

# **TONGA: IN COUNTRY TRAINING REVIEW**

**ALISON GRAY  
GRAY MATTER RESEARCH LTD  
WELLINGTON**

**December 2007**

## Table of contents

1.	Executive summary.....	1
2.	Recommendations.....	4
3.	Introduction.....	7
3.1	Background.....	7
3.2	The review .....	7
4.	Performance of MSC .....	8
4.1	Managing and administering the NZAID funded ICT programme in Tonga.....	8
4.2	Monitoring and accounting for expenditure .....	12
4.3	Monitoring, analysing and reporting on progress .....	13
4.4	Value for money .....	16
5.	The design and management of future NZAID support to METYS and ICT .....	17
5.1	Joint Tonga/New Zealand Programme Strategy 2008-2018.....	17
5.2	The training context .....	17
5.3	The focus of the In-Country Training Programme .....	19
5.4	Programme management .....	20
5.5	Programme content and delivery .....	21
Annex 1	List of people consulted.....	27
Annex 2	Glossary of terms .....	29
Annex 3	Terms of reference .....	30

## 1. Executive summary

1. The New Zealand Government has provided assistance for an In-Country Training (ICT) programme since 1994. The programme aims to “assist the Tongan Government to provide quality, relevant and timely short-term training in Tonga that meets their priorities and NZAID policy guidelines.
2. The programme is currently managed by a Management Services Contractor (MSC), David Forman Ltd, under contract to NZAID.
3. The objectives of this assignment were to:
  - review the performance of the MSC against contract objectives
  - make targeted recommendations for the future efficient design and management of NZAID support to the Ministry of Training, Employment Youth and Sport (MoTEYS).

### The performance of the MSC

4. New Zealand High Commission (NZHC) staff in Tonga rate the ICT programme as one of the most successful elements of their aid programme. The MSC has managed and administered it well.
  - For each year of the contract, the proposed programme of courses and reserve courses has been approved by the Programme Coordination Committee (PCC) at the May or June meeting.
  - Budgets have been prepared and submitted by the due date each year.
  - Trainers have been recruited to run courses, including three local trainers to run courses in 2007/2008.
  - The MSC as provided technical support to trainers. All the trainers contacted have been satisfied with this.
  - The MSC liaised with AusAID while AusAID was engaged in delivering short-term courses.
  - Six-monthly PCC meetings were held each year, with the exception of November 2006, where the meeting was cancelled due to the riots. The MSC attended these meetings
  - A limited range of management issues have been discussed at PCC meetings. Some major issues have not been raised and have therefore not been addressed.
5. The MSC has monitored and accounted for expenditure appropriately and in a timely fashion. With one exception, actual expenditure has been close to projected expenditure each year. In 2006/2007 one PCC meeting was cancelled due to the riots on 16 November. This resulted in funds being underspent by 9% (approximately \$31,000).
6. Course data shows that the MSC has met or exceeded most of its targets each year. (The 2007/08 year is incomplete and is indicative only).

- The proportion of participants rating courses at 4 or more out of 5 ranged between 86% and 91% in the three years for which full data is available.
  - The target of 50% participation by women has been exceeded each year.
  - Outer Island participation approximated 20% in three of the four years under review.
  - Private sector involvement fluctuated between 14% and 19%, depending on what courses were offered. The target was 20%.
  - Participation by NGOs exceeded the 20% target every year.
7. Tracer studies show self-assessed improvements in skills, with average improvements of 62% in 2004/2005, 54% in 2005/2006 and 52% in 2006/2007. The proportion of participants who said they used their knowledge at least three-quarters of the time varied from 75% in 2004/2005 to 88% in 2005/2006 and 75% in 2006/2007.
  8. The tracer studies need to be strengthened to provide more robust information.
  9. The reports prepared by the MSC have been timely and are generally clear and well-presented, but they rarely include information on emerging risks, issues affecting progress, risk management strategies, third party issues or proposals for improved efficiencies.
  10. The requirement for fuller reporting as set out in the NZAID contract with the MSC needs to be supported by a formal process for dealing with any issues raised.
  11. The MSC has taken limited steps towards an exit strategy. Its main focus has been on developing the capability of local trainers and it has made some good progress in this regard.
  12. The MSC has taken some steps to localise the administration of the programme, including the management of training requests and the administration of the Tracer Study. The Short-term Training Centre (STTC) has limited resources and faces increasing demands. The constraints on a possible handover were identified by NZAID in 2004 but were not included in the subsequent MSC contract.
  13. The MSC has run the programme efficiently and effectively according to its contract and to the satisfaction of participants and requesting organisations. And in that context represents value for money.

