SUPPORT DOCUMENT

Private training providers: Their characteristics and training activities—Support document

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Appendix A: Literature Review

Introduction

Private training providers are now an integral part of the vocational education and training landscape. Where once they were relegated to a small and largely unacknowledged role in the provision of post compulsory education and training, private training providers are now arguably viewed as having 'equal status' with TAFE (Anderson 1996, p. 112). However, despite this growing importance and status, relatively little research focussing exclusively on private training providers has been undertaken in Australia. What is known has tended to be gathered as a by-product of larger investigations concerned with the vocational education and training sector in general or specific issues relating to aspects of its operation such as efforts in the implementation of key policy initiatives. The notable exceptions to this have been specific research projects commissioned by the Australian Council for Private Education and Training (ACPET) and the body of work undertaken by Anderson examining the development of the VET training market (Anderson, 1994, 1996, 1997, 2000).

Understanding the exact nature of the contribution of private providers is an important part of attempting to quantify the overall VET effort in Australia, which in turn can help to determine the contribution of VET to overall economic development and growth in the country. This task of quantification rests initially on an understanding of the genesis of private providers as part of the overall efforts aimed at reforming the VET sector and the policy frameworks that have given rise to the private training market that exists today. This is the departure point for this literature review. Definitional issues relating to understandings of the term 'private provider' are then examined. This context provides the backdrop for the second part of the review, which examines what we currently know from the research about private training providers and their ways of working and an overview of the data available which specifically addresses the contribution of the private sector to the overall VET effort.

Training reforms and the open training market

Private training providers have always operated alongside public training organisations, with Anderson (1994) tracing the establishment of private providers back to the late 19th century with the establishment of Stott's Secretarial College in Melbourne. What has changed since that time, particularly with the advent of the late 20th century reforms to the vocational education and training sector has been the 'rediscovery' of private training providers and the increasing importance placed on their role in the development of a quality vocational education and training system within Australia.

The training reforms that commenced in the early 1990s signalled the beginning of a changing relationship between education and industry and the linking of educational goals with microeconomic reform (Billett, McKavanagh, Bevan, Angus, Seddon, Gough, Hayes & Robertson, 1999, p.1). Debates about the standards of trade training provided impetus for the implementation of a competency-based approach to the delivery of vocational education and training. Parallel concerns about the adequacy of Australia's vocational education and training

system to meet the demands for skilled workers were also being raised in a context where there was a pressing need to address problems with the economy and enhancing Australia's international competitiveness (Australian Council of Trade Unions / Trade Development Council, 1987, p. xi). Growing unemployment and changes in occupational and industry structures also added to the need for growth in the provision of vocational education and training (Burke 2000, p. 25).

At the same time as issues relating to the quality and quantum of vocational education and training were being explored, broader reforms around thinking related to the ways in which governments might provide services was also occurring. Neo-liberal thinking increasingly challenged the position of TAFE as a 'protected state monopoly…resistant to the discipline imposed by competition for market share' (Anderson, 1994a, p.4). Following overseas trends in this area, 'the most significant structural change involved a redefinition of the role of government and public TAFE providers through the purchaser/provider split' (Selby Smith, Ferrier, Anderson, Burke, Hopkins, Long, Malley, McKenzie & Shah 2001, p.116).

One response to addressing this issue of adequacy was founded in the Commonwealth *Training Costs of Award Restructuring* (Training Costs Review Committee 1990 – also known as the Deveson Report). This report was notable for its emphasis on a market approach to the provision of VET and the importance of a robust supply of training through the introduction of a national system which would recognise and accredit private and industry training providers. This was a particularly timely suggestion since it was well recognised that while growth in the provision of vocational education and training was a policy imperative, it needed to occur within a context where economic reform demanded a decrease in public spending an increased efficiency and effectiveness in the ways public funds were used (Burke 2000, p. 26).

In 1990 the Special Ministerial Conference committed to the development of an open national training market, although the operational details of this direction were not clearly spelt out (Harris, Guthrie, Hobart, Lundberg, 1995, p. 82). It was the implementation of the National Framework for the Recognition of Training (NFROT) in 1992 which provided, amongst other processes, the mechanism for the registration of private training providers. Along with the processes of recognition of prior learning, articulation and credit transfer, accreditation of training courses and mutual recognition , this 'national framework…contributed substantially to improving the future scope for competition between TAFE and private providers' (Harris *et al.* 1995, p. 79). The implementation of national competition policy, flowing from the report by Hilmer, Raynor and Taperell (1993), added further impetus to the press for market reforms in VET and provided further fertile ground for the growth of private training providers in the VET marketplace. ANTA, established in 1993, took up this mandate as part of its role in setting the strategic directions for the development of the VET system in Australia. Strands of reform thus coalesced into a series of policies which included, among other desired outcomes the goals of introducing greater competition between suppliers of vocational education and training, reforms to the management and regulation of vocational education and training and the introduction of greater accountability measures for those in receipt of public funds (Burke, 2000, p. 26).

The early training reforms were lauded by many for their focus on creating greater efficiency through competition and the breaking of the TAFE monopoly over accreditation and recognition of vocational education and training (Committee for Economic Development of Australia (CEDA) 1995, p. 18). The recognition of over 1,200 registered training providers was viewed as having 'positive effects' by inducing TAFE colleges to introduce 'innovative courses matched to local industry needs' (Thorn, 1994 cited in CEDA 1995, p. 18). In this respect private training providers were being acknowledged more for their role in providing the needed competition which has led to greater responsiveness from TAFE institutions rather than any unique contribution that they might make to the VET sector in their own right (Sharp 1994).

Despite these apparent successes, the development of the training market (and hence the role that might be played by private training providers to further the training reforms) was impeded by a range of factors. Private providers found the national framework to be overly bureaucratic

and that 'regulatory bodies [were] tending to entrench approaches that [were] heavily dependent on TAFE practices and attitudes' (Harris *et al.* 1995, p. 79). Further concerns for the penetration of the concept of the training market within the VET sector were found in reviews and inquiries that were conducted to track the progress of the training reforms. The first of these was undertaken by the Allen Consulting Group. A background paper developed to inform the review noted that

> …there has been limited progress in the development of a national training market. While the registration of private training providers has increased, the impact of this growth on the development of a training market is inconclusive (ANTA, 1994, p. 24).

While data from state training profiles was anticipated to provide some information which could be used to assise the impact of private training providers, it was also acknowledged that factors relating to lack of information to industry on the training reforms, slow progress in the development of competency standards and the endorsement of curricula and 'problems…in the nationally consistent implementation of NFROT were also impacting on the development of the training market (ANTA 1994, p. 24). In this context the Allen Consulting Group concluded that 'the concept of the training market is too limited, with many elements necessary for a properly functioning market missing' (Allen Consulting Group, 1994, p. iii). The report also suggested significant reforms to further the development of the market including the promotion of the 'user buys' concept to further enable greater choice for employers and students and greater opportunities for private providers to expand their offerings. Additionally, microeconomic reforms of the public VET sector needed to

> …reflect the widely accepted principles pursing reform in the public sector, including clearly separating cental government roles (policy and regulatory roles and purchase of services on behalf of the community) from service delivery roles (Allen Consulting Group, 1994, p.viii).

As Selby Smith *et al.* (2001, p. 116) note, the operationalisation of this purchaser/provider split was fundamental to subsequent efforts to firmly establish a training market, whereby TAFE became 'one of many providers'.

Other reviews continued this theme of the need for a more robust training market. The review of the ANTA agreement, conducted by Taylor (1996), concluded that the development of the training market and the overall VET system were being considerably impeded by a highly centralised approach to training reforms that promoted uniformity over customisation and responsiveness. A Senate inquiry heard evidence from private training providers which seemed to suggest that they felt disadvantaged in a system that they believed favoured TAFE (Senate Employment, Education and Training Reference Committee 1995, p. 50). This committee also noted the difficulties inherent in attempting to define who are private providers and the lack of data available to establish the scope of the sector (Senate Employment, Education and Training Reference Committee 1995, p. 50). These reviews, combined with the election of the Liberal Coalition Government in 1996, heralded a new direction in reforms to the vocational education and training system.

Since that time a revised policy framework, initially know as the National Training Framework (now the Australian Quality Training Framework) has established new benchmarks to govern the activities of vocational education and training providers (known as registered training organisations – RTOs). Mechanisms to promote mutual recognition of qualifications awarded by all providers and to assure the quality of vocational education and training provision are core components of this framework. Greater competition between public and private training providers has been leveraged through the twin mechanism of competitive tendering and the implementation of User Choice (Noble, Hill, Smith and Smith 1999).

This very brief outline of training reforms highlights what Anderson has noted as a

> …fundamental shift in official attitudes towards the balance of public and private sector responsibility for financing VET and a…transformation of the traditional roles and relationships of public and private VET providers (Anderson 1994, p. 1).

Over time, the training reforms have 'cohered into a strategy to develop a market-based approach to VET provision' (Anderson, 1996, p. 114). As Gill and Dar (1999) note, the principle of funding vocational education and training in ways that reinforce rather than contradicts market forces is a foundational principle of the training reforms and that 'a healthy private supply of vocational training [is] good for both labour market efficiency and for budgetary reasons' (Gill and Dar 1999, p. 422). They further argue that the conditions for building this robust provision revolves putting in place policies which

✧ remove and or streamline legal requirements for the establishment of private providers;

✧ ensure balanced funding formulas which do not discriminate between public and private providers;

✧ encourage employment growth;

✧ are not founded on the assumption of the need for universal accreditation schemes which allow for tight regulation of private providers; and

✧ are not based on poor or incomplete information on the private sector which can lead to an oversupply in the public sector and the subsequent 'crowding out' of private providers (Gill and Dar 1999, pp. 422-425).

Research on private training providers

Despite the growth in significance of private providers within the vocational education and training sector, there is relatively little empirical data available on their activities. Anderson attributes this gap to a number of factors including:

✧ a lack of a comprehensive data base of private training providers;

✧ issues relating to defining the term 'private provider' and the flow effects of this for the consistency of existing data; and

✧ issues relating to access to data on performance of private training providers which is considered to be commercial in confidence and hence not publicly available (Anderson 1995a, pp. 465-467).

The majority of the Australian literature on private training providers is technical in nature, describing the development and construction of the training market and is comprised mostly of government working papers, review and reports from committees, many of which have been referred to in previous sections of this literature review. There is also a body of work that seeks to make known the activities of private training providers. These are usually descriptive, written by personnel within these organisations and largely focus on advocating for the place of private training providers within the VET system (see for example, Caulfield 1996, Carrick, 1996, Sharp 1994, Walsh, 1996). There is a substantial amount of literature providing a critique of the fundamental principles of the training market and its impact on the TAFE sector (see for example, Ryan 1996) and the impact of market reform on vocational education and training. For example, there are studies that adopt a state-based focus (Bannikoff 1999, Schofield 1999, 1999a, 2000, Smith 1999), examining the outcomes of competition for a range of stakeholders but more particularly the TAFE system. There are also a number of studies which take a micro perspective, examining outcomes for either single or a small of sites (Anderson 1995, Brown, Seddon, Angus & Rushbrook 1996, Kell, Balatti and Hill & Muspratt 1997, Seddon 1999). A very much smaller body of work has examined the activities of private providers as the sole focus of the research activity including the nature and scope of their work, particularly that which lies outside of the regulated framework of the AQTF (one exception here is the work of McPhee 2004, 2003).

Defining private providers

One of the first issues that encountered when examining the existing literature on private training providers is that of nomenclature and definition. Private training providers are labelled using various terms including 'private sector providers', private provider', 'non-government providers', 'registered private provider' or more simply as 'non-TAFE providers' or 'providers other than TAFE' (McPhee 2003, p. 3). While each of these terms are arguably similar, certain terms do connote slightly different emphases on some of the key characteristics of private providers. The use of the term 'registered' for example, suggests a focus on those private providers who are listed as part of the national training system, while excluding those providers that might offer vocational education and training that is not accredited under the national frameworks. By way of contrast, use of the term 'non-government' necessarily excludes provision by a range of government departments and other authorities that might offer training on a commercial basis (for example TAFE institutes).

Anderson (1995a, p. 466) defines private training provision in a much broader manner describing it as:

> …provision of post-school VET in the non-government sector by privately financed individuals and institutions operating more or less independently of government control.

This definition, with its careful wording around the degree of government control under which private training providers operate is particularly salient in a policy context where regulatory frameworks for private providers in receipt of government funds are sometimes viewed as quite stringent (see for example Graham, 1999) and estimates by Anderson estimated that approximately 17% of income from private providers were sourced from government funds from labour market programs (Anderson 1995a, p. 466). Anderson also points out that 'TAFE colleges are in many instances drawing up to 20 percent of their annual income from individual fees and industry contracts' (Anderson, 1995a, p. 466)

Benham (1996, p. 8) offers a more narrow definition of the term private, stating that providers can include

> …commercially based businesses. These may be business colleges or training consultants. They may be community organisations such as adult and community providers…They may be industry enterprises or skill centres. They may be enterprise based or in-house trainers.

In a study comparing the public and private provision of post secondary education and training in 1993 and 1997, Roussel and Murphy (2000) include business colleges, industry skill centres, professional / industry associations, equipment / product manufacturers and suppliers, private training organisations, adult and community education centres and a grouping called 'other' in their definition of private providers on the basis that the source of their operational funds is not from government sources (Roussel and Murphy 2000, pp.2-3).

The National Training Information System uses a typology containing a number of sub categories to further delineate private training providers from their TAFE counter parts. These subcategories are:

✧ Adult education Centre

✧ Adult Migrant Education Provider

✧ Agricultural College

✧ Commercial Training Organisation

✧ Community Access Centre

✧ Community Education Provider

- ✧ Enterprise-based organisation
- ✧ Government provider
- ✧ Industry organisation
- ✧ Licensing authority
- ✧ Local Government
- ✧ School (state, church-based and independent)
- ✧ University
- ✧ Other
- ✧ Other government provider
- ✧ Professional Association

Adopting the label of 'non-TAFE providers' as a first level sorting mechanism, as the listing from the NTIS data base does, suggests that the private training providers may include not-for-profit organisations as well as commercial arms of government instrumentalities and other publicly funded organisations including schools, universities and arguably the commercial enterprises within TAFE colleges. Other definitions which restrict definitions of private training providers to those who operate on a commercial basis or are not in receipt of 'substantial' (however defined) government funds necessarily excludes universities, schools (although some would argue for the inclusion of church-based and independent schools) and all other government providers (including local governments).

What might be reasonably included or excluded from the population defined as private training providers for the purposes of conducting research is clearly open to interpretation. For example, McPhee (2003) in her study examining private training provision in Victoria restricts the term 'private training provider' to those organisations which 'did not receive substantial government funding' (McPhee, 2003, p. 4). This included commercial, enterprise, industry organisations and private or independent schools but excluded community based providers, TAFE institutes and government schools. Anderson, in his study divides training providers into two categories of TAFE and non-TAFE thereby including all categories noted above. These definitional issues necessarily impact on ways in which research questions might be framed, particularly those aimed at efforts to better understand the differences between public and private training providers and their operation within the vocational education and training market.

