support Iwi growth and development through a WBL model that is co-designed with Iwi, Learners and NZIST.

There is also a need to be able to offer learning provision, assessment and support 24/7 and to move away from annual, cohort-based delivery to rolling enrolments that meet the needs of the world of work including seasonal demands, shift works and flexible working hours.

Micro-credentialing
The future of WBL will need to consider the role micro-credentials play in traineeships as well as smaller bundles of learning packages designed to upskill learners. Micro-credentials may offer a faster way to design learning packages to meet short-term or emerging needs. Micro-credentials will also be important for learners in work to upskill when there is new technology or work systems introduced in industry.

Expanding provision – schooling and post-training
The future of WBL will need to consider the 'supply' side within secondary school if it is to consider encouraging future growth and pathways into WBL via pathways into further education, training and employment such as school-based apprenticeships. It will also need to look at the opportunity to enhance its current education products and services via emergent programmes already under development in New Zealand and in practice overseas.

Emerging – Degree Apprenticeships
There is emerging interest in the development of Degree Apprenticeships – work-based degrees that integrate academic learning with on-the-job practical training. In these degrees learners combine full-time work with will be in full-time work. Otago Polytechnic and Weltec are piloting these degrees in their Bachelor of Engineering Technology.

Group Apprenticeship Models
One important model for WBL identified by the working group that has shown broad success in NZ and overseas is Group Apprenticeships Organisations. In this model a separate entity is established to employ the apprentices and provide their training. The entity works with a number of 'host employers' who provide the workplace training to the apprentices. An

apprentice may spend their entire time in apprenticeship with one employer or be rotated around employers so all of the skills in the apprenticeship can be developed.

This arrangement means employers who may not have otherwise been involved in training due to, for example, the limited range of work they undertake, or the ability to provide sustained employment, can become involved. The Group Apprenticeship organisation also takes on much of the pastoral support for the apprentices – something that employers can find a burden on top of their day to day operations.

Successful models currently operate in New Zealand for example, ETCO, ATNZ, Masterlink and ATT.

3.4 Operation of WBL for NZIST in 2030

NZIST's work-based learning will be characterised by one integrated system of national provision achieved through inputs from:

- Workforce Development Councils (WDCs)
- Regional Development Leadership groups (RDLs)
- Centres of Vocational Excellence (CoVE)
- Industry representative organisations
- Employers
- Learners
- Runanga – iwi, hapu and partnerships with mana whenua
- Unions, other employee and workforce representative organisations
- Government – labour and workforce development agencies, education and training, quality assurance, regional economic development

It is essential that all parts of the new system work in a cohesive, collaborative environment to ensure success.

These organisations and groups will identify:

- Technology development trends
- Labour market shifts, movements and trends
- Employer, industry and organisational demand for skills development and workforce training
- Learner needs and support requirements

NZIST will use this information to provide work-based learning. There will be a range of high-level operational requirements with a range of options for industry/employers and learner/trainees.

The table below describes the environment that will need to operate inside NZIST including having a range of service offerings for both learners and employers so they can choose how best to use what is available.

For industry and employers:	For trainees and learners
Single point 24/7 employer/industry service desk – tiered information and 'help' systems and support services	Single point 24/7 learner service desk – tiered information and 'help' systems, offering access to training and learning

	activity that is responsive to and designed for engagement with diverse learner and trainee groups; specifically, oriented to Maori, Pasifika, and disabled learners seeking development to support employment and career development. Learners are able to move seamlessly between work based, classroom and digital learning irrespective of location and institution.
Digitally-enabled self-help access to training resources; information, resources and data to support employer-led training activities.	Digitally-enabled self-help access to training opportunities; matching of workplace skill requirements with training requirements; self-evaluation of current competency and recognition of prior learning; digital access to information, resources and data to learner decision making on training choices and activities.
Access to online and in-workplace digitally based assessment and credentialing services. Rolling enrolments that meet the needs of the world of work including seasonal demands, shift works and flexible working hours	Access to online and in-workplace training resources, including assessment on demand and access to credentialing. Rolling enrolments that meet the needs of the world of work including seasonal demands, shift works and flexible working hours
''In-field' proactive sales and support services in the workplace, developing and delivering organisation/industry-specific systems of training designed in consultation with NZIST and delivered regionally/nationally through collaborative and partnered agreements, including the availability of learner specific success and engagement support and assistance. Support for employer capability development to become workplace trainers/mentors and assessors	'In-field' mentoring, coaching, training and assessment support for learner/trainee-specific success and engagement. Accessible to all learners in the workplace, regionally and/or nationally. Tailored support for all learning needs.

3.5 The new world – acknowledging diverse perspectives

An important part of developing and testing the described future state by the Working Group was to develop personas of a range of learners. The personas consider the ecosystem of the learner journey including pre-curser activities such as career expos, information searches and tools that guide decision making. The personas also describe the support required to ensure retention, achievement and completion for the learner. The personas also draw on the many delivery models that can suit varied learner, employer and community needs and contexts.

Nine learner personas were developed by the WBL workstream and provided as Appendix XX. These were developed for the following learners:

1. Trainee, supported by an employer
2. Apprentice
3. Pacific learners
4. Maori learners
5. Volunteers
6. International learners
7. Schools transition
8. In-care - Corrections
9. Disabled learners

In the future, more and different employers will need to become involved in WBL to support the greater emphasis in all programmes and the diverse learner types. Only one persona was completed for SME employers. This recognised the level of support required to increase participation rates in these organisations. It is recommended that further persona work is completed on other employer types as the needs of employers are varied depending on the size of the organization, the capability within the organization to support apprentices and trainees and their level of maturity in terms of investment in capability development of their employees. In many instances the benefits of engaging in work-based learning needs to be proactively introduced to employers before they will engage; business development, workforce planning and needs analysis capability is required to support this.

The personas for the learners highlight the diversity of those who will need to access WBL and the need for a system that is designed and operated in a way that takes into account this diversity.

While the major focus of VET is on increasing the skills and employability of learners, the personas point to the need to build the capability of employers as both trainers and supporters of their staff who may be involved in WBL, particularly for SME businesses. This support will include how the needs of different learners may need different support in the workplace and how employers can share knowledge that maximises learning. Future funding arrangements will need to address the additional support for learners and employers to ensure the interventions are meaningful and have tangible positive impact.

The development of flexible and adaptable learning options will be more prevalent e.g micro-credentials that can, when appropriate, be "stacked" into full qualifications is seen as a key element of WBL needed to support the future of work. Micro credentials allow for shorter programmes of learning and, if stackable, provides the benefit to learners of accumulating all the skills of a qualification over time. Current NZQA policy and operational practices will need to be reviewed if the benefits of micro credentials are to be realized.