### **The future design of ICT in Tonga**

14. The review found support for a more focused approach to ICT in Tonga, in accord with the Joint Tonga/New Zealand Programme Strategy 2008-2018 and the Tongan Strategic Framework for Short-term Training.

15. Together these support a focus on training associated with governance and civil society, increased economic opportunities and equitable access to quality education. Short-term training should provide a staircase or bridge to formal training or be a refresher for those who have skills that need certification or updating.
16. It is proposed that the ICT programme be managed through a strengthened Programme Coordinating Committee (PCC) and a local MSC. This would relieve pressure on both the NZHC and MoTEYS.
17. The shift will need to be supported by clear guidelines on processes and responsibilities, and by up to date information on current or potential trainers, the activities of other donors in the area, current benchmarking arrangements and the range of facilities available.
18. The design of the ICT programme will need to be informed by the Training Needs Analysis (TNA) to be undertaken in January 2008. This will help clarify selection criteria and identify the range of trainers required. It will also clarify opportunities to develop the skills of counterpart trainers.
19. A redesigned ICT programme should be able to offer better delivery with more flexible courses, better follow up and support and opportunities for further training. It will encourage local ownership and management of ICT and should be a more cost effective way of using NZAID funds to enhance short-term training in Tonga.

## **2. Recommendations**

The recommendations that follow refer to the design and management of In-Country Training in Tonga in the future.

### **Management**

1. The In-Country Training Programme is widely appreciated and has made a useful contribution to training in Tonga and should continue in a modified form.
2. The PCC needs to be strengthened so that it has a clearly articulated role in setting policy - within the broad framework and guidelines set by NZAID and the Government of Tonga. The PCC should also oversee the development and delivery of each year's work programme.
3. Its membership should be limited to five or six people. It could include representatives of NZAID, MoTEYS and other Government ministries as appropriate, the programme implementing agency (see below), the private sector, the newly formed vocational and technical training associations, and possibly community agencies or NGOs.
4. The chairmanship of the PCC needs to be reviewed. The role could be filled by someone who is independent of NZAID and MoTEYS or it could remain within MoTEYS. In either case, it needs to be filled by someone who is senior, has authority and is familiar with the training, community and employment context.
5. An implementing agency should be appointed to manage the programme. This could be under an MSC arrangement with a training or management organisation in Tonga.
6. The implementing agency will need to retain links with a training organisation in New Zealand to help source overseas trainers where they are required.

### **Information**

7. As part of its contribution MoTEYS (through the STTC or TESC) should:
  - maintain an up to date database of accredited trainers or trainers who would like to be accredited to work in Tonga
  - collate data on training support being provided by other donors, such as the ADB, the EU, the Peace Corps and the SPC
  - undertake a mapping exercise to document which training providers in Tonga accredit courses through New Zealand, Australian and other educational institutions.

### **Administration**

8. Clear guidelines on processes and responsibilities need to be developed and signed off by the implementing agency, MoTEYS and NZAID. Acceptance needs to be evident in the commitment of resources.

