

Service IQ

HELPING OUR CUSTOMERS SUCCEED
BY GROWING THEIR TALENT



Investment Plan 2021–2022

ServiceIQ Investment Plan 2021–2022

Service Skills Institute Incorporated T/A ServiceIQ

Tertiary Education Organisation (TEO) details

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Chief Executive Foreword

As mentioned further in this plan, the service sector, particularly tourism, travel, hospitality, retail, accommodation and cafés, bars and restaurants, have all been significantly impacted as a result of Covid-19. As a result there will be a substantial decline in trainee numbers over 2020 and out to 2022.

This decline in trainee numbers has necessitated a review of existing resources to align them with the forecast level of activity with employers and trainees. During this process we will look to retain appropriate capability to both meet existing needs of industry and any growth that might occur in the sector, during the Covid-19 economic recovery.

Despite the downturn in trainee numbers, ServiceIQ, its sectors and employers remain committed to vocational education and training. We realise that as a Transitional Industry Training Organisation (TITO) we have a significant role to play in helping industries and employers to continue to invest in skills development.

We also have a key role to play in working collaboratively with Workforce Development Councils (WDCs), the New Zealand Institute of Skills and Technology (NZIST) and other Providers, to develop appropriate education and training responses for our industries and learners. In addition, we need to ensure the transition of our TITO functions are well planned and well supported.

Indication from feedback with our sectors is that most employers and their employees in vocational training, are likely to transition to the New Zealand Institute of Skills and Technology (NZIST). Industry preferences for transitioning to the NZIST during the consultation phases were consistent in that they wished to see transitioning occurring in 2022, aligned to completing transition by December of that year.

Many larger entities will require a national account management approach to be in place and functioning well, to be ready to transfer. These employers have made it clear they are not interested in having to interact with multiple points, and the goals of a seamless transfer and a system that is the same or better is required to keep them engaged in the vocational education system.

Our employers have said that they wish to see a well-managed and planned transition that is virtually seamless and causes no disruption to their business and their staff who are undertaking vocational qualifications. To this end, ServiceIQ will work closely with its industries and employers during the transition to NZIST.

We acknowledge that for many employers it may be a challenge to retain their involvement in vocational education and training and to rebuild trainee and apprentice numbers. It will therefore be a key focus for ServiceIQ to keep our employers engaged and supported over the coming years.



Andrew McSweeney
Chief Executive
ServiceIQ



1. Mission, Role and Structure

Industry Scope

ServiceIQ is the recognised Transition Industry Training Organisation (TITO) for ten sectors: Aviation; Travel; Tourism; Museums; Accommodation; Cafes, Bars and Restaurants; Catering Services (formerly Food Services); Clubs; Quick Service Restaurants; Retail and Retail Supply Chain.

Our Mission

ServiceIQ's mission is to **“help our customers succeed by growing their talent”**. Our mission is underpinned by four key pillars and related strategic goals as noted below.

Key Pillars and Strategic Goals

Key Pillars	Strategic Goals
Our Customers and Key Stakeholders	<ul style="list-style-type: none">▶ Build stronger stakeholder relationships, delivering consistently to their needs
Our People	<ul style="list-style-type: none">▶ Ensure we have the right structure and roles; and people with the right skills, knowledge and attitude.▶ Develop a workforce culture that will underpin achievement of our strategies.
Our Systems and Processes	<ul style="list-style-type: none">▶ Invest in technology to improve customer experience and provide tools for our people to be more effective and efficient.▶ Review core competencies end-to-end to maximise effectiveness and efficiencies and continuing compliance.
Financial Sustainability	<ul style="list-style-type: none">▶ Grow sustainable surpluses to re-invest into sector and trainee deliverables.▶ Accurately forecast business performance/.

Governance and Management

BOARD

ServiceIQ has a very strong governance and management structure. The ServiceIQ Board comprises nine members, six of whom are industry-based and three are independents, being the Board Chair, Chair of the Audit and Risk Committee, and the Employee Representative. The six industry-based members of the Board are drawn from the three Industry Advisory Groups (two from each) – see below.

INDUSTRY ADVISORY GROUPS

In addition to the Board, ServiceIQ has three sector-based Industry Advisory Groups (IAGs) representing the former ITO entities pre-merger in 2013; covering (1) Aviation, Tourism, Travel and Museums (2) Hospitality – inclusive of Accommodation; Cafes, Bars and Restaurants; Catering Services (formerly Food Services); Clubs; Quick Service Restaurants; (3) Retail and Retail Supply Chain.

The IAGs provide strategic advice and sector information to the Board and have the function of an Electoral College to elect Board members. The IAGs also validate ServiceIQ's workforce priorities and can act as a conduit to their respective industry associations.

EXECUTIVE TEAM AND STAFF

The Executive Management structure of ServiceIQ consists of the CEO and General Managers of Strategy and Government Relations; Industry Engagement; Talent Supply and Transitions; Products, Quality and Marketing; Human Resources and Finance. Currently ServiceIQ has approximately 130 staff across New Zealand.

2. Addressing the needs of stakeholders and giving effect to government priorities

Addressing the needs of stakeholders

ServiceIQ addresses the needs of its stakeholders through a combination of training programmes, products, activities and processes outlined in this section of our plan.

Our overall approach is based on having robust information, data and evidence of stakeholder need, so we may then appropriately and effectively address that need.

We have done extensive research on the needs of the service sector and have a National Workforce Development Plan as well as 15 Regional Workforce Roadmaps – one for each MBIE region in New Zealand.

More recently we have conducted extensive research into the economic outlook for the services sector both current and post-Covid-19 impacts, which has provided us with a clear picture of the state of our sector, and direction about how we can best address the needs of our stakeholders.

In addition, ServiceIQ has employed the services of a professional Customer Insights Analyst who has been able to provide the business with quality research information and analysis on the vocational education and training needs of our employers, trainees and apprentices.

This information, along with information gained from other sources such as NZQA Consistency Reviews, other internal market research, direct engagement and feedback from industry, industry associations, employers, trainees and apprentices, and our own frontline staff, has formed a solid platform for ongoing self-assessment and continuous improvement within ServiceIQ.

Central to our success is 'getting the basics right', 'acting with integrity', and having a strong focus on 'quality outcomes and great customer service'.

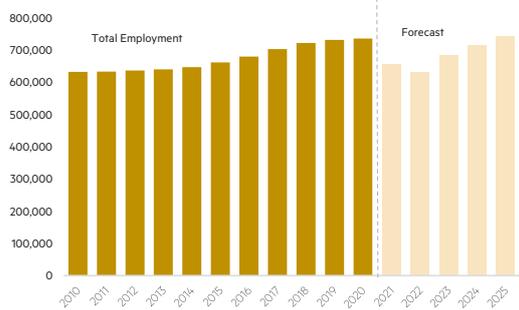
NEW ZEALAND SERVICE SECTOR AT A GLANCE

The Infographic below covers the overall Service Sector and includes up to date forecasts, as well as recently released sector-level demographic data from the 2018 Census.

New Zealand Service Sector

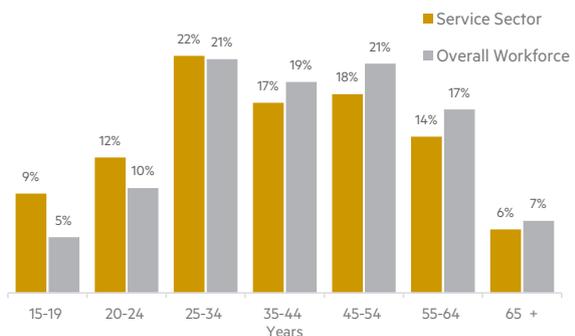
Employment

2019 **730,648** **636,089** **29%**
 Filled jobs FTEs % of jobs



	Service sector filled jobs			% change pa	
	2010	2019	2025	10-19	19-25
New Zealand	631,435	730,648	742,625	1.6%	0.3%
New Zealand	2,146,545	2,543,195	2,688,077	1.9%	0.9%

Age

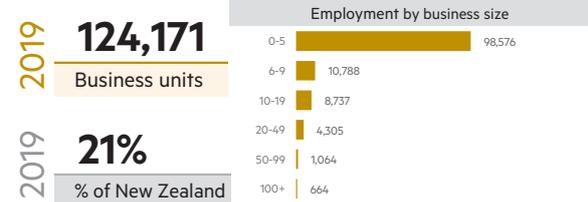


Businesses and employment

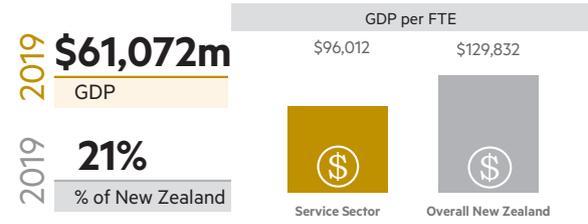
	Business units	Filled jobs		Change
	2019	2019	2025	19-25
Accommodation	7,094	37,388	32,047	-5,341
Aviation	1,407	22,496	23,740	1,244
Cafés, bars and restaurants	13,068	96,839	94,058	-2,781
Catering	2,801	20,483	22,387	1,904
Clubs	707	4,805	4,336	-469
Museums	336	3,349	3,553	204
Quick Service Restaurants	6,192	29,403	31,010	1,607
Tourism*	36,048	229,564	230,804	1,240
Travel	2,813	10,300	10,200	-100
Retail and retail supply chain	76,067	422,669	432,350	9,681
Total service sector	124,171	730,648	742,625	11,977

*Tourism includes overlap with the other sectors

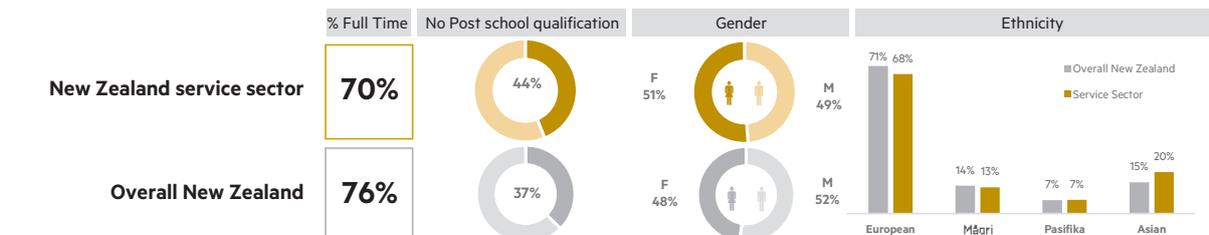
Business Units



Economic contribution



Demographics



Data and forecasts supplied by Infometrics.
 2020 jobs data is as at end of March 2020
 Updated: Tuesday, August 4, 2020

Economic Outlook for the Service Sector

SECTOR ECONOMIC IMPACT: PRE-COVID

At the end of 2019 the ten sectors that make up the service industry accounted for 730,648 jobs (636,089 full time equivalent jobs). This was 28.7 per cent of all New Zealand jobs.