There is a need to have digital and online learning and support options in place, but these need to be designed and operated in a way that takes into account the different needs of learners. The personas point to potential barriers to the increasing use of on-line options including the capability in the system to, for example, provide resources that are culturally appropriate across the range of learners, how a lack of digital literacy can be addressed and the practical issue of poor connectivity for rural areas. These issues will have been also considered by the Online Arrangements Workstream.

For assessment, two key requirements are identified through the personas. Firstly, the importance of assessments being designed to align with the work the learner is engaged in and to use naturally

occurring evidence of outcomes. Secondly is that assessments need to be appropriate to the needs of the different learners while maintain assessment integrity in the system.

Quality and cost-effective RPL/RCC and credit recognition and transfer (CRT) processes are important for many of the groups of learners considered. The existence of a common system across NZIST would enable learners to transfer more easily across regions and learning pathways in the VET system, Also identified was the need to have consistency across programmes to enable learner transferability, the option of Master Programmes should be seriously considered as a key underpinning pillar of the reform

All personas refer to the importance of the current Training Advisor (TA) role typical in the ITOs and the importance of maintaining this skill set in NZIST. The need to extend TA skills to take into account the support needed for diverse learners in workplaces,, the additional support required for employers and to become familiar with new learning arrangements such as on-line learning, 24/7 access and possible shifts in pedagogy will need to be considered by NZIST.

At the point where learners are considering WBL options there is the suggestion that opportunities to experience the workplace is introduced early for all learners. This will require a larger group of willing employers who will provide access to their workplaces for a range of learners. Building this network of employers will be a responsibility shared in the VET system with WDCs also having a key role in engaging employers. The Employer and Community Engagement workstream is considering these arrangements.

The need to review and update careers information to have a greater emphasis on WBL is also required. Links will need to be developed and maintained with the TEC Careers System Strategy and connections with the marketing and promotion of industries in conjunction with WDC's.

At the end of a WBL programme the importance of celebrating success alongside whanau, employers and community is seen as important for all personas. Of equal importance is the need to celebrate progress throughout the qualification through milestone achievements as well as final completion of a qualification.

Expansion of WBL will need to be prioritized, based on available resources, skills shortages and regional needs.

4.   Transition of Learners Supported by ITOs to the NZIST

The second task that the Working Group was required to undertake was to consider how the apprentices and trainees currently supported by the ITOs are transferred to the NZIST.

Currently there is little capacity or capability in the ITP sector to support the 138,000 learners in the ITO apprenticeship and trainee arrangements although some ITPs are currently supporting a small number of Managed Apprentices (1305 in 2018). The ITO arrangements have been in place for many years with industry, employers, employees and providers (where used) being familiar with the arrangement and having had little experience in any other system.

The transition of the apprentices and trainees will occur for different industries on different timeframes with the standard setting and brokerage roles of the ITOs being transferred to

the new Workforce Development Councils (WDCs). These WDCs will be stood up based on the arrangements that best suit the industries involved.

ITOs become Transitional ITOs (TITOs) from 1 April. Each TITO will develop a transition plan with the TEC that will describe the future arrangements of the industries within its coverage. A critical risk to be managed during the transition period is that employers and learners lose confidence in the system and choose to withdraw or not participate until the picture is clear. It will be important for NZIST to work alongside the TITOs and TEC during this period to ensure NZIST has the capacity and capability to continue arrangements for employers, apprentices and trainees as seamlessly as possible.

For many industries there is currently no provider delivery with the ITOs making all the arrangements for the trainees and apprentices. All of the training is delivered in the workplace. The existing arrangement will need to be transferred as a "going concern" in the transition.

Of critical importance in the current arrangements are the ITO Training Advisors (for corporate clients often referred to as Account Managers or Business Partners) who have a role of supporting both the apprentices/trainees and employers who are engaged in industry training. These people are the "face of industry training" for most employers who see a major risk in the reforms being the potential loss of this type of one-to-one relationship between the ITO and them and their apprentices/trainees.

The role of individual Training Advisors differs across ITOs but areas of business development, technical and pastoral support and assessment are all covered across the people employed. Likewise, the vast network of assessors both contract and workplace are critical to the success of the model, these relationships must be well managed and transitioned.

ITOs and ITPs all operate information systems for the collection of data and monitoring the progress of students, trainees and apprentices. These systems will need to continue. It is recommended that any rationalisation of systems should happen post transition as part of a wider consolidation plan for all IT platforms within the NZIST.

All ITO's provide learning and assessment content development, maintenance and delivery via either paper based or online mechanisms. The capability, IP, supplier relationships and IT platforms are essential to transition to NZIST.

Existing Training Agreements and Programmes of Training with learners and employers will all need to be transferred and honoured without disruption. TEC and NZQA rules will need to be modified for this to occur.

The current funding settings for WBL arrangements managed by the ITOs differs vastly from that of the ITPs. The timing of the development of the Unified Funding System for the VET system is for the new system to be in operation for 2023 – the end of the transition period. This new funding system is a key enabler for the success of WBL, any interim improvements to support employers and priority learner groups should be considered prior to 2023.

During the transition clarity will be needed about how existing funding arrangements are managed for transferring the arranging and delivery of training for learners into NZIST.

5.   Measuring Success

The Working Group developed the following draft KPIs for consideration:

1.   Increasing participation in WBL by employers from 10% to 20% by 2030, and proportional participation in VET of the overall working age population from 9% to 11% by 2030.

2.   Gaining NZQA approval to develop a suite of fast-paced, responsive, industry-endorsed micro-credentials that are stackable to build to full qualifications by 2023.

3.   Increasing participation, access & success rates for priority groups, year-on-year from 2022 onward – Māori, Pacific, & Disabled people, e.g. qual. completion rates from 55% to 67.5% by 2030.

4.   Maintaining and improving (where required) External Evaluation and Review (EER) Confidence Ratings for NZIST subsidiaries from NZQA and graduate and learner satisfaction ratings/evaluations.

5.   Maintaining and improving industry endorsement of the training delivered by NZIST, approved work-ready graduate profiles, and employment outcomes through regular employer satisfaction research.

6.   Making significant and measurable difference to Māori and Pacific learners, and to regional New Zealand.

6.   Recommendations and Risks Matrix

The table below outlines the key recommendations from the Working Group including the risks associated with implementing the recommendations. The Working Group has prioritised the recommendations by assigning an indicative timeline across the next three years of transition.