Private training providers in the VET market

While there is a theme running through much of them literature which emphasises the differences between public and private training organisations, there is also acknowledgement that the public / private training divide should not be viewed as immutable. A number of researchers have noted that private and public training organisations do share many similar views in terms of their adoption of a market orientation to vocational education and training, understandings of the policy frameworks in which they operate, the impact of policy changes on the ways in which vocational education and training is organised and delivered and the impact that these changes have made on the work of teachers, trainers and managers (see for example, Chappell and Hawke 2003, Harris, Simons and Clayton 2005, Saggers, Moloney, Nicholson & Watson, 2002).

One of the earliest studies examining the activities of commercial training organisations after the implementation of the national training reforms was a study of registered commercial training providers in Victoria and Queensland (Anderson 1995). This study found that this group of private providers were:

> …tuition dependent and specialise in the provision of short courses for fee-paying
> individuals…None of the commercial colleges studied had any significant involvement in

the direct provision of training programs and services for industry and enterprise clients…[They] concentrated on provision of training in niche markets where TAFE provision was non-existent or insufficient…on average around 80 percent of college revenue was derived from fee-paying individuals, while public fund, primarily from government labour market programs, accounted for around 17 percent (Anderson 1995, p. 11).

Another early study contrasting the operation of public and private training providers was an early qualitative study of six sites (consisting of three matched pairs of commercial and TAFE colleges) delivering business, tourism / hospitality and computing programs. This study provided evidence that commercial training organisation can be distinguished from TAFE providers across a range of characteristics, the most pronounced of which is an emphasis on the for-profit motive of commercial providers and a stronger emphasis on a broader charter for TAFE that includes providing access to training for a wider audience in order to achieve social as well as economic goals (Anderson, 1995, p. 50). Anderson further argues on the basis of evidence from the case studies that commercial providers are the major private sector providers of vocational education and training to fee-paying clients. Rather than competing directly with TAFE, commercial providers tend to concentrate on the development of niche markets in response to gaps in public provision or act in ways to complement the TAFE system by 'soaking up' unmet demand particularly from school leavers (Anderson 1995, p. 51). The major benefits afforded to individual clients (as reported by clients and the management of the commercial colleges included in the study) by commercial colleges lie in their perceived ability to provide greater flexibility and responsiveness to individual needs and a stronger throughput of work ready graduates in a shorter time compared to that of TAFE. Additionally commercial colleges often valued added to their training through the provision of services such as employment placement services, on going employment support and professional development.

In a study examining the provision of professional development for teachers and trainers, Harris *et al.* (2001) data collected from purposive samples of HR managers and teachers and trainers from both TAFE and private training organisations found that private training providers showed indications of operating differently from their TAFE counterparts on a range of issues. Private providers included in this study:

✧ showed a preference for employing staff who already held appropriate teaching / training qualifications (rather than employing staff and then assisting them to attain qualifications);

✧ used staff to work in a range of ways. Only 64% of staff described their role as that of a teacher or training (compared to 84% of TAFE staff). 40% of teaching staff were involved in institutional-based delivery of vocational education and training (compared to 63% of TAFE staff); and

✧ tended to concentrate their operations in the fields of health, community services, multi-field education, education and computing and within a narrower scope of qualification levels (usually Certificate II, III and IV).

This theme of differences between the ways in which staff from public and private training providers work and the issues that they face in implementing training reform have also been noted in other research examining the changing nature of work for VET teachers and trainers (Chappell and Johnston 2003, Harris *et al.* 2005). This body of work argues that there have training reforms have impacted on different ways and resulted in differing challenges for teachers and trainers from public and private training providers as they grapple with the changes to their work as a result of the training reforms. The key message from these studies is that context matters when it relates to the issue of managing educational and differences do exist between public and private training providers in terms of the impact of changing policies on the everyday working lives of practitioners (for example, the impact of a business / corporate culture within public sector VET providers versus the impact of the penetration of educational norms and values into the working cultures of private sector providers).

In a project examining the meaning and operationalisation of the concept of an 'industry led' training system (Chappell and Hawke 2003), one sub project consisted of case studies conducted with six private training organisations in three states. Respondents in this study stress their role as 'commercial enterprises with the primary aim of making a profit and staying in business' (Dumbrell, 2003, p. 4). Provision of vocational education and training is increasingly viewed as a 'single product, delivered according the needs of their customers' (Dumbrell 2003, p.4). Additionally, two of the private training organisations engaged in providing courses overseas as being involved in an export industry where their role was not confined solely to servicing Australian industries.

Chappell and Hawke (2003), commenting on the dynamics of relationships between training providers and industry note that regardless of whether a training provider could be designated as public or private, the dynamics of the relationship with industry depended on whether the provider was providing a commercial training product or working with an employer to provide a placement for students in a public funded course. Both private providers and TAFE are involved in providing fee-for-service courses but arguably this commercial relationship is more critical to private training providers who they believe are 'less involved or less interested in delivering government funded vocational education programs endorsed by peak industry bodies' and are 'more actively pursuing commercial relationships outside of the national framework' (Chappell and Hawke, 2003, p. 8).

Further evidence of the ways in which public and private organisations might operate differently within a regulated environment can be found in studies from the field of organisational behaviour. For example, in a study examining the responsiveness of public and private organisations to changes in the accreditation standards of professional bodies (Casile and Davis-Blake 2002), it was found that market niches and links with the accrediting body affected the ways in which both public and private organisations responded to changes in accreditation standards. Specifically,

> …technical factors (potential economic gains from accreditation) had a greater effect on the responsiveness of private organizations and institutional factors...have a greater effect on the responsiveness of public organisations (Casile &Davis-Blake, 2003, p. 180).

Institutional factors, in this case, refer to the degree to which changes are seen to be 'socially appropriate' and in keeping with 'social cues indicating the legitimacy of the new institutional norms' (Casile & Davis-Blake, 2002, p. 191).

Studies undertaken by researchers for the Australian Council for Private Education and Training which have examined the impact of some of the more recent training reforms on private training providers also point to the ways in which the implementation of mechanisms to comply with new aspects of the training reforms (Training Packages and the Australian Quality Training Framework) were viewed largely through their perceived economic costs for organisations (Anderson 2000, Kellock 2003). Issues relating to the cost of implementation, the income foregone through delays in registration approvals and the perception that the dynamics of the training market had been 'distorted' with negative impacts on the bottom line for training organisations were all found to be issues for respondents in these studies.

Collectively this research provides sufficient indirect evidence to support the hypothesis that while there are necessarily some significant similarities between public and private training providers because they are operating under the same policy frameworks (Saggers *et al.* 2002), there is also some differences. Further, given these differences between the two groups of providers, it is reasonable to hypothesise that the contribution that private training providers may differ from that of public providers in a number of ways.

Estimating the activity of private training providers

Debates on definitional issues have necessarily impacted on attempts to map the broad field of private training provision, resulting in some considerable variance in estimates of the numbers of private training providers and their contribution to the overall VET effort. What is clear, however, is that there has a steady and upward growth in numbers of private providers operating in the Australian training market since the 1990s but there is considerable difficulty when attempts are made to quantify the contribution of private providers to the overall vocational education and training effort.

A national survey of state and territory training authorities estimated that there were 782 private providers registered in 1993 (Anderson, 1995, p. 50). Ryan (1996, p. 10) notes that in 1994 the Allen Consulting Group described the training market as consisting of 704 TAFE institutions and around 1,000 private providers. Benham (1996, p. 8) estimated that there were over 3,200 private sector organisations offering training on a commercial basis in 1996. The most recent statistics from NCVER report that public VET training provision included 'over 890 community education providers and over 3,400 private providers in receipt of government funds (NCVER, 2003, p.7).

As Anderson notes, estimating the size of the contribution of private providers to the total VET effort is problematic because private providers can be operating as part of a quasi market sector (which is subject to regulation because providers are in receipt of government funds and hence need to fulfil certain accountability requirements including reporting activities) as well as in the open training market (which does not necessitate the reporting):

> …the ABS found that only 39 percent of 170 respondents were registered with a State government training recognition authority…Moreover, only 25 percent of commercial training providers had their courses accredited with the relevant state accreditation authority, which suggests that three quarters of total course provision in the private training sector continued to be delivered outside the partially regulated sector…(Anderson, 1996, p. 120).

A survey conducted by the Australian Council for Private Education and Training (cited in Anderson 1995, p. 9) found that

✧ of the 188 respondents, 69% were government registered;

✧ the major areas of course provision were in general computing, office and clerical studies, general management, English language, advanced computing, general sales, marketing and accounting, food and hospitality, travel and tourism and general supervision;

✧ most private providers were relatively small operations with 61% reporting having five or fewer teaching staff; and

✧ most providers had a high involvement in conducting courses for fee paying students and export education for overseas students and a low involvement in joint ventures with other providers.

The ABS *Commercial Training Providers Survey* (1994) estimated that private training sector delivered approximately one tenth of effort in the post-school training sector. Roussel and Murphy (2000), arguing that this survey omitted courses that employers provided in-house, analysed data from the 1993 ABS *Survey of Training and Education* and the 1997 ABS *Survey of Education and Training*, and concluded that, within the limitations of the data:

> Private providers accounted for approximately 10% of award courses in both 1993 and 1997. Private sector employers provided approximately one half of all in-house non-award courses in both 1993 and 1997. Approximately half of all external non-award courses were privately provided in 1997. The comparable figure for 1993 is 73% which is considered an overestimate. When combining all forms of courses – award, external, non-award and in-

house non-award courses, approximately one fifth were considered to be privately delivered (Roussel and Murphy 2000, p. 12).

A more recent study by Chadwick Hall (2003) which collected data from 101 private training organisations found that training delivered on the basis of government funding only amounted to 30% of the output of these organisations, while the remaining 70% of training was provided on a fee-for-service basis.

One the basis of these incomplete estimates and other limitations with existing statistical collections, Karmel (2003) argues that current data does not provide a useful estimate of the total VET effort and, based on estimates of student numbers from the Hall Chadwick survey undertaken for the Australian Council for Private Education Training, asserts that 'private provision, not collected by NCVER, is of the order of 180,000 students or 60% of NCVER's measure of the public sector' (Karmel, 2003, p. 10). This comment underscores the importance of further empirical work to better capture the nature of the work undertaken by private training providers.

Conclusion

There can be little doubt that the training reforms of the past ten years have moved firmly decisively towards promoting a greater role for private providers in the delivery of vocational education and training. Evidence from the literature illustrates a steady increase in the numbers of private providers in a context where the boundaries between what can be labelled as public and private training provision is becoming increasingly debatable.

The complex web of private training providers who now provide vocational education and training both within and outside of the current regulatory frameworks present considerable challenges to researchers concerned with more accurately ascertaining the contribution that private training providers make to the overall vocational education and training effort. The study presented here is a further attempt to 'unpick' the diversity of private training provisions and derive some insights into the activities that comprise the work of private training providers.

Appendix B: Methodology

Scope and coverage of the survey

Database of private providers

Through early consultations and after discussion with the Reference Group, it was recognized that the only realistic database to use that would be the most comprehensive and likely to be the most up-to-date would be the National Training Information Service (NTIS) database (vis-à-vis others such as the ACPET membership list or the government-funded list of private providers). While use of this database would mean that only *registered* providers were being included, at least it also meant that *all* registered providers, whether partly government-funded or not, were being considered.

The NTIS database (as at 1 October 2003) was obtained in electronic form and considerable 'cleaning' was undertaken. One of the main issues was that the database was structured on the basis of courses – it contained 65,535 cases (courses). However, what was required was the database structured on the basis of providers – of which there were 3,820 in the database. The 'cleaning' included:

- All universities and schools were removed from the database – RTOs classified as 'commercial training' that are parts of universities were left in the database
- All TAFE colleges in SA were removed from the database (these were classified as 'government provider')
- Registered training organisations that had courses whose accreditation date had lapsed were removed from the data base

This left 3,127 registered training organisations to form the population for the study. The following tables detail some of the characteristics of this population.

Table 1: Distribution of private registered training organisations by State/Territory

State/Territory	Frequency	Percent
New South Wales	698	22.3
Victoria	963	30.8
Western Australia	376	12.0
Queensland	654	20.9
South Australia	219	7.0
Northern Territory	49	1.6
Tasmania	90	2.9
Australian Capital Territory	78	2.5
Total	3127	100.0

Table 2: Private registered training organisations by type of provider

	Frequency	Percent
Adult Education Centre	204	6.5
Adult Migrant Education Provider	1	-
Agricultural College	4	0.1
Commercial Training	1	-
Commercial Training Organisation	1,370	43.8
Community Access Centre	163	5.2
Community Education Providers	62	2.0
Enterprise Based Organisation	208	6.7
Government Provider	32	1.0
Industry Organisation	876	28.0
Licensing Authority	1	-
Local Government	7	0.2
Other	117	3.7
Other Government Provider	56	1.8
Professional Association	25	0.8
Total	3,127	100

Table 3: Type of private registered training organisation by state

	NSW	Vic	WA	Qld	SA	NT	Tas	ACT	Total
Adult Education Centre	58	134	12						204
Adult Migrant Education Provider		1							1
Agricultural College				4					4
Commercial Training	1								1
Commercial Training Organisation	447	423	255	1	141	4	56	43	1370
Community Access Centre	24	117	6			3	10	3	163
Community Education Providers				41	21				62
Enterprise Based Organisation	66	86	18		29	1	8		208
Government Provider		1		27	3	1			32
Industry Organisation	51	191	22	581	21	3	4	3	876
Licensing Authority								1	1
Local Government	2						1	4	7
Other	21	4	45		4	34	2	7	117
Other Government Provider	18	1	11			1	8	17	56
Professional Association	10	5	7			2	1		25
Total	698	963	376	654	219	49	90	78	3127

Table 4: Scope of registration

	Frequency	Percent
Provides training, assessment and issues qualifications	3114	99.6
Assesses and issues qualifications	13	0.4
Total	3127	100

Table 5: Provider type by scope of registration

	Provide training, assessment and issue qualifications	Provide assessment and issue qualifications	
Adult Education Centre	204		204
Adult Migrant Education Provider	1		1
Agricultural College	4		4
Commercial Training	1		1
Commercial Training Organisation	1363	7	1370
Community Access Centre	163		163
Community Education Providers	62		62
Enterprise Based Organisation	208		208
Government Provider	32		32
Industry Organisation	872	4	876
Licensing Authority	1		1
Local Government	7		7
Other	115	2	117
Other Government Provider	56		56
Professional Association	25		25
Total	3114	13	3127

The seemingly arbitrary self-identification of provider type raises some queries about consistency in this database. For example:

- the difference between 'government provider" and 'other government provider'
- the large number of 581 'industry organisations" in Qld (cf: NSW n=51), and yet only one 'commercial training organisation' (cf: NSW n=447)
- the relatively large numbers of 'Other' in NT (n=34) and WA (n=45) compared with, for example, Victoria (n=4)
- no 'enterprise-based organisations' in Qld (cf: SA n=29, Victoria n=86).

