



## Reform of Vocational Education (RoVE)

# Careerforce

# TITO Transition Plan (Second Version)

**Date:** February 2022

**Version:** 2.0



# Contents

<i>Section 1: Transition approach</i> .....	4
<i>Section 2: Transition of Arranging Training</i> .....	16
<i>Section 3: Transition of Apprenticeship Training Activities</i> .....	32
<i>Section 4: Transition of other activities</i> .....	42
<i>Section 5: Declarations</i> .....	43
<b>Part 4: Appendices</b> .....	<b>44</b>
<i>Supporting information</i> .....	44

# Part 1: Introduction

---

This plan details Careerforce’s approach to transitioning all current activities to Te Pūkenga in accordance with the government’s mandated transition of ITO functions under the RoVE transformation and the Education and Training Act 2020.

In current state Careerforce works with over 2,000 employer sites across Aotearoa, supporting employers to deliver traineeship and apprenticeship programmes that lead to NZQA recognised qualifications

Central to this support is the identification of needs in workforce competence and the development of employer training solutions that meet those needs and align with government initiatives.

The majority of Careerforce training is carried out in the workplace, under an ‘employer-led’ model. Careerforce works directly and closely with employers (in their own workplaces) to help them identify their specific workforce development needs and to tailor training supports to meet them. Direct learner support for trainees is mainly via the employer. Careerforce has support systems in place for initial training and professional development of educators and assessors. When needed, Careerforce will organise contract assessors and support.

# Section 1: Transition approach

## 1.1 Overview of transition approach

Careerforce will transition all sectors' arranging training, other activities and support functions to Te Pūkenga. Based on our evaluation, a transition into Te Pūkenga is the best available option for the health and wellbeing sectors. This is based on our belief that a lift and shift transition, in which Careerforce would become an operationally autonomous business division within Te Pūkenga Work Based Learning Limited (WBL) is the best option for employers and learners. Lift and shift maintains:

- current trainee and apprentice support methods;
- business model & support systems; and
- the skill and expertise of our people - including both our frontline field team and support team.

A lift and shift transition significantly minimises disruption during the transition process, thereby maintaining continuity of service to learners and employers. It also allows us to ensure that, in the short and medium term, the current strengths of the Careerforce training model are preserved.

Careerforce has transitioned standard setting functions to Toitū te Waiora (Community, Health, Education, and Social Services) Workforce Development Council and Ringa Hora Services Workforce Development Council. This was achieved through the transfer of staff, documents, files, data and operating policies/processes along with comprehensive hand over documentation outlining key information and history for each sector.

The intention is that the remaining capability of Careerforce will transition as a complete arranging training solution to Te Pūkenga Work Based Learning subsidiary with the expectation the following principles are met:

- o The voice of all learners, employers and industry will be at the centre of any new operating model with an appropriate and effective level of governance.
- o The current service and delivery model with our current staff will be maintained throughout the transition process.
- o The current level of engagement with industry and employers will be maintained or exceeded to ensure their needs are met and where necessary industry and employers have the mechanisms in place with Te Pūkenga to affect necessary change.

- o Careerforce’s learned experience of best practice, from over 25 years of workplace-based training, will be respected and adhered to.
- o Financial reserves transferred will be utilised for the benefit of Careerforce’s current sector coverage and will allow for investment in priority learners.
- o National reach and sector-based services will be maintained.
- o Gateway programmes as pathways to health and wellbeing industry careers will continue to flourish as a key element of the new operating model.
- o Relationships with our current training providers will continue and new relationships will be established where this is needed.
- o The Executive and Senior Leadership Team and all remaining staff, capability, systems, and processes will move as one to ensure seamless continuity of training through the reform process.
- o Delivery models that currently work well will be retained whilst providing for transformation of the overall system.

Careerforce will transition all arranging training activities into Te Pūkenga, as a business division of its new workplace learning subsidiary.

This will involve a ‘lift and shift’ arrangement in which the subsidiary receives Careerforce’s people and assets related to training, maintains the current Careerforce pedagogical model, and takes ownership of the Careerforce brand.

This business unit takes responsibility for formal publicly-funded education and training (i.e. that funded through the industry training fund), our non-publicly funded training (e.g. individual unit standards), and our current work with schools (e.g. Gateway). It will also include the people, systems, and processes that support our direct education activities, such as our Learner Management Systems, people capability, and internal quality assurance work.

This allows the maintenance of current quality standards and minimises disruption to learners. It also allows the business division to leverage its location within Te Pūkenga to improve aspects of the training model and skills pipeline, such as providing delivery of training and greater pastoral care for learners.

### When the transition will occur and rationale

It is intended that Careerforce will transition to Te Pūkenga on 1 September 2022.

This timeframe will give the Transitional Industry Training Organisations (TITOs) and Te Pūkenga time to codesign an operating model and provide confidence to our sectors, employers and learners that the transition is well managed, and executed, as well as having a system which will deliver better outcomes for employers and learners.

It is intended that this date be fixed to allow certainty in planning around novating contracts and bringing to an end the legal entity of Community Support Services ITO Limited.

Most importantly it is critical to give all staff certainty of when the transition will occur and a clear understanding of the process to achieve it to ensure that all staff enjoy a seamless and risk-free move to the Te Pūkenga WBL.

### Transition of other activities

We anticipate that the 'Lift and Shift' model will allow the Careerforce business division to maintain other relevant training activities. These consist principally of:

- provision and support of Gateway and curriculum-based unit standards in Schools
- careers functions and activities intended to encourage new learners into employment
- sponsorship and other financial support for industry events, awards and promotion of training opportunities

Te Pūkenga will continue to undertake these services and maintain the current service models using the existing employees, systems and processes.

### Relevant post-transition activities

Te Pūkenga is currently undertaking design of a future operating model intended to align future service provision with the RoVE vision and the Minister's expectations.

The initial transition as a going concern is intended to ensure that there are no unintended disruptions for learners and employers through the transition period and to ensure that consultation with a wide range of stakeholders and full change impact analysis can be undertaken before changes are made to current service models.

Careerforce is committed to engaging constructively in this process prior to transition and will endeavour to keep sectors, employees, and learners engaged following transition. In summary, the initial transition as an integrated business division is to enable subsequent transformation to the future service model envisaged under RoVE.

9(2)(i)

## 1.2 Alignment with learner, employer, and industry needs

### Alignment with learners' needs

Our proposed transition approach ensures that the current model of arranging training remains as a coherent whole, enabling continuous alignment with learners (including under-served learners) needs.

Careerforce supports learners nationwide to enhance skills and improve health and wellbeing outcomes in our community.

Careerforce designs customised work-based training programmes alongside our sectors, linking training to policies and workplace practices. We then provide the tools, resources and support needed by learners. Our employer-led training model is built on quality and sustainability. Careerforce training and apprenticeship programmes respect the existing skills and knowledge of learners and make efficient use of the evidence of competence that occurs in the natural flow of work.