Recommendation	Details	Risks
2020 and 2021		
1. *Build capability and capacity for WBL into NZIST by bringing a first tranche of the current ITO capability and provision of WBL into NZIST.*	• *There is limited and variable capability and capacity for the delivery of work-based learning (both apprenticeships and trainees) within the ITPs.* • *It will be important that the range of delivery options outlined in Section 3 are accommodated in the transition. The high and low touch delivery models of WBL are all key to the continuing success of the learners.* • *There are multiple ways the transition of ITOs trainees and staff into NZIST can be managed and this is a matter to be resolved between ITOs and NZIST. One model considered by the Working Group was to develop TITOs as subsidiaries of NZIST.* • *It will be important that NZIST works with the Transitional ITOs and TEC as the Transition Plans are developed.* • *The sooner this transition occurs the sooner NZIST can start to gain greater understanding of WBL models, look at integration opportunities and build a unified culture.* • *It will be important to include employers during*	• *That necessary regional and national differences across industries (i.e. nationally distributed businesses vs local) are not well managed .*

	this phase. Their inclusion is key to successful WBL.	
2. *Ensure the ITO Training Adviser capabilities of, business development, product knowledge, WBL assessment support systems pastoral care and learning support are retained to ensure apprentice, trainee and employer progression, trust and confidence.*	• *An important aspect in building trust and confidence necessitates a clear communication strategy to be outlined noting all stakeholders and the various touch points involved. Training Advisors will be crucial in this communication to both existing work based learners and employers and will require training. The consistency of message is crucial for success of NZIST.* • *There will be expansion of existing product/assessment support systems from ITOs which need to transition and be fully integrated into NZIST functions and systems.* • *Retain capability within ITO/ITP structures .* • *Look to expand roles to include greater learner support, mentoring and potentially training in the workplace along with employer advice and support.*	• *Critical risk around capability of Training Advisors, etc., be ing lost if an effective transition within a short timeframe is not well managed;* • *ITPs may attempt to unnecessarily duplicate TA roles/existing ITO function.*
3. *Develop the personas for employers as a key customer for NZIST.*	• *Ensuring there is a deep understanding of the diversity of employers in as much depth as the diversity of learners.* • *Understanding that to increase the numbers of employers, NZIST will need to understand the drivers of performance.* • *Understand the extent of the self-employed – close to 400,000 of the 566,000 of enterprises have no employees.*	• *Personas developed so far may not reflect the broad range of learners and employer scenarios needed to design solutions to address the issues – for example, small-to-medium enterprises, sole traders, those not currently engaged or those employers who are engaged but the current system does not support them wells.*

	• Small enterprises (less than 5 employees) make up the next biggest group. • Just 2760 have more than 100 employees. • Participation by size of enterprise, drivers for this and support models needed. • Identify and understand needs of those employers/industries that are not currently engaged in WBL.	
4. Design a WBL component into all/most NZIST programmes that can be delivered through the high and low touch options outlined in Section 3.	• Broadening the definition and understanding of WBL beyond current arrangements is needed for WBL type arrangements to be used widely across the NZIST programmes. • Having a range of options for WBL will be important for employers and leaners to access arrangements that best suit their needs. • Positively leveraging employer and industry links to qualifications and programmes to explore wider WBL opportunities for other disciplines, e.g. access to the construction industry may permit access to the other components that support the sector, e.g. finance, logistics, etc. • Formal WBL arrangements are currently focused at Level 3-5. There is a need to shift the positive aspects into level 5-6 and up to level 9, as well as recognising foundation level learning as a critical pathway into level 3-4. • Leverage WBL models such as school-based	• Maintaining the current level of WBL activities does not make a significant improvement to accessing work-based or work-integrated learning opportunities for NZIST, its learners and employers and industry and will not lead to an improved return on investment

		apprenticeships, internships, work experience, apprenticeships, cadetships and advanced apprenticeships and traineeships.	
5.	*Consolidate the organisational structure for WBL of NZIST (and subsidiaries) in line with WDC Groupings.*	• *An aligned structure gives the opportunity to build stronger collaboration and connections between the two parts of the system.* • *Clear alignment with WDC's, clear communication required of what industry belongs where and effective management of small, niche industries.* • *Some form of infrastructure is required to facilitate clear communication and relationships between NZIST and WDC's and employers.* • *Improve clarity around employer engagement with WDC and via WBL feedback .* • *Benefits for some of other recommendations, e.g. Master Programme development.*	• *Lack of clarity around brokerage and work-based learning functions between WDCs and NZIST and how the relationships and transfer of information between the two can best be developed may jeopardise positive outcomes for learners and employers.*
6.	*Develop a National organisational structure of provision, supporting work-based, provider-based and online learning*	• *Current ITO field teams (Training Advisors) deliver to sectors nationally, giving consistency of delivery and support, ability for industries to influence programme outcomes to meet their needs* • *Create specialist employability and industry centres that capture current examples of good practice to ensure the student and employer experience across NZIST is strengthened across the network of education*	• *Potential disruption (perceived or real) of positive relationships with subsidiaries and local MoU or partnership agreements and/or relationship or account manager relationships.*

	provision e.g. [AUT's Employability & Career Centre](), Wintec [industry and community partnership]() work various ITO employment/placement services and school connection teams • *Effectively utilise and develop capabilities of existing community/industry networks e.g. Ara @Auckland Airport (extending Skills and Training elements of these hubs); leveraging the role of Trades Academies (e.g. as a potential point of contact or pathway for students into apprenticeships).* • *Transfer of existing IP (learning and assessment content, programmes of training) and capability to develop and maintain this.* •	

2022 for 2023 operation

7. *If required, complete the transfer of TITO capability and provision.*	• Transition arrangements will differ for each of the TITO but must be completed by the end of 2021.	
8. *Provide clarity on transitional funding arrangements as soon as possible while the unified funding system is under*	• *A unified funding system is a key enabler to WBL with this development on a timeline for implementation in 2023.* • *The new system needs to be implemented with urgency to avoid unnecessary competition and confusion. A consistent transparent approach required. Interim changes to support*	• *Inability to deliver new models of flexible WBL, reduces NZIST's ability to meet employer and learner need* • *Ability to meet priority learner need is reduced due to funding restrictions and expectations around learner success – and associated education performance indicators*

development.	employers and priority learners will need to be in place prior to 2023 • *A plan is needed for transition of ITP managed apprenticeships as well as ITO trainees and apprentices into NZIST that removes current competition between ITOs and ITPs.* • *This will enable expansion of existing delivery of WBL to better reflect learner and employer needs (i.e. block & night courses for learners to ensure they can successfully have access to and acquire all learning outcomes in a programme of study; establishment of learning communities (to support priority groups etc)* • *An added benefit is that pre employment programmes should be able to meet market: short duration, work hours etc, transfer of credits to apprenticeships etc as appropriate.* • Learner interventions needed to ensure learner success must be funded appropriately • Appropriate funding to support greater engagement from employers, particularly SME's needs to be considered in the unified system**.**	