Sampling frame and design

The target population was private training providers that were registered to provide nationally accredited vocational education and training and listed on the NTIS database. The target population (3,127) included the following groups of providers (see Table 6):

- Adult/community providers (includes Adult Education Centres, Adult Migrant Education Providers, Community Access Centres and Community Education Providers)

- Enterprise based organisations

- Industry organisations

- Commercial training organisations

- Others (Agriculture Colleges, Government Providers, Licensing Authorities, Local Government, Other, Other Government Providers, Professional Associations)

Table 6: Population of private training providers

Type of provider	Frequency	Percent
Adult/community providers	430	13.8
Enterprise based organisations	208	6.7
Industry organisations	876	28.0
Commercial training organisations	1371	43.8
Others	242	7.7
Total	3127	100

The sampling frame used in the study was drawn from the NTIS database as at 1 October 2003. A stratified random design was selected for the survey, with the type of training provider being used as the stratification variable. Numbers were allocated to each stratum on the basis of the total proportion of each of private training provider in the population. The sample size to provide a 95% confidence level was calculated to be 343 for this study (see Table 7).

Table 7: Calculation of sample size

Confidence Level	95%
Population Size	3127
Confidence Interval	0.05
Upper	0.5500
Lower	0.4500
Standard Error	0.02551
Relative Standard Error	5.10%
Sample Size	343

Interview schedule design

Data for the study was to be collected via a telephone survey conducted by the Marketing Science Centre at the University of South Australia. Development of the instrument for the interview process was undertaken in several discrete phases. Firstly an initial draft of the instrument was devised (see Appendix C). This was then distributed to members of the Project Advisory Group for feedback. Feedback was also received via the External Reviewer's Report and from the initial application to the Statistical Clearing House (SCH) of the Australian Bureau of Statistics. As a result of ongoing negotiations about the content and conduct of the study, agreement was reached that a first stage of the survey would be conducted before a final decision was made in relation to the conduct of a second stage. This first stage was devised to consist of two processes. Cognitive interviews would first be used to further refine the content of the instrument. Secondly, a pilot study of a sample of 150 private training providers would be undertaken to further test the interview process.

Cognitive interviews

In order to further refine the content of the survey, cognitive interviews of about hour duration were conducted with three private training providers. This procedure involved testing both the instrument and the accompanying primary approach letter that was planned for use in the survey (see Appendix 2 for an outline of the cognitive interview protocol and the Primary Approach Letter). The process of cognitive testing (Willis 1999) – in particular, verbal probing techniques was used. The focus was on the cognitive processes that respondents use to answer survey questions rather than on the results received.

Outcomes from cognitive interviews

Information letter

In its current form the letter was most likely to go to the administration area of larger organisations where a decision will need to be made about whom to redirect it to for completion. It was suggested that the letter be addressed to a senior officer in the organisation such as the Director, Chief Executive, Managing Director, Senior Manager, Owner, a person possibly involved in decision-making within the organisation who would have access to the information required to answer the questions.

In relation to the dot points seeking information, two comments related to:

✧ Some ambiguity about interpreting the question relating to the ways in which an your organisation provides training

✧ concerns about how to categorise the numbers of students enrolled in the different national qualifications

In order to complete the interview, subjects believed that various records in the organisation would need to be accessed. Annual reports were seen as one possible source but many private providers are private companies and do not produce an annual report. Similarly it was thought that much of the required information is not often found in an annual report. As a result, answers would need to be sourced from various areas within the organisation such as student records, payroll records, and reports to state training authorities. Subjects also agreed that some questions focused on areas which are not likely to be reported on by private providers in the general course of business and required answers that could only reasonably be made by a person with a sound understanding of the organisation, its operations and client base.

Estimations of the time required to assemble the information required to answer the questions varied from 30 minutes to an hour. In larger organisations it was thought that information would be requested from the different sections of the organisation and a couple of days allowed for it to be assembled.

As a result of this information minor wording changes were made to the letter.

Question 1

Subjects were able to understand the question and no revisions were necessary.

Question 2

Subjects were able to understand the question and no revisions were necessary.

Question 3

When a subject had given the question some previous thought, the main reason was easily recalled and a suitable response was selected. In cases where subjects had not thought about the reasons prior to reading the question, they were faced with the task of first thinking about the reasons why their organisation had become registered, selecting the main one and matching that with the response sets offered. They invariably came up with a range of reasons and found it difficult to identify one of these as the main reason, so that they felt somewhat ambivalent about their final choice. One subject thought that an additional response set worth including would be 'To make money' as registration is a prerequisite to access government funds and to be eligible for accreditation with various bodies so that the organisation can then proceed to target the client base it does and achieve its ultimate goal of making money. As a result of this feedback it was decided to discard this question.

Question 4

Subjects from organisations which are commercially driven and have clear business objectives found it easy to pick one description. However, this proved more difficult for others. The main problem was uncertainty about the meaning of the other categories. For example, one subject believed that enterprise-based organisation was the best description for her organisation as she interpreted an enterprise -based organisation to be one that delivers training to a particular industry or sector. The question was revised to include definitions of each option.

Question 5 and 6

Subjects were unsure of what information question 5 sought in terms of dates and student status (full-time, part-time). One subject provided the answer to these questions by selecting a date at random in 2003 and getting the student administration system to generate the number of students at that time. It was suggested that the question would be easier to answer if a date(s) was/were nominated and there was differentiation between full-time and part-time students.

Another subject found the definition of Australian students confusing and suggested rewording this to present the characteristics which an Australian student has (eg: citizenship, permanent residency) rather than in the current format which emphasises what they do not have. There was also uncertainty about the level of accuracy sought by these questions given the use of 'approximately' (this feedback was repeated for questions 7, 10, 11, 15). On the basis of this information the following revisions were made to these questions:

✧ the term 'approximately' was removed from both questions and others

✧ the term 'Australian students' was redefined;

✧ a timeframe was nominate timeframe; and

✧ the subcategories of part time and full time were added to question relating to the number of students

Question 7

Subjects reported that they struggled with the meaning of the term 'non-government sources' and guessed that it meant funded by parents, self-funded by students (combining work and study), employer funded, commercially supported (eg: scholarship from a company), full fee-paying international students. One subject from a medium-sized, commercial training provider pointed out that his organisation has no record of students who may have enrolled on the instigation of their employer.

Likewise subjects found the meaning of 'government sources' unclear and found it difficult to categorise some students. One subject explained that his organisation delivered VET courses to HSC students from private secondary schools and the schools receive a government subsidy for each of these students. The schools then pay the training provider with these funds. Thus the student could be deemed as being funded by government sources even though funding is not channelled directly to the training provider. Another subject from an organisation that provides training to students from government agencies where the agencies pay all fees was faced with a similar dilemma. Does this constitute government or non-government sources?

There was some confusion as to how subjects would get the answer for this question but this was largely linked to uncertainty about the meanings 'government' and 'non-government' sources. If these terms were clarified then the answer could be obtained by accessing the student database. In organisations that receive government funding (eg: for traineeships), there are reasonably strict reporting requirements associated with this so that student numbers could be determined from those records. Any other students would then simply be placed in the non-government sources category. One subject suggested that a separate self-funded response set should be added to

provide a more complete picture. Finally, the use of 'approximately' was questioned by one subject who was unsure of how accurate the answer needed to be. The term 'Australian students' and another category entitled 'self-funded' were added to this question.

Question 8

Subjects had no difficulty understanding this question and were either 'very' or 'quite' sure of their answers.

Question 9

Subjects had varying opinions about the difficulty of answering this question. One subject had no difficulty at all and was very confident with the answer that they gave. In contrast, another subject indicated that none of the options offered were applicable to his organisation which specialised in training for hospitality/tourism and communication design (graphic design, media design). He believed that 'accommodation, cafes and restaurants' and 'communication services' did not adequately reflect his organisation's focus and was reluctant to tick them.

Another subject indicated that he would find it 'very hard' to answer at all as he was unsure that the organisation provides training for any particular occupations or industries. Further probing revealed that the organisation provides training in business, IT and graphic design for school leavers predominately and the subject viewed his organisation as a 'general provider' who was 'just there to provide that particular training and not targeted to a specific industry. On the basis of this feedback it was decided to revise this question and use 'fields of study' categories for the question.

Questions 10 and 11

No one had difficulty understanding the questions as posed. However subjects experienced varying degrees of difficulty in answering these questions. The first subject indicated that it would be very hard to answer the questions as the organisation does not currently produce a report on student enrolments and completions according to AQF level and the information would need to be manually calculated from a range of sources, taking 2-3 hours to assemble. Another subject was uncertain about which category was most appropriate for certain groups of students and would need to clarify these issues before he could be confident in his response. Specifically the problems areas were:

✧ secondary school students sitting for HSC but training provider is teaching Cert II – a respondent was unsure whether to record as secondary school qualification or Cert II as students get both qualifications; and

✧ students doing Advanced Diploma – depending on program chosen, in first year these students do Cert IV or Diploma and in second year do Advanced Diploma. The provider indicated that he would provide an answer based on the number of students according to year level i.e. first or second year but pointed out he that could paint an alternative picture by recording them all as Advanced Diploma students.

In contrast, one subject indicated that the information was available on the student database so that he could provide an answer which he was 'reasonably sure' of with minimal difficulty. Again, the use of 'approximately' was questioned by one subject who was unsure of how accurate the answer needed to be. Question 10 was subsequently deleted and question 11 revised to include a reference to 'Australian' students and to remove the term 'approximately'. Additionally, reference to high school qualifications was removed from the list of options.

Question 12

Subjects understood that the question was asking for information about the different delivery methods and the places and ways in which training and assessment are conducted. However,

there was some uncertainty about the distinction between 'computer-assisted delivery (eg: online delivery)' and 'external/distance education'. For example, two subjects reported that their organisations deliver much of their training via computers onsite in computer labs but do not offer distance education. One categorised this as 'face-to-face in your own organisation' while the other categorised it as 'computer-assisted delivery'. There was also some confusion as to whether 'a mix of the above (mixed mode)' referred to a mix of all three or simply two of the previous options. Apart from these issues, subjects indicated that the question is relatively straightforward to answer and suggested that almost any staff member in the organisation should be able to answer it with a fair degree of confidence. In revising this question, the reference to mixed mode delivery was removed, the term 'computer assisted was amended and the term 'distance education' defined.

Question 13

The difficulties associated with answering this question related to the need for the subject to make a judgement about the main reason. One subject reported that the organisation did not collect data about these issues so that the answer given is based purely on anecdotal information and personal observations and may not necessarily be accurate. Another subject said that he would not feel comfortable answering this question in its current format as he believed that all of the reasons applied and to single out one reason would provide an incomplete picture of his organisation. In his view, the question would be more appealing to private providers generally if respondents were asked to rank the reasons thereby giving them the opportunity to promote their key selling points. Finally, subjects highlighted the importance of the 'right' person answering this question to ensure some degree of accuracy in the answer – that is, a person with a good understanding of the organisation and the market it caters to. One the basis of this feedback the question was discarded from the final version of the interview schedule.

Question 14

Subjects interpreted this question as asking did your organisation deliver nationally accredited programs offshore According to one subject, use of the word 'offer' could be misleading. He pointed out that in a sense his organisation did 'offer' nationally accredited programs offshore as they promoted their programs throughout the world but they did not 'deliver' offshore as students came to Australia to undertake training. Another subject commented on the value of this question particularly as no follow-up information is sought if a respondent gives an affirmative answer. The question was subsequently amended to read 'Did your organisation deliver nationally accredited programs off-shore in 2003?

Question 15

All subjects agreed that the answer to this question would be obtained fairly easily by accessing payroll records. However, there was some uncertainty about which staff the question refers to. Subjects also noted that in some smaller organisations with less sophisticated payroll systems and possibly with staff employed largely on a casual basis and a high turnover rate then payroll records may not capture this information so clearly. In addition, one subject proposed that some organisations, particularly those that only employ casual staff, could be sensitive to requests for this information. In his view, it would be very important to reassure respondents of the confidentiality guarantee associated with the research. One subject suggested use of the categories permanent full-time, permanent part-time, sessional [i.e.: engaged on contract for a specific period of time]. In his view, 'casual' was not an appropriate term for the group of staff employed on a contract/sessional basis and defining casual on the basis of sick pay/holiday pay is not a good differentiator. It would seem that some subjects interpreted the question which asks for the approximate numbers of staff employed in 2003 as an instruction to select a specific date at random in 2003 and find out staff numbers via the payroll system on that particular day. Once again, the use of 'approximately' was questioned by one subject who was unsure of how accurate

the answer needed to be. In the final document this question was revised to ask for details of staff members directly involved in training.

Question 16

Some subjects found this question difficult to answer because they had problems with understanding the question and some of the terms used. Comments included: '*I don't know what this means because different staff do different things.*' Further probing indicated that the subject had a sound knowledge of the services offered by the organisation but was '*not sure where things fit*' eg: counselling, extra tuition, language support, financial advice, social activities for students. According to another subject the question is 'fairly vague' particularly in regard to the term 'learner support services' and what it incorporates. Similarly there was uncertainty about the 'assessment services only'. One the basis of this feedback, this question was discarded.

Question 17

Subjects indicated that the question seeks a summary of services provided for students. These services support and supplement the training programs offered by providers. All subjects believed that this is basic knowledge which they possess due to their position in the organisation and all were very sure of their answer.

Question 18

Subjects understood the terms 'promoters' and 'inhibitors'. 'Promoters' were described as supporters or contributors of growth while 'inhibitors' prevented or detracted from growth. Subjects generally had to think for some time before giving an answer. One subject was unsure of what sort of growth the question is interested. This lack of clarity meant that it was difficult to give a definitive answer as she believed that some factors could be ranked as both a promoter and an inhibitor. Other subjects pointed out that due to the diversity of factors listed in the question, only a person with a sound understanding of the organisation (eg: director, chief executive) would be able to provide an answer. In each case, subjects were reasonably sure of their answers but each qualified this by saying that it is personal opinion, highly subjective and based on anecdotal evidence only. No revisions were made to this question.

First stage of the survey

Once the cognitive interviews were undertaken, the interview schedule and primary approach letter were revised and the first stage of the survey undertaken (see Appendices E and F).

In addition to testing the revised questions, the purpose of the first stage of the survey was to obtain empirical data relating to the response burden the research might create for respondents. To this end, four questions were added to the revised instrument, seeking specific details about the difficulty respondents encountered in collecting data in preparation for their interview and the amount of time this process took to complete. The survey was converted to CATI format by the Marketing Science Centre of the University of South Australia who conducted the interviews.