## **Focus**

9. ICT would benefit from having a sharper focus and a clearer philosophical or “editorial” base. The selection of programmes is currently guided by 15 criteria, which is unwieldy. Using the Strategic Framework for Short-term Training components, where short-term training is seen as having “bridge”, “refresher” or “staircase” functions, with NZAID’s equity criteria would be a useful start in developing a more coherent framework.
10. The focus should continue to be on providing training for the community and private sectors rather than for Government ministries.

## **Content**

11. The focus of NZAID support to MoTEYS should be on bridging and foundation courses, validation and refresher courses, entrepreneurial and business courses and training for trainers.
12. The Training Needs Analysis taking place in January should guide ICT priorities. Tourism, agriculture including food production and food processing, and fisheries are expected to be high on the priority list.
13. Once the focus of the programme is established the criteria for selection should be refined. The criteria need to be included in a redesigned form for organisations requesting training.

## **Trainers**

14. The ICT programme should give priority to increasing the pool of local trainers. This can be done by:
  - bringing New Zealand trainers to Tonga who can validate or update local trainers’ existing qualifications
  - providing more substantial “train the trainers” courses that lead to certification.
15. Trainers need to be encouraged to register an interest in providing training in Tonga. The register could include trainers from other Pacific Islands.
16. Counterpart trainers should be:
  - attached to the trainer rather than based in the requesting organisation
  - able to participate in a minimum of three courses before they are considered ready to run a course themselves
  - given some form of certification in recognition of their competence.

## **Delivery**

17. Training needs to be delivered in a much more flexible manner to accommodate participants’ other commitments and to encourage better take up of learning

16. Overseas trainers need to spend longer than they do now in-country. A longer stay would allow them to become more familiar with the Tongan context, deliver courses more flexibly over a longer period and spend more time developing the skills of their local counterparts. Options include contracting a trainer to provide a certain number of days' training over a given period and exploring options with VSA for developing three month placements for mature people who are willing to share their expertise.

### **Cross-cutting issues**

17. More courses should be delivered in the Outer Island groups, particularly Ha'pai and 'Eua, rather than always bringing participants to Vava'u or Nuku'alofa. This would be more equitable. It would also "ground" learning where it is to be applied and may encourage the development of a wider range of local organisations.

18. The gender balance of courses has favoured women every year for the last four years. While this should continue to be monitored, it appears to be less of an issue than in the past.

### **Follow up support**

19. Refresher or follow up training is vital to the learning process and should be built in to each course design. Follow up can be provided by the trainer or the counterpart trainer or a mix of both.

20. If NZAID were to take over payment for counterpart trainers, it would be reasonable to ask the Government to pay allowances for employment-related courses.

### **Monitoring and evaluation**

21. Gathering monitoring information should be the responsibility of the implementing agency.

22. Regular monitoring reports MoTEYS and NZAID should clearly identify trends, note any emerging issues and suggest ways to address them. Some issues will be able to be resolved at this point. Issues that have policy implications will need to be put before the PCC.

23. The implementing agency should take over responsibility for the tracer studies. These need to be strengthened to provide more robust outcome information. The implementing agency should report its findings six monthly to the PCC.

24. A review should take place within two years of the implementation of the revamped programme to identify any issues or areas that might need modification.

## **3. Introduction**

### **3.1 Background**

The New Zealand Government has provided assistance for an In-Country Training (ICT) scheme since 1994. The goal of the scheme is to “assist the Tongan Government to provide quality, relevant and timely short-term training in Tonga that meets their priorities and NZAID policy guidelines (participation for men and women from the public and private sectors including NGOs, and from the main and outer islands).

The ICT scheme provides skilled trainers from New Zealand, Tonga and other countries as appropriate for short term courses on a range of subjects with both the public and private sectors and civil society.

The scheme is currently managed by a Management Services Contractor (MSC), David Forman Ltd, under contract to NZAID. The MSC works with a counterpart organisation, the Short-Term Training Centre (STTC), which is part of the Ministry of Training, Employment, Youth and Sports (MoTEYS). The MSC and STTC are also part of a Programme Coordination Committee (PCC) which is made up of NZAID and representatives from each sector.