Recommendations linked to WDC and IT Infrastructure development

9. *Bring together the unity, shared vision and*	• *Clearly define roles and responsibilities: WDC's responsible for consistency, endorsement and*	• *Timing of NZQA reviews of the NZ qualifications and programme development*

values of NZIST and the WDCs through the development of a core suite of 'Master Programmes' that are aligned to a national qualification structure. − and growing programme offerings, aligned with nationally-consistent support models.	*consolidation of qualifications; NZIST responsible for development of Master Programmes.* • *Master Programmes need to align with and recognise regional industry and skill demand differences/needs and be flexible to adapt to individual workplace needs.* • *Master Programmes need to recognise the importance of Digital Skills in the future of WBL.* • *Pre-employment programmes should be limited to 12 weeks and focus on employment readiness and building employability skills ('soft' skills).* • *Delivery of Master Programmes across multiple channels (workplace, online, campus) ensures improved access to best alternative delivery to suit each learner and employer needs- improves industry trust in benefits of reform* Central development and repository for learning and assessment content available for all • *Wherever possible, naturally occurring assessment evidence should be used* • *Review existing consortiums that undertake national master programme development and updating e.g. EngTech ITP consortia; Diploma of Engineering Board; ITP*	*may not fit with the WDC developments.*

	consortia development of Trade Automotive programmes post TRoQ, ITO consortia of programmes in Business, Sales, Competitive Systems and practice and NZBED.
	• *Include micro credentials to*
	    ○ *adapt to changing nature of work and requirements of differing workplaces*
	    ○ ability to create stackable credentials that may lead to full qualifications
	    ○ *enable certification for disabled persons who may be unable to obtain whole qualification*
	    ○ *enable volunteers to build to a qualification with available timeframes*.		

10. *Ensure there are unified systems to manage, track and monitor apprentices and trainees, provide 27/4 access and support – including learning management and student management systems.*	• *IT system required that allows accessibility for all e.g. employers, student, trainees, trainers, lecturers, etc. Clearly records student/trainee work and can be easily transferred between locations e.g. www.Sonia.com.au* • *Access to existing ITP learning support and programme delivery (as options to suit each learner needs) etc., for workbased learners.* • *Flexible training and learning, start at any time, access support 24/7* • *Increased pastoral/academic support may be required for priority learners.* • *Some employers may need support on provision of*	• *Systems are not suitable to the New Zealand context – 'off the shelf' systems have limitations* • *Lack of due diligence around Customer Relationship (CRM), Learning Management System (LMS), and Student Management Systems (SMS) may be costly in the medium to long-term, e.g. maintenance, updates, integration between, may not suit users – learners, trainers/tutors/lecturers and employers.* • *Lack of investment in the most suitable system may lead to compromised function and negatively impact uptake and engagement.*	

	training and learner support • *Clear, complete and correct pathway and process information available* • *Systems to overcome learner isolation where they are not part of a wider community of apprentices or trainees. Systems may need to "talk to" large employer systems.* • *Transition of existing IT systems until such platforms outlined above are in place*	

6.1 Recommendations for April 2020 (Day 1)

The Recommendations and Risks matrix provides high-level recommendations from the Working Group that will, if accepted, result in the design of new WBL arrangements inside NZIST over the coming years.

From this comprehensive list a series of related recommendations have been drawn where work can begin immediately. This work will support the nine substantive recommendations.

It is recommended that NZIST:

a) Explore options to bring the current capability, IP and provision of WBL into NZIST as soon as possible, including the consideration of ITOs becoming subsidiaries of NZIST or similar such arrangements.

b) Establish a mechanism for NZIST to work alongside TEC and the ITOs as the ITO transition plans are developed to gain greater understanding of WBL models for each industry.

c) Develop arrangements to ensure the current Training Advisor roles and capabilities within ITOs are retained in transitional arrangements.

d) Continue working with the Workstream Team to develop persona for employers.

e) Develop metrics for success and the data collection processes that will enable these to be reported on.

Appendix 1: Personas Developed by the Working Group

Overarching comments on the personas developed for WBL

DRAFT

Nine personas were developed by the WBL workstream as follows: Trainee, supported by an employer

1. Apprentice
2. Pacific learners
3. Maori learners
4. International learners
5. Schools transition
6. In-care - Corrections
7. Differently abled
8. SMEs employers

The NZIST in the new world will have two customers, 1. Learners, 2 employers. The personas for the learners highlight the diversity of those who will need to access WBL and the need for a system that is designed and operated in a way that takes into account this diversity. More and different employers will need to become involved to be able to support the diverse learner type. Only one persona was completed for SME employers recognizing the level of support required to increase participation rates in these organisations. It is recommended that further persona work is completed on other employer types as the needs of, employers are varied depending on the size of the organization, the capability within the organization to support apprentices and trainees, and their level of maturity in terms of investment in capability development of their employees.

While the major focus of VET is on increasing the skills and employability of learners, the personas point to the need to build the capability of employers as both trainers and supporters of their staff who may be involved in WBL, particularly for SME businesses. This support will include how the needs of different learners may need different support in the workplace. Future funding arrangements will need to address the additional support for learners and employers to ensure the interventions are meaningful and have tangible positive impact.

The development of micro-credentials that can, when appropriate, be "stacked" into full qualifications is seen as a key element of WBL needed to support the future of work. Micro credentials allow for shorter programmes of learning and, if stackable, provides the benefit to learners of accumulating all the skills of a qualification over time. Current NZQA policy and operational practices will need to be reviewed if the benefits of micro credentials are to be realized.

There is a need to have digital and online learning and support options in place. But these need to be designed and operated in a way that takes into account the different needs of learners. The personas point to potential barriers to the increasing use of on-line options including the capability in the system to, for example, provide resources that are culturally appropriate across the range of learners, how a lack of digital literacy can be addressed and the practical issue of poor connectivity for rural areas. These issues will have been also considered by the Online Arrangements Workstream.

For assessment, two key requirements are identified through the personas. Firstly, the importance of assessments being designed to align with the work the learner is engaged in and to use naturally occurring evidence of outcomes. Secondly that assessments need to be appropriate to the needs of the different learners while maintain assessment integrity in the system.

Quality and cost-effective RPL/RCC and credit recognition and transfer (CRT) processes are important for many of the groups of learners considered. The existence of a common system across NZIST would enable learners to transfer more easily across regions and learning pathways in the VET system, Also identified was the need to have consistency across programmes to enable learner transferability, the option of Master Programmes should be seriously considered as a key underpinning pillar of the reform.

All personas refer to the importance of the current Training Advisor (TA) role typical in the ITOs and the importance of maintaining this skill set in NZIST. The need to extend TA skills to take into account the diverse learners, the additional support required for employers and to become familiar with new learning arrangements such as on-line learning, 24/7 access and possible shifts in pedagogy will need to be considered by NZIST.

At the point where learners are considering WBL options there is the suggestion that opportunities to experience the workplace is introduced early for all learners. This will require a larger group of willing employers who will provide access to their workplaces for a range of learners. Building this network of employers will be a responsibility shared in the VET system with WDCs also having a key role in engaging employers. The Employer and Community Engagement workstream is considering these arrangements.