Careerforce supports training via either paper-based learning resources and assessments or digital based (Aka Toi). We are seeing a consistent shift towards digital learning, but we have a commitment to supporting the modes of learning that will ultimately deliver the best learner outcomes.

Careerforce supports the arranging workplace training function via:

- Dedicated Careerforce Workplace Advisors supporting workplaces and with their workforce development and training needs
- Dedicated Careerforce Apprenticeship Advisors directly supporting apprentices through kanohi ki te kanohi and virtual hui (both individual and group), noho, wananga, pastoral care and assessment
- Dedicated training and support of workplace assessors and verifiers
- Dedicated support for priority learner groups
- Provision of workplace-based training programmes that lead to nationally recognised NZQA qualifications
- Provision of learning and assessment resources, and extensive dedicated learning platform (Aka Toi)
- Moderation of workplace assessors
- Workshops and hubs supporting workplaces, assessors and trainees
- Literacy, language and numeracy support and guidance

### **Supporting trainees:**

The Careerforce arranging training model has been developed over many years to support learning and progression for learners in the health and wellbeing sectors. Different learners and different sectors require different, individualised levels of support. Most important to Careerforce trainees and apprentices is that they are provided with a seamless transition to Te Pūkenga that gives them the same level of service and support, that they receive throughout the learning journey currently provided by Careerforce.

### **Workplace Assessment:**

Central to the arranging training activities are assessment and provision of constructive and developmental feedback through the learning journey. Careerforce staff assessors support the assessment of specialist skills and higher-level (4-6) programmes within Careerforce's coverage. Staff assessors take the lead on trainee assessment and support in full-service training agreements. Staff assessors are responsible for maintaining contact with the trainee, preparing trainees for assessment, assessing the evidence presented by trainees, and providing feedback to support the trainee's development.

In addition to staff assessors Careerforce currently has just under 1,200 workplace assessors operating within the employer-led Careerforce model. Workplace assessors are a vital part of the training cycle. They oversee the formal marking process and provide mentoring, either within their own workplace or independently. They are a vital part of maintaining the quality of Careerforce qualifications and programmes.

Careerforce workplace assessors are required to meet the criteria outlined in the Consent and Moderations Requirements for the standards they will assess. In summary, the criteria are that assessors:

- are appropriately qualified to assess against assessment standards. To meet this requirement assessors must hold unit standard 4098.
- either hold a qualification relevant to the content of the standards being assessed, at or above the level of the standards, or can demonstrate equivalent knowledge and skills.
- undertake relevant training or professional development to remain current in their sector.
- where relevant, hold professional registration.

### **Supporting Apprentices:**

Pastoral care is an important part of the support offered to our apprentices. It involves guidance, clarification, motivation and support to the apprentices as they move through the programme. It is offered face to face where practical and is also provided virtually through a variety of modes. In some instances, for efficiency, it is delivered in a group setting. Typically, our advisors offer this 4 times annually, however some apprentices require more contact and this is offered on an as needs basis depending on the learning style and needs of the apprentice. For apprentices assigned to a Careerforce Apprenticeship Advisor (CAA) a pastoral care log is kept in ITOMIC to record pastoral care events and activities. CAA team meetings have a standing agenda item to discuss pastoral care issues.

## Alignment with employers' and industries' needs

Due to its health and wellbeing coverage, Careerforce works closely with government, national peak bodies and employers to support the sectors it serves to improve the health and wellbeing of New Zealanders. Central to this support is the identification of needs in workforce competence and the development of employer training solutions that meet those needs and align with government initiatives.

The majority of Careerforce training is carried out in the workplace, under an 'employer-led' model. Careerforce works directly and closely with employers (in their own workplaces) to help them identify their specific workforce development needs and to tailor training supports to meet them. Direct learner support for *trainees* is mainly via the employer. Careerforce has support systems in place for initial training and professional development of educators and assessors. When needed, Careerforce will organise contract assessors and support.

Our proposed transition approach is supported by our sectors as it ensures that the current model of arranging training remains as a coherent whole enabling continuous alignment with employer, sector and government needs. As with trainees and apprentices, the most important element of our training activities for employers is the workplace-based, contextualised approach. This follows best practice in workplace-led learning and treats both employers and learners as active participants in the training process. This allows training to be adapted to the specific context of the organisation, its workforce development needs, and the trainee/apprentice's own learning requirements. We engage with our stakeholders every day through the work we currently do in supporting employers and learners in the achievement of qualifications.

A recurring theme from employers, as we have engaged with them on ROVE has been the high value they place on the staff of Careerforce with whom they work. They see these staff as having a deep connection to the health and wellbeing sectors and to the employers in the sector who are training employees, and do not want to see them lost as arrangements move to the Te Pūkenga Work-Based Learning subsidiary.

In addition, throughout RoVE discussions the following three themes have clearly emerged:

- Our stakeholders appreciate the current service offering of Careerforce but there are some areas where direct training by Careerforce would be beneficial
- Employers cannot afford to release staff from shifts to attend off-job learning, and the demographic of the workforce often means they are unable to attend off-job training in their own time
- Stakeholders are already under huge pressure due to COVID-19, funding conditions, workforce shortages and the recently announced Health Reform

Most important to our employers during RoVE is that they are provided with a seamless transition that gives them the same level of service and support that they receive throughout the learning journey currently provided by Careerforce. The proposed transition to Te Pūkenga through a lift and shift transaction is expected to have minimal impact on employers and the sectors that Careerforce serves. As the Te Pūkenga operating model is designed and implemented this offers the opportunity to provide the additional direct training delivery within workplace industry training that some employers have advised would be of benefit.

## Current Provision Models

### Full Service Model:

Employers have the option of choosing a full service model. The training is carried out in the workplace and Careerforce provides the assessor. The assessor may be a Careerforce contracted assessor or a Careerforce staff assessor:

- Assessors meet with workplace observers to outline requirements and expectations.
- Regular meetings are scheduled both with trainees and observers.
- Assessments are submitted and processed. Results are then submitted via Careerforce Learning Management System Aka Toi, or Iportal

There are two exceptions within this model:

1. The New Zealand Certificate in Health and Wellbeing (New-born Hearing Screening) (Level 3) is offered exclusively as full service using a contracted assessor identified by the Ministry of Health.
2. The New Zealand Diploma in Business Leadership and Management (Level 5) is offered under the full-service model using Careerforce staff assessors only.

### Employer-led Model:

Our employer-led training model is built on quality and sustainability. Careerforce training is embedded in everyday workplace activities. Employers support trainees to learn on-the-job and assessment is carried out by assessors within the workplace.

This model requires that the employer meets the following criteria:

- The workplace has the training infrastructure to support a model of 'assess, learn, assess' and naturally occurring evidence is captured
- The workplace has registered Careerforce assessors employed and workplace observers who support the assessors by seeing or hearing evidence of competence as it occurs
- The workplace has educators/assessors who deliver the additional learning required
- The workplace can deliver quality training outcomes

**Contract Model:**

The contracted employer model is implemented if the employer has met set criteria.