NZAID is obligated under the MSC contract to review the performance of the MSC. At the same time, NZAID is entering into a new five-year Tonga Country Programme Strategy (TCPS) with the Government of Tonga (GoT), and is keen to ensure that all training mechanisms offered under the TCPS are consistent with the priorities of both the GoT and the TCPS. NZAID decided to include both these aspects in this review.

### **3.2 The review**

Alison Gray of Gray Matter Research Ltd undertook this review in November 2007. The Terms of Reference for the review are in Annex 3. The main objectives were to:

- review the performance of the MSC against contract objectives
- make targeted recommendations for the future efficient design and management of NZAID support to the MoTEYS.

Prior to visiting Tonga, Alison reviewed documentation and met with staff at NZAID and with Holona Lui, the programme manager for the MSC. NZ High Commission (NZHC) staff in Tonga organised meetings with a wide range of people associated with ICT, including Tongan Government officials, members of the PCC, representatives of requesting organisations, training institutions and the private sector, co-trainers and participants (see Annex 1). The Managing Director of David Forman Ltd, David Glover, took part in a telephone interview after the visit to Tonga.

Preliminary findings were presented at a debriefing workshop in Tonga at the end of the fieldwork. Issues raised and points made at this workshop have been incorporated into the final report.

## **4. Performance of MSC**

The MSC for the ICT programme in Tonga has three contracted outputs:

- To manage and administer the NZAID funded ICT programme in Tonga.
- To monitor and account for all expenditure of NZAID funds for the ICT programme for Tonga.
- To monitor, analyse and report on progress towards achieving the goal and objectives of the programme, and to -
  - Identify risks and constraints and recommend solutions to improve the effectiveness and sustainability of the programme.
  - Put in place an exit strategy so that Tonga takes full ownership of the programme at the end of the contract period.

The sections below summarise the MSC's achievements and note issues that have arisen in discussion.

### **4.1 *Managing and administering the NZAID funded ICT programme in Tonga***

NZHC staff in Tonga rate the ICT programme as one of the most successful elements of the aid programme. David Forman Ltd has managed and administered it well.

- For each year of the contract, the proposed programme of courses and reserve courses has been approved by the Programme Coordination Committee (PCC) at the May or June meeting.
- Budgets have been prepared and submitted by the due date each year.
- Trainers have been recruited to run courses, including three local trainers to run courses in 2007/2008.
- The MSC as provided technical support to trainers. All the trainers contacted have been satisfied with this.
- The MSC liaised with AusAID while AusAID was engaged in delivering short-term courses.
- Six-monthly PCC meetings were held each year, with the exception of November 2006, where the meeting was cancelled due to the riots. The MSC attended these meetings
- A limited range of management issues have been discussed at PCC meetings. Some major issues have not been raised and have therefore not been addressed.

#### **Selection of courses**

Under the current model, the STTC invites proposals from various organisations, including Government departments. It also advertises the ICT programme on the radio and in the local newspaper, the Chronicle, as well as on television. The STTC has been more proactive in promoting the programme in recent years and the number of proposals has increased.

### ***Selection criteria***

Fifteen criteria are currently used to rank proposals<sup>1</sup>. At present they are applied retrospectively rather than being publicised in advance and used to guide programme development.

All the criteria have equal weight which has the advantage of being inclusive but the disadvantage of being somewhat unwieldy and encouraging a “scattergun” approach. If the programme had a clearer focus some of these issues would disappear. For example, only funding courses that are “not available in Tonga” would eliminate one criteria and only accepting proposals within the tourism, agriculture and education sectors would eliminate others and allow a sharper focus on content. Steps like these would help the MSC to develop a team of skilled trainers.