A random sample of 150 private training providers was selected from the customised database assembled for the project. The sample of private training providers was stratified by provider type (see Table 8).

Table 8: Sample of registered training organisations

Type of registered training organisation	Frequency	Percent
Adult /community provider	21	14.0
Commercial training organisation	66	44.0
Enterprise-based organisation	10	6.7
Industry organisation	42	28.0
Other	12	7.3
Total	150	100.0

The primary approach letter (Appendix F) was sent to the selected providers seven working days prior the data collection. Data collection for this first stage occurred over eight working days.

During the first stage of the survey:

✧ 41 interviews were completed (see Table 9)

✧ 28 were not able to be contacted (no answers from 9 providers (after three call backs), 17 were not in service, and 2 were a fax/modem number)

  81 were contacted, but 36 refused to participate, 3 were no longer an RTO or the RTO was no longer in business, 5 terminated the interview part way through the process, and 37 requested call backs outside the tight pilot timeframe of eight days.

Table 9: Respondents to first stage of the survey

	Frequency	Percent
1-Adult/community provider	13	31.7
2-Enterprise-based organisation	4	9.8
3-Industry organisation	6	14.6
4-Commercial Training organisation	17	41.5
Other- please specify	1	2.4
Total	41	100.0

Estimates of response burden

Eighty percent of respondents did not find the questions contained in the survey difficult to answer (Table 10)

Table 10: Respondents who found difficulty in answering questions

	Frequency	Percent
Yes	8	19.5
No	33	80.5
Total	41	100.0

Of those that expressed some difficulty, one respondent stated they did not understand the question(s); one said they did not have the information that they needed at the time of the interview and one reported they did not have the information needed to answer the question. Other reasons for difficulties included belief that organisation was unique / different / not like TAFE (to which it was believed the questions were geared) the need for more time to come up with a response and the belief that the questions were too complex to answer.

Respondents estimated that it took between zero and 45 minutes to assemble information needed for the interview process (mean = 15 minutes) – see Table 11.

Table 11: Estimate of time taken to assemble information for survey

	Frequency	Percent
0	1	2.4
1	2	4.9
5	9	22.0
7	1	2.4
10	11	26.8
12	1	2.4
15	4	9.8
20	2	4.9
30	7	17.1
35	1	2.4
45	2	4.9
Total	41	100.0

Only a small percentage of respondents (two percent) found the information required for the survey difficult to locate (Table 12).

Table 12: Estimate of difficulty in locating information for survey

	Frequency	Percent
Difficult	1	2.4
Neither Difficult nor Easy	1	2.4
Easy	26	63.4
Very Easy	13	31.7
Total	41	100.0

The mean time for completing the telephone interview was 13 minutes (range 5 minutes – 33 minutes).

On the basis of these outcomes, permission was granted by the Statistical Clearing House for the second stage of the survey to proceed.

Second stage of the survey

The second stage of the survey was conducted by the Marketing Science Centre during the period 25 October to 19 November 2004 in the same way as the first stage. Estimating from the response rates achieved in the first stage, 909 providers were selected at random from the NTIS database to be contacted during the survey period. Primary approach letters were sent to these providers prior to the interview period, and in response to these letters, 17 contacted the researchers and asked not to be contacted to participate in the interview.

Response rate

Table 13 sets out the record of calls during both stages of the survey.

Table 13: Record of calls from both stages of the survey

Result of call	First stage – number of calls	Second stage – number of calls	Totals
Completed interviews	41	289	330
Not able to be contacted:			
• no response after three call backs	9	183	192
• wrong number		68	68
• not in service	17	17	34
• fax/modem number	2	9	11
Contacted:			
• Refused	36	281	317
• No longer an RTO / RTO no longer in business	3	25	28
• Do not have any students		3	3
• Do not offer any VET		14	14
• Have not delivered any training		1	1
• Requested interview outside of fieldwork timeframe	37	1	38
• Interview terminated part way through	5	1	6
• Declined to participate in writing before fieldwork commenced		17	17
TOTAL	150	909	1,049

The total number of organisations telephoned was 1,059. Of these, 130 (12.3%) were defunct (no longer an RTO / out of business, wrong number or not in service). This is a conservative calculation, as it makes the assumption that all other cases, including all those not even able to be contacted after three call-backs, were 'live' cases. Thus, within the telephoned sample of 1,059, the actual number of 'live' providers was 929. The number of interviews completed was 330, making a response rate of **35.5%**. This figure is very similar to Anderson's response rate of 32.6% for his national survey of private providers in late 2001 (Anderson, in press, p. 5).

The number of interviews fell 13 short of the calculated sample required for the study. Given time and budget constraints, it was decided not to pursue these outstanding interviews. The 330 completed interviews results in a sampling error at the 95% confidence interval for proportional questions of between +/- 1.1% and +/- 4.5%.

A further 178 providers, while declining to participate in the full interview, were willing to answer three questions for statistical purposes, on whether they were currently registered, their provider type and number of States/territories in which they delivered nationally accredited training (see Appendix G).

Method of calculating 'live' organisations in the population

The breakdown by size of the total population of private registered training organisations in Australia is not known. Therefore, the only possible way that this study could account for size was to use provider type. The mean number of students (both fulltime and part-time) in each provider type in the sample was calculated, then multiplied by the numbers of those types of provider considered to be 'live' in the population.

There were 130 (12.3%) defunct organisations in the telephoned sample: 12 (9.2%) adult/community providers, 3 (2.3%) enterprise-based organisations, 42 (32.3%) industry organisations, 67 (51.15) commercial training organisations and six (4.6%) other organisation types.

Assuming that 12.3% of the population would be defunct, and that the proportions of organisational types holds consistently across the population, we could expect that there would be 384 defunct organisations, comprising: 35 adult/ community providers, nine enterprise-based organisations, 124 industry organisations, 198 commercial training organisations and 18 other organisation types.

Thus, the 'live' population of private RTOs is estimated to be 2,743:

- 395 adult/ community providers

- 199 enterprise-based organisations

- 752 industry organisations

- 1,173 commercial training organisations, and

- 224 other organisation types.

These figures are used in the report when estimating the training activity of all private registered training organisations in Australia.

Limitations

This sample, in comparison with the total population of private providers, was over-represented in adult/community providers and enterprise-based organisations, and under-represented in commercial training organisations and industry organisations. The findings, therefore, need to be treated with caution not only because of the study's limitations mentioned earlier in this report, but also because of any potential bias that these over- and under-representations may cause. For example, that the sample was over-represented in adult/community providers and enterprise-based organisations could potentially mean that the following aspects may be accentuated:

- the small organisation picture (adult/community providers had the fewest students)

- the proportion of part-time students (enterprise-based organisations had the most part-time students)

- the proportion receiving government funding (more adult/community providers and enterprise-based organisations reported government funding)

- the percentage delivering in only one State/Territory (almost all adult/community providers offered programs in one State/Territory)

- the numbers of staff (enterprise-based organisations had by far largest staffing – though this could be to an extent counter-balanced by adult/community providers having small numbers of staff)

- the extent of services for students (adult/community providers provided most services more that the other provider types)

Similarly, the quantum of offshore activity may be underplayed because industry organisations and commercial training organisations (under-represented in the sample) provided most of it.

Appendix C: First draft of interview schedule

SECTION A

This first section of the survey asks for some information about your organisation.

1.

Are you <u>currently registered</u> as a training organisation that is able to deliver nationally accredited vocational education and training? *[Explain if necessary: By nationally accredited training, we mean training that leads to either a qualification that is recognised as part of the Australian Qualifications Framework or completion of a course that is registered as part of the national framework.]*

Yes: _____   No: _____

[If not currently registered, end the interview]

2.

Is your organisation also registered as:

	No	Yes
a higher education institution?		
a school?		

3.

What is the <u>main reason</u> for your organisation being registered as a training organisation that is able to deliver nationally accredited vocational education and training?

	Main reason (please tick one only)
To give credibility to your training activities	
To access government funds	
To keep up with government policies	
Other reason (please record)	

....

4.

Which one of the following descriptions best fits your organisation?

Please tick one

Adult / community provider
Enterprise-based organisation
Industry organisation
Commercial training organisation
Other (please record their description) :
....

5.

Approximately how many Australian students [that is, excluding those who are studying here on a student visa] were enrolled with your organisation in 2003?

_____ students

6.

Approximately how many of these Australian students were enrolled in:

	Numbers of students
nationally accredited programs?	
non-accredited programs? [that is, not leading to a nationally accredited VET qualification]	

7.

In the nationally-accredited programs, approximately how many students were in programs:

	Number of students
funded by government sources?	
funded by non-government sources?	

SECTION B

In this section of the survey, we are interested in the courses that your organisation offered in Australia in 2003 to Australian students (that is, students not here on a student visa).

8.

In which States/Territories did your organisation deliver nationally accredited training in 2003?

Indicate which location had the <u>most</u> activity.

	Yes (tick ones that apply)	Most activity (tick one)
ACT		
NSW		
NT		
Queensland		
SA		
Tasmania		
Victoria		
WA		

9.

For which three main industries (or occupations) did your organisation provide nationally accredited training in 2003?

	Serviced (tick up to three)
Accommodation, cafes and restaurants	
Communication Services	
Construction	
Cultural and recreational services	
Education	
Electricity, gas and water supply	
Finance and Insurance	
Government Admin. and Defence	
Health and Community Services	
Manufacturing	
Mining	
Personal and other services	
Property and Business Services	
Retail trade	
Transport and Storage	
Wholesale trade	

10.

Approximately how many students were <u>enrolled</u> in each of the following types of national qualifications with your organisation in 2003?

	Approx. nos. of students
Secondary school qualification	
Certificate I	
Certificate II	
Certificate III	
Certificate IV	
Diploma	
Advanced Diploma	

11.

Approximately how many students <u>completed</u> each of the following types of qualifications with your organisation in 2003?

Qualification type / level	Approx. nos. of students
Secondary school qualification	
Certificate I	
Certificate II	
Certificate III	
Certificate IV	
Diploma	
Advanced Diploma	

12.

How is training and assessment for nationally accredited programs provided by your organisation? *(tick ones that apply)*

Mode of training service	Yes Training	Yes Assessment
Face-to-face in your own organisation		
Face-to-face in a training room(s) in industry / other companies		
On-the-job in workplaces		
A mix of the above (mixed mode)		
Computer-assisted delivery (e.g. online delivery)		
External/distance education		
In another way (please record):		

……………………………………………………………..

13.

In your opinion, what is the <u>main reason</u> why students choose to do nationally accredited training with your organisation?

Possible reasons for completing courses with your organisation	Yes
	(tick one)
Financial value for money	
Small size of organisation	
Care/attention given by the organisation	
Perceived independence of the organisation	
Perceived advantage in getting a job on completion	
Articulation arrangements with universities	
Other reason (please record):	
....	

14.

Did your organisation offer nationally accredited programs <u>off-shore</u> in 2003?

Yes: _____   No: _____

SECTION C

15.

What were the approx. numbers of full-time, part-time and casual staff employed in your organisation in 2003?

Category of staff	Approx. numbers in 2003
full-time	
part-time	
Casual (i.e. employed on an hourly basis; not entitled to sick pay or paid holidays)	
Total:	

16.

Which of the following services were provided by your staff in 2003?

Services	Yes
	(tick ones that apply)
Training services only	
Assessment services only	
Training <u>and</u> assessment services	
Learner support services	
Other service (please record):	
....	

17.

What services does your organisation provide for students who are completing nationally accredited training with your organisation?

Service for students	Yes (tick ones that apply)
Career counselling / career placement	
Assistance on fees concerns	
Study assistance	
Specific assistance for Indigenous students	
*specify: …………………………………………	
Personal counselling	
Academic counselling	
Library facilities	
Access to computer facilities	
Access to a study space	
Accommodation services	
Other service (please record):	
………………………………………………………	

18.

How strong are the following factors as either <u>promoters</u> or <u>inhibitors</u> of growth in your registered training organisation?

Factor	Strong promoter of growth	Promoter of growth	No real effect	Inhibitor of growth	Strong inhibitor of growth
Absence of HECS for private students [Higher Education Contribution Scheme]	5	4	3	2	1
Requirements of Training Packages	5	4	3	2	1
Requirements of the AQTF (e.g. entails an audit) [Australian Quality Training Framework]	5	4	3	2	1
Requirements of New Apprenticeships	5	4	3	2	1
State / Territory course accreditation processes	5	4	3	2	1
Competition from TAFE providers	5	4	3	2	1
Competition from on-line training providers	5	4	3	2	1
Lack of recognition by overseas countries of Australian pre-university qualifications	5	4	3	2	1
Any other important factors? (please record):	5	4	3	2	1
……………………………………					
……………………………………					

Thank you for your participation in this survey.

Conclude interview

Appendix D: Cognitive testing protocol

Introduction

Thank respondent for being willing to assist us in the development of the survey

Purpose of this interview is to learn about any problems they believe might be encountered in answering the questions

Emphasise that it is the instrument (not the respondent) that is being tested

Ask if they have any questions before proceeding

[Tape recorder]

Remind respondent about the process to be used in the conduct of the survey

Letter will arrive

Organisation will be contacted by Marketing Science Centre to collect data within a given time frame (usually a three day period up to one week after the letter has arrived)

When the Marketing Science Centre rings, the interviewer will check that the respondent has the available information and then proceed with the interview

Information letter

Let's turn first to the information letter

If a letter like this came into your organisation, who would get it? Would they be the person that would be able to provide the answers to the questions? If no, who would they pass it onto? How might the wording in the letter be changed to ensure that it gets to the person who would be able to provide this information when the telephone interviewer calls?

Who in your organisation is the person most likely to be able to supply the answers to the questions?

In relation to the dot points seeking information – are there any that you are not sure what they mean?

Are annual reports the place where a person would look for the sort of information that is required for the interview? If no, where would people look?

How long do you think it would take a person in your organisation to assemble the information listed in the letter and have it ready for the telephone interview?

Is there anything in the information letter that you were not sure about?

Interview schedule

What does the term 'private training provider' mean to you?

What does the term 'nationally accredited vocational education and training' mean to you?

Question 2

What do you understand by the term 'higher education institution'?

Question 3

It is hard to think of the main reason?

How much have you thought about the reasons why your organisation is registered to provide nationally accredited training?

Question 4

How easy was it to pick one description for your organisation?

Questions 5 and 6

How difficult would it be for you to answer these questions?

Question 7

What does the term 'non-government sources' mean to you?

How would you get the answer for this question?

Question 8

In your own words what is this question asking?

How sure would you be of your answer?

Question 9

How hard would this question be to answer?

How sure would you be of your answer?

Question 10 and 11

In your own words what are these two questions asking you to provide?

How hard are these two questions to answer?

How sure would you be of your answers?

Question 12

In your own words what is this question asking you to provide?

How easy would it be for you to answer?

How sure would you be of your answer?

Question 13

How easy would it be for you to answer?