The Service Sector contributed over \$61 billion dollars to New Zealand's GDP in 2019, which was an increase of 3.2 per cent (higher than the GDP growth for the total economy of 3.0%).

The Service Sector's GDP contribution was 20.5 per cent of New Zealand's total GDP. GDP per FTE grew 1.5 per cent in 2019, which was also higher than the GDP per FTE growth of 0.7 per cent for the total economy.

There were 124,171 businesses operating in the Service Sector or 21.1 per cent of all New Zealand businesses. 57,954 Service Sector businesses employed at least one staff member; which is 31.7 per cent of all New Zealand businesses employing one or more staff.

SECTOR ECONOMIC IMPACT: POST-COVID

Worldwide the economy is expected to contract by 3 per cent in 2020 but could grow 5.8 per cent in 2021 as economic activity normalises, helped by policy support.

In New Zealand, approximately 121,000 jobs are expected to be lost over the next year; with tourism-related sectors set to be the worst hit. International tourism makes up 5 per cent of New Zealand's economy.

With New Zealand's borders effectively closed until the Covid-19 risk diminishes (through a vaccine or controlling the risk of importing new cases), the tourism industry will initially be relying on domestic tourism as a key part of its recovery.

In the year ending March 2021, there are forecast to be 81,108 job losses in the Service Sector which is 11 per cent of the total Service Sector workforce. Another 22,725 Service Sector job losses or 3.5 per cent are forecast for the year to March 2022. There will be sector and regional variations in both the initial impact of Covid-19 and the recovery time, however, it will take until 2025 for the Service Sector workforce to reach its pre-Covid-19 level.

Information provided by Infometrics reveals the service sectors most heavily hit are:

- ▶ Retail and Retail Supply Chain with almost 20,000 job losses in the year to March 2021 and another 30,000 in the year to March 2022
- ▶ Tourism with 40,000 job losses, and
- ▶ Cafés, Bars and Restaurants with 26,700 job losses.

A key factor for the recovery of the Service Sector is the tourism outlook. There is uncertainty around when international tourism can recommence and how much the economic shock and possible longer-term travel safety measures may impact the rebound.

While the number of jobs that rely on tourism varies greatly by sector, overall a third of Service Sector jobs rely on it; so, this will impact how each sector looks over the remainder of 2020 and throughout 2021.

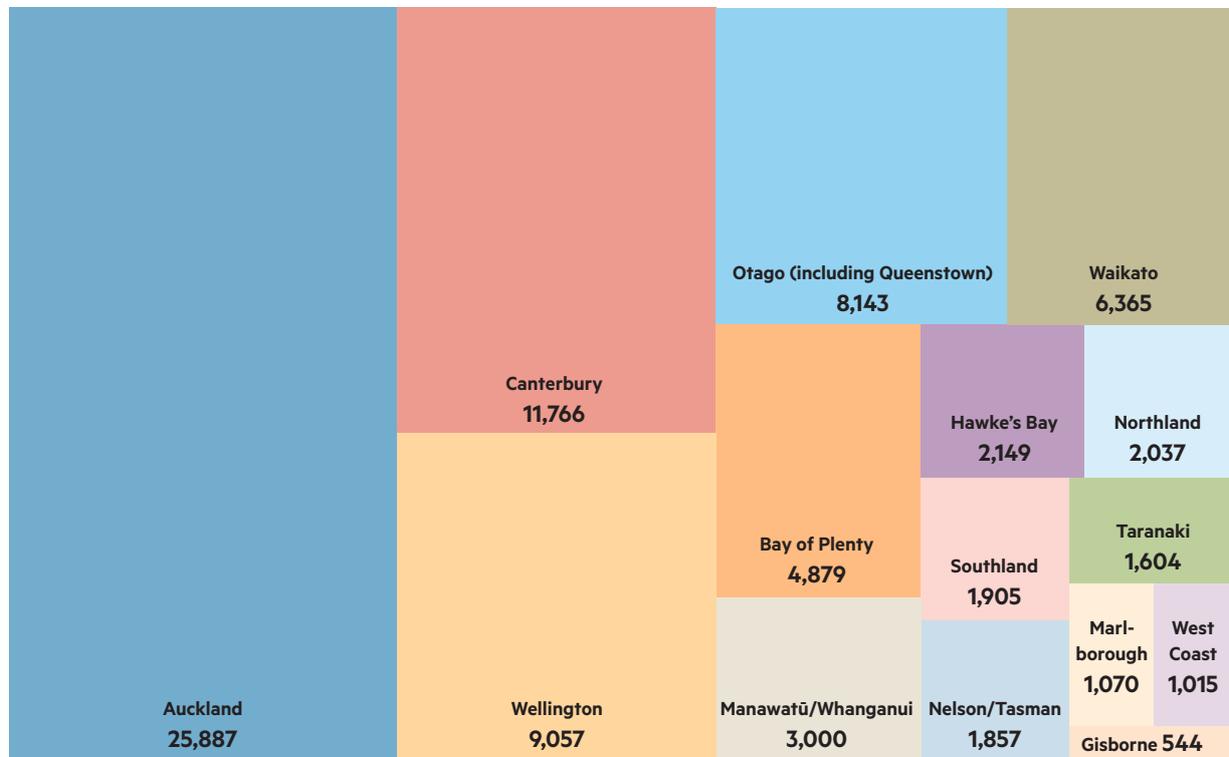
August 2020 Updated Service Sector Forecast with Covid-19 Impacts

End March by year	Forecast Employment	New Job openings	Replacement Job openings	Total Job openings
2020	735,067	4,419	33,193	37,612
2021	653,960	-81,108	29,880	-51,227
2022	631,235	-22,725	28,973	6,248
2023	684,026	52,791	31,467	84,258
2024	714,497	30,472	32,821	63,292
2025	742,625	28,128	34,068	62,196

Note:

- ▶ A new person in an existing role (replacement job opening) could mean a new employee or an existing employee moving into a new role (both which may require on-job training) which may contribute to trainee numbers.
- ▶ Another contributing factor that may increase demand for on-job training, is where migrant labour is no longer available, requiring the domestic labour force to be upskilled.

Forecast Service Sector Job Losses by Region April 2020 to March 2021



SERVICE SECTOR FORECAST WITH COVID-19 IMPACTS

The following tables reflect (by sector) – ‘jobs’ as 31 December 2019; ‘job losses’ forecast to 31 March 2021; the percentage of the sector represented by the Tourism workforce; the percentage of the sector with employees who identify as Māori as at Census 2018. Of all the sectors mentioned, only Retail is forecast to experience ongoing significant job losses past March 2021, with an additional 30,000 job losses forecast between 1 April 2021 and 31 March 2022.

Travel and tourism

AVIATION	MUSEUMS	TRAVEL	TOURISM	RETAIL AND RETAIL SUPPLY CHAIN
22,800 jobs 4,700 job losses 52% tourism 9.0% Māori	3,400 jobs 400 job losses 47% tourism 12.0% Māori	10,400 jobs 2,100 job losses 86% tourism 8.9% Māori	231,600 jobs 40,000 job losses 42% international 13.2% Māori	423,600 jobs 19,700 job losses 8.1% tourism 12.1% Māori

Hospitality

QUICK SERVICE RESTAURANTS	CAFES, BARS AND RESTAURANTS	CATERING	CLUBS	ACCOMMODATION
30,000 jobs 6,600 job losses 49% tourism 13.6% Māori	98,000 jobs 26,700 job losses 49% tourism 14.0% Māori	21,000 jobs 2,400 job losses 49% tourism 15.6% Māori	4,800 jobs 1,400 job losses 0% tourism 20.0% Māori	37,000 jobs 12,800 job losses 86% tourism 13.9% Māori

North Island

NORTHLAND	AUCKLAND	WAIKATO/BOP	HAWKE'S BAY/ TARANAKI/ MANAWATU	WELLINGTON
Total employment -5.0% ServiceIQ sectors -10.3%	Total employment -3.6% ServiceIQ sectors -9.4%	Total employment -4.5% ServiceIQ sectors -10.9%	Total employment -4.1% ServiceIQ sectors -10.4%	Total employment -4.5% ServiceIQ sectors -12.0%

South Island

NELSON/TASMAN/ MARLBOROUGH	CANTERBURY	OTAGO/ SOUTHLAND	WEST COAST
Total employment -5.8% ServiceIQ sectors -12.1%	Total employment -6.4% ServiceIQ sectors -12.0%	Total employment -7.4% ServiceIQ sectors -15.9%	Total employment -8.4% ServiceIQ sectors -17.5%

Information supplied by Infometrics

3. Programmes/Products and Activities

ServicelQ has an extensive and well-developed suite of training programmes, products and activities to address the needs of our employers, trainees, apprentices in vocational education and training.