Contracted employers provide apprentice promotion, coordination, coaching, pastoral care, assessment and administration for apprentices within their organisation.

They support apprentices to complete Apprenticeship Training Agreements and forward these to Careerforce; ensure every apprentice has a Training Plan and Training Needs Analysis completed; monitor and support apprentice progress and update the Training Plan at the beginning and end of each module of learning.

Contracted employers have assessors with scope to assess the programme and they maintain an acceptable ratio of assessors to apprentices. Pastoral care is an important part of the support offered to our apprentices. It involves guidance, clarification, motivation and support to the apprentices as they move through the programme. It is offered face to face where practical but is also done via phone and email. In some instances, for efficiency, it is delivered in a group setting.

They prepare and support managers / supervisors / observers to complete attestation and observation forms and assess all apprentices as per the training plan. Contracted employers comply with the requirements of the Careerforce Moderation plan

They provide quarterly reporting on the impact of the training and on how their pastoral support is responsive to the apprentices needs. Careerforce monitors the reporting of Pastoral Care events of Contracted employers.

## 1.3 Employer and industry support

### Employer engagement and support

Careerforce has undertaken extensive engagement with employers and industry in developing our transition intentions and plan since RoVE was first proposed.

Careerforce first engaged with stakeholders to understand their priorities and used these to determine the viable options for a receiving provider of Careerforce's arranging training function.

The key priorities shared with us from our stakeholders were:

- Employers need a seamless transition of training support to receiving entities, that will ensure the same level of service and support that they receive throughout the learning journey with Careerforce
- Employers need, as a minimum, the continuation of:
  - o identification of needs for learning in their workplace context
  - o the ability to create learning supports and pathways specific to the organisation that result in competence of the employee
  - o the development of employer training solutions that meet both employer and employee needs, align with government regulations, and meet commissioning requirements
- Employers cannot afford to release staff from shifts to attend off-job learning and the demographic of the workforce means employees are unable to attend off-job training in their own time. Careerforce is quite unique in that its learners are 100% workplace based, with no off-job training, and on-job solutions need to be prioritised
- The sector is already under huge pressure due to workforce shortages, COVID-19, funding mechanisms for their organisations, and the Health Reform. There is very little scope left for disruption and uninvited unnecessary change.

We considered closely the sectors that Careerforce currently provides support for:

- Aged residential care
- Disability support
- Healthcare services
- Home and community services
- Mental health and addiction support
- Social and community services
- Youth work
- Cleaning
- Urban pest management

There is very close synergy in the workforce needs and capability of the first seven of these sectors. The skills requirements are aligned, and the programmes undertaken across these sectors lead to similar qualifications across the sectors. This results in strong interdependencies between the sectors.

The two sectors that could be viewed as distinct are Cleaning and Urban Pest Management. However, the connection with infection control and hygiene is obvious and the connection is robust.

Based on the priorities of our stakeholders, and the synergy and interdependencies between the sectors, Careerforce determined that the best way forward is to complete a transition of Careerforce’s programmes in their entirety and not dilute the strength of the collective.

There are three types of entities that are included within RoVE as possible “receiving providers” for the transition of an ITOs arranging training function. These being Te Pūkenga, Wananga and Private Training Establishments. After careful analysis (including information supplied by TEC) and consideration of all the options available including meetings with Te Pūkenga and Te Wānanga o Aotearoa (amongst others) the options were reduced to just three. The three options presented to our stakeholders in mid-2021 were:

- Careerforce (as a PTE);
- Te Pūkenga; and
- Te Wānanga o Aotearoa

We determined the most effective and efficient way to engage our stakeholders was to host a series of roadshows and online forums. In addition, a series of one-on-one meetings with our key stakeholders and peak associations were held. This consultation occurred July – August 2021.

The information provided at the forums was also made available on the Careerforce website for those who were unable to attend the forum offerings above. Information available included:

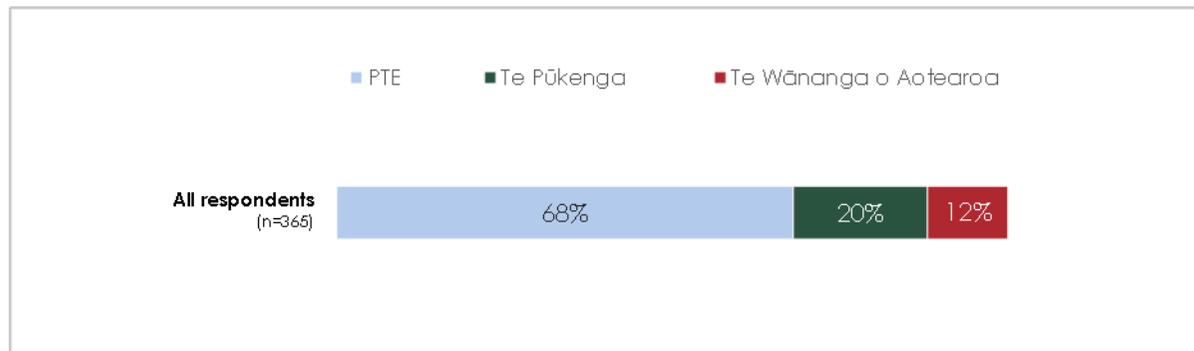
- A recording of the first online forum;
- A copy of the presentation slides;
- A summary document of the Careerforce PTE offering;
- A summary document of the Te Pūkenga offering;
- A summary document of the Te Wānanga o Aotearoa offering; and
- A series of frequently asked questions (FAQs) updated after each event.

Following the roadshows and online forums, stakeholders were asked to complete a survey on the Careerforce website where they were able to indicate their order of preference for the proposed options and make additional comment to explain the reasoning behind their decision (should they wish to).

A summary of the survey result is:

Nearly seven out of ten employers and other stakeholders rank the PTE option number '1' indicating it is their most preferred option (68%) (see Figure 1). A further 20% say their first preference is the Te Pūkenga option, and the remaining 12% indicate that their number one option is Te Wānanga o Aotearoa.

Figure 1: Proportion of employers and other stakeholders that 'most prefer' each option



### Summary of key findings:

- Employers and other stakeholders who responded to the survey would most prefer Careerforce to transition into a PTE (68%). In contrast, 20% would prefer Careerforce join with Te Pūkenga, and 12% would prefer it to become part of Te Wānanga o Aotearoa.
- The PTE option was preferred by the majority of those in all sectors. But depending on the sector, this ranges from a small to large majority.
- The main reasons why employers and other stakeholders prefer Careerforce to transition into a PTE include:
  - The desire to retain the high-quality service that Careerforce provides
  - Careerforce has an in-depth knowledge of their needs
  - Things work well, so why change
  - Careerforce and its systems are familiar
  - Careerforce has a long history and is highly experienced
  - It is well placed to provide workplace-based training
- Reasons given by those who prefer Careerforce to transition into Te Pūkenga include:
  - Te Pūkenga is the best fit or most capable
  - It will ensure consistency of training
  - It offers a range of options or pathways
  - They don't want Careerforce to become a PTE, not a viable option
  - Te Pūkenga will provide more support, supporting Māori / Pasifika / learning disabilities
- Similar kinds of reasons were given by those who would prefer Careerforce to transition into Te Wānanga o Aotearoa. In particular:
  - Te Wānanga o Aotearoa is the best fit or most capable
  - Te Wānanga o Aotearoa will provide more support, supporting Māori / Pasifika / learning disabilities

Careerforce's stakeholder's second favoured option is a transition to Te Pūkenga. The Tertiary Education Commission's (TEC) preference is for Careerforce's arranging training function to transition to Te Pūkenga. This was communicated through a number of forums – an example being the following extract of an email from TEC to Careerforce dated 20 January 2021:

“To summarise the key points of our earlier guidance which is specific to Careerforce:

- We believe that Te Pūkenga is likely to be a good fit for Careerforce
- TEC is not likely to be supportive of Careerforce becoming a PTE to continue to deliver arranging training”.