How sure would you be of your answer?

Question 14

In your own words what is this question asking?

Question 15

How would you get the answer to this question?

How sure would you be of your answer?

Is it difficult to answer this question?

Question 16

How would you get the answer to this question?

How sure would you be of your answer?

Question 17

In your own words what is this question asking you to provide?

How would you get the answer to this question?

How sure would you be of your answer?

Question 18

What do you understand by the terms 'promoters' and 'inhibitors'

How difficult would this question be for you to answer?

How sure would you be of your answers?

SURVEY ON PRIVATE TRAINING PROVIDERS IN AUSTRALIA

I am writing to ask your help with a survey on private training providers conducted by the University of South Australia. This survey will collect important information about what private training organisations do and the contribution that they are making to the development of the Australian workforce. This information is needed to find out more about the contribution that private training providers make to the overall vocational education and training effort in Australia. Your co-operation is vital to the success of this survey.

Your Part in the Survey

An interviewer from the Marketing Science Centre of the University of South Australia will call you sometime over the two week period from …….. to ……… and invite you (or a representative from your organisation) to participate in a telephone interview which will take about 15 minutes to complete. During this interview, you will be asked to provide the following information:

✧ numbers of full time, part time and casual staff you have employed in your organisation in 2003

✧ services provided by these staff (training only, assessment only, training and assessment services, learner support)

✧ numbers of Australian students (excluding those who are studying here on student visas) enrolled in 2003

✧ numbers of students enrolled in nationally accredited and on accredited programs in 2003

✧ numbers of students in programs funded from government and non-government sources

✧ numbers of students enrolled in the different types of national qualifications (secondary school certificate, Certificates I, II, III, IV, Diploma and Advanced Diploma)

✧ numbers of student completions for these various qualifications in 2003

✧ states / territories in which you are registered to provide nationally accredited training

✧ the three main industries / occupations for which you provide nationally accredited training

✧ the ways in which your organisation provides this training

✧ the support services that you provide to students; and

✧ your opinions on what inhibits and promotes the growth of your organisation

In preparation for the interview we would urge you to collect any documents such as your annual report from 2003; and / or information that you provided to State / Territory Training Authorities in 2003 which you might need to refer to during the interview. Additionally, you might also find it helpful to alert your staff to the survey and when the interview will be taking place so that they are able to locate you or the most appropriate person to talk to. Usually the most appropriate person will be someone who is familiar with reporting your nationally accredited training activity to state / territory training authority. Undertaking this form of preparation will shorten the interview.

Guarantee of confidentiality

The answers that you provide will be treated confidentially. At no time will you be identified and any personal details you provide during the course of your participation will remain confidential. No information will be used in a way that would enable an individual or private training organisation to be identified. All data collected during the study will be retained by the Centre for Research in Education and Work and will be securely stored for a period of seven years.

Further information

If you wish to enquire further about this survey, please telephone me on (08) 8302 6427 and I will be glad to assist you. I look forward to your cooperation in this important survey.

Yours faithfully

Dr Michele Simons

Centre for Research in Education, Equity and Work

Appendix E: Interview schedule used in the study

Interview schedule for telephone survey

Hello, my name is .... from the Marketing Science Centre, University of South Australia. I am following up on some information that you were sent about a survey we are conducting about private training providers who are registered to provide vocational education and training in Australia. Can you please put me through to the person who might be able to assist up with completing this survey?

Reintroduce if necessary

Hello, my name is .... from the Marketing Science Centre, University of South Australia. Today, we are conducting a survey about private training providers who are registered to provide vocational education and training in Australia. You would have received some information in the post about this survey and I am following up to find out if you would be able to assist us by participating in this survey. The survey is being funded by a grant from the National Research and Evaluation Committee which is a subcommittee of the Australian National Training Authority. The findings of this study will add to present knowledge about what contribution private training providers are making to the overall level of vocational education and training provided in Australia. What we are asking you to do is provide us with some details on estimates of the numbers of Australian students (that is, those not on a student visa), staff numbers and some general information about sources and levels of funding that you receive. You will therefore need to have some information at hand as you answer the questions (for example, extracts from your student and staff records and / or reports to your State/Territory Training Authority).

Information obtained as part of this survey will be published. However, at no time will your organisation be identified and any personal details that you provide during the course of your participation will remain confidential. Participation in the project is voluntary, and you have the right to withdraw your consent at any time during the interview. If you consent to participate in the study, we will provide you with a brief summary of the outcomes of the survey for your information when it is completed.

The survey should only take fifteen minutes. Can I begin, or would you rather I call back some other time?

Checklist:

1. Yes

2. Not available – end, and record call back details

3. No do not offer vocational education and training courses – cancel interview

4. Not a private training provider – cancel interview

5. Refused to participate – cancel interview, but ask following questions (to assist in determining non-response bias)

If declined to participate …

Before you go, can I ask a couple of details about your organisation for our sampling purposes?

(a) Are you currently registered as a training organisation that is able to deliver nationally accredited vocational education and training? *[Explain if necessary: By nationally accredited training, we mean training that leads to either a qualification that is recognised as part of the Australian Qualifications Framework or completion of a course that is registered as part of the national framework.]*

Yes: _____   No: _____

[If 'no', end the interview]

(b) Which one of the following descriptions best fits your organisation?

Please tick one

Adult / community provider

Enterprise-based organisation

Industry organisation

Commercial training organisation

Other (please record their description) :

....

(c) In how many States/Territories in Australia did your organisation deliver nationally accredited training in 2003? (please circle)

1   2   3   4   5   6   7   All

Interviewer to record:

State / Territory: _____

SECTION A

This first section of the survey asks for some information about your organisation.

1.

Are you <u>currently registered</u> as a training organisation that is able to deliver nationally accredited vocational education and training? *[Explain if necessary: By nationally accredited training, we mean training that leads to either a qualification that is recognised as part of the Australian Qualifications Framework or completion of a course that is registered as part of the national framework.]*

Yes: _____   No: _____

[If not currently registered, end the interview]

2.

Is your organisation also registered as:

	No	Yes
a higher education institution?		
a school?		

3.

Which one of the following descriptions best fits your organisation? (*Read accompanying definitions if needed*).

	Please tick one
Adult / community provider (a provider who identifies with the adult and community education sector and who has a primary focus on education and training)	
Enterprise-based organisation (a training centre within an enterprise whose prime business focus is an industry other than education and training)	
Industry organisation (an industry-sponsored training centre)	
Commercial training organisation	
Other (please record their description) :	
....	

4.

<u>How many Australian students</u> [that is, students who hold Australian citizenship] were enrolled with your organisation during the period January – December 2003?

_____ full time students

_____ part time students

5.

How many of these students were enrolled in the following types of courses for the period January – December 2003?

	Numbers of students
nationally <u>accredited</u> programs	
<u>non-accredited</u> programs [that is, not leading to a nationally accredited VET qualification]	

6.

In the nationally-accredited programs, how many Australian students were in programs that were:

	Number of students
funded by <u>government</u> sources (for example traineeships and apprenticeships)?	
funded by <u>non-government</u> sources?	
self-funded?	

SECTION B

In this section of the survey, we are interested in the courses that your organisation offered in Australia in 2003 to Australian students (that is, students who hold Australian citizenship) between January and December 2003.

7.

In which States/Territories did your organisation deliver nationally accredited training in 2003?

Indicate which location had the <u>most</u> activity.

	Yes (tick ones that apply)	Most activity (tick one)
ACT		
NSW		
NT		
Queensland		
SA		
Tasmania		
Victoria		
WA		

8.

In which three main fields of education did your organisation provide nationally accredited training in 2003?

	Serviced (tick up to three)
Natural & Physical Science	
Information Technology	
Engineering & Related Technologies	
Architecture & Building	
Agriculture, Environmental & Related Studies	
Health	
Education	
Management & Commerce	
Society & Culture	
Creative Arts	
Food, Hospitality, Personal	
Mixed Field Programmes	

9.

How many Australian students <u>completed</u> each of the following types of qualifications with your organisation during the period January – December 2003?

Qualification type / level	Approx. nos. of students
Certificate I	
Certificate II	
Certificate III	
Certificate IV	
Diploma	
Advanced Diploma	

10.

How is training and assessment for nationally accredited programs provided by your organisation? *(tick ones that apply)*

Mode of training service	Yes Training	Yes Assessment
Face-to-face in your own organisation		
Face-to-face in a training room(s) in industry / other companies		
On-the-job in workplaces		
Using online methods with students who are <u>external</u> to your organisation		
Distance education (using printed study materials)		
In another way (please record):		
……………………………………………………………..		

11.

Did your organisation deliver nationally accredited programs <u>off-shore</u> in 2003?

Yes: _____ No: _____

SECTION C

12.

What were the numbers of full-time, part-time and casual staff employed to deliver training / provide assessment services in your organisation during the period January – December 2003?

Category of staff	Numbers in 2003
full-time	
part-time	
Casual (i.e. employed on an hourly basis; not entitled to sick pay or paid holidays)	
Total:	

13.

What services does your organisation provide for students who are completing nationally accredited training with your organisation?

Service for students	Yes (tick ones that apply)
Career counselling / career placement	
Assistance on fees concerns	
Study assistance	
Specific assistance for Indigenous students *specify:	
Personal counselling	
Academic counselling	
Library facilities	
Access to computer facilities	
Access to a study space	
Accommodation services	
Other service (please record):	

14.

How strong are the following factors as either <u>promoters</u> or <u>inhibitors</u> of growth in your registered training organisation?

Factor	Strong promoter of growth	Promoter of growth	No real effect	Inhibitor of growth	Strong inhibitor of growth
Absence of HECS for private students [Higher Education Contribution Scheme]	5	4	3	2	1
Requirements of Training Packages	5	4	3	2	1
Requirements of the AQTF (e.g. entails an audit) [Australian Quality Training Framework]	5	4	3	2	1
Requirements of New Apprenticeships	5	4	3	2	1
State / Territory course accreditation processes	5	4	3	2	1
Competition from TAFE providers	5	4	3	2	1
Competition from on-line training providers	5	4	3	2	1
Lack of recognition by overseas countries of Australian pre-university qualifications	5	4	3	2	1
Any other important factors? (please record):	5	4	3	2	1

…………………………………

…………………………………

15.

Before we complete the interview we would like to ask a couple of questions about how you found the process of participating in this survey.

a) Overall, did you find any of the questions difficult to answer?

_____ Yes   _____ No

b) What was the main cause of this difficulty?

_____   I did not understand the question(s)

_____   I didn't have the information I needed at the time of the interview

_____   I do not have the information needed to answer the question

c) Approximately how many minutes did it take you to assemble the information needed for this interview?

_____ minutes

d) How difficult was it for you to locate this information?

_____	Very difficult
_____	Difficult
_____	Neither difficult nor easy
_____	Easy
_____	Very easy

Thank you for your participation in this survey.

Conclude interview

Appendix F: Primary approach letter

To: The Director / Chief Executive Officer / Managing Director

Re: Survey on private training providers in Australia, sponsored by the National
        Centre for Vocational Education Research, and funded by the National VET Research
        and Evaluation Program of the Australian National Training Authority

_____

Dear Director / CEO,

I am writing to ask your help with an interview survey on private training providers conducted by the University of South Australia. The survey has the support of the National Centre for Vocational Education Research (see attached letter). It will collect important information on the training activities of private training organisations as they assist in the development of Australia's workforce. This information is needed to find out more about the valuable contribution that private training providers are making to the overall vocational education and training effort in Australia. Your co-operation is vital to the success of this survey – we have kept questions to a minimum.

Your part in the survey

An interviewer from the Marketing Science Centre at the University of South Australia will call you sometime over the two week period from …….. to ……… and invite you (or a representative from your organisation) to participate in a telephone interview which will take about 15 minutes to complete. During the interview, you will be asked to provide answers to the attached set of questions for the period January – December 2003.

In preparation for the interview, we would urge you to collect any documents – such as relevant extracts from your student and staff records and information that you provided to a State/Territory training authority in 2003 – to which you might need to refer during the interview. Additionally, you might also find it helpful to alert your staff to the survey and when the interview will be taking place, so that they are able to locate you or the most appropriate person to talk to when your organisation is phoned. The most appropriate person will be someone who is familiar with reporting your nationally accredited training activity to a State/Territory training authority. Undertaking this preparation will ensure that interview time is kept to a minimum.

Guarantee of confidentiality

The answers that you provide will be treated in the strictest confidence. At no time will you be identified and any personal details you provide during the course of your participation will remain confidential. No information will be used in a way that would enable an individual or provider to be identified. All data collected during the study will be retained by the Centre for Research in Education, Equity and Work for a period of seven years.

Further information

If you wish to enquire further about this survey, please telephone me on (08) 8302 6427 and I will be glad to assist you. Alternatively, further information on ethical issues in relation to this project can be obtained by contacting the Executive Officer of the Human Research Ethics Committee at the University of South Australia, Ms Vicki Allen on tel: (08) 302 3118, fax: (08) 8302 3921 or email: vicki.allen@unisa.edu.au

I look forward to your cooperation in this important survey, and strongly encourage you to participate so that the most complete set of data can be obtained.

Yours faithfully,

Dr Michele Simons

Centre for Research in Education, Equity and Work

University of South Australia

INTERVIEW QUESTIONS

1. How many (a) full time and (b) part-time Australian students [that is, students who hold Australian citizenship] were enrolled with your organisation during the period January – December 2003?

2. How many of these Australian students were enrolled in

   (a) nationally accredited programs of training

   (b) non-accredited programs (that is, not leading to a nationally accredited VET qualification) within your organisation during the period January – December 2003?

3. In the nationally-accredited programs, how many Australian students were in programs that were

   (a) funded by government sources (for example, traineeships and apprenticeships)? (b) self-funded? (c) funded by non-government sources?

4. In which States/Territories did your organisation deliver nationally accredited training in 2003 and which State/territory had the most activity?

5. What were the three main fields of study for which your organisation provided nationally accredited training in 2003? (Natural & Physical Science, Information Technology, Engineering & Related Technologies, Architecture & Building, Agriculture, Environmental & Related Studies, Health, Education, Management & Commerce, Society & Culture, Creative Arts, Food, Hospitality, Personal, Mixed Field Programmes)

6. How many Australian students completed each of the following types of qualifications with your organisation during the period January – December 2003: Certificate I, Certificate II, Certificate III, Certificate IV, Diploma, Advanced Diploma?

7. How is training and assessment for nationally accredited programs provided by your organisation? (Face-to-face in your own organization; Face-to-face in a training room(s) in industry / other companies; On-the-job in workplaces; Using online methods with students who are external to your organization; Distance education (using printed study materials); by other means)

8. Did your organisation deliver nationally accredited programs off-shore during 2003?

9. What were the numbers of (a) full-time, (b) part-time and (c) casual staff in your organisation employed to deliver training / provide assessment services during the period January – December 2003?