The need to review and update careers information to have a greater emphasis on WBL is also required. Links will need to be developed and maintained with the TEC Careers System Strategy and connections with the marketing and promotion of industries in conjunction with WDC's.

At the end of a WBL programme the importance of celebrating success alongside whānau, employers and community is seen as important for all personas. Of equal importance is the need to celebrate progress throughout the qualification through milestone achievements as well as final completion of a qualification.

Expansion of WBL will need to be prioritized, based on available resources, skills shortages and regional needs.

A few specific comments and recommendations:

- That pre-employment programmes should be limited to 12 weeks of learning. Work readiness

- Greater emphasis on engagement with schools through school-based apprenticeships, advanced apprenticeships and internships

- Shifts in the emphasis of WBL in the VET system will require policy and operational changes from MOE, TEC and NZQA

- The establishment of a Te Reo Assessment Centre.

NZIST establishment unit advisory group working draft, December 2019. Not official government policy

Apprenticeship Persona Process Map

Apprentices – learners currently funded as NZAs, completing whole qualifications at Level 4

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JOURNEY					
Discovery – Evaluating options	Entering - Induction	Academic journey	Pastoral journey	Assessment	Completion and 'outduction'
• School adverts/Online • Parents/Whānau/Friends • Employers • ITO/ITP associations • Career or Trade Expos • Government agencies • Pre-trade/ Trade Academies, Gateway, STAR, etc.	• Understand employer's workplace and capability, complete TNA • Job/employment (in work) • Employer/provider/learner agreement (3 way)	• Recognition of prior learning or current competencies • Training plans • Progressive assessment • Online, On & Off-job. • Blocks, night classes, on-line, on-job(90%), off-job	• Support in place for both employer and apprentice • Extra support identified (i.e. ELN etc.)	• Formative and summative (during and at the end of 'blocks' of learning) • Employer verifies and/or assesses	• Capstones • Graduation/Completion
OPPORTUNITIES					
• Better advice	• School-based apprenticeships • Recognising credits toward apprenticeship • Degree apprenticeships • 12-week pre-apprenticeship training only • 24/7	• Flexible timeframes and systems • 24/7 Learning and support • Stackable micros • Apprentice knows and is willing to learn • Stronger support for the employer as trainer	• Culturally appropriate • Extra funding • Level 4 literacy etc • Maori and Pasifika apprenticeships	• RPL/RCC continuously reviewed • Consistency – mode of assessing • More naturally occurring evidence	• Next training opportunity – ENROL NOW
CAPABILITY NEEDS					
• Understand the value of the employer • Promotion/apprenticeship careers advice • Better understanding business needs		• Recognise and activate policy changes MOE/TEC/NZQA • Development of training resources and assessments (currently ITO owned as standards setting bodies) • Sufficient resources and funding • Leverage ITO and ITP capabilities	• Leverage ITO capabilities and ITPs • Tas have critical capability • Bridge, partner, and collaborate – ITO / ITPs	• Mechanism for naturally occurring evidence • TEC Funding dual qualifications	
RESOURCE NEEDS					
	• Best fit for learner and employer - brokerage	• Pick up the training packages (Aus model) • RPL • NZQA/MOE/TEC policy changes	• Sufficient funding and resources • Access to specific funding for the employer to enable them to do training while maintaining their business • Mana in mahi type model for all employer/apprentice models – particularly for SMEs • Specific Māori teaching / trainer support models eg. Te Arakura (Russell Bishop)	• Funding dual qualification	• Records of Achievement and quals etc available on completion

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Disability Persona Process Map

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JOURNEY					
Discovery – Evaluating options	Entering - induction	Academic journey	Pastoral journey	Assessment	Completion and 'outduction'
May be • Already in work or volunteering • Looking for work or volunteering • Looking for a mechanism to gain a qualification or undertake training. **Expected outcomes** • Meet current employment or volunteering requirements • Advancement in current employment or volunteering • Assist in gaining employment or volunteering in standard position • Assist in gaining employment or volunteering in modified position • Social outcomes **Qualification status** • Required: may be before any work or in order to advance or to branch in a particular direction. • Optional interest **Information source** • Internal: supervisor, mentor, training co-ordinator, website, internal literature. • External: adverts, online, parents/ whanau, Friends, ITO, ITP, volunteering promotional (CAB, Volunteer NZ etc)	• Often a non-credentialed induction process to the workplace. May need targeted modifications relating to the disability • May be a probationary or trial period before any training • May require sufficient experience hours prior to training • ITO, ITP or organisational training enrolment	• Recognition of prior learning or current competency process for "old", overseas or other organisation in-house qualifications • Need a mentor – usually within the workplace or organisation but may be an external mentor • Training and assessment timeframe must take account of disability • Progress checks and suitable support required • May include online, field work, reference material supported, block course, one-on-one training, group training • Learning resources must be appropriate for the disability e.g. Braille for the blind, voice for the deaf • Skill set to be trained may also be limited by employer needs/expectations of employment of person with a disability • Skill set may be limited by employer	• Support required for trainee • Support and information may be required for organisations or people supporting the disabled person • The health and welfare needs of trainee needs to be paramount so a balance between work, training and life needs to be monitored • Training advisors that fully understand the disability and learner need are needed to support the trainee and the workplace or volunteer organisations	• Formative assessment may include self-assessment, peer assessment, supervisor/trainer based • Pre-assessment may be optional or required • Assessment may include online, paper based, oral, in-field or practical. • Assessment may be continuous, after blocks of learning or at the end of the qualification or paper (qualification segment) • May require evidence gatherers, internal and/or external assessors. These may need training to understand and modified assessment requirements while maintaining assessment integrity • Moderation and consistency processes required	• Both the workplace or organisation and the trainee need to be informed about completion steps and qualification. • Certification may go directly to trainee or to the organisation to award • May be a formal awarding ceremony. • May be promotion to go with graduation • May be able to go straight on to next step in the pathway or more experience may be required
OPPORTUNITIES					
• May have social outcomes other than employment. This may be occupational therapy, developing social or employment skills or enabling volunteering • Opportunity to assess interests skills and abilities to better shape and design options • Opportunity to design specific training programme for specific workplace and/or learner needs		• Co-design solutions for learning utilising access-enabling technologies • Education to change employer perceptions of employing disabled	• Training can be pastoral journey in its own right with many social outcomes	• Opportunity to redefine "success" – may require policy intervention	