Programmes/Products

Introduction: Our programmes and products provide industry trainees, apprentices, assessors and workplace facilitators with a combination of industry relevant, unit standard based, hard copy and online programmes and products to enhance workplace-based training and educational achievement. We also produce non-unit standard based products that can be used standalone or to support our other products.

Industry Training Programmes: We have a comprehensive suite of generic and bespoke programmes of workplace-based learning that enable trainees and apprentices to achieve the graduate profile outcome of a New Zealand Qualification.

Industry Training Products: We also have a comprehensive suite of generic and bespoke products that enable a trainee, apprentice or workplace training facilitator, to engage with workplace-based vocational education and training.

Online Short Courses: Over 30,000 people have upskilled with ServicelQ's online short courses, including new staff and experienced staff who need a refresh. The courses are practical and contain the essential information you need to know to help protect and build your business. They are also quick, can be completed anytime, anywhere, and when you succeed you gain a certificate.

Savvy Intro Skills Awards: Our Savvy Intro Skills Awards turns beginners into experts in only four months on the job, and cover Hospitality, Retail, Distribution, Team Leadership, Tour Guiding and Visitor Experience.

Online Learning and Assessment: In addition to ServicelQ's print offering, ServicelQ offers online learning and assessment on its Assessment Management System (AMS). Some full programmes are available, as are several limited credit programmes and resources for schools. Combined with data tracking in the user portals, employers have ready access to the progress of their staff and ServicelQ has good oversight of completion data.

User Experience: ServicelQ's Product Development Team works in close collaboration across ServicelQ teams to achieve a seamless process for trainees and employers, from sign-up through to graduation. The goal is to limit the roadblocks to achievement and improve completion outcomes. ServicelQ has a large library of blended e-learning products currently being purchased by schools and training providers. New authoring tools enable the enhancement of the interactive elements of these learning resources, which responds to customer feedback and improves the learning experience and the ability to better track learner progress.

Activities

As noted earlier, central to our success is ‘getting the basics right’. In the context of ServiceIQ, this involves establishing robust practices and interconnectedness between several key activities that collectively result in our service offering to industry.

SKILLS LEADERSHIP AND WORKFORCE DEVELOPMENT PLANNING

ServiceIQ has a well-developed Skills Leadership and Workforce Development Planning model that is applied across its industries and sectors. Although Industry Skills Leadership was removed as a mandated function of ITOs, most ITOs, including ServiceIQ, have continued a strong focus in this area. Without doing so, it would not be possible for any ITO to fully undertake their standard setting, qualification development and arranging training functions.

Introduction: ServiceIQ’s Industry Skills Leadership and Workforce Development ‘provides strategic skills leadership to develop a skilled workforce’ by (1) Providing specialist knowledge to inform workforce planning for ServiceIQ’s industries, through the provision of sector-based, national and regional workforce development information, data and strategies, including customer insights (2) Providing specialist knowledge to the Industry Engagement Team in terms of skill supply and demand at a sector, national and regional level, and where there are potential business development opportunities aligned to forecast industry growth (3) Providing specialist knowledge to the Qualification Development Team to inform qualification development and review.

Workforce Development Model: ServiceIQ has an exemplary workforce development model that has been developed and refined over the seven years since ServiceIQ became an entity. ServiceIQ’s overall approach to national and regional workforce planning and engagement is twofold, and to put it into context, currently involves and achieves, the same activity and outcomes expected of both Workforce Development Councils (WDCs) and Regional Skills Leadership Groups (RSLGs). This is achieved by having

an interconnected and circular process where national workforce trends (National Workforce Development Plan) inform regional (Regional Workforce Roadmaps) and vice-versa.

STANDARD SETTING AND QUALIFICATION DEVELOPMENT

ServiceIQ sets standards and develops and registers qualifications for the 10 sectors outlined above under ‘Industry Scope’.

Standard Setting (Unit Standards): ServiceIQ has Standard Setting Body responsibility for approximately 1,500 unit standards across all sectors. It works with industry and employers to develop nationally recognised standards that meet the needs of employers and trainees and are valued by them. Although standards are generally on a five-year review cycle, the actual frequency of any reviews or revisions is driven by market relevant factors such as the level and type of industry change, legislative requirements, and moderation feedback.

Qualification Development: ServiceIQ has Qualification Developer responsibility for 60 New Zealand Certificates and Diplomas, two transitioning New Zealand Diplomas, and 17 transitioning National Certificates and Diplomas. ServiceIQ has commenced the full review of the Hospitality, Retail, and Tourism and Travel suites of qualifications as part of their five-year review cycle. The review of the Retail and Sales qualifications, Catering qualifications and Tour Guiding qualification is complete, and ServiceIQ continues to work on other qualification reviews.

ServiveIQ works with industry and employers to develop and maintain nationally recognised qualifications that meet the needs of employers and trainees and are valued by these groups. Depending on the outcome of the consultation process, the offerings may include a mixture of Gateway, apprenticeships or training programmes.

ServiceIQ has recently become the Qualification Developer for a New Zealand Diploma in Commercial Sky Diving, working collaboratively with the New Zealand Sky Diving School, a Category 1 Provider and the only provider in New Zealand able to offer this qualification. ServiceIQ is also working with Rocket Lab to develop an Aerospace Engineering strand within an Aeronautical Engineering qualification, with a plan in progress to create an apprenticeship model for their workforce.

NZQA Consistency Reviews: The ServiceIQ Qualifications Manager represents ServiceIQ as the Qualification Developer at all relevant NZQA Consistency Reviews, and is responsible for: (1) determining, in conjunction with relevant stakeholders, the core evidence requirements for demonstrating consistency for the qualification; the information is included in the listing details of the qualification, (2) clarifying the evidence requirements for assuring national consistency arrangements in the qualification when requested by programme owners and other stakeholders, and (3) acting as a subject matter expert advising the consistency reviewer on the qualification outcomes.

ARRANGING INDUSTRY TRAINING

ServiceIQ offers its employers a range of models for arranging workplace-based vocational education and training, covering large enterprise level customers through to small-to-medium enterprises.

Arrangements for the delivery of industry training: Each of ServiceIQ's sectors has a Sector Manager and a combination of Sector Advisers (dealing with larger customers) and Training Advisers (dealing with SMEs). Arrangements for training are based on a training needs analysis of the needs of each employer (as are arrangements for the pastoral care of trainees) and support of trainees to assist them with their vocational learning. Arrangements for training are linked to one of ServiceIQ's business models and tailored as necessary to the size, scale and environment of an employer.

Employer Memorandum of Understanding:

ServiceIQ has a Memorandum of Understanding (MoU) agreement with key employers. The MoU formalises the arrangements between ServiceIQ and employers for the arranging of appropriate training. The resultant training enables trainees/team members, to become skilled and qualified in their chosen career paths and to add value to the organisation. The MoU emphasises that for an effective partnership, there needs to be strategic and cultural alignment between both parties; and, to be successful, this will include alignment on specific strategic initiatives. The MoU includes KPIs to measure performance, promote regular open and honest communications, regular feedback and a workstream for continuous improvement.

Arranging Trainee Support: The MoU states that ServiceIQ will provide a Sector or Training Advisor/s who will support the organisation with ongoing training support and advice, including assessment services, at both the recognised Head Office (or Support Office) and In-Store on an agreed cycle and method. The MoU further states that ServiceIQ will provide trainee pastoral care, support for Māori and Pasifika (specialist learning support) and assistance with Literacy, Numeracy and Language skills. Specifically, ServiceIQ will conduct or arrange a Literacy and Numeracy Assessment and support as required for trainees. As part of the MoU, employers agree to provide pastoral care and support for the trainee or apprentice, as well as Literacy and Numeracy support, and/or support for those for whom English is not their first language. Employers also agree to provide support for trainees and/or apprentices who identify as Māori or Pasifika, where appropriate, to ensure parity of educational achievement. Trainee pastoral care support is also arranged for organisations and employers where there may not be a formal MoU in place.

Monitoring Training: Monitoring the training occurs in line with the arrangements made in the Employer MoU and from data analysis with ServicelQ's Customer Service Team who track a trainee's progress throughout the life of their qualification in terms of credit achievement and programme completions. Flags are raised to alert members of the Industry Engagement Team where any anomalies are identified with a trainee's progress, such as delays in reporting credits.

Assessing Training: As with monitoring, arrangements for assessment occur in line with the provisions made in the Employer MoU. Many of ServicelQ's employers use workplace assessors who are certified by ServicelQ through its US4098 course, while others use contracted assessors, coordinated by ServicelQ. ServicelQ has a dedicated Assessor Support Team, which is part of our Quality Assurance Team. ServicelQ pre-moderates all its assessment material to ensure it meets the requirements of individual unit standards.

Quality Assuring Training: ServicelQ has a robust moderation system in line with its Consent and Moderation Requirements (CMR), which ensures that assessment is fair, valid and robust. Consistency of Graduate Profile Outcomes is measured at NZQA Consistency Reviews and through ServicelQ's Annual Moderation Plan and Process.