After considering the consultation report and the repeated communication from TEC that a transition to Te Pūkenga was the preferred option, the Careerforce Board determined, in September 2021, that a transition to Te Pūkenga was required to achieve approval of the transition plan from TEC and ongoing funding support for the workplace training needs of the health and wellbeing sectors.

While the majority of support was for Careerforce to establish a PTE, the Careerforce Board did not see the complete mandate they required to go ahead with this option, especially given the preference clearly represented by TEC.

Careerforce advised learners, employers and peak bodies of this decision through a number of forums including email, newsletter, website and meetings. There have no significant objections of note to the decision. While stakeholders signalled a strong preference for a transition to a Careerforce PTE there has been general understanding that the governments intent of RoVE was for a unified vocational education system within Te Pūkenga. With Careerforce being clear in the transition process and of the intent to maximise the opportunities for the sectors as part of the Te Pūkenga network there have been no material concerns raised.

It was deemed unnecessary to conduct further consultation with stakeholders as this would be repeating a process that had already been completed. In addition, the sectors that Careerforce serves are under extraordinary pressure from COVID-19 and the enduring workforce shortages that are now at crisis point. Going back out to these sectors to repeat the engagement process would be disrespectful of their current situation and priorities.

It was concluded that the proposed transition approach is supported by our sectors as it ensures that the current model of arranging training remains as a coherent whole enabling continuous alignment with employer and industry needs. From September 2021, work was undertaken with Te Pūkenga in planning the pathway to the transition of Careerforce's arranging training function.

## Industry engagement and support

Industry body	Representation	Engaged with? Y/N	Supportive? Y/N
Ara Taiohi	Ara Taiohi is the peak body for youth development in Aotearoa. It has a national membership of over 1,600 personal and organisational members representing a diverse range of groups and practitioners that work with young people.	Yes	Yes
Business Services Contractors of New Zealand Inc. (BSCNZ)	BSCNZ promotes the cleaning industry's vital role in providing clean, healthy environments. The BSCNZ has been representing New Zealand's building service contractors for over 50 years. Members range from sole operators to multi-national companies.	Yes	Yes
Home and Community Health Association (HCHA)	HCHA members provide home and community health services in NZ. There are 48 home and community organisations that employ 17,000 people to support 100,000 within their homes	Yes	Yes
New Zealand Aged Care Association (NZACA)	NZACA represents 93%, equivalent to 37,000 beds, from the aged residential care sector. The services they provide include rest home, hospital, dementia and psychogeriatric care as well as short term care.	Yes	Yes
New Zealand Disability Support Network (NZDSN)	NZDSN is a national network of organisations and individuals providing disability support services, mainly through contracts with government. NZDSN takes a pan-disability perspective on the sector.	Yes	Yes
New Zealand Society of Diversional and Recreational Therapy (NZSDRT)	NZSDRT is a membership society for: Diversional, Recreational Motivation Therapists; Activity Co-ordinators; Occupational Therapy Aides.	Yes	Yes
Pest Management Association of New Zealand (PMANZ)	PMANZ mission as an association of pest management firms is to communicate the role of the industry as protectors of food, health, property and the environment and affect the success of members through education and advocacy.	Yes	Yes
Platform Trust	Platform is a charitable trust that works with organisations that provide support to people and their whānau who are directly impacted by mental health and addiction. Platform's nationwide network of 81 member organisations work in a range of community mental health and addiction services.	Yes	Yes
Social Service Providers Aotearoa (SSPA)	SSPA is a national body representing over 200 community organisations, representing an approximate collective of 6,500 staff and 5,000 volunteers providing essential services to children and young people, families, whānau and communities throughout NZ.	Yes	Yes

Careerforce uses the following mechanisms to regularly engage with industry and stakeholders:

Audience	Details
Kaiāwhina Workforce Action Plan (KWAP)	<p>The KWAP is owned by the Health and Disability sector and overseen by a partnership between Careerforce and the Ministry of Health, the first and formative 5-year Kaiāwhina Workforce Action Plan 2015-2020 was launched in July 2015.</p> <p>The KWAP has five key priorities for the next period 2020-2025, they are; Build Cultural Capability, Connect Kaiāwhina, Accelerate New Ways of Working, Create Workforce Knowledge and Supply &amp; Develop the Workforce.</p> <p>The 20-year vision of the KWAP is “A Kaiāwhina workforce that adds value to the health and wellbeing of New Zealanders by being competent, adaptable and an integral part of service provision”.</p> <p>The Kaiāwhina Workforce Taskforce is made up of a broad range of health and disability sector leaders, who meet quarterly to guide and progress the plan’s actions.</p> <p><i>Note that the KWAP was transitioned to Toitū te Waiora in October 2021 as part of the WDC transition. Careerforce remains an active participant.</i></p>
Disability Advisory Group	<p>In 2019, Careerforce established, a tangata whaikaha, disability and whānau lived experience advisory group.</p> <p>The group helps to shape Careerforce’s understanding, inform qualification reviews, and co-create programme learning, assessment and implementation reviews.</p>
Whānau, Community and Social Services Reference Group	<p>The Whānau, Community and Social Services Reference Group was convened last year to provide guidance and support to Careerforce product development.</p> <p>The role of the Whānau, Community and Social Services Reference Group (WCSSRG) is to represent the wider social services sector and provide advice, expertise and agree completions of the actions associated with the objective: kōkiritia tonutia te ara whai pūkenga – strengthen and accelerate developing career pathways and skills.</p>