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In Care Persona Process Map

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JOURNEY					
Discovery – Evaluating options	Entering - Induction	Academic journey	Pastoral journey	Assessment	Completion and 'outduction'
• Department of Justice • Corrections Facility • ITP / provider • Career or Trade Expos (to highlight training options to Corrections) • Government agencies • Pre-trade/ Trade • Ability to design specific training programmes to meet Corrections facility needs	• Understand Corrections Facility workplace and capability • Job/employment (for Working Prisons, release to work) • ITP training enrolment • Kōtahitanga - knowing what the learner's needs are	• Currently paper-based and no ability to use internet (valid reasons) • Recognition of prior learning or current competencies • Delivery plans • Mana Motuhake - voicing and demonstrating high expectations, employer, Corrections staff and training provider • Ako - teaching and learning; effective teaching interactions and relationships with learners • Wānanga - rich, dynamic sharing of knowledge. Dialogue, debate and careful consideration • Progressive assessment	• Support in place for provider staff (working behind the wire) • Extra support identified (i.e. ELN etc.) • PAL's mediate support between learner and training provider • Whanaungatanga - positive relationships and connections - a family-like atmosphere, a sense of belonging • Manaakitanga - a nurturing, caring and supportive environment. Caring for and nurturing the learner, including their language and culture	• Formative and summative (during and at the end of 'blocks' of learning) • Progressive assessment • Provider verifies and/or assesses with specialist Corrections staff • Assessment in preferred language as an option	• Capstones • Graduation/Completion • Promotion to next opportunity or further WBL pathways (Working Prison, release to work or for on release as applicable)
OPPORTUNITIES					
☐ Corrections non-custodial constituents engaged in skill training for employment/in-work training. ☐ Opportunities to lead the way with increased Maori and Pacific engagement and success ☐ Opportunities to deliver in-care career pathway planning ☐ Micro credentials rather than full qualifications ☐ Opportunity to deliver in-care career pathway planning ☐ Deal with the current lack of (or united) access to digitally-based learning resources	• Foster quality teaching by specifically and intentionally creating a relationship-based teaching, learning and working environment	• Digital delivery model for prisons or some secure platform • Foster quality teaching by specifically and intentionally creating a relationship-based learning and working environment • When possible, provide external industry exposure opportunities • Support from Corrections for job placement post-release and ongoing support to employee and employer	• Delivery pastoral support based on a Te Ao Māori perspective – e.g. Te Wheke, Whare Tapa Wha within the in-care setting • Look at te reo Māori delivery of learning • Incorporation of feedback where learners are able to practice their learning and request feedback as they learn. They can articulate where they need support and this is encouraged		• Celebrate success as it is achieved rather than just completion
CAPABILITY NEEDS					
• Further investigation into Te Atakura and the benefits to all parties(learners, Corrections, training provider) • Implement already tested/evidence based systems for original delivery in secure facilities (international recognised, already in use) • Deal with current lack of (or united) access to digitally-based learning resources		• RPL Process that is easy to process and cost effective for the provider and Corrections • Ability for power sharing where learners can work cooperatively • Corrections policies should not sanction refusal of inmates class attendance as a form of punishment • Involve families post-release • Mentor programmes post release	• Ability for power sharing where learners can work cooperatively together		• Involve families post-release • Mentor programmes post release • Relevant funding or accept that each Corrections Facility has different requirements for inmates re learning opportunities alongside other aspects inmates must complete e.g. Drug/Alcohol, Anger Management courses. Also class sizes differ across the board. • Allow for specialist input from such as the Lowries Foundation

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International Persona Process Map

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JOURNEY					
Discovery – Evaluating options	Entering - Induction	Academic journey	Pastoral journey	Assessment	Completion and 'outduction'
May be • Already in work or current tertiary study • Considering immigration options/pathways to residency • Looking for a mechanism to gain a qualification to enhance NZ employability and residency criteria **Expected outcomes** • Meet current employment requirements • Assist in gaining employment • Assist in gaining residency • Industry connections • Social outcomes, connections **Qualification status** • Normally bachelor's degree or higher? **Information source** • Internal: Friends, colleagues, current institution, mentor, training co-ordinator, website, internal literature. • External: adverts, online, parents/ family, Friends, ITO, ITP, trade fairs, education agents	• May require a NZ culture and workplace introduction course. • May be a probationary or trial period before any training • May require sufficient experience hours prior to training. • ITO, ITP or organisational training enrolment	• Recognition of prior learning or current competency process for "old", overseas or other organisation in-house qualifications • Need a mentor – usually within the workplace or organisation but may be an external mentor. Preferably someone who has encountered a similar pathway. • Progress checks and suitable support required. • May include online, field work, reference material supported, block course, one-on-one training, and group training. • Scaffold their WBL	• Support required for trainee. • Support and information may be required for organisations or people supporting the international student/trainee • The health and welfare need of students students/trainee needs to be paramount so a balance between work, training and life • Training advisors are needed to support the student/trainee and the organisation	• Formative assessment may include self-assessment, peer assessment, supervisor/trainer based • Pre-assessment may be optional or required • Assessment may include online, paper based, oral, in-field and/or practical. • Assessment must be continuous, to keep the learner on track • May require evidence gatherers, internal and/or external assessors. These may need training to understand and modified assessment requirements while maintaining assessment integrity • Moderation and consistency processes required	• Both the workplace or organisation and the trainee need to be informed about completion steps and qualification • Certification may go directly to trainee or to the organisation to award. • May be a formal awarding ceremony. • May be promotion to go with graduation • May be able to go straight on to next step in the pathway or more experience may be required
OPPORTUNITIES					
• May have social outcomes other than employment. This may be developing social or employment skills and networks • Opportunity to promote international students as a way to improve the cultural experience of local learners and institutions • Opportunity to establish international partnerships with other education or research-based organisations	• Matching vocational training with immediate/near term skills needs of NZ employers • Work to identify and define who the audience is for international learner WBL in Aotearoa – both learners and employers		• Training can be a pastoral journey with many social outcomes • Opportunity to ensure social isolation and language support (the 2 highest factors that hinder success concerns for international students) is provided		

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Māori Learner Persona Process Map

