



Tertiary Education Commission  
Te Amorangi Mātauranga Matua

# Management and conduct of the 2006 PBRF Quality Evaluation

A TEC Perspective

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## The TEC perspective on managing the 2006 Quality Evaluation - Overview

- Planning
- Processes
- Price
- Products
- People
- Planet



## Planning – the earlier the better

- Began 18 months prior to Quality Evaluation – early preparation was essential. Decisions for future rounds need to be made well in advance to allow for this.
- Quantifying resources was challenging – need to be cost efficient but deliver a faultless evaluation round
- 2003 experience useful for learning – but expertise ‘lost’ to the TEC
- Experienced staff in TEOs greatly assisted with planning
- Review process – Sector Reference Group (SRG) made a significant contribution to consultation papers and therefore the refinements required
- Sector feedback to review via consultation papers gave the TEC clarity to make refinements for 2006 Quality Evaluation
- TEOs that actively participated in review phase were better prepared than those who chose to participate but whom did not engage earlier. This group required greater support from the TEC.



## Processes – complex and exacting

- The review process was essential to the subsequent ‘buy in’ by TEOs
- The PBRF Quality Evaluation is complex and detailed exercise and required precision and attention to detail by the TEC
- For 2006 a new project team was established – the new team had to learn all the processes and support TEOs and panels
- 2006 project team at the TEC were committed and professional. Some expertise may be able to be retained for future round but cannot be guaranteed.
- Implementation tools used in 2003 needed refining for 2006 to reflect the outcomes of the review i.e. guidelines/ forms/ process maps. Any changes for future rounds will mean further revisions.
- TEOs generally had a high level of understanding of PBRF processes but significant support was required by the sector from the TEC



## Price – PBRF QE is a significant financial cost

Costs included:

- Recruitment and training of staff, leasing of offices and arranging support services for the huge job of implementing the complex and exacting processes
- IT development for software to enable TEOs to submit data, to support the assessment processes and the decision support system to record processes
- Panel costs – 12 panels comprising 175 panel members – fees (although low, add up), training, travel, dispatch of EPs and NROs, venue hire, meeting expenses etc plus specialist advisor fees, moderation costs and the management of the complaints process
- Reporting – including release of individual results, public report and publication costs
- Cost efficiency was aimed for at all times, but operating expenditure for review and implementation of project from 2005 -2007 was close to \$2m
- Significantly less costly than 2003 when all guidelines and materials to support processes were developed from scratch.



## Products – software

- TEOs needed to develop or purchase software to submit census data as well as evidence portfolios. Larger TEOs purchased or developed own products to assist.
- Smaller TEOs were reliant on the product(s) the TEC had previously indicated would be available for 2006 Quality Evaluation
- Concern within TEC about its role of ‘software developer’ became a matter of significant concern
- The TEC honoured this commitment and developed ‘EP Manager’
- The TEC is indicating clearly that it is unlikely to retain this role of ‘software developer’ and consideration of other options will need to be explored as part of the review in order to analyse and develop satisfactory future options in time for the sector to plan



## People – making it happen

- In 2003 all staff were contracted. An expensive option and most expertise lost. High level, expensive contractors used.
- 2006 QE utilised a mixture of full time salaried staff on fixed term contracts, seconded staff from within the TEC, and temps
- Huge peaks in work activity support the mixed model for cost efficiency, but issues of retaining skills, experience and PBRF knowledge will always be challenging
- The TEC and TEOs will find it difficult to retain PBRF expertise and/or experience from one Quality Evaluation to the next, given the planned six yearly cycle



## Planet – 2006 PBRF QE not contributing to policies or practices for a sustainable environment

Consultation, communication and data uploads were electronic but:

- Over 1 million pages of photocopying of EPs, NROs, Guidelines, training material, forms etc.
- Every EP couriered to at least 3 panel members. Note that 41 panel members required international couriers.
- Every requested NRO was copied by TEOs and couriered to the TEC, and forwarded to at least 1 panelist
- All NZ panel members flew to training in Wellington in June and 175 panelists flew to Wellington for 12 three day meetings in November/ December
- Training materials copied and couriered to all international panelists and specialist advisors.



## Thank you – the cast of thousands

- The Sector Reference Group & PBRF Advisory Group
- To the project team
- TEC Internal Auditors
- The sector – including all PBRF eligible staff who prepared evidence portfolios
- PBRF Steering group and the TEC senior managers
- Panel members, specialist advisors, panel chairs and moderators