Audience	Details
Peak Bodies	<ul style="list-style-type: none"> <li>• Kanohi ki te kanohi or phone call – regular engagement by CEO or senior member of staff</li> <li>• Skills for Good newsletter – sent out monthly</li> <li>• Conference – participation at Peak Body conferences on an annual basis</li> <li>• Invited to contribute to programme development and reviews</li> <li>• Invited to contribute insights to sector reports</li> <li>• Invited to Careerforce engagement events (e.g WDC consultation) or consultation via other means (e.g. surveys)</li> <li>• Providing editorial or advertising material for industry publications and/or communication channels</li> </ul>
Workplaces	<ul style="list-style-type: none"> <li>• Skills for Good newsletter – sent out monthly</li> <li>• Kanohi ki te kanohi or phone call – quarterly engagement by Careerforce Workplace Advisor (and Careerforce senior leaders for larger employers)</li> <li>• Invited to contribute to programme development and reviews</li> <li>• Invited to contribute insights to sector pipeline reports</li> <li>• Invited to Careerforce engagement events (e.g WDC consultation) or consultation via other means (e.g. surveys)</li> <li>• Invited to contribute to annual Employer Survey</li> </ul>
Assessors	<ul style="list-style-type: none"> <li>• Assessor newsletter – sent to all assessors bi-monthly</li> <li>• Invited to contribute to programme development and reviews</li> <li>• Invited to attend assessor professional development activities</li> </ul>
Trainees <i>(In addition to support provided as a trainee of Careerforce)</i>	<ul style="list-style-type: none"> <li>• Trainee welcome pack – all new trainees receive a welcome pack from Careerforce upon enrolment</li> <li>• Welcome email – all trainees receive a welcome email upon enrolment</li> <li>• Training for Good newsletter – sent to all trainees quarterly</li> <li>• Invited to contribute to programme development and reviews</li> <li>• Invited to contribute to Graduate Survey at completion of programme</li> <li>• Invited to contribute to Withdrawn Learner Survey where learner has withdrawn from programme before completion</li> </ul>

Audience	Details
Apprentices <i>(In addition to support provided as an apprentice of Careerforce)</i>	<ul style="list-style-type: none"> <li>• Welcome email – all apprentices receive a welcome email upon enrolment</li> <li>• Kanohi ki te kanohi or phone call – a quarterly pastoral care event for all apprentices</li> <li>• Apprenticeship Journey newsletter – sent to all apprentices bi-monthly</li> <li>• Quarterly apprenticeship survey</li> <li>• Invited to contribute to programme development and reviews</li> <li>• Graduate survey response requested at completion of programme</li> </ul>

### Nature of engagement with employers and industry

Refer above to beginning of Section 1.3

### Evidence key existing employers and industry bodies support the Transition Plan

Refer above to Section 1.3 regarding employer consultation.

Refer Appendix 1 – Letters of Support from Peak Bodies.

## 1.4 Status of discussions with Receiving Organisations

Activity	Receiving Organisation	Progress as at 28 February 2022	Next significant milestone	Issues to resolve
<b>Arranging Training and Apprenticeship Training Activities</b>	Te Pūkenga	Agreement to transition all Careerforce arranging training function to Te Pūkenga. Discovery completed and Terms Sheet agreed between the two parties (February 2022).	Te Pūkenga completion of the design for the future operating model.  Te Pūkenga Transfer Agreement completion.	Understanding of proposed operating and organisational structure to provide surety to our industry stakeholders.

## 1.5 Conflicts of interest

N/A
-----

# Section 2: Transition of Arranging Training

## 2.1 Rationale for preferred provider(s) of Arranging Training

Providers that have been considered for Arranging Training

Providers considered	Approach to engaging and evaluating this provider	Decision and rationale
Te Pūkenga	<p>Utilised longlist criteria and accessed public information including EER profiles of subsidiary entities, NZQA provider profile, Te Pūkenga website. Contributed to discussion at TITO CEO / Te Pūkenga workshops.</p> <p>Meetings held with Te Pūkenga regarding the option of transitioning Careerforce’s arranging training function in full.</p> <p>Te Pūkenga provided collateral for consultation presentation and website information.</p> <p>Refer Appendix 2 for the Te Pūkenga consultation takeaway document.</p>	<p>The transition to Te Pūkenga’s Work Based Learning subsidiary will be on the basis of a ‘lift and shift’ approach. This provides certainty on continuity of service for staff, learners and employers.</p>

Providers considered	Approach to engaging and evaluating this provider	Decision and rationale
Careerforce as a PTE	<p>The Careerforce Board of Directors, which are largely sector/industry appointments, made the decision to pursue this option having considered the feedback received from stakeholders.</p> <p>The intent is not to merely continue “arrange training” but rather to innovate and build upon this to develop a delivery model that increases the value we are already offering. What we currently do and would continue to do:</p> <ul style="list-style-type: none"> <li>• Careerforce engages strongly with employers to ensure continued alignment to current and future needs.</li> </ul> <p>Careerforce understands that employers want to know that staff are able to perform job specific tasks, to job standards, on the job, i.e. they want assurance of proof of competence. This is what Careerforce has always, and will continue to, focus on while working with employers and learners. This point of difference and expertise in understanding the needs of employers comes second to no other providers within our sectors.</p>	<p>Careerforce did not include this solution within its transition plan as it did not gain the complete mandate of the sectors as the Careerforce Board required.</p> <p>This was essential given the TEC position that this was not a preferred option.</p>
Te Wānanga o Aotearoa (TWOA)	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p> <p>Meetings held with TWOA regarding the option of transitioning Careerforce’s arranging training function in full.</p> <p>TWOA provided collateral for consultation presentation and website information.</p> <p>Refer Appendix 3 for the TWOA consultation takeaway document.</p>	<p>Included as an option in the stakeholder consultation that occurred in July – August 2021.</p> <p>Stakeholders determined this as the least preferred option of the three considered.</p>

Providers considered	Approach to engaging and evaluating this provider	Decision and rationale
9(2)(b)(ii) [REDACTED]	Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.	<p>Not suitable.</p> <p>This organisation focuses on training international students with 9(2)(b)(ii) [REDACTED]. They have experience with work integrated learning but not work based learning. Connection to a limited number of employers via MoU. Limited connection to industry via an advisory group. Good learner outcomes for relatively small learner numbers. Limited facilities and does not appear to support eLearning.</p> <p>Following discussions with Careerforce, TEC understands Careerforce's rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>
9(2)(b)(ii) [REDACTED]	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p> <p>Meeting was held with 9(2)(b)(ii) [REDACTED] on 24 March 2021.</p> <p>While the discussion was positive, the decision stood that this PTE was unsuitable for large scale transition.</p>	<p>Not suitable.</p> <p>This 9(2)(b)(ii) [REDACTED] organisation focuses on and achieves good outcomes in providing pre-employment training to priority learners and international students including for support work and healthcare roles. It does not appear to have infrastructure to support arranging training on a national scale. Very limited relationships with industry. Does not appear to support eLearning.</p> <p>Following discussions with Careerforce, TEC understands Careerforce's rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>