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JOURNEY					
Discovery – Evaluating options	Entering - Induction	Academic journey	Pastoral journey	Assessment	Completion and 'outduction'
• School adverts/Online • Parents/Whānau/ Friends • School Teachers/Career Advisors • Employers • ITO/ITP associations • Career or Trade Expos • Government agencies • Pre-trade/ Trade Academies, Gateway, STAR, etc	• Understand employer's workplace and capability, complete TNA • Training plans • Job/employment (in work) • Employer/provider/learner agreement (3 way relationship) • ITO/ITP training enrolment. • Kōtahitanga - knowing what the learner's needs are	• Recognition of prior learning or current competencies • Training plans • Mana Motuhake - voicing and demonstrating high expectations, employer, TA and training provider. • Ako - teaching and learning; effective teaching interactions and relationships with learners • Wānanga - rich, dynamic sharing of knowledge. Dialogue, debate and careful consideration • Progressive assessment • Online, On & Off-job	• Support in place for both employer and apprentice • Extra support identified (i.e. ELN etc.) • Training Advisers (**TAs**) mediate support between learner, employer and training provider • Whānaungatanga - positive relationships and connections - a family-like atmosphere, a sense of belonging • Manaakitanga - a nurturing, caring and supportive environment. Caring for and nurturing the learner, including their language and culture	• Formative and summative (during and at the end of 'blocks' of learning) • Progressive assessment • Online, On & Off-Job • Employer verifies and/or assesses • External assessors, TA's as assessors and moderators with involvement of the training provider • Assessment in preferred language as an option	• Capstones • Graduation/Completion • Promotion to next opportunity or further WBL pathways. • Whanau heavily involved in and part of any recognition of final completion of a qual/credential
OPPORTUNITIES					
• Opportunities to lead the way with increased Maori engagement and success • Address parity of esteem issues through positive promotion of VET as a viable option • Need to have iwi play a key role in the discovery		• Incorporation of feedback where apprentices are able to practice their learning and request feedback as they learn. They can articulate where they need support and this is encouraged. • Co-designed, bite-sized, just-in-time learning with mini (or micro) outcomes • Stackable to programme outcomes • Encourage discussion incorporating a Maori perspective e.g. Tino Rangatiratanga, taonga,tuku iho • Incorporate Te Reo as much as possible	• Deliver pastoral support based on Te Ao Maori perspective – e.g. Te Wheke, Whare Tapa Wha • A way of increasing cultural understanding/what works for Maori, by employer and industry • Training advisor role expanded to include supporting employers, not just learners	• Assessment in Te Reo • Co-designed/peer assessed/learner driven and choice	• Celebrate success as it is achieved not just on completion • Digital badging • Micro-credentials • Recognition of achievement • Continuous learning • Mentoring and support for graduates through the job application and interview process • Whānau included in success celebrations

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Not in the Workplace, Retaining Persona Process Map

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JOURNEY					
Discovery – Evaluating options	**Entering - Induction**	**Academic journey**	**Pastoral journey**	**Assessment**	**Completion and 'outduction'**
• Changing circumstances e.g. redundancy, financial, family, location. • New skill, new industry • Return to work – • MSD, friends and family • In-line e.g. Seek • Outplacement • Volunteering • Web-based discovery • Health, sickness, disability • ACC • Role model of life-long learning	• MSD/ACC • ITP direct approach • Door knocking • Online/TV advertisement • Call centre • Enrolment • Readiness, expectations and time required • Induction • Enrolment pack • RPL • Contact with a person student adviser	• Literacy and numeracy • Learning to learn vocational/academic • Digital fluency • Scaffolding • Unlearning old habits	• Family/whānau • Training Advisor • Childcare • Mentors • Buddies • Employers	• RPL system and processes (ITO process) • Conventional (Same as school leaver)	• Employment/job to change in lifestyle • Lifelong learning • Role models • Promotion and progression • Graduation/acknowledgement
OPPORTUNITIES					
• Marketing campaign around our touch points in industries • Link to situations vacant	• Resource devoted to adult learners	• Learner choice • Skills mix and match	• Framework • Structure • Results based	• One assessment system	☐ Career guidance
CAPABILITY NEEDS					
	• Consultation process • Opportunity to structure around life • Specialist skills identified and team set up	• Micro • Badging stackable		• System to RPL • Access to credit through assessment only • Naturally occurring evidence	• Central careers services bureau
RESOURCE NEEDS					
• $$ and coordination	• $$ Skills	• Approval and accreditation for....	• Platform and teams to manage delivery	• Skills and team to deliver	• Brokerage and advice platform

Across Assessment, Pastoral Journey and Academic Journey
24/7 availability
On-line platform
Web design team
$$ and Skills

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Not in the Workplace, Schools Transition Persona Process Map

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JOURNEY					
Discovery – Evaluating options	**Entering - Induction**	**Academic journey**	**Pastoral journey**	**Assessment**	**Completion and 'outduction'**
• Careers advisors • Education expos • School visits/site visits • Alumni • Employers work experience • TEC Careers • Family and friends • Teachers • ITF Expo • External media of opportunities – police, NZDF • STAR • Gateway • Trade Academy	• Open days • School visits • Uni's Expos, visits • Employment • Enrolment • LNATT • Orientation • Onboarding/induction	• Learning support • Literature/Numeracy • Unit standards • Progress and monitoring side • Formative assessment	• Buddy (employer) • Teachers • Mentor • Alumni • Experts (employer) • Manager (employer) • Family/whānau • Church/marae	• On-job • Pre-job • RPL/RCC • Unit standards/DKO	• Qualification • Graduation • Employment • Wage increase • Promotion • CV Writing • Employability skills • A record of learning that is universal and can be read by employers
		• ITP Student support • ITO TA • Transition Coordinator – support for life			
OPPORTUNITIES					
• Work experience earlier • Link to community engagement • Closer relationship with Careers advisors • Marketing a range of WBL • Wananga involvement	• Industry school Partnerships	• 24/7 learner driven	• Destigmatise asking for help • Building capability of whanau to be engaged early	• Aligned to the rhythm of work • Badges • Micro • Learner centred • (E-portfolio) • Challenge the institution-based pedagogy	
CAPABILITY NEEDS					
• Provider to coordinate industry partnerships for all • Campaigns • WBL talk to other working groups	• School liaison people to connect with local industry • Support for entering and signing up • Platform for all interns training (brokerage, situations vacant) • Conversation platforms		• Framework pastoral care and guidance • Online platform for all NZ	• Prioritise short pre-employment courses (12 weeks max) • Naturally occurring • Making assessment easy • Capability of assessing in all forms and all evidence	
RESOURCE NEEDS					
• Designated Team	• Funding mechanism to reduce burden and trainee/worker • NZ for all platform for sign up (Web team and design)		• Pastoral and mentor support for employers • New specialist jobs – a team with these skills • Web team • Phone team	• NZIST Assessors and systems • Assessment centre	

Comments and connections
Learner Journey plan e.g. plan for student loan and journey
+ transitions – this needs to be considered by Leaner Journey Workstream

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Small-to-Medium Enterprise Persona Process Map

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JOURNEY					
Discovery – Evaluating options	Entering - Induction	Academic journey	Pastoral journey	Assessment	Completion and 'outduction'

Learner
School adverts/Online
 	
• Parents/Whānau/Friends
• Employers
• ITO/ITP associations
• Career or Trade Expos
• Government agencies
• Pre-trade/ Trade Academies, Gateway, STAR, etc.
 	