Collective representation of employees in the governance of the organisation: ServicelQ has a Union (Employee/Trainee/Apprentice) Representative on its Board who advocates where necessary to ensure the rights of workers are considered in any arrangements made for training. ServicelQ also has three Industry Advisory Groups (IAGs) that it works closely with, each of which also has a union/employee representative.

ARRANGING APPRENTICESHIP TRAINING

Apprenticeship Offering: ServicelQ offers New Zealand Apprenticeships (NZA) in aeronautical engineering, cookery, catering services, and food and beverage. ServicelQ is committed to supporting people on our NZA programmes, employing dedicated Sector Advisors so we have a direct role in supporting Apprentices and lifting engagement, credit and programme completion rates.

Apprenticeship Promotion (Prospective Apprentices): ServicelQ works closely with industry associations and workplaces to promote the business benefits of apprenticeships to employers. We actively look to identify opportunities to recognise and celebrate employers supporting apprentice training through our marketing activities, inclusive of social media. Our Sector Advisors also work alongside our Talent Supply and Transitions team, increasing awareness of apprenticeship pathways for secondary students and assisting with introductions of prospective Apprentices to the relevant parties.

In a coordinated approach with our industry associations, we share knowledge of Industry contacts to assist students in government initiatives (e.g. Restaurant Association of NZ with their Hospo Start programme) to gain work experience with a view to gaining employment leading to an Apprenticeship. Significant time has been invested into attending School Cluster Meetings as well as working directly with schools and students to increase the awareness of apprenticeships. This successful approach has resulted in prospective Apprentices being matched to potential employers.

Apprenticeship Training Agreements:

Expectations and requirements of the programme, and responsibilities (i.e. work logs, theory component, development and progression of skills to meet assessment requirements) are discussed by the Employer, Apprentice and ITO on signing the apprenticeship agreement. A training plan is formulated with timelines to ensure Apprentices are well prepared and working towards their scheduled milestones. These are captured in a training site visit document and signed by all three parties.

Apprenticeship Monitoring and Support:

Through regular contact and determining the appropriate level of support at the regular reviews, ServicelQ Sector Advisors check the Apprentice is on track to meet their agreed milestones, resulting in completion of the programme within reasonable timeframes. These reviews are an excellent opportunity to identify progression of learning, provide guidance and feedback as to how the Apprentice is progressing, discuss the Apprentice's performance with their employer and identify if there are any issues or concerns to address.

New Zealand Apprenticeships Code of Good Practice:

ServicelQ is compliant with the Code of Good Practice (Code) for New Zealand Apprenticeships, and provides appropriate pastoral care and support for apprentices. ServicelQ ensures quality support by promoting the Code and we set a minimum of four visits per year, particularly in the early stages of the programme (Year 1). The frequency of visits is determined by the needs of each Apprentice, with increased or fewer visits depending on the level of pastoral care and support required. The level of care required for each Apprentice is identified, reviewed and documented in the ServicelQ CRM against each Apprentice's records. Our Sector Advisors ensure the Apprentice and the Employer are introduced to the Code, providing them with an electronic copy or website link.

SUPPORT FOR WORKFORCE PRIORITIES

ServicelQ has a dedicated team to provide support around TEC priority focus areas (workforce priorities) including Māori; Pasifika; Literacy, Language and Numeracy; People with Disabilities; and Young People.

Introduction: The team develops and communicates the workforce priority strategies, actions plans and initiatives for each focus area, on behalf of ServicelQ and for the Service Sector as a whole. The team then works with and across the business to support implementation of the action plans and initiatives through other teams. Part of the support involves the development of internal staff understanding, knowledge and capability and part is focused on positively impacting parity of education achievement for each of the workforce priority groups. See information further below on "Giving effect to Government Priorities".

QUALITY ASSURANCE, MODERATION AND ASSESSOR SUPPORT

ServicelQ provides Quality Assurance, Moderation and Assessor Support to its industries, employers, assessors, training providers and schools stakeholders.

Introduction: ServicelQ quality assures all qualifications and unit standards for which it is the standard setting body or has consent to assess. The quality assurance processes are carried out to ensure that the robustness and integrity of assessment is maintained. The National Moderator has overall responsibility to ensure that all schools and providers with consent to assess, and workplaces engaged in assessment, meet the relevant consent and moderation requirements (CMRs) and our governing bodies' rules.

Assessment and Assessor Support: ServiceIQ provides support for registered workplace assessors and contract assessors, including assessment advice and guidance, workplace assessment guides, understanding moderation, how to report trainee credits following assessment, how to extend assessor scope, as well as up-to-date important news and any assessment changes an assessor might need to know in order to help trainees achieve unit standards and gain a qualification.

National Unit Standard 4098 Assessor Course: ServiceIQ also provides access to its National Unit Standard 4098 Assessor Course. A workplace assessor is a person, such as an experienced supervisor or manager, who works in an organisation that has trainees. They are registered with ServiceIQ as a workplace assessor to assess employees in their workplace. As a minimum they must hold the National Unit Standard 4098: 'Use standards to assess employee's performance or demonstrate equivalent knowledge and skills.'

TALENT SUPPLY AND TRANSITIONS

ServiceIQ has a stand-alone function called Talent Supply and Transitions (TST), which looks at the workforce labour-talent supply pipeline from a secondary-tertiary transition perspective. It helps secondary students to make informed work choices and a successful transition into employment.

Introduction: The TST Team is focused on the development and coordination of national and regional talent supply and transition pipelines to meet industry demand by sector, sub-sector and key employers. The Talent Supply and Transitions (TST) team has regular engagement with circa 373 secondary schools around New Zealand, making it the largest schools programme of any ITO.

Purpose: The purpose of the Talent Supply and Transitions team is threefold, to (1) facilitate the embedding of service sector vocational units and pathways in schools (2) provide practical real-world workplace-based credentialed training and work experience opportunities for Years 12 and 13 secondary school students through supported Gateway programmes; (3) promote the service sector as a viable career pathway and support industry and employer demand for skills and labour supply by providing access to a talent supply pipeline.

Schools Engagement: The Talent Supply and Transitions team facilitates the embedding of service sector vocational units and pathways in schools, aligned to targeted industries. The focus areas are hospitality (cookery) and travel and tourism with other industries planned. Industry links into the schools via Industry Advisory Groups ensure the practice is current and support the transition of school leavers into the industry.

Supported Gateway Programme: Coordination of the talent supply pipeline primarily focuses on school-to-work transitions, utilising the Tertiary Education Commission funded 'Supported Gateway' programme, that provides secondary school students at Years 12 and 13 the opportunity to participate in 10-week (school-term) workplace-based training, as part of the attainment of 22 Level 2 and 3 unit standard credits towards their National Certificate of Educational Achievement (NCEA). Gateway programmes are customised to reflect the needs of individual workplaces, with each programme offering an industry-recognised Customer Service Award to the student upon completion. Supported Gateway programmes are in place with the Retail, Aviation and Hospitality sectors.

Māori Cultural Tourism Camps: In addition to Gateway, the TST Team also manages a Māori Cultural Tourism Camp programme. Each camp involves around 30 secondary school students from different schools spending a week in a mārae-based immersion programme. There they learn the core elements of Māori Cultural Tourism, as it exists in New Zealand now, and the significant importance this plays as part of New Zealand's world-leading tourism offering to international and domestic visitors. The Māori Cultural Tourism programme results in the attainment of 22 Level 2 and Level 3 unit standard credits towards the student's NCEA. This very successful programme has grown from two annual camps to eight camps per year; held at Waiheke Island, Waitomo, Kapiti Island and Whakarewarewa.

Wider Talent Supply Pipeline: The Talent Supply and Transitions Team is currently exploring the coordination of the wider talent supply pipeline involving provider graduates-students and job-seekers into employment via collaborative ventures with industry, funded or supported by Iwi and key government agencies including MSD and MoE. One recent example is a successful bid for Ministry of Education funding for "events that connect schools, communities and employers", an MoE initiative to increase young people's engagement in vocational education. Another current example is a proposal to MSD to provide recently unemployed job seekers from the service sector (impacted by Covid-19) with access to short online courses to help quickly reconnect them with the job market.

4. Outcomes and Measures

ServiceIQ has captured its proposed outcomes for 2020 and 2021 by way of the volume of Standard Training Measures (STMs) for the number of trainees and apprentices signed into Industry Training, in relation to the tertiary education programmes and activities for which funding is sought.

We have also provided our Educational Performance Indicator Commitments (EPICs) that we will use to measure whether those outcomes have been achieved. In addition, ServiceIQ has a strong commitment to effectively address the Government Priorities outlined in the Ministry of Education's Tertiary Education Strategy and the TEC's Investment Briefs and Plan Guidance documentation.

Specifically, we will work towards the TEC priorities for the 2021-2023 Plan round in terms of, by 2022, achieving: Parity for participation for Māori and Pacific Peoples¹; Parity of achievement for Māori and Pacific Peoples²; and Patterns of participation for Māori and Pacific Peoples that will lead to better outcomes.

Giving effect to Government Priorities including Treaty of Waitangi

(See Learner Success Template for more Information)

Support for Māori Trainees and Apprentices

Service IQ has a dedicated Strategy and Action Plan for supporting Māori Trainees and Apprentices. Part of our strategy has seen the development of a Māori Cultural Framework called Te Pae Tawhiti (Journey towards a new horizon), that gives effect to the Treaty of Waitangi.