Providers considered	Approach to engaging and evaluating this provider	Decision and rationale
9(2)(b)(ii)	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p> <p>9(2)(b)(ii)</p> <p>9(2)(b)(ii)</p> <p>9(2)(b)(ii)</p>	<p>Not suitable.</p> <p>This 9(2)(b)(ii) organisation focuses on provision of Health and Wellbeing qualifications for aged care support roles. They provide online options for people in work to credential or upskill after hours rather than in work.</p> <p>Do not appear to have infrastructure to support national work-based provision.</p> <p>Relationship with industry unclear however they engage and get positive feedback in relation to student work placements.</p>
9(2)(b)(ii)	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p>	<p>Not suitable.</p> <p>9(2)(b)(ii) work with programmes offered in locations across New Zealand. Offers work integrated learning but does not appear to offer work-based learning or have systems in place to support WBL. Does not offer eLearning options. Connection to industry appears to be for work placement options and some input to programme development.</p> <p>Following discussions with Careerforce, TEC understands Careerforce’s rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>

Providers considered	Approach to engaging and evaluating this provider	Decision and rationale
<p>9(2)(b)(ii) [REDACTED] [REDACTED] [REDACTED] [REDACTED]</p>	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p> <p>Meeting was held with 9(2)(b)(ii) [REDACTED] in early 2021. While the discussion was positive, the decision stood that this PTE was unsuitable for large scale transition.</p>	<p>Not suitable.</p> <p>9(2)(b)(ii) [REDACTED] offers full-time pre-employment training on campus at level 2 and 3. They arrange work placement but do not appear to offer work-based learning. No apparent eLearning options available. Utilise MoU to manage employer/industry partnerships, however unclear if these are used in industries relevant to Careerforce.</p> <p>Following discussions with Careerforce, TEC understands Careerforce’s rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>
<p>9(2)(b)(ii) [REDACTED] [REDACTED]</p>	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p>	<p>Not suitable.</p> <p>9(2)(b)(ii) [REDACTED] are small 9(2)(b)(ii) [REDACTED] PTE who mainly deliver Level 5, 6 and 7 programmes to international students. They do work integrated but no work-based learning. No obvious eLearning available. Connects to employers through student placement otherwise no apparent connection to industry.</p> <p>Following discussions with Careerforce, TEC understands Careerforce’s rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>

Providers considered	Approach to engaging and evaluating this provider	Decision and rationale
9(2)(b)(ii) [Redacted]	Utilised longlist criteria.  Meeting held to clarify requirements for arranging training.	Not suitable.  This small niche 9(2)(b)(ii) PTE provides training for [Redacted]  Following discussions with Careerforce, TEC understands Careerforce’s rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health & Wellbeing sectors.
9(2)(b)(ii) [Redacted]	Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.  Follow up discussions held with 9(2)(b)(ii) to clarify requirements for arranging training.  The decision stood that this PTE was unsuitable for large scale transition.	Not suitable.  9(2)(b)(ii) [Redacted] [Redacted] [Redacted] [Redacted]
9(2)(b)(ii) [Redacted] [Redacted]	Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.	Not suitable.  9(2)(b)(ii) youth work programmes in 9(2)(b)(ii) [Redacted]. They offer work integrated learning but do not offer work-based learning. They have eLearning capability.  9(2)(b)(ii) have insufficient geographical coverage to deliver arranging training activities for the sector.

Providers considered	Approach to engaging and evaluating this provider	Decision and rationale
9(2)(b)(ii) [REDACTED] [REDACTED]	Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.	<p>Not suitable.</p> <p>This 9(2)(b)(ii) based PTE offers 9(2)(b)(ii) [REDACTED]. They also offer tailored 9(2)(b)(ii) [REDACTED] so have some experience with work-based learning. No eLearning. They have well established relationships with local aged care facilities but wider connection to industry is not apparent.</p> <p>Following discussions with Careerforce, TEC understands Careerforce's rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>
9(2)(b)(ii) [REDACTED] [REDACTED]	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p> <p>There has been no approach made by 9(2)(b)(ii) [REDACTED] to Careerforce expressing interest in the transition of arranging training.</p>	<p>Not suitable.</p> <p>This 9(2)(b)(ii) organisation specialises in pre-employment training for the health and wellbeing sectors. They have experience with work integrated learning through enabling work placements, but not work based learning. They support online learning.</p>
9(2)(b)(ii) [REDACTED] [REDACTED] [REDACTED]	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p> <p>Meeting was held with 9(2)(b)(ii) [REDACTED] on the 8<sup>th</sup> March 2021. While the discussion was positive, the decision stood that this PTE was unsuitable for large scale transition.</p>	<p>Not suitable.</p> <p>9(2)(b)(ii) targets domestic students seeking alternative pathways for employment-focused education and training. They offer campus-based full-time study and do not have capability or systems in place to support work-based learning.</p>

Providers considered	Approach to engaging and evaluating this provider	Decision and rationale
<p>9(2)(b)(ii) [redacted] [redacted] [redacted] [redacted] [redacted]</p>	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p> <p>Meeting was held with 9(2)(b)(ii) [redacted] on 9 April 2021. While the discussion was positive, the decision stood that this PTE was unsuitable for large scale transition.</p>	<p>Not suitable.</p> <p>9(2)(b)(ii) [redacted] offer pre-employment training in a range of areas for primarily second-chance learners in 9(2)(b)(ii) [redacted]. [redacted] Have connections to local employers and engage industry via advisory groups, however this is limited to local networks only.</p> <p>Following discussions with Careerforce, TEC understands Careerforce’s rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>
<p>9(2)(b)(ii) [redacted] [redacted] [redacted]</p>	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p>	<p>Not suitable.</p> <p>9(2)(b)(ii) [redacted] has an exclusive focus on supporting 9(2)(b)(ii) [redacted] into further learning and employment through trades-based education. 9(2)(b)(ii) [redacted]</p> <p>Following discussions with Careerforce, TEC understands Careerforce’s rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>

Providers considered	Approach to engaging and evaluating this provider	Decision and rationale
9(2)(b)(ii) [REDACTED]	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p> <p>Meeting was held with 9(2)(b)(ii) [REDACTED] on 1 April 2021.</p> <p>While the discussion was positive, the decision stood that this PTE was unsuitable for large scale transition.</p>	<p>Not suitable.</p> <p>This 9(2)(b)(ii) [REDACTED] organisation appears to focus on international education using a blend of tuition and work integrated learning. Online learning not apparent. Connection to industry or key industry partners not known.</p> <p>Following discussions with Careerforce, TEC understands Careerforce’s rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>
9(2)(b)(ii) [REDACTED] [REDACTED]	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p>	<p>Not suitable.</p> <p>9(2)(b)(ii) [REDACTED] Extent of engagement with industry is unclear.</p> <p>Following discussions with Careerforce, TEC understands Careerforce’s rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>
9(2)(b)(ii) [REDACTED] [REDACTED] [REDACTED]	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p>	<p>9(2)(b)(ii) [REDACTED] that also offers training and professional development for 9(2)(b)(ii) [REDACTED]. Offers existing programme throughout New Zealand using online learning supplemented by seminars. Robust systems in place to manage workplace training and assessment.</p> <p>The existing programme that the 9(2)(b)(ii) [REDACTED] offers is well accepted through the sector, with only a minority opting for the Careerforce alternative. No further action or transition of the Careerforce programme is warranted.</p>