10. What services does your organisation provide for students who are completing nationally accredited training with your organisation? (Academic counselling; Access to a study space; Access to computer facilities; Accommodation services; Assistance on fees concerns; Career counselling / career placement; Library facilities; Personal counselling; Specific assistance for Indigenous students; Study assistance; Other services)

You will also be asked your opinion on what inhibits and what promotes the growth of your organisation, as well as a couple of questions for general background information about your organisation.

Appendix G: Non-participant organisational information

This first section of the survey elicited some basic information about the organisation from those organisations that did not participate in the survey, either as a result of being ineligible or refusal. They were invited to repond to three questions. This information was obtained to determine if those not participating (n=178) were particularly different from those participating (n=330).

Firstly, non-participants were asked whether they were currently registered as a training organisation that is able to offer nationally accredited vocational education and training (Table 14).

Table 14: Current registration as a training organisation, by provider type (non-participants)

	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total	
	(n=58)	(n=11)	(n=43)	(n=45)	n	%
	%	%	%	%		
Yes	90	73	93	91	154	87
No	9	27	7	9	23	13
Total	100	100	100	100	178	100%

Eighty seven percent of non-participants reported that they were currently a registered training organisation. EBOs (27%) had the highest proportion of non-registrants, compared with the other three provider types all below ten percent.

In comparison, all participants were currently registered as a training organisation.

Secondly, the non-participants were invited to classify themselves as one of the four types of private provider (Table 15).

Table 15: Self-classification by provider type (non-participants)

Type of provider	Total (non participants)		Total (participants)	
	n	%	n	%
Adult/community provider	58	33	84	25
Commercial training organisation	45	25	127	38
Industry organisation	43	24	64	19
Enterprise based organisation	11	6	42	13
Other	19	11	10	3
Total	178	100	330	100

ACP (33%) was by far the most common organisational type among those that did not participate in the survey, comprising one-third of this sample. CTOs and IOs each made up one-quarter of the non-participants, while the EBOs (only six percent) were the least common provider type.

In comparison with the participating sample, those not participating were more likely to be an ACP (33%, cf: 24%) and an IO (24%, cf: 19%), and less likely to be a CTO (25%, cf: 38%) or an EBO (6%, cf: 13%). Other responses included defence force, flying school, not-for-profit organisation/charity and government.

The third question to the non-participants inquired about the number of States/Territories their organisation had delivered nationally accredited training in during 2003 (Table 16).

Table 16: Number of States/Territories in which training was provided, by provider type (non-participants)

Number of States/Territories	Adult / community provider (n=58) %	Enterprise-based organisation (n=11) %	Industry organisation (n=43) %	Commercial training organisation (n=45) %	Total N (178)	%
One	83	45	56	56	113	63
Two	5	18	7	9	13	7
Three	2	18	5	16	12	7
Four			2	2	2	1
Five			5	2	4	2
Six			5	2	3	2
Seven				2	1	1
All			12	7	10	6
Total	100	100	100	100	178	100

Over 80% of adult/community providers provided training in only one State/Territory. In comparison, about one-half of the other three types of providers operated in a single State/Territory. Industry organisations and commercial training organisations were the only organisational types to operate in more than three states. Among the non-participants, adult/community providers operated in 1.1 states (cf: 1.1 among participants), enterprise-based organisations in 1.7 states (cf: 2.4), industry organisations 2.6 (cf: 1.9), commercial training organisations 2.3 (cf: 1.7) and, overall, organisations operated in 1.9 states (cf: 1.7).

In comparison with the participants, therefore, the non-participants operated as a whole in exactly the same number of States/Territories. Though the enterprise-based organisation non-participants operated less widely than their participating counterparts, and the other three provider types operated more widely, the differences were very small.

Appendix H: Further data

Other current registrations

Table 17: Reported current registrations of providers in addition to registration as a VET training provider

Also registered as a	Adult / community provider (n=84)	Enterprise-based organisation (n=42)	Industry organisation (n=64)	Commercial training organisation (n=127)	Other (n=10)	Total (N=330)
higher education institution	7	1	3	7	2	20
school	5			2		7

Students enrolled in the organisations

Table 18: Distribution of fulltime and part-time students, by provider size

Numbers of students reported by organisations, clustered for presentation	Fulltime students		Part-time students	
	Number of organisations	Total number of students	Number of organisations	Total number of students
No students enrolled	144	-	70	-
10 or less	18	127	27	140
11-20	13	205	24	380
21 -30	13	472	14	383
31-40	12	466	5	179
41-50	3	138	12	576
51-60	9	503	8	461
61-70	6	408	3	195
71-80	8	630	2	144
81-90	2	175	8	664
91-100	8	763	8	796
101-200	29	4510	39	6031
201-300	14	3831	13	3454
301-400	6	2262	10	3473
401-500	7	3327	10	4800
501-1000	10	7235	17	12010
1001-5000	11	22389	34	75684
>5000	1	9000	9*	65032
Totals	**170**	**56441**	**243**	**174,402***

* Note: This figure excludes one outlier

Table 19: Distribution of fulltime students by provider type

Numbers of fulltime students	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Other	Total organisations	
						N	%
1-20	10	2	7	10	1	30	17.8
21-50	11	3	4	8	3	29	17.2
51-100	10	4	9	10		33	19.5
101-200	7	3	4	13	1	28	16.6
201-300	2	3	3	6		14	8.3
301-500		2	4	6	1	13	7.7
501 - 1000	3	2	2	3		10	5.9
>1000	1	2	4	4	1	12	7.1
missing						1	-
Totals	44	21	37	60	7	170	100

Table 20: Distribution of part-time students by provider type

Numbers of part-time students	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Other	Total organisations	
						n	%
1-20	19	4	8	16	2	49	20.4
21-50	6	6	5	13	1	31	12.9
51-100	7	2	6	13	1	29	12.1
101-200	10	6	7	15	1	39	16.3
201-300		3		10		13	5.4
301-500	4	4	4	8		20	8.3
501-1000	6	1	5	6		18	7.5
>1000	13	4	6	17	1	41	17.1
missing						3	-
Totals	80	41	59	121	9	310	100

Table 21: Enrolment status of students in 2003 by provider type

Enrolment status	Adult/community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Full-time students only	14	11	18	20	63
Part-time students only	37	20	22	59	138
Full- and part-time students	28	10	18	38	94
Total	**79**	**41**	**58**	**117**	**295**

Table 22: Mean numbers of enrolled Australian students in 2003, by provider type

Provider type	Numbers of organisations	Mean number of fulltime students	Mean number of part-time students
Adult/community provider	84	92	564
Enterprise-based organisations	42	237	683
Industry organisations	64	330	569
Commercial training organisations	127	146	487
Total	**317**	**179**	**557**

Students enrolled in nationally accredited and non-accredited programs

Table 23: Students enrolled in nationally accredited programs, by provider size

Students in nationally accredited programs	Number of organisations	Total number of students
Enrolled no students	11	
20 or less	31	315
21-50	44	3211
51-100	56	4315
101-200	51	7990
201-500	60	19667
501-1000	26	18591
1001-5000	42	90657
>5000	3	25693
Missing data	5	
Totals	**329**	**170,439**

Table 24: Students enrolled in non-accredited programs, by provider size

Students in non-accredited programs	Number of organisations	Total number of students
Enrolled no students	210	
20 or less	14	164
21 -100	39	2012
101-500	27	8231
501-1000	9	6064
>1000	20	51874
Missing data	10	
Totals	**329**	**68,345**

Table 25: Mean numbers of students enrolled in nationally accredited and non-accredited programs, by provider type

Provider type	Number of organisations	Nationally accredited programs		Non-accredited programs	
		Mean numbers of students	Std Dev	Mean numbers of students	Std Dev
Adult/community providers	84	372	812	274	810
Enterprise-based organisations	42	816	2233	116	418
Industry organisations	64	506	957	369	1205
Commercial training organisations	127	510	819	155	535
Total	**317**	**521**	**1148**	**221**	**767**

Funding sources for Australian students enrolled in nationally accredited programs in 2003

Table 26: Sources of funding for nationally accredited programs

Funding sources	Numbers of organisations	Percent
Government funded only	76	25.4
Non-government funded only	28	9.4
Self-funded only	72	24.1
Government and non-government funded	24	8.0
Government-and self-funded	59	19.7
Non-government and self-funded	12	4.0
All three sources of funding	28	9.4
Missing	31	-
Total	**330**	**100**

A chi-square test revealed a significant relationship between type of funding source and type of training provider (χ^2 (18) =63.575, $\varrho < 0.000$). The observed frequencies are shown in the following table.

Table 27: Funding source for nationally accredited programs by provider type

Funding sources	Adult/ community providers	Enterprise-based organisations	Industry organisations	Commercial training organisations	Total
Government funded only	31	12	14	17	74
Non government funded only	2	11	7	7	27
Self-funded only	21	3	16	28	68
Government and non-government funded	2	3	2	17	24
Government and self-funded	17	9	12	19	57
Non government and self-funded	-	1	2	9	12
All three sources of funding	6	1	2	17	26
Total	79	40	55	114	288

Table 28: Funding source by type of program

Funding source	Offered nationally accredited programs only	Offered non accredited programs only	Offered both nationally accredited and non accredited programs	Total
Government funded only	54	1	21	76
Non government funded only	18	2	7	27
Self funded only	50	1	19	70
Government and non government funded	16	1	7	24
Government and self funded	39	0	19	58
Non government and self government	8	0	4	12
All three sources of funding	14	0	14	28
Total	**199**	**5**	**91**	**295**

Table 29: Mean numbers of students in nationally accredited programs in private registered training organisations, by funding source

	Adult/ community providers	Enterprise-based organisations	Industry organisations	Commercial training organisations	Other*	Total Students*	Percent-age
Mean number of students government-funded in the sample RTOs	175	476	178	139	77	61,168	38.4
Mean number of students non-government-funded in the sample RTOs	24	290	108	138	47	36,708	23.0
Mean number of students self-funded in the sample RTOs	145	89	278	246	137	61,607	38.6
Total number of students in sample RTOs (reported in item about funding source)	27,475	34,279	32,325	63,126	2,078	159,483	100

* excludes one outlier

States/Territories in which nationally accredited training was delivered

Table 30: Numbers of States/Territories in which nationally accredited training was delivered, by provider type

Number of States/Territories in which training is delivered	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Missing	Total	Percentage
1	79	25	41	89	8	242	74.5
2	2	6	6	18	2	34	10.5
3	1		6	4	1	12	3.7
4		2	2	6		10	3.1
5	1	2	4	4	1	12	3.7
6		1	1	2		4	1.2
7		1	1			2	0.6
8		4	1	3	1	9	2.8
Missing	1	1	2	1		5	
Total	**84**	**42**	**64**	**127**	**13**	**330**	**100**

Table 31: Numbers of States/Territories in which nationally accredited training was delivered, by provider type

Number of States/Territories in which providers operate	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
1	79	25	41	89	234
2	2	6	6	18	32
3 or more	2	10	15	19	46
Total	**83**	**41**	**62**	**126**	**312**

Table 32: States/Territories in which nationally accredited training was delivered, by provider type

State/Territory	Adult/ community provider (n=84) %	Enterprise-based organisation (n=42) %	Industry organisation (n=64) %	Commercial training organisation (n=127) %	Total N (317)	%
Victoria	44	45	41	46	145	44
Queensland	18	33	39	32	101	31
New South Wales	12	31	30	25	78	24
Western Australia	14	38	25	24	77	23
South Australia	8	36	25	17	64	19
Tasmania	4	17	13	11	35	11
Northern Territory	6	21	8	9	33	10
Australian Capital Territory	2	14	8	6	22	7

Table 33: State/Territory where there was most nationally accredited training activity

State/Territory	Adult/ community provider (n=84) %	Enterprise- based organisation (n=42) %	Industry organisation (n=64) %	Commercial training organisation (n=127) %	Total N (324)	%
Victoria	42	31	25	33	107	33
Queensland	15	7	30	23	69	21
Western Australia	12	21	13	15	48	15
South Australia	7	17	14	9	36	11
New South Wales	11	5	6	8	27	8
Tasmania	4	2	3	6	15	5
Northern Territory	6	7	3	3	14	4
Australian Capital Territory	2	7	2	2	8	2

Analysis of individual States/Territories

Australian Capital Territory: 22 organisations in the sample delivered nationally accredited training in the ACT – two adult/community-based, six enterprise-based, five industry and eight commercial training organisations (one missing). Only two providers offered nationally accredited programs in the ACT only (one industry and one adult/community organisation).

New South Wales: 78 organisations in the sample delivered nationally accredited training in NSW – 10 adult/community-based, 13 enterprise-based, 19 industry and 32 commercial training organisations (four missing). Twelve providers delivered training in NSW only – seven adult/ community, one enterprise-based; two industry and two commercial training organisations.

Northern Territory: 33 organisations in the sample delivered nationally accredited training in the NT – five adult/community-based, five enterprise-based, five industry and 11 commercial training organisations (three missing). Thirteen providers delivered training in NT only – five adult/community-based, three enterprise-based, two industry and three commercial training organisations.

Queensland: 101 organisations in the sample delivered nationally accredited training in Queensland – 15 adult/community-based, 14 enterprise-based, 25 industry and 41 commercial training organisations (six missing). Fifty five providers delivered training in Queensland only –13 adult/community-based, two enterprise-based, 12 industry and 23 commercial training organisations (five missing).

South Australia: 64 organisations in the sample delivered nationally accredited training in SA – seven adult/community-based, 15 enterprise-based, 16 industry and 22 commercial training organisations (four missing). Twenty eight providers delivered training in SA only – six adult/ community-based, five enterprise-based, seven industry and nine commercial training organisations (one missing).

Tasmania: 35 organisations in the sample delivered nationally accredited training in Tasmania – three adult/community-based, seven enterprise-based, eight industry and 14 commercial training organisations (three missing). Twelve providers delivered training in Tasmania only –three adult/ community-based, one enterprise-based, two industry and six commercial training organisations.

Victoria: 145 organisations in the sample delivered nationally accredited training in Victoria – 37 adult/community-based, 19 enterprise-based, 26 industry and 59 commercial training organisations (four missing). Eighty providers delivered training in Victoria only – 35 adult/

community-based, seven enterprise-based, nine industry and 29 commercial training organisations.

<u>Western Australia</u>: 77 organisations in the sample delivered nationally accredited training in WA – 12 adult/community-based, 16 enterprise-based, 16 industry and 30 commercial training organisations (three missing). Forty providers delivered training in Western Australia only – nine adult/community-based, six enterprise-based, six industry and 17 commercial training organisations (two missing).

Fields of education

Respondents were asked to indicate the three main fields of education in which they provided nationally accredited training.