Te Pae Tawhiti focuses on building internal cultural capability and equipping ServiceIQ staff with the skills to engage with employers, trainees and apprentices, in a culturally appropriate way, over parity of educational achievement. The key focus areas are:

1. Working with industry and trainees,
2. Building ServiceIQ's internal cultural capacity and capability, and
3. Engaging with Iwi and Māori businesses and organisations.

To help lead this key focus area, ServiceIQ has appointed a Lead Advisor Ōritetanga and a Kaumatua. We have also formalised our support arrangements for Māori trainees and apprentices through the introduction of a new Memorandum of Understanding (MoU) with key employers in 2019. The MoU emphasises that for an effective partnership, there needs to be strategic and cultural alignment between both parties; and, to be successful, this will include alignment on specific strategic initiatives.

The MoU states that ServiceIQ will provide a Sector Advisor or Training Advisor who will provide trainee pastoral care and support (specialist learning support) for Māori (and Pasifika). Employers also agree to provide support for trainees or apprentices who identify as Māori (and Pasifika), where appropriate, to ensure parity of educational achievement. Trainee pastoral care support is also arranged for employers where there may not be a formal MoU in place.

1 Compared to general population or regional catchment for PTEs/ITPs

2 Compared to 15-39 year-old non-Māori, non-Pacific learners' rates in 2016

Support for Pasifika Trainees and Apprentices

Service IQ has a dedicated Strategy and Action Plan for supporting Pasifika Trainees and Apprentices. This work will be led by ServiceIQ's Lead Advisor Ōritetanga as part of his overall role of supporting parity of educational achievement for Pasifika trainees and apprentices. The focus is on building internal cultural capability and equipping staff with the skills to engage with employers, trainees and apprentices, in a culturally appropriate way, over parity of educational achievement. The key focus areas are:

1. Working with industry and trainees,
2. Building ServiceIQ's internal cultural capacity and capability, and
3. Engaging with Pasifika Communities, organisations and groups.

Supporting Literacy, Language and Numeracy (LLN) Need

ServiceIQ is committed to implementing practical interventions and enduring systems, processes and procedures that support the identified needs of those trainees who would benefit from literacy, language and numeracy support; particularly where it will have a positive impact on a trainee's learning, qualification completion, work and career prospects. ServiceIQ is working in partnership with a range of employers to embed literacy approaches in the workplace to support building trainees and workplace LLN capability.

ServiceIQ has the services of a Senior Advisor Literacy, Language and Numeracy who provides the business with specialist knowledge and hands-on operational support with initiatives to build internal LLN capability (including Industry Engagement staff and Product Development staff) and direct support for trainees and apprentices, including managing ServiceIQ's Literacy and Numeracy Adult Assessment Tool (LNAAT) Assessment Programme as per TEC guidelines.

ServiceIQ has a Literacy Numeracy and Language Strategy and Project Plan, which lays out ServiceIQ's approach to LLN and a roadmap of how to move to a position of both compliance and best practice. Whenever a trainee obtains a result of Step 2 or below in the LNAAT, the ServiceIQ 'customer owner' (the Training Advisor or Sector Advisor) is advised and then either:

1. the ServiceIQ Industry Engagement representative determines support needs with the employer, or
2. the Workforce Priorities Team makes contact directly with the trainee to see if support is required.

Supporting People with Disabilities

ServiceIQ has adopted a focused approach to disability called 'Disabilities – Training Support and Parity (Ōritetanga)', which involves a process where whenever a trainee identifies a disability on their TAG, the ServiceIQ customer owner (the TA or SA) is advised and then either:

1. the ServiceIQ IE Team representative determines support needs with the employer, or
2. the Workforce Priorities Team makes contact directly with the trainee to see if support is required.

A more formal strategy and action plan will be developed over 2020.

Supporting Youth

ServiceIQ has a formalised 'Youth Strategy', which provides additional focus on trainees and apprentices under 25 years. While Youth have always been significant for ServiceIQ and Youth EPIs have been closely monitored, the strategy provided an opportunity to collect and analyse approaches across the organisation. The action plan attached to the strategy is well underway and will be further progressed over 2020.

Summary of planned shifts for 2021–2023

Government priority area	Brief description of proposed shift/initiative and its expected impact	How ServiceIQ will implement the proposed shift/initiative	Expected changes in EFTS/dollars and/or performance
Delivering Skills for Industry	Working with industry and employers to maintain or increase their engagement in industry training and apprenticeships as they recover from the economic impacts of Covid-19. And, where possible, coordinate the transition of students from school to work.	Focused industry engagement activity including launching a ‘dual-focus’ support model, between our Industry Engagement staff and our Talent Supply and Transitions staff, in targeted regions.	An end-to-end process and service offering, including transition from secondary schools via Gateway through to employment, with the aim of signing-up to industry training.
Māori Achievement	Focused application of ServiceIQ’s ‘refreshed’ Māori Strategy and Action Plan.	Structured support to targeted employers, trainees and apprentices as well as building of ServiceIQ staff skills, knowledge and capability.	Increase in participation, achievement and retention of Māori trainees and apprentices.
Pasifika Achievement	Focused application of ServiceIQ’s ‘refreshed’ Pasifika Strategy and Action Plan.	Structured support to targeted employers, trainees and apprentices as well as building of ServiceIQ staff skills, knowledge and capability.	Increase in participation, achievement and retention of Pasifika trainees and apprentices.
Literacy, Language and Numeracy	Focused application of ServiceIQ’s LLN Strategy and Action Plan with targeted employers.	Maximise use of the ‘recently finalised’ API (Automated Programme Interface). Work with identified industry trainees and their employers to establish bespoke support services) for actioning the LNAAT assessment process.	Engagement of 2–3 key employers to set up a systematic approach to administer LNAAT assessments.
People with Disabilities	Focused application of ServiceIQ’s People with Disabilities Strategy and Action Plan with targeted employers.	Work with identified industry trainees and their employers to establish bespoke support services.	Development of an established support model for application across other workplaces where relevant.
Young People	Focused application of ServiceIQ’s Young People Strategy and Action Plan with targeted employers.	Work with identified industry trainees and their employers to establish bespoke support services.	Development of an established support model for application across other workplaces where relevant.

5. Past Performance

Summary of Educational Performance Indicator Commitments (EPICs) 2017–2019

ServicelQ has had a strong commitment over the last three years to improving its Educational Performance Indicator Commitments.

SUMMARY

1. Our Māori and Pasifika participation rates are the best they have been in ServicelQ's history.
2. Programme completion rates are very good – we are above target at all levels for our priority groups.
3. Credit achievement has been a challenge in 2019 – however, we know which employers are excelling and which have challenges, and we are having conversations with the latter to turn this around.
4. Our Pasifika trainees are achieving well – Pasifika credit achievement and programme completion rates are similar or better, when compared to all trainees.
5. Māori achievement is down in some areas. We have identified this and responded to it by making it a focus across the organisation and recruiting a person (Lead Advisor Ōritetanga) to directly work on this with our Industry Engagement Team.

Credit Achievement 2017–2019

	Total	Non-Māori & Pasifika	Māori	Pasifika	U25yr
2017	▶ All trainees all levels 76%	▶ Non-M&P all levels 77%	▶ Māori all levels 65%	▶ Pasifika all levels 78%	▶ U25yr all levels 72%
	▶ All trainees L4+ 88%	▶ Non-M&P L4+ 89%	▶ Māori L4+ 73%	▶ Pasifika L4+ 92%	▶ U25yr L4+ 82%
2018	▶ All trainees all levels 70%	▶ Non-M&P all levels 70%	▶ Māori all levels 69%	▶ Pasifika all levels 74%	▶ U25yr all levels 72%
	▶ All trainees L4+ 84%	▶ Non-M & P L4+ 83%	▶ Māori L4+ 83%	▶ Pasifika L4+ 89%	▶ U25yr L4+ 83%
2019	▶ All trainees all levels 59%	▶ Non-M&P all levels 61%	▶ Māori all levels 50%	▶ Pasifika all levels 55%	▶ U25yr all levels 54%
	▶ All trainees L4+ 72%	▶ Non-M&P L4+ 73%	▶ Māori L4+ 62%	▶ Pasifika L4+ 75%	▶ U25yr L4+ 78%

Credit Achievement and Priority Groups

- ⬇️ Credit achievement for **Pasifika** at levels 1–3 is slightly lower than for all trainees.
- ⬆️ Credit achievement for **Pasifika** at levels 4+ is slightly higher than for all trainees.
- ⬇️ Credit achievement for **Māori** at levels 1–3 is lower than for all trainees.
- ⬇️ Credit achievement for **Māori** at levels 4+ is lower than for all trainees.
- ⬇️ Credit achievement for **Youth** at levels 1–3 is lower than for all trainees.

↑ Credit achievement for **Youth** at levels 4+ is higher than for all trainees.