Providers considered	Approach to engaging and evaluating this provider	Decision and rationale
9(2)(b)(ii) [REDACTED]	Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.	<p>Not suitable.</p> <p>9(2)(b)(ii) [REDACTED] is part of 9(2)(b)(ii) [REDACTED]</p> <p>[REDACTED] They deliver a single programme to support people engaged in their service provision. No online learning apparent. Connection to local community. Work integrated learning but no work-based learning.</p> <p>Following discussions with Careerforce, TEC understands Careerforce's rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>
9(2)(b)(ii) [REDACTED]	Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.	<p>Not suitable.</p> <p>This 9(2)(b)(ii) [REDACTED] based organisation offers the 9(2)(b)(ii) [REDACTED] students using blended work integrated delivery. EER report signals strong links to local industry. No online learning.</p> <p>Following discussions with Careerforce, TEC understands Careerforce's rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>

Providers considered	Approach to engaging and evaluating this provider	Decision and rationale
<p>9(2)(b)(ii) [redacted] [redacted] [redacted] [redacted]</p>	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p>	<p>Not suitable.</p> <p>This organisation is focussed on offering 9(2)(b)(ii) [redacted]. Do not yet seem to offer any H&amp;W; learning through full time course delivered 9(2)(b)(ii) [redacted].</p> <p>Following discussions with Careerforce, TEC understands Careerforce’s rationale for not engaging with this PTE to discuss the possibility of PTE arranging training for the Health &amp; Wellbeing sectors.</p>
<p>9(2)(b)(ii) [redacted]</p>	<p>Careerforce is supporting 9(2)(b)(ii) [redacted] on their journey to gain accreditation for the 9(2)(b)(ii) [redacted] through initially contracting them to support delivery of the 9(2)(b)(ii) [redacted] in kaupapa Māori organisations.</p> <p>Careerforce has met with 9(2)(b)(ii) [redacted] and discussed the responsibilities involved in arranging training.</p> <p>9(2)(b)(ii) [redacted] demonstrated no further interest.</p>	<p>Not suitable.</p> <p>9(2)(b)(ii) [redacted] [redacted]</p> <p>9(2)(b)(ii) [redacted] [redacted] [redacted]</p> <p>9(2)(b)(ii) [redacted] [redacted]</p>
<p>9(2)(b)(ii) [redacted] [redacted] [redacted]</p>	<p>Utilised longlist criteria and accessed public information including EER profile, NZQA provider profile, provider website.</p> <p>Meeting was held with 9(2)(b)(ii) [redacted] on 8 March 2021. While the discussion was positive, the decision stood that this PTE was unsuitable for large scale transition.</p>	<p>Not suitable.</p> <p>This organisation offers three health and wellbeing qualifications using either blended or fully online delivery in 9(2)(b)(ii) [redacted]. They offer work integrated learning but no work-based learning. No connection to industry apparent in public documents.</p>

## Preferred providers' approach to Arranging Training

Preferred provider	Preferred provider's approach to Arranging Training	How this will meet learner needs	How this will meet employer needs
Te Pūkenga	<ul style="list-style-type: none"> <li>• Te Pūkenga will support a full 'lift and shift' approach to transitions, under which Careerforce will become a business division within WBL and maintain its current employees, models and systems.</li> <li>• Te Pūkenga will retain the current service models. This includes all of the systems, processes and engagement with learners and employers.</li> <li>• The full network of third-party providers, workplace assessors and contracted assessors will continue to support the current service models.</li> <li>• These will be delivered through the Careerforce business division within Te Pūkenga Work Based Learning Subsidiary</li> <li>• Te Pūkenga will then seek to fully understand the current approach and seek to evolve and enhance this in conjunction with their new operating model and future integrated delivery.</li> </ul>	This is consistent with the success factors identified by learners	This is consistent with the success factors identified by employers

## Preferred providers' capabilities

Describe the existing capabilities (such as people, operating assets, relationships) for the preferred provider(s), and their plans for acquiring additional capability that will allow them to take over transferred assets and Arranging Training responsibilities.

Preferred provider	Preferred provider's existing capabilities	Plan to obtain additional capabilities
Te Pūkenga	<p>Te Pūkenga does not have existing capability to deliver Arranging Training into the Health and Wellbeing sector.</p> <p>Has strong governance and management capability in vocational education.</p>	All of Careerforce's current training capabilities (including people, assets and relationships) will be transferred from Careerforce through the lift-and-shift approach being defined and confirmed with Te Pūkenga.

## Details of transitioning programmes, learners and standard training measures

### Te Pūkenga

It is understood that Te Pūkenga does not currently have the capacity, flexibility or capability to deliver Careerforce current arranging training functions, hence the rationale to transition all of Careerforce programmes, learners (STMs), delivery models and staff to ensure the continuity of these services.

All of Careerforce's expected delivery (including programmes) for the 2022 year is covered in the following table:

NZQF Level	Learners		Standard Training Measures (STMs)	
	Trainees	Apprentices	Trainees	Apprentices
2	4995		9(2)(b)(ii)	9(2)(b)(ii)
3	6881			
4	4178	3949		
5	505			
6	20			

## 2.2 Service continuity approach

This section describes the planned approach to ensuring continuity of service during the transition of Arranging Training to preferred providers and in ensuring a seamless movement of learners, employers, and industry groups, while minimising service disruption as much as possible.

Topic	Planned approach
Retaining relevant assets	All assets including IP in learning/assessment resources will be transferred to Te Pūkenga to which arranging training is transitioned. Careerforce is not intending to retain any assets following transition nor to dispose of these to any entity other than Te Pūkenga.
Maintaining service levels for existing learners	<ul style="list-style-type: none"> <li>Transition to Te Pūkenga ensures that current service models and relationships will remain unchanged though the immediate transitions and provide for a period under which Te Pūkenga agrees to maintain these models for the period following transition. This expectation and the approach under which this will be achieved are outlined in the Terms Sheet covering the agreed transition approach.</li> <li>Careerforce believes that the commitment of Te Pūkenga in this regard is genuine and extends beyond any formal obligation that will be created in the Transfer Agreement.</li> <li>Careerforce therefore does not believe that any learners or employers will experience changes in service level, risk or disruption as a result of transition.</li> <li>Te Pūkenga intends to enhance the current service models once the regulatory and funding constraints for arranging training are removed and after they are able to fully evaluate and manage any impact on learners and employers through a full understanding of the current service models.</li> </ul>
Managing risks related to under-served learners	
Minimising disruption to employers and industry groups	
Minimising disruption to existing education and training providers	Careerforce planned approach is that Te Pūkenga will maintain the existing provider <b>9(2)(b)(ii)</b> for its Urban Pest Management programme, until at least December 2023.
Continuing school-focused activities	Careerforce planned approach is that Te Pūkenga will continue current service models.

## 2.3 Retention of people, skills, knowledge, experience and relationships

As outlined in the initial version of our Transition Plan, the key risk in regard to people, skills, knowledge and experience and the consequential disruption for learners and employers would arise through disruption to our predominantly employer-led service model, particularly if this was undertaken without a full understanding of the potential impact.