Table 34: Main fields of education in which training was offered, by provider type

Field of study	Adult/ community provider (n=84) %	Enterprise- based organisation (n=42) %	Industry organisation (n=64) %	Commercial training organisation (n=127) %	Total	
					N (330)	%
Management and Commerce	32	38	23	35	109	33
Health	20	19	23	15	63	19
Food, Hospitality, Personal	17	7	13	21	58	18
Education	20	17	17	13	54	16
Information Technology [a]	21	10	3	12	40	12
Agriculture, Environmental and Related Studies	10	7	14	7	31	9
Society and Culture	15	7	8	6	31	9
Mixed Field Programs [b] [eg Numeracy, Literacy]	27	2	2	2	27	8
Engineering and Related Technologies [c]		14	6	8	21	6
Creative Arts	10	2	5	5	18	5
Architecture and Building	5	2	6	4	15	5
Natural and Physical Science	2	2	3	2	8	2
Other	15	24	23	28	75	23

[a.] $\chi^2 (3) = 11.809$, $\rho = 0.008$
[b.] $\chi^2 (3) = 52.219$, $\rho < 0.000$
[c.] $\chi^2 (3) = 10.704$, $\rho = 0.013$

In the 'other' category, a wide range of qualifications and areas of study were listed – these included:
- Retail (18)
- Transport/ distribution/ warehousing (13)
- Assessment and workplace training (9)
- Public safety (9)
- Recreation and sport (5)
- Aviation (3)
- OHSW (3)
- Outdoor recreation (2)
- Pre-vocational/vocational training (2)
- Public services (2)
- Adventure-based training (1)

- Drink driver education (1)
- Furnishing (1)
- General Study Skills (1)
- Golf Management (1)
- Life skills (1)
- Maritime (1)
- Media, journalism and radio production (1)
- Mining (1)
- Flight attendant training (1)
- Racing (1)
- Traffic control (1)
- Utilities (1)

Types of qualifications

Table 35: Mean numbers of Australian students completing various levels of qualification, by provider type

	Certificate 1				Certificate 2			
	n	Mean	Std Dev	Max	n	Mean	Std Dev	Max
Adult	77	6	16	90	75	48	245	2000
Enterprise	42	7	35	225	42	32	124	780
Industry	59	2	12	94	57	64	250	1500
Commercial	125	25	193	2100	123	37	161	1500
Total	315	17	143	2100	309	47	207	2000
	Certificate 3				Certificate 4			
	n	Mean	Std Dev	Max	n	Mean	Std Dev	Max
Adult	77	21	60	400	76	24	77	479
Enterprise	41	90	254	1500	41	32	62	300
Industry	58	43	97	410	58	85	267	1300
Commercial	123	74	237	1500	123	48	274	3000
Total	312	55	183	1500	310	45	213	3000
	Diploma				Advanced diploma			
	n	Mean	Std Dev	Max	n	Mean	Std Dev	Max
Adult	78	4	13	75	80	0	2	20
Enterprise	41	5	13	61	41	1	3	20
Industry	58	73	342	2380	60	4	20	147
Commercial	124	39	328	3650	124	4	21	200
Total	314	31	254	3650	318	3	16	200
	Graduate diploma				Statements of attainment			
	n	Mean	Std Dev	Max	n	Mean	Std Dev	Max
Adult	63	3	24	190	58	409	1044	5693
Enterprise	37	0	0	0	33	351	1383	8000
Industry	53	0	0	0	47	573	2380	15968
Commercial	105	0	4	36	100	264	756	4532
Total	271	1	12	190	250	388	1401	15968

Certificate 1

A chi-square test revealed a significant relationship between the issuing of Certificate 1 and the type of training provider (χ^2 (3) =16.025, $\varrho = 0.001$). The observed frequencies are shown in the following table.

Table 36: Numbers of organisations issuing Certificate 1, by provider type

Issued Certificate 1	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Yes	19	5	3	10	37
No	58	37	56	115	266
Total	77	42	59	125	303

Certificate 2

Table 37: Numbers of organisations issuing Certificate 2, by provider type

Issued Certificate 2	Adult/ community provider	Enterprise-based 0rganisation	Industry organisation	Commercial training organisation	Total
Yes	31	16	20	40	107
No	44	26	37	83	190
Total	75	42	57	123	297

Certificate 3

Table 38: Numbers of organisations issuing Certificate 3, by provider type

Issued Certificate 3	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Yes	33	24	25	62	144
No	44	17	33	61	155
Total	77	41	58	123	299

Certificate 4

Table 39: Numbers of organisations issuing Certificate 4, by provider type

Issued Certificate 4	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Yes	35	21	32	50	138
No	41	20	26	73	160
Total	76	41	58	123	298

Diploma

Table 40: Numbers of organisations issuing Diploma, by provider type

Issued Diploma	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Yes	14	9	13	31	67
No	64	32	45	93	234
Total	78	41	58	124	301

Advanced Diploma

Table 41: Numbers of organisations issuing Advanced Diploma, by provider type

Issued Advanced Diploma	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Yes	5	2	10	12	29
No	75	39	50	112	276
Total	80	41	60	124	305

Graduate Diploma

Table 42: Numbers of organisations issuing Graduate Diploma, by provider type

Issued Graduate Diploma	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Yes	2	0	0	3	5
No	61	37	53	102	253
Total	63	37	53	105	258

Statements of Attainment

Table 43: Numbers of organisations issuing Statements of Attainment, by provider type

Issued Statement of Attainment/Participation	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Yes	38	20	28	58	144
No	20	13	19	43	95
Total	58	33	47	101	239

Modes of training for nationally accredited programs

Other methods of providing training included:
- self-paced (4)
- RPL (3)
- flexible learning (2)
- assignments
- correspondence
- videoconferencing
- videos

A chi-square test revealed a significant relationship between the use of face to face delivery in own premises and the type of training provider (χ^2 (3) =29.901, ϱ <0.000). The observed frequencies are shown in the following table.

Table 44: Used face-to-face in own training rooms, by provider type

Used face-to-face mode in own training rooms	Adult / community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Yes	75	38	51	77	241
No	9	4	13	50	76
Total	84	42	64	127	317

A chi-square test revealed a significant relationship between the use of face-to-face delivery in training rooms in industry/other companies premises and the type of training provider (χ^2 (3) =10.005, ϱ = 0.019). The observed frequencies are shown in the following table.

Table 45: Used face-to-face in training rooms outside of own organisation, by provider type

Used face-to-face in training rooms outside of own premises	Adult / community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Yes	33	20	36	77	166
No	51	22	28	50	151
Total	84	42	64	127	317

A chi-square test revealed a significant relationship between the provision of training on the job in workplaces and the type of training provider (χ^2 (3) =13.001, ϱ = 0.005). The observed frequencies are shown in the following table.

Table 46: Used training on job in workplaces, by provider type

Provides training on job in workplaces	Adult / community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Yes	38	29	46	71	184
No	46	13	18	56	133
Total	84	42	64	127	317

Ways of providing assessment for nationally accredited programs

'Other' methods of assessment included:
- Written assessment/assignments (6)
- On location(2)
- Third party reports
- Case studies
- Non-paid practical placement
- Observation
- Exams
- Peer assessment
- Record book
- Portfolio
- Video conference

- Work book

A chi-square test revealed a significant relationship between the conduct of assessment face to face in RTO's own organisations and the type of training provider (χ^2 (3) =26.851, ϱ <0.000). The observed frequencies are shown in the following table.

Table 47: Used face-to-face assessment in own organisation, by provider type

Uses face to face assessment in own organisation	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Yes	76	34	46	75	231
No	8	8	18	52	86
Total	84	42	64	127	317

A chi-square test revealed a significant relationship between the provision of assessment on the job in workplaces and the type of training provider (χ^2 (3) =15.630, ϱ =0.002). The observed frequencies are shown in the following table.

Table 48: Used on job in the workplace assessment, by provider type

Assesses on the job in workplaces	Adult/ community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Yes	38	27	49	77	191
No	46	15	15	49	125
Total	84	42	64	126	316

Staffing

Table 49: Distribution of fulltime staff employed by registered training organisations in the sample

Numbers of fulltime staff reported by organisations, clustered for presentation	Number of organisations	Percentage	Total number of fulltime staff
None	36	11.3	
1-5 staff	191	59.9	476
6-10 staff	43	13.4	327
11-20 staff	26	8.2	390
21-50 staff	10	3.1	384
51-100 staff	3	0.9	253
101-1000 staff	5	1.6	1870
>1000 staff	5	1.6	9112
Don't know / missing	11	-	
Total	**330**	**100**	**12812**

Table 50: Distribution of part-time staff employed by registered training organisations in the sample

Numbers of part-time staff reported by organisations, clustered for presentation	Number of organisations	Percentage	Total number of part-time staff
0	132	41.4	
1-5 staff	131	41.1	323
6-10 staff	26	8.2	191
11-20 staff	11	3.4	180
21-50 staff	10	3.1	324
51-100 staff	2	0.6	136
101-1000 staff	6	1.9	1739
>1000 staff	1	0.3	2267
Don't know / missing	11	-	
Total	**330**	**100**	**5160**

Table 51: Distribution of casual staff employed by registered training organisations in the sample

Numbers of casual staff reported by organisations, clustered for presentation	Number of organisations	Percentage	Total number of casual staff
0	164	51.4	
1-5 staff	73	22.9	186
6-10 staff	27	8.4	210
11-20 staff	28	8.8	411
21-50 staff	15	4.7	531
51-100 staff	7	2.2	510
101-1000 staff	4	1.3	861
>1000 staff	1	0.3	2500
Don't know / missing	11	-	
Total	**330**	**100**	**5209**

Table 52: Groupings of staff types employed by the registered training organisations

Groupings of staff types	Frequency	Percent
Fulltime staff only	57	17.9
Part-time staff only	18	5.7
Casual staff only	12	3.8
Fulltime and part-time staff	89	28
Fulltime and casual staff	64	20.1
Part-time and casual staff	5	1.6
Fulltime, part-time and casual staff	73	23
Missing	12	-
Total	**330**	**100**

Table 53: Distribution of staff numbers employed by the registered training organisations

Numbers of total staff reported by organisations, clustered for presentation	Number of organisations	Percent
1-5 staff	116	36.5
6-10 staff	67	21.1
11-20 staff	59	18.6
21-50 staff	44	13.8
51-100 staff	13	4.1
101-1000 staff	11	3.5
>1000 staff	8	2.5
Missing	12	-
Total	**330**	**100**

A chi-square test revealed a significant relationship between the different groupings of staff type (fulltime, part-time and casual) and the type of training provider (χ^2 (18) =37.837, ϱ =0.004). The observed frequencies are shown in the following table. (The number of cells with less than five in them is higher than expected, and so this table is to be interpreted with caution.)

Table 54: Distribution of staff types, by provider type

Staffing groups	Adult / community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
Fulltime staff only	6	10	15	24	55
Part-time staff only	10	3	3	2	18
Casual staff only	6	1	2	3	12
Full time and part time staff	19	6	15	40	80
Fulltime and casual staff	13	5	12	33	63
Part-time and casual staff	3		1	1	5
Fulltime, part time and casual staff	25	13	12	22	72
Total	**82**	**38**	**60**	**125**	**305**

A chi-square test revealed a significant relationship between number of staff and type of training provider (χ^2 (12) =24.805, ϱ =0.016). The observed frequencies are shown in the following table.

Table 55: Distribution of staff numbers, by provider type

Numbers of staff	Adult / community provider	Enterprise-based organisation	Industry organisation	Commercial training organisation	Total
1-5 staff	27	12	22	50	111
6-10 staff	13	4	13	35	65
11-20 staff	14	9	12	21	56
21-50 staff	18	5	5	15	43
> 50 staff	10	8	8	4	30
Total	**82**	**38**	**60**	**125**	**305**

Table 56: Mean numbers of fulltime, part-time and casual staff employed by the organisations in 2003 to deliver training and/or provide assessment services

	Fulltime staff				Part-time staff			
	n	Mean	Std Dev	Max	n	Mean	Std Dev	Max
Adult/community provider	84	6	14	100	84	5	10	71
Enterprise-based org.	42	119	329	1258	42	39	114	550
Industry organisation	64	94	495	3454	64	6	25	186
Commercial training org.	127	9	45	500	127	3	6	45
Total	330	39	251	3454	330	16	132	2267

	Casual staff			
	n	Mean	Std Dev	Max
Adult/community provider	84	15	40	316
Enterprise-based org.	42	75	387	2500
Industry organisation	64	6	14	78
Commercial training org.	127	3	7	55
Total	330	16	140	2500

Services

Table 57: Services offered to students completing nationally accredited training, by provider type

Services provided	Adult/ community provider (n=84) %	Enterprise-based organisation (n=42) %	Industry organisation (n=64) %	Commercial training organisation (n=127) %	Total N (330)	%
Career counselling / career placement	58	60	44	46	169	51
Access to computer facilities	56	45	38	38	147	45
Personal counselling	44	38	44	38	136	41
Academic counselling	42	26	31	37	119	36
Access to study space	40	31	31	31	113	34
Study assistance	24	26	33	36	103	31
Library facilities	39	29	30	23	98	30
Assistance on fees concerns	31	21	19	20	78	24
Specific assistance for Indigenous students	15	17	14	8	41	12
Accommodation services	8	10	11	11	37	11
Other services	31	29	25	23	87	26

Other services offered included: literacy and numeracy assistance (n=13), assistance for those with disabilities (n=4), childcare, industry specific equipment, and on-the-job support.