Credit achievement at L1–3 for 2019 has been impacted due to a system reporting issue mainly contained to one large employer who makes up a significant number of these trainees.

b) Programme Completion 2017–2019

	Total	Non-Māori & Pasifika	Māori	Pasifika	U25yr
2017	▶ All trainees all levels 65%	▶ Non-M&P all levels 65%	▶ Māori all levels 62%	▶ Pasifika all levels 65%	▶ U25yr all levels 62%
	▶ All trainees L4+ 70%	▶ Non-M&P L4+ 70%	▶ Māori L4+ 68%	▶ Pasifika L4+ 57%	▶ U25yr L4+ 68%
2018	▶ All trainees all levels 70%	▶ Non-M&P all levels 72%	▶ Māori all levels 68%	▶ Pasifika all levels 73%	▶ U25yr all levels 67%
	▶ All trainees L4+ 78%	▶ Non-M&P L4+ 78%	▶ Māori L4+ 73%	▶ Pasifika L4+ 68%	▶ U25yr L4+ 70%
2019	▶ All trainees all levels 68%	▶ Non-M&P all levels 69%	▶ Māori all levels 67%	▶ Pasifika all levels 71%	▶ U25yr all levels 67%
	▶ All trainees L4+ 76%	▶ Non-M&P L4+ 76%	▶ Māori L4+ 72%	▶ Pasifika L4+ 80%	▶ U25yr L4+ 73%

Credit Achievement and Priority Groups

- ↑ Programme completion for **Pasifika** at levels 1–3 is higher than for all trainees.
- ↑ Programme completion for **Pasifika** at levels 4+ is higher than for all trainees
- ↑ Programme completion for **Māori** at levels 1–3 is slightly higher than for all trainees.
- ↓ Programme completion for **Māori** at levels 4+ is lower than for all trainees
- ↑ Programme completion for **Youth** at levels 1–3 is higher than for all trainees.
- ⊖ Programme completion for **Youth** at levels 4+ is equal to all trainees.

Priority groups are achieving well in programme completion with Pasifika achieving very well in 2019.

Assessment Against TEC Industry Training Fund (ITF) Investment Briefs for 2020–2022 – (Refer Appendix 2)

[ITF LEVELS 1–2; LEVELS 3–4; LEVELS 5–7; AND NEW ZEALAND APPRENTICESHIPS]

An assessment of ServiselQ's Y.E. 2019 Education Performance Indicator Commitment (EPIC) Outcomes, against the TEC Industry Training Fund (ITF) Investment Briefs for 2020–2022 is attached as Appendix 2.

The Appendix uses a code to identify where ServiselQ is either below, exceeded or matched the EPI targets in the Investment Briefs. [Blue = Below EPI Target / Green = Exceeded or Matched EPI Target].

There are several areas in the Investment Briefs, particularly in relation to Credit Achievement for Māori and Pasifika trainees and Young people at combined Levels 1–2 and combined Levels 3–4, that have been significantly impacted as a result of a small number of bespoke employer issues during 2019.

The employer issues included a major credit reporting issue with one of our key national employers, plus changes due to internal restructuring to training and new training models with another employer.

The national employer that had the major credit reporting issue has a large proportion of Māori, Pasifika and Young trainees, which is reflected in the information in Appendix 2.

The credit reporting issue has been fully communicated to TEC and an agreement reached to what impact this one-off situation had on ServiselQ's 2019 YE 10-Credit EPI Offset.

The credit reporting issue has mostly been resolved with the employer concerned and we expect to see a steady increase in educational performance between now and 2022.

The ongoing economic impacts of Covid-19 may, however, continue to have an adverse effect on trainee achievement in general, as employers navigate their way through uncertain times. As noted earlier, Covid-19 has had a severe economic impact on the Service Sectors in New Zealand that are covered by ServiselQ.

This is an area ServiselQ is monitoring carefully and we are working closely with our industries, employers, trainees and apprentices to provide whatever support we can over the coming months and years.

Findings of any Quality Assurance Reviews

EXTERNAL EVALUATION AND REVIEW (EER): 23–26 JUNE 2020

NZQA completed its EER of ServicelQ in June 2020 using a virtual engagement model via Zoom, due to Covid-19 social distancing requirements. It was the first ever virtual EER conducted by NZQA. NZQA have advised in their Draft EER Report on Friday 31 July 2020, that their assessment of ServicelQ is **Confident in TITO Performance** and **Confident in Capability in Self-Assessment**, which equates to a **Category 2** rating.

Summary of Results

- ▶ Strong leadership is shown in improved governance oversight, effective management and communication.
- ▶ ServicelQ understands key industry skills needs and develops suitable-relevant qualifications based on industry need and inputs.
- ▶ Training is aligned to business requirements, and resources are widely used to support on-job training and assessment.
- ▶ The new leadership has established clear direction and implemented better monitoring of Qual Link and information-sharing processes, contributing to improved confidence. However, there are still areas for improvement for trainee achievement.
- ▶ Qualifications are valued by employers and ensure staff develop the relevant skills. Trainees use their skills to gain entry-level roles or for career progression. Lower-level qualifications enabling transition into employment or training are also valued by secondary schools.
- ▶ Trainee credit completion rates are variable across employers and sectors. Factors contributing to this include the nature of the sectors – particularly retail and hospitality, which are characterised by high turnover of staff and a high proportion of youth employed – as well as the operations of large employers, which have an impact on completions.
- ▶ Improvements to support parity of achievement for priority groups have yet to be realised. However, steps have been taken to improve ServicelQ's staff cultural awareness and provide a strategic focus to improve the TITO's response to the needs of priority learner groups.
- ▶ Flexible training and assessment models are arranged to suit business needs, with suitable resources and support for employers and staff.
- ▶ ServicelQ has improved its monitoring of quality assurance processes, including the review of Qual Link training programmes and on-job assessment.
- ▶ The organisation monitors employer and trainee feedback about the qualifications in general to identify gaps and areas for improvement.
- ▶ Feedback also shows there is high satisfaction with the qualifications and arrangements managed by ServicelQ.
- ▶ The organisation has a strong focus on addressing previous quality assurance concerns, with regular review and reporting on activities using reliable data for analysis and decision-making, in order to improve outcomes.

Satisfactory Assessment – TEC's Financial Monitoring Framework

ServicelQ's financial forecasts for 2020–2021 were submitted by way of our Mix of Provision in 2019, along with new Educational Performance Indicator Commitments. ServicelQ also has an annual external Financial Audit through Grant Thornton, (previously through BDO), and understand we meet the requirements of TEC's Financial Monitoring Framework.

6. Additional Requirements for Industry Training Organisations (ITOs)

ServicelQ is fully compliant with the activities set out in **Section 10(2)** of the Industry Training and Apprenticeships Act 1992 (the Act), in relation to which funding is sought. ServicelQ's proposed plan identifies activities for which it seeks funding. Refer 'Activity' pages 10–15 of this Plan.

Re Section 10(2) of the Act, the activities are:

1. developing and maintaining skill standards for the industry (or industries); and
2. developing arrangements for the delivery (not being delivery by the organisation itself or organisations themselves) of industry training intended to enable trainees to attain those standards, including arrangements for:
 - a) monitoring the training to ensure that it enables trainees to attain those standards; and
 - b) assessing trainees and the extent to which they have in fact attained those standards; and
3. making arrangements for the delivery (not being delivery by the organisation itself or organisations themselves) of industry training that will enable trainees to attain skill standards previously set by the organisation (or organisations) and registered by the Qualifications Authority, including arrangements accepted by the Qualifications Authority for:
 - a) monitoring the training to ensure that it enables trainees to attain those standards; and
 - b) assessing trainees and the extent to which they have in fact attained those standards; and
4. the apprenticeship training activities described in section 13D(2) (which, if funded, must be carried out as a package); and
5. *[Repealed]*
6. developing arrangements for the collective representation of employees in the governance of the organisation.

ServiceIQ is fully compliant with the activities set out in **Section 13D(2)** of the Industry Training and Apprenticeships Act 1992 (the Act), in relation to which funding is sought. ServiceIQ's proposed plan identifies activities for which it seeks funding. Refer 'Activity' pages 10–15 of this Plan.

Re Section 13D(2) of the Act, the apprenticeship training activities are:

1. to promote apprenticeship training generally through the provision of information, guidance, and advice to employers and prospective apprentices on the benefits of an apprenticeship
2. to identify:
 - a) prospective apprentices; and
 - b) employers able to offer apprenticeship training
3. to arrange training or employment that may lead to apprenticeship training for prospective apprentices
4. to help prospective apprentices enter into apprenticeship training agreements
5. to produce, and facilitate (in consultation with an apprentice and the apprentice's employer) the implementation of, individual training plans consistent with an apprentice's apprenticeship training agreement
6. to monitor individual apprentices to ensure that their apprenticeship training leads them to attain, within a reasonable time, the level of skills necessary to complete a qualification in the skills of the specified industry
7. to ensure, as far as is reasonably practicable, that apprenticeship training, and every apprenticeship training agreement, within the specified industry is consistent with any apprenticeship training code
8. to provide or procure appropriate pastoral care and support for apprentices, having regard to the age and experience of the apprentice and the contents of any apprenticeship training code.