The intended transition in which all Careerforce's arranging training, other activities and support functions are transitioned to Te Pūkenga effectively as a going concern addresses this risk.

Careerforce staff have the key skills, knowledge, experience and relationships that need to be retained within the system for the sectors currently supported by Careerforce.

Careerforce has consistently sought transition arrangements that best ensure key skills, knowledge, experience and relationships are retained through the transition and so that current service models are not disrupted. This enables Te Pūkenga to then ensure that they fully understand the current service models, interdependencies and evaluate any impact on learners, employers and employees as they evolve service models.

Careerforce's high level approach has been to ensure employees are fully informed of progress and thinking as RoVE transition options are developed and ensure that, so far as possible, our people are positive about the proposed changes. This has been and will continue to be achieved through leadership, extensive internal communications, pulse/engagement monitoring and an approach of transparency.

Careerforce advocates strongly for a transition approach that minimises impact on employees.

For clarity, all Careerforce staff as at date of transition will transfer to Te Pūkenga under existing terms and conditions.

## 2.4 Transition of information and assets

### Key categories of information needed for transition

Category of information	Approach to transition	Key risks
Details of employers, providers and learners, and their relationships with TITO	This data is held in the Trainee Management System and document files. The Trainee Management System will be transferred to Te Pūkenga as an operational system	No risk identified
Details of the needs of learners, employers and industries, relevant to transitioned activities	The institutional knowledge will be transferred to Te Pūkenga with the employees and the intact and integrated service model	No risk identified
Details of relevant functions, contracts, IP, systems, policies, on-going projects, and how these relate to future needs for learners and employers	IP, relevant contracts, employment agreements and policies are being transitioned to Te Pūkenga. These will be identified in the Terms Sheet. On-going projects will transition to Te Pūkenga as agreed between the parties. These will be identified in the Terms Sheet.	No risk identified
Details of careers information guides and related activities	All careers information guides will be transferred in print and digital form to Te Pūkenga.	No risk identified
e.g. business roadmap or other plans showing the intended vision for development of Arranging Training activities	All strategy, roadmaps and plans will transition to Te Pūkenga and will continue to guide the business division within the work-based subsidiary until the work-based learning within Te Pūkenga is integrated into the new operating model and overall strategy/planning frameworks	No risk identified
Any other information being transferred to the preferred provider(s) – please specify	No other information has been identified	No risk identified

## Key categories of assets needed for transition

Category of assets	Approach to transition	Key risks
Trainee Management systems	The Careerforce TMS including all functionality and current/historic data will transition as an asset to Te Pūkenga and will continue to be operated and supported by Careerforce staff transitioned to the Te Pūkenga work-based training subsidiary on the agreed date of transition.	No risk identified
Employer Key Account systems	This data is integrated within the CRM functionality of the TMS and will be transitioned as above.	No risk identified
Other IT systems	All existing IT systems, software licencing, video meeting room technology, data warehouse reporting portal, payroll etc will be transferred to Te Pūkenga at transition.	No risk identified
Hardware and equipment	All other hardware and equipment will be transferred to Te Pūkenga on the agreed date of transition.	No risk identified
Vehicles	All Careerforce owned vehicles (if any) will be transferred to Te Pūkenga on the agreed date of transition.	No risk identified
Other assets (e.g. Intellectual Property, Brands)	All intellectual property and branding will be transferred to Te Pūkenga on the date of transition.	No risk identified

## 2.5 Commercial and legal processes

Careerforce have agreed the Terms Sheet with Te Pūkenga detailing the key agreements in relation to the transition. This will be formalised in a formal and conditional Transfer Agreement post TEC approval of this Transition Plan.

Careerforce and Te Pūkenga expect TEC to undertake a funding washup on the date of transition.

A Completion Checklist will be prepared and agreed following approval of the transition to allow monitoring of all activity required to successfully achieve transition.

## 2.6 Working with external parties

TEC wishes to ensure that all external parties are aligned and work together to ensure a seamless transition of Arranging Training for employers and learners. External parties may include contracted PTEs, schools, the Ministry of Education, NZQA, unions, and other relevant organisations.

Use this section to describe the planned approach to working with external parties during the transition planning and implementation.

Please outline the:

- Roles of external parties (other than the TITO, preferred provider(s) and TEC) in delivering on a successful transition;
- Collaboration model (e.g. governance, organisation, and processes) between your organisation, preferred provider(s) and other external parties to ensure a seamless transition.

NZQA	<p>Managing the New Zealand Qualifications Framework.</p> <p>Independent quality assurance of non-university tertiary education providers.</p>	Continue the current relationship
------	--	-----------------------------------

## 2.7 High-level work plan

Careerforce has finalised its Terms Sheet with Te Pūkenga, which will, along with the Transfer Agreement provide the roadmap for the transition of Careerforce’s Arranging Training function, for industry trainees and apprentices.

The lift-and-shift approach offered by Te Pūkenga will have the effect of managing the transfer of Careerforce’s relevant responsibilities to Te Pūkenga, while ensuring a seamless transition for learners and employers.

# Section 3: Transition of Apprenticeship Training Activities

## Apprenticeship Training Activities going to same provider as Arranging Training

Apprenticeship training activities will transfer to Te Pūkenga, at the same time and using the same approach as for Arranging Training.

# Section 4: Transition of other activities

## 4.1 High-level approach and planning considerations

Use this section to identify relevant Other Activities and describe the high-level planning approach (Receiving Organisation(s), transition approach and planned timeframes) and the key considerations for transferring them:

All activity currently undertaken by Careerforce will be transferred to Te Pūkenga WBL as a going concern **9(2)(b)(ii)**

## 4.2 High-level work plan

N/A

# Section 5: Declarations

Please confirm, on behalf of your TITO, that:

✓	You are satisfied that the proposed providers to receive Arranging Training and Apprenticeship Training Activities meet TEC's initial approval criteria.
✓	You agree to immediately inform TEC of any risks or issues that could adversely impact your operations in order to allow us to discuss how these could be managed, prior to transition.
✓	Where applicable, you agree to factor your transition activities and dates into your annual Investment Planning process and to work with the TEC to provide for a smooth transition of TEC funding.
✓	All of the information in your TITO Transition Plan is true and correct at the time of submission.
✓	Your TITO Transition Plan (Second Version) has been signed off by your relevant governance body.

Please provide your details, including your role within your organisation:

<b>Your name:</b>	Jane Wenman
<b>Your signature:</b>	
<b>Your position / role:</b>	Chief Executive Officer
<b>Name of TITO:</b>	Community Support Services ITO Limited trading as Careerforce

# Part 4: Appendices

---

## Supporting information

### Summary of TITO's current business

This section summarises 'current state' information from the TITO's Transition Plan (First Version) and any additional relevant information obtained separately by TEC.

Please:

1. Review and confirm that this information is accurate;
2. Update any inaccurate information; and
3. Provide any missing information.

[Tables TBC]