Employer
• NZIST must engage with industry at employer level to provide information and support at time/place that suits the employer
• Understanding why would I do this?
• Incentives to participate
• Pathways other than learner pathway:
  o Led by employer
  o Led by outside group e.g. WINZ; church; Marae; company; association
  o Other employers- success stories
  o Employees recommending other people
	• Example bullet points
	• Understand employer's workplace and capability, complete TNA
	• Job/employment (in work)
	• Employer/provider/learner agreement (3 way)
	• ITO/ITP training enrolment
	
	Employer
	• Make it as easy as possible for an employer to get engaged in WBL
	• Onboarding support: Access to mentor or expert to establish an understanding of where the employer (including employees) sits on the spectrum of capability (intellectual; pedagogy (the way they learn); resources; location etc)
	• Help finding the learner OR bring on board the learner they have already found
	• Clear understanding of and simple process to access support
	• Reduce barriers to participation
	• Can determine the outcome of the learning i.e. full qualifications versus credential for specific learning need
	• Utilization of gamification within credentials
	• Transparency and mobility of learner's knowledge
		• Example bullet points
		• Recognition of prior learning or current competencies
		• Training plans
		• Progressive assessment
		• Online, On & Off-job
		
		Employer
		• Access to mentor/expert who can be called into the workplace as needed
		  o Provide reassurance they are on track
		  o Transparent metrics/KPI's
		  o Clearly identify success and address shortcomings
			• Example bullet points
			• Support in place for both employer and apprentice
			• Extra support identified (i.e. ELN etc.)
			• Training Advisers (**TAs**) mediate support between learner and employer
			
			Employer
			• Wrap around support element within the NZIST
			• Access to mentor/expert who can be called into the workplace as needed
			  o Provide reassurance they are on track
			  o Transparent metrics/KPI's
			• Clearly identify success and address shortcomings
				• Example bullet points
				• Formative and summative (during and at the end of 'blocks' of learning)
				• Employer verifies and/or assesses
				• External assessors, TA's as assessors and moderators
				
				Employer
					• Example bullet points
					• Capstones
					• Graduation/Completion
					• Promotion to next opportunity or further WBL pathways
					
					Employer
					• Access top a database for assurance of previous learning
					• Confidence in outcomes

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Supported by an Employer Trainee Persona Process Map

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JOURNEY					
Discovery – Evaluating options	Entering - Induction	Academic journey	Pastoral journey	Assessment	Completion and 'outduction'
• Chosen the industry • Employer decides (compliance) • Can be employee driven		• Most workplace delivered • Develop content and assessment for employers • Mapper to employers training resources (not always)	• Not mandated • Employer driven for large cohorts	• Shorter course • SME expertise not necessarily a requirement (some still need SMEs) • Naturally occurring evidence	• Qual issued • Pathway to higher qual or into a new pathways • Promotion of life-long learning
OPPORTUNITIES					
• Employability Centres • Support for international learners and work-visa holders	• Support more women, mothers, Māori	• Stackable micros • Flexible timeframe and system • Speed to market of need/credential • 24/7 additional support	• Extra funding • Contractor workforce (future of workforce) • Staff on work permits not needing to be aligned to programme duration • Culturally appropriate	• Naturally occurring evidence	
CAPABILITY NEEDS					
• Physical one was to upskill 'outduction'		• Growth opportunity for upskilling – this responds to the future of work skills • Policy change from MOE, TEC, NZQA	• Extra TEC funding • TEC and NZQA policy • Support for employers		
RESOURCE NEEDS					
• Designated team	• Training needs analysis for employers – mapping their needs to pathways • Better understand business needs • Understand the value and employer workplace context • Grow trainee for future of work labour market	• Understanding the classroom is the workplace • Bring together PITs and POS • Masters Programmes	• Sufficient resources and funding • Recognise and activate policy changes NZQA/MOE/TEC		

Comments and connections
Learner Journey plan eg. plan for student loan and journey
+transitions – this needs to be considered by Leaner Journey Workstream

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Volunteers Persona Process Map

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JOURNEY					
Discovery – Evaluating options	Entering - Induction	Academic journey	Pastoral journey	Assessment	Completion and 'outduction'
Pre-volunteer • Altruistic: interested in becoming a volunteer and looking at options to serve the community or how to assist with a particular issue • Win-win: interested in getting a qualification in a field and wishing to volunteer as a means to achieve that. **Current Volunteer** • Altruistic: a volunteer serving the community or assisting with a particular issue • Win-win: volunteering as a means to complete a qualification. **Qualification status** ☐ Required: may be before any volunteering or in order to advance or to branch in a particular direction. May be regulatory ☐ Optional interest. **Focus** ☐ Narrow: may only apply to that organisation or volunteer field ☐ Broad: may apply in a range of fields, possibly for employment (but may not be in the same field as the volunteer is employed in) or personal development. **Information source** ☐ Internal: supervisor, mentor, training co-ordinator, website, internal literature ☐ External: adverts, online, parents/ whanau, Friends, ITO, ITP, volunteering promotional (CAB, Volunteer NZ etc).	• May require police vetting • Often a non-credentialed induction process • May be a probationary or trial period before any training • May require • May be a volunteer hour requirement to meet prior to training. This may be absolute or may be avoided by paying own way • ITO, ITP or organisational training enrolment • Volunteers may need to pay own fees and costs or organisation or sponsor may pay these • Volunteers may need to pay own fees and costs or organisation or sponsor may pay these	• Need a recognition of prior learning or current competency process for "old", overseas or other organisation in-house qualifications • Need a mentor – usually in the organisation at "branch level" or field mentor or may be an external mentor • Needs training and assessment timeframe plus progress checks and support • May include online, field work, reference material supported, block course, one-on-one training, group training • May be revalidation requirements eg. first aid, volunteer/field hours or continued competency evaluation	• Support and information required for volunteer organisations • Support required for volunteers • Volunteering-life balance needs to be encouraged and steps in place to prevent burn-out. Training and assessment may be pushed out due to commitment to volunteering, work and/or family life • Training advisors are needed to support the volunteer organisations at nation level, branch level and the volunteer trainees.	• Formative assessment may include self assessment, peer assessment, supervisor/trainer based • Pre-assessment may be optional or required • Evaluation of volunteer or field hours may be required. This may include confirming sufficient level of experience and/or range of experience rather than simply a count of hours • Assessment may include online, paper based, oral, in-field or practical • Assessment may be continuous, after blocks of learning or at the end of the qualification or paper (qualification segment) • May require evidence gatherers, internal and/or external assessors. • Moderation and consistency processes required.	• Both the organisation and the trainee need to be informed about completion steps and qualification. • Certification may go directly to trainee or to the organisation to award. • May be a formal awarding ceremony. • May be promotion of volunteer status to go with graduation. • May be able to go straight on to next step in the pathway or more experience may be required.
OPPORTUNITIES					
• Long term unemployed • Retirees			• Volunteer training can be a pastoral journey in its own right • It may be a pathway or personal development option for long term unemployed, retirees, disabled people, second chance learners, ex prisoners, people recovering from anxiety disorders, alcoholism or drugs.		

Draft Not official Government Policy