Appendix 1 – Educational Performance Indicator Commitments 2021–2022

Type	Description	Age	Ethnicity	Level	2018 Commitment	2018 Achievement	2019 Commitment	2019 Achievement (Jan-June)	2019 YTD Achievement	2018 vs 2019 YTD Achievement Average	Achievement vs 2019 YTD %	2020 Commitments	2020 Achievement 30 June	2021 Commitments	Revised 2021 Commitments	2022 Commitments
Credit Achievement	Credit Achievement rate for all trainees and apprentices	All	All	All	74.00%	70.40%	75.00%	42.47%	59.30%	56.44%	60.33%	72.00%	38.33%	74.00%	72.00%	72.00%
Credit Achievement	Credit Achievement rate for Māori trainees and apprentices at level 4 and above	All	Māori	L04 Plus Register Levels	74.00%	82.57%	75.00%	39.18%	61.80%	60.88%	47.45%	83.00%	36.12%	84.00%	80.00%	80.00%
Credit Achievement	Credit Achievement rate for Pasifika trainees and apprentices at level 4 and above	All	Pasifika	L04 Plus Register Levels	74.00%	89.47%	75.00%	46.14%	74.80%	67.81%	51.57%	87.00%	28.37%	89.00%	87.00%	87.00%
Credit Achievement	Credit Achievement rate for trainees and apprentices aged under 25 at level 4 and above	Under 25	All	L04 Plus Register Levels	74.00%	83.32%	75.00%	53.47%	77.83%	68.40%	64.17%	84.00%	35.13%	86.00%	84.00%	84.00%
Participation	Māori trainees and apprentices at level 4 and above as a proportion of all trainees and apprentices at level 4 and above	All	Māori	L04 Plus Register Levels	11.00%	12.54%	11.00%	12.64%	12.77%	12.59%	100.80%	12.00%	12.95%	12.00%	13.00%	13.00%
Participation	Pasifika trainees and apprentices at level 4 and above as a proportion of all trainees and apprentices at level 4 and above	All	Pasifika	L04 Plus Register Levels	6.00%	7.33%	6.00%	7.12%	7.69%	7.23%	97.16%	7.00%	7.78%	7.00%	8.00%	8.00%
Participation	Trainees and apprentices aged under 25 at level 4 and above as a proportion of all trainees and apprentices at level 4 and above	Under 25	All	L04 Plus Register Levels	30.00%	34.36%	30.00%	30.55%	32.02%	32.46%	88.91%	35.00%	28.12%	35.00%	35.00%	35.00%
Programme Completion – Cohort-based	Programme completion rate for all trainees at levels 1 to 3	All	All	L01-L03 Register Levels	63.00%	68.72%	64.00%	65.10%	66.49%	66.91%	94.73%	68.00%	56.00%	69.00%	69.00%	69.00%
Programme Completion – Cohort-based	Programme completion rate for Māori trainees at levels 1 to 3	All	Māori	L01-L03 Register Levels	64.00%	67.97%	65.00%	66.02%	67.07%	67.00%	97.13%	68.00%	55.00%	69.00%	69.00%	69.00%
Programme Completion – Cohort-based	Programme completion rate for Pasifika trainees at levels 1 to 3	All	Pasifika	L01-L03 Register Levels	61.00%	74.59%	62.00%	68.28%	69.59%	71.44%	91.54%	68.00%	58.00%	69.00%	69.00%	69.00%
Programme Completion – Cohort-based	Programme completion rate for trainees aged under 25 years at levels 1 to 3	Under 25	All	L01-L03 Register Levels	59.00%	68.31%	60.00%	66.06%	67.13%	67.19%	96.71%	68.00%	57.00%	69.00%	69.00%	69.00%
Programme Completion – Cohort-based	Programme completion rate for all trainees at levels 4+	All	All	L04 Plus Register Levels	75.00%	77.56%	76.00%	75.23%	76.22%	76.40%	97.00%	77.00%	64.00%	78.00%	78.00%	78.00%
Programme Completion – Cohort-based	Programme completion rate for Māori trainees at levels 4+	All	Māori	L04 Plus Register Levels	62.00%	73.46%	63.00%	70.83%	72.00%	72.15%	96.42%	77.00%	67.00%	78.00%	78.00%	78.00%
Programme Completion – Cohort-based	Programme completion rate for Pasifika trainees at levels 4+	All	Pasifika	L04 Plus Register Levels	51.00%	68.27%	52.00%	79.69%	80.47%	73.98%	116.73%	77.00%	70.00%	78.00%	78.00%	78.00%
Programme Completion – Cohort-based	Programme completion rate for trainees aged under 25 years at levels 4+	Under 25	All	L04 Plus Register Levels	67.00%	69.67%	68.00%	72.36%	73.08%	71.02%	103.86%	77.00%	66.00%	78.00%	78.00%	78.00%
Programme Completion – Cohort-based	Programme completion rate for all apprentices	All	All	All	75.00%	45.42%	76.00%	67.79%	67.79%	56.61%	149.25%	55.00%	55.00%	68.00%	68.00%	68.00%
Programme Completion – Cohort-based	Programme completion rate for Māori apprentices	All	Māori	All	62.00%	32.56%	63.00%	35.42%	35.42%	33.99%	108.78%	55.00%	44.00%	68.00%	68.00%	68.00%
Programme Completion – Cohort-based	Programme completion rate for Pasifika apprentices	All	Pasifika	All	51.00%	33.33%	52.00%	54.17%	54.17%	43.75%	162.53%	55.00%	50.00%	68.00%	68.00%	68.00%
Programme Completion – Cohort-based	Programme completion rate for apprentices aged under 25 years	Under 25	All	All	67.00%	44.64%	68.00%	56.78%	56.78%	50.71%	127.20%	55.00%	53.00%	68.00%	68.00%	68.00%
Apprentice Retention	Apprentice retention rate for all apprentices	All	All	All	76.00%	78.34%	77.00%	38.28%	72.73%	58.31%	48.86%	78.00%	47.80%	80.00%	78.00%	78.00%
Apprentice Retention	Apprentice retention rate for Māori apprentices	All	Māori	All	73.00%	69.81%	74.00%	40.54%	78.38%	55.18%	58.07%	78.00%	36.59%	80.00%	78.00%	78.00%
Apprentice Retention	Apprentice retention rate for Pasifika apprentices	All	Pasifika	All	73.00%	75.00%	74.00%	28.57%	85.71%	51.79%	38.09%	78.00%	57.14%	80.00%	78.00%	78.00%
Apprentice Retention	Apprentice retention rate for apprentices aged under 25 years	Under 25	All	All	77.00%	80.12%	78.00%	38.21%	69.11%	59.17%	47.69%	78.00%	50.83%	80.00%	78.00%	78.00%

Appendix 2 – ITF Investment Briefs 2020–2022 Analysis

[ServiceIQ EPI Performance Against TEC Investment Briefs 2020–2022]

ServiceIQ is committed to maintaining our focus on improvement to areas that are below the TEC 2020 and 2022 EPI Targets. Our Strategic Plan, Business Plan and dedicated engagement to these areas has seen significant results already and will continue to grow over 2020–2021.

TEC Investment Brief Areas

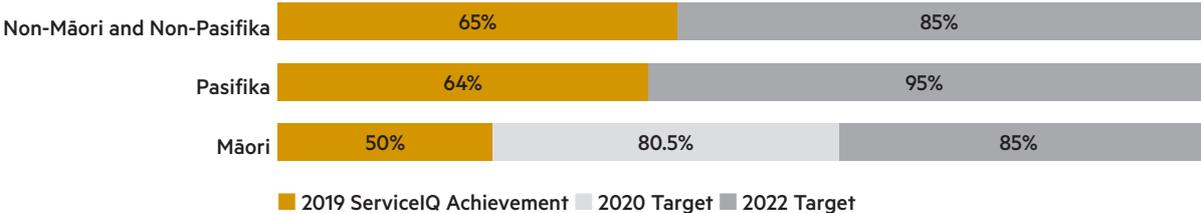
[Blue = Below EPI Target / Green = Exceeded or Matched EPI Target]

- A. Industry Training Levels 1 and 2
- B. Industry Training Levels 3 and 4
- C. Industry Training Levels 5 and 7
- D. New Zealand Apprenticeships

A. INDUSTRY TRAINING LEVELS 1 AND 2

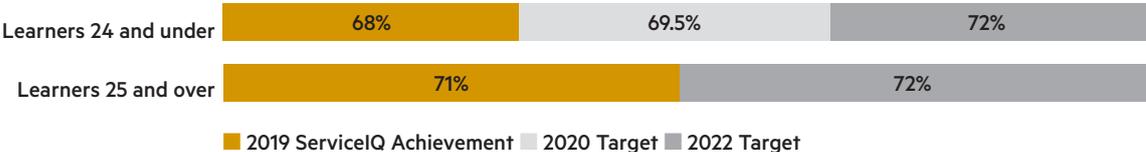
Credit Achievement Rates for Māori Learners

- ▶ 2019 credit achievement rates for Levels 1–2 for Māori is sitting at 30.5 per cent below the 2020 Target and 35.5 per cent below the 2022 Target. Pasifika are sitting at 31 per cent below the 2022 Target. Non-Māori and non-Pasifika are sitting at 20 per cent below the 2022 Target.
- ▶ Both Māori and Pasifika low rates are specific to two large employers where work is being done to address the disparity.
- ▶ Non-Māori and non-Pasifika; this low percentage also comes from the same two main employers.



Programme Completion Rates for Young Learners aged 24 and Under

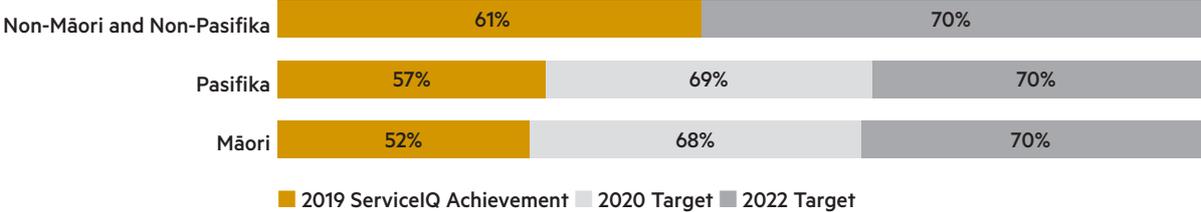
- ▶ Cohort (2019) programme completion rates for Learners 24 years and under are sitting at 1.5 per cent below the 2020 Target and 4 per cent below the 2022 Target. This is still below the target, however an increase compared to cohort (2016) of 4 per cent for both. Learners 25 and over are sitting at 1 per cent below the 2022 Target.