Specific assistance that was provided for Indigenous students included (a complete listing of these specific forms of assistance for Indigenous students is presented in Appendix I): contextualisation of study materials to suit language/culture, provision of more one-on-one assistance, and specific people to assist in job placement

Growth factors

Adult/community providers

Table 58: Growth factors –adult/community providers

	n	Mean	Std. dev.	% +ve	% neutral	% -ve
Requirements of New Apprenticeships	84	3.1	0.6	12	80	8
Requirements of Training Packages	82	3.0	1.0	32	36	30
Requirements of the AQTF	84	3.0	1.1	40	29	32
State/Territory course accreditation processes	81	3.0	1.1	28	40	28
Lack of recognition by overseas countries of Australian pre-university qualifications	83	3.0	0.5	6	88	4
Competition from online training providers	84	2.9	0.5	2	83	15
Absence of HECS for private students	83	2.7	0.7	2	74	23
Competition from TAFE providers	84	2.5	0.9	10	54	36

Enterprise based organisations

Table 59: Growth factors – enterprise-based organisations

	n	Mean	Std. dev.	% +ve	% neutral	% -ve
Requirements of Training Packages	42	3.4	1.0	55	24	22
Requirements of the AQTF	42	3.2	1.1	50	19	31
Requirements of New Apprenticeships	42	3.1	1.0	29	45	26
State/Territory course accreditation processes	40	3.1	1.0	31	48	17
Absence of HECS for private students	42	3.0	0.6	12	76	12
Competition from online training providers	42	3.0	0.5	4	83	12
Lack of recognition by overseas countries of Australian pre-university qualifications	41	3.0	0.3	5	88	5
Competition from TAFE providers	42	2.8	0.9	14	60	26

Industry organisations

Table 60: Growth factors – industry organisations

	n	Mean	Std. dev.	% +ve	% neutral	% -ve
Requirements of Training Packages	63	3.3	1.1	44	28	27
Requirements of New Apprenticeships	62	3.2	0.8	21	66	11
Requirements of the AQTF	62	3.1	1.2	45	19	33
Absence of HECS for private students	64	3.0	0.7	8	81	11
State/Territory course accreditation processes	62	3.0	1.0	25	45	27
Competition from online training providers	63	2.9	0.5	3	83	13
Lack of recognition by overseas countries of Australian pre-university qualifications	63	2.9	0.6	8	81	13
Competition from TAFE providers	63	2.6	1.1	10	59	29

Commercial training organisations

Table 61: Growth factors – commercial training organisations

	n	Mean	Std. dev.	% +ve	% neutral	% -ve
Requirements of Training Packages	127	3.1	1.2	39	29	31
Requirements of the AQTF	124	3.1	1.2	40	29	29
Requirements of New Apprenticeships	122	3.1	1.0	25	51	20
State/Territory course accreditation processes	122	2.9	1.0	25	42	29
Competition from online training providers	124	2.9	0.5	6	76	15
Lack of recognition by overseas countries of Australian pre-university qualifications	126	2.8	0.5	2	82	15
Absence of HECS for private students	126	2.6	0.8	3	71	25
Competition from TAFE providers	126	2.6	1.0	11	49	39

Appendix I: Specific forms of assistance provided by private providers for Indigenous students

- Two indigenous tutors, links to Aboriginal programs and curriculum, and ATAS tutoring – one-on-one tutoring

- Accommodation assistance, indigenous RTO for people

- ATAS tutoring, contextualisation of study materials to suit for language

- Breaking down learning into smaller chunks and delivering them separately. More one-on-one. Going back to the workplace for further follow up

- Can access any of our community areas – food, financial and study

- Culturally sensitive environment. Cater to their cultural needs and flexibility in delivery and timeframes

- Face-to-face visit every six weeks, provide written material so they can understand course content

- Flexibility that suits their needs, on-site mentors to assist an employer in that respect, continuous from Certificate 2 to 3 as mentors

- Fulltime Project Officer to place them in jobs, get mentoring, counselling and development of career paths

- General assistance. Trainer would provide support

- Generally get what everybody else gets

- Guiding Circles. Worked with Aboriginal liaison officers and people within the Aboriginal community

- Have an Indigenous officer who helps them find work and keeps place open once completed education

- Have literacy and numeracy training, ATAS, personal counselling and coaching, professional development plans for them

- Haven't had any, but do have numeracy and literacy to offer them and other supports

- Initiated a program for train the trainee in Certificate 4

- Intensive numerous literacy programs, tutors, accommodation and numerous support structures

- L, R. and N transition from their culture to ours

- Language and numeracy, will pay for fees for TAFE, mentoring in workplace

- Literacy and numeracy, Indigenous tutors

- Nothing extra

- One-on-one tutoring

- Provide training and work placement for Aborigines in remote communities in the area of health and community health

- Resource materials tapped into other community services

- Same as everyone else

- Small number on Federal Government wage assistance program

- Student assistance, one-on-one help, customise material, supported and mentored with specific people pre-training (i.e. computers)

- Study time to complete course, try to provide any needs they have

- Supply food, travel and accommodation for students. All students are Indigenous

- Support of staff members who have done courses about Indigenous culture and work with other Indigenous groups

- Taking them as a group and using Aboriginal mentors and trainers with them

- Teachers' aides, breakfast cooks, homework centres

- The call centre, provide coach mentor that goes down to call centre and gives them assisted support

- The whole course is designed for Indigenous people

- They get additional one-on-one

- Through counselling, delivery of training, personal support and financial help

- Try to help with fees and make the transition

- Tutorial assessment away from classroom

- We offer one-to-one mentoring and support, flexible arrangements and welfare assistance from our Indigenous coordinators

- Working with Aboriginal organisations, traineeships with them, have co-operative ventures with them, generally inclusive

Appendix J: Factors cited by interviewees as promoters or inhibitors of growth in their registered training organisation

Unspecified

Access to scholarships

Credibility of training from schools gains less acceptance as not on-job training

Becoming and remaining registered is cumbersome and dictatorial

Difference self and government funding

Inhibitor - AQTF compliance, it's way too hard to meet. Inequity between TAFE and enterprise (private) trainers. Promoter - enthusiasm of staff

Inhibitor - lack of understanding about aboriginal culture(AQTF). Promoter - Case management & services are integrated, everyone pitches in to help

Inhibitor - no incentives for businesses to conduct training. Businesses don't know about you. Promoter - word of mouth referrals, good quality staff

Lack of federal funding

Lack of funding for competencies, thin regional markets (I), National training Framework (P)

Lack of recognition by Government of accreditation for 4wd courses

The changing of the package midstream and the question of traineeship

Wanting to deliver the diploma to current staff but no funding available. Lack of government depts. communication. Three-year review of training packages

We are in a new area and there is a lack of awareness of what we teach

Strong promoter of growth

Being able to get government funding

Compliance to standard

Course being new for HR within government

Employer incentive traineeships

Funding availability

Get a lot of work experience people coming back to do courses

Industry requirements

Selecting qualifications that are relevant to industry

Skill shortage in hospital has prompted our growth

State of the economy

Stronger legislation

The geographic location there is strong demand for services

The views of management that is prepared to promote the training

Strong promoter of growth

Training awards and government industry recognition

Variation within content with training providers of courses

Promoter of growth

Industrial relations and training as part of EBAs

Level of funding from Government

Not specified

Performance in the industry actively seeking

Very competitive market which is a promoter as it raises the standards of training overall

We are not in business services training package

No real effect

RTO accredited people trying to undercut us

Inhibitor of growth

A lot of government organisations still have the view that training is necessary. Reactive rather than proactive

AQTF administration

Access to funding support

Access to government funding at traineeship time

Amount of funding doesn't allow for infrastructure costs

Anything that impacts tourism industry

Attitude of employers to training

Availability of government funding. A quota

Cap on the number of students and use of 3 corporate giants to create own training

Competency certificates are a liability for RTOs

Competition with other bible colleges

Compliance costs for small operation

Constant change in the requirements of trainers

Constant changing of rules by dept. Immigration depending on country student comes from. One day one rule next day its changed again

Different training packages use there own units for generic competencies instead of common units

Difficulty in getting government funding

Employers attitude towards training for staff

Encouragement with govt licensing requirements

Expense of equipment

Fair playground if qualified should train

Finding the right staff to write curriculum

Funding levels from State Government

Lack of access to skills in training accreditation

Inhibitor of growth

Lack of broadband consistency throughout the world

Lack of funding

Lack of funding, low cost of return after training

Lack of funds

Lack of govt. funding for private training organizations

Lack of knowledge of funding. Have to do research ourselves. Companies don't know where to access funds

Lack of state funding for apprenticeships

Lack of teachers that would fit into the culture here

Level of government funding for administration of courses

Limitations on minimum hrs. requirements which does not enable women with young children sometimes to participate. More flexibility would help

Limited access to State and Federal funding

Manufacturing trades are unattractive to the local population and school leavers/students

More uniform requirements in each state – inhibitor. Promoter – funding provided by govt

National qualifications relatively new. No culture of trade available within our industry

New competition

Non government funding

Other people not following AQTF in first aid training

Paperwork and reporting. Anything that takes away from our core business of training

People that teach

Personnel skills and levels of skills required

Remote location

Requirements of course we have to take trainees out of the work place for training. This makes it difficult to comply with performance agreements

Shiatsu not community accepted

Small group in large organisation which is not a training organisation

Socio economic demographics of local area with high unemployment and elderly people

Some areas encounter people who have been disenchanted by requirements. Lack of accountability of employer getting incentives but not supporting training

The ability to get experienced teachers. We have to attract them from the mainland & offer them higher wages

The assessment paper trail becoming too complex for average industry to be bothered with

The cost of maintaining the scope of registration

The inequities of user choice funding across the states

The lack of facilities e.g. no library due to our remote location

The loss of I.T.A.B.S. has created backward step as far as meeting needs of industry. No feedback to govt. sources anymore

There is no assistance given to students with fees

Training package core skills are not relevant to industry requirements

Two different reporting systems for VIC and NSW. They should be standardised

Want to open in NSW hard time getting information on 2 accreditations and costs $10,000 for 2 accreditations. No funding to help assist students

Inhibitor of growth

Where EBAS are approved and signed off by arbitration it should override employment basis for trainees in the meat processing industry

Workcover covered by employer have had less sign ups

Strong inhibitor of growth

A push by WA State Government to direct funding to TAFE colleges rather than private training providers

AQTF & TAFE gets in the way and don't help students. TAFE give out certificates and the students are not up to standard

AQTF competency requirements were not compatible with our subject areas

AQTF for small RTO compliance constraints

Access to funding is not there

Access to staff, not enough staff to reach and facilities in right areas

Accessing funding from job nets- i.e. getting the job nets to allow clients to come to us for training

All the criteria from AQTF

Anta RTO having to be trained every 5 years accreditation

Artificial manipulation of the market by the Federal Government

Auditing processes to retain accreditation is very time consuming and too demanding

Availability of well qualified staff

Bureaucracy of TAFE & AQTF auditing

Biggest problem is the different legislations in each state - in part the user chooses policies for funding agreements

Business cost pressures

Capping of apprenticeships and traineeships by the State Government. Lack of Federal funding

Changes in government and regulations and funding priorities

Changes to training packages

Competing for funds

Competing with the work environment, wages versus education

Competition from publicly funded groups and they get subsidised, its not a level playing field

Competitors and they reduce the time of courses. Workplaces demanding workers are back from courses sooner

Continuity of work post training and industrial issues like rates of pay

Costly audits for RTO'S. Lack of clear direction, no uniform funding to support change

Course length

Cultural issues with students and unavailability of appropriate trainers i.e. aboriginal trainers

Dept allocation of funding only get a short warning to apply - CTP funding

Different standards in each state

Dodgy courses around and issuing qualifications too quickly, not enough quality control

Educating parents to the value of traineeships and apprenticeships and understanding pathways

Fees

Finance constraints

Strong inhibitor of growth

Financial burden of compliance impacts us financially and takes up staff time

Free material from public education sector

Funding issues need more money

Funding on state level

Government recognition and strong support of TAFES. Provision of funding to TAFE without competition from private training providers

Government departments do not recognise Casa aviation approved courses

Government funding and infrastructure

Government policies lack of funding

Government regulators and regulations

Govt agencies in competition with private providers

Govt policy - TAFES favoured we are not promoted like they are, policies change and lack of direction from VET in schools

Govt policy at present favors Govt funded organisations well above those of the private industry even though private more cost effective

Have to satisfy AQTF and the main road and often they do different things

Inadequate funding on state level to private RTOs

Inadequate levels of funding and not much flexibility with course projects

Increase of private training organisation, decreased funding

Industry attitude towards trainees, lack of promotion funded by department of training

Industry planning in regards to minimum standards of skills to do the job

Infrastructure to support flexible learning eg online learning its expensive

Insufficient funding from State and Federal Governments

Keep changing the requirements of qualifications or funding for certain courses

Lack of additional funding - ACFE funding it just doesn't grow

Lack of available learning materials that are learning materials specific to children's services

Lack of awareness at school level of trades as a career path

Lack of employment opportunities, they train but no job to go to

Lack of flexibility of training packages

Lack of full-time employment opportunities and lack of career paths within the industry

Lack of funding

Lack of funding

Lack of funding and employer incentive to train

Lack of funding both state and Federal

Lack of funding both State and Federal

Lack of funding for capital works to expand premises

Lack of funding for community based initiatives

Lack of funding from Govt for rural training

Lack of funding from State and Federal Governments

Lack of government funding for traineeships and apprenticeships

Lack of government funding or opportunities for government funding

Strong inhibitor of growth

Lack of government support for overseas recognition as a training provider for potential International students

Lack of management's commitment to training

Lack of money

Lack of primary education with indigenous students i.e. numeracy/literacy mainly adults. Consistency in primary school education

Lack of public funding

Lack of recognition and regulation in performing arts industry

Lack of respect for small private RTO in state funding

Lack of state funding and more delays in allocations

Lack of time for preparation and staff to write manuals for growth into new courses

Lack of understanding of VET system, language is foreign to businesses

Lack of user choice with State Government funding

Lots of issues relating to NSW dept of e and t data collection process not working. Not providing enough training when changing systems

Low funding levels for ACE centres and lack of publicity of ACE centres

Money

More work needs to be done articulating with higher education, so they understand Vet qualifications. The idea of competency is not understood

Need to be funded for non accredited training that meets the needs of industry, TAFE gets money thrown at them

New apprenticeship centres they refuse to give info about trainees

No consistent standards for our industry all states different and within state different

No funding for private students

Non standards for passing subjects other colleges give marks too easily so not standard

Not specified

Organisational strategies - lack of them in training area

Our local population recession

Police regulators don't come up with standard info, change mind all the time no stability

Poor pricing structure from sate training authority and having to fund courses ourselves

Prior qualifications unrelated to aged care cutting out eligibility for aged care traineeships. On state level can not grow traineeships due to quota

Procedural requirements for re accreditation both in time and in cost

Registration requirements for three separate registration processes

Requirements of licensing geared to protecting consumers while the training packages are geared to providing knowledge to real estate agents

School, college who decide to train their students to Cert 2 then put them in work field so they miss out on a job because workplace won't take them

Section 54 work cover act in relation to third party liability in SA

State government promotes TAFE. Hard to compete for government contracts and break even

State training authority keep changing the rules for funding

TAFE don't operate on a level playing field they have the advantage, things are for them not private people

Strong inhibitor of growth

TAFE has funding money way more than us can promote it much more we can't afford that

Technology access to IT reasonable band width

The admin audit requirements are way over the top and had a terrible experience with an auditor this year- bullying and really bad

The arbitrary decision that state governments make, lack of support for higher education in SA and regulations in other states

The Cap in Victoria

The conversion of curriculum based packages to training package based

The difficulty in finding a training recognition consultant to upgrade our RTO

The funding by DEET inability to pay on time

The nature of trades we offer training in and numbers of businesses taking on apprentices

The over administration and difference between states in everything for compliance

The paperwork is huge and uses up a lot of time - wrong priority placed on paperwork

The State and Federal Governments. Lack of support for my organisation. Lack of training for casual staff

Traineeships need to be developed and promoted more

Unequal treatment between private and public providers

Unfunded state holder participation in development

Very small and have to do the same paperwork as TAFE and is an inhibitor to us

Views. TAFE e.g. funded private struggle with funds & less support. Little understanding for RTO

Wages are too low for traineeships. Way too low to encourage people to take them up

We struggle as RTO'S meeting the requirements as we get no support and no recognition from the govt. We don't get recognised