B. INDUSTRY TRAINING LEVELS 3 AND 4

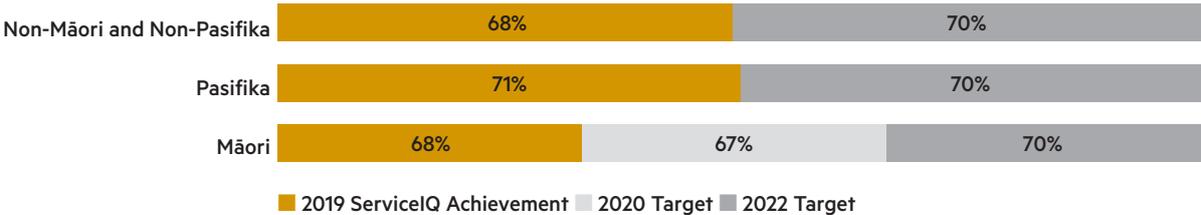
Credit Achievement Rates for Māori and Pasifika

- ▶ Credit achievement rates for Māori during 2019 are 16 per cent and 18 per cent respectively below the 2020 and 2022 Targets. Pasifika learners 2019 credit achievement rates are 12 per cent and 13 per cent below 2020 and 2022 Targets. Non-Māori and non-Pasifika are 9 per cent below the 2022 Target. See explanation under A above.



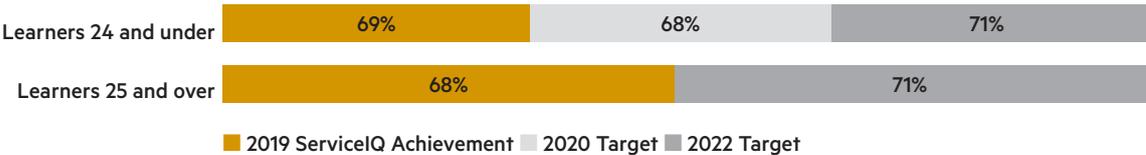
Cohort Programme Completion Rates for Māori

- ▶ Cohort (2018, 2019) programme completion rates for Māori exceeded the 2020 target with 2 per cent below the 2022 Target. Pasifika exceeded the 2022 Target. 2019 programme completion rates for non-Māori and non-Pasifika are slightly below the 2022 Target.



Cohort Programme Completion Rates for Young People Aged 24 and Under

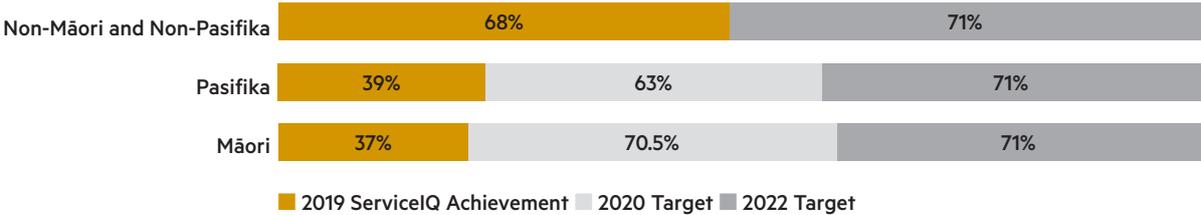
- ▶ Cohort (2018, 2019) programme completion rates for Learners 24 and under have exceeded the 2020 Target and Learners 25 and over are 3 per cent below the 2022 Target.



C. INDUSTRY TRAINING LEVELS 5-7

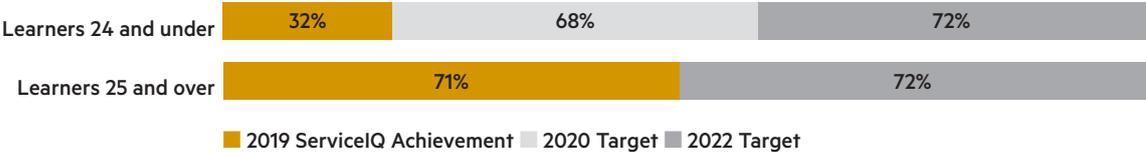
Credit Achievement Rates for Māori and Pasifika Learners

- ▶ 2019 credit achievement rates for Māori are sitting at 33.5 per cent below the 2020 Target and 34 per cent below the 2022 Target. Pasifika are sitting at 24 per cent below the 2020 Target and 32 per cent below the 2022 Target. 2019 credit achievement rates for non-Māori and non-Pasifika are slightly below the 2022 Target.
- ▶ The Māori and Pasifika sections are low due to the low volume of trainees sitting on Level 5-7. The highest areas of performance are sitting at Level 4, which has been excluded.



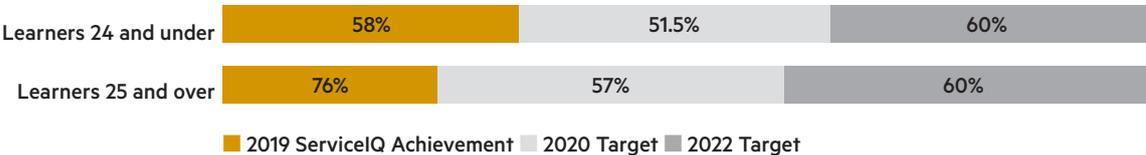
Credit Achievement Rates for Young Learners aged 24 and Under

- ▶ 2019 credit achievement rates for Learners 25 and over is 1 per cent below the 2022 Target, while Learners 24 and under are sitting at 36 per cent below the 2020 Target and 40 per cent below the 2022 Target. This low rate can be attributed to one main employer who we have been working with to address the issues.



Cohort Programme Completion Rates for Young People Aged 24 and Under

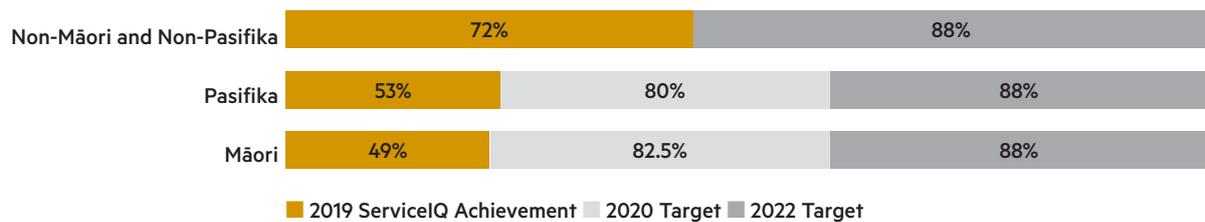
- ▶ Cohort (2018-2019) programme completion rates for Learners 25 and over have exceeded the 2020 and 2022 Targets, while Learners 24 and under exceeded the 2020 target and sitting slightly below the 2022 Target.



D. NEW ZEALAND APPRENTICES

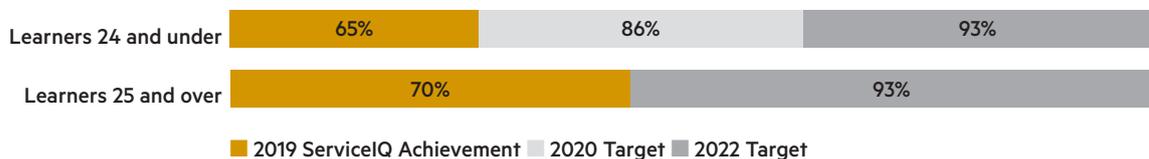
Credit Achievement Rates for Māori and Pasifika Learners

- ▶ 2019 credit achievement rates for Māori Learners are sitting at 33.5 per cent below the 2020 Target and 39 per cent below the 2022 Target. Pasifika Learners are sitting at 27 per cent below the 2020 Target and 35 per cent below the 2022 Target.
- ▶ The Māori and Pasifika percentages are mainly linked to a small number of employers who we are working with to address the disparity.
- ▶ Note: when looking at credit achievement rate by priority learning grouping, the number of trainees in the sample can be very low, so the results can be skewed up/down disproportionately e.g. L4 Cookery 2019 had only 7 Pasifika and 8 Māori trainees (vs non-M&P = 200 trainees).



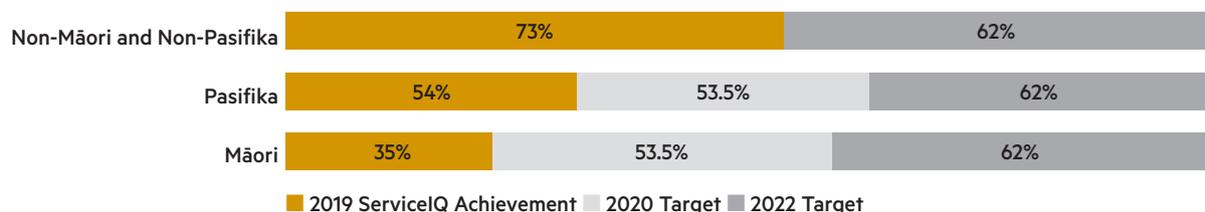
Credit Achievement Rates for Young Learners aged 24 and Under

- ▶ 2019 credit achievement rates for Young Learners on an apprenticeship are sitting at 21 per cent below the 2020 Target and 28 per cent below the 2022 Target. Learners 24 and over also require attention sitting at 23 per cent below the 2022 Target.



Cohort Programme Completion rates for Māori and Pasifika Learners

- ▶ Cohort programme completions for Māori Apprentices are sitting at 18.5 per cent below the 2020 Target and 27 per cent below the 2022 Target. Pasifika Apprentices exceeded the 2020 Target and sitting at 8 per cent below the 2022 Target. Non-Māori and non-Pasifika Apprentices exceeded the 2022 Targets.



Service IQ

HELPING OUR CUSTOMERS SUCCEED
BY GROWING THEIR TALENT



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