Both the criteria and the Tonga National Training Needs should be listed on the training request form, so that organisations can explain how the proposed training fits with the guidelines.

At the moment, the form implies that the training is designed mainly to benefit the requesting organisation, rather than the individuals taking part. This may be true but not all participants in courses are employed by the requesting organisation.

*In the future, the criteria for selection should be refined so that they provide a clear framework and philosophical basis for the programme.*

*The NZAID In-Country Training Project Proposal form needs to be redesigned. It should include the criteria for selection.*

### ***Shortlisting***

The STTC records proposals and discusses them with the Director of MoTEYS to identify the areas he would like to emphasise. The MSC and STTC then prepare a ranked list which the MSC reviews with NZHC staff.

The final list is signed off by the PCC. At present, the PCC has no formal authority, although its approval does provide some independent validation of the list. On one occasion changes were made to the list as a result of discussions at PCC meetings. On

---

<sup>1</sup> **Equity criteria:** Previous reserve list programme; Receiving significant funding from NZAID over multiple years; Unemployed/unpaid/dispossessed; Women; Rural and Outer Islands; NGO participation/private sector development; Youth.  
**Priority criteria:** Leadership/management; Organisation strengthening; Not available in Tonga; Improved supply chain; Improved quality of teaching/ learning; Agriculture, fisheries (subsistence); Training of Trainers; Tourism.

another, the MoTEYS sought to change the agreed list after it had been approved by the PCC.

*It would be preferable for the role of the PCC to be clarified and strengthened so that it has both a policy and an oversight function.*

## **Recruiting trainers**

The MSC has access to a network of trainers and approaches individual trainers to take particular courses. This has some benefits in that it takes time for consultants to become familiar with the Tongan context and building up trainers' in-country experience greatly enhances their effectiveness. At the same time, it is not clear how extensive the MSC network is and whether it provides sufficient opportunity for "new entrants".

The contract also allows for trainers to be appointed from other countries as appropriate, but the MSC has not yet attempted to find regional trainers who might be able to bridge the cultural divide more quickly and bring experience more closely allied to the situation in Tonga e.g. in terms of scale and the availability of skills and resources.

The MSC has made considerable and commendable efforts to increase the number of local trainers but has to rely on STTC for information about potential candidates. When they do get a referral, they check out their credentials, interview them and if possible, observe them in action. It is not clear how up to date the STTC database is or whether there is a formal process for referring potential trainers to the MSC. (The same applies to the NZHC, which has had an approach from at least one Tongan/New Zealand trainer to run HR, management, and business courses.)

*Opportunities for NZ trainers to register an interest in providing training in Tonga need to be expanded. Experience in Tonga or another Pacific Island would be an important selection criteria.*

*The same opportunities need to be extended to trainers from other Pacific Islands.*

*The STTC database for local trainers needs to be regularly updated and a formal process established for referring potential trainers to the MSC.*

## **Counterpart trainers**

The role of the counterpart trainer is seen as an opportunity to grow local training. In fact the role currently has four aspects:

- To develop person's capacity to become a trainer
- To provide subject/technical/organisational expertise relevant to the situation in Tonga and/or in the requesting organisation
- To provide cultural support for overseas trainer and interpreting for participants before and during training
- To provide administrative support.

Under the present arrangement, the MSC has no control over the quality of the counterpart trainer, who may not have appropriate facilitative skills and no wish to become an independent trainer. Often counterpart trainers are appointed only a few days before the course starts. Many lack the expertise they need to either to advise the trainer or to represent the organisation adequately.

A more sustainable arrangement would be to attach a counterpart trainer to the overseas trainer independently of the requesting organisation. The counterpart trainer could be selected on the basis of their skills, expertise and interest in becoming an accredited local trainer. They could move with the trainer from one course to another, acquiring skills and developing resources as they did so. They would probably need to be paid through the ICT programme. At present counterpart trainers are paid for by requesting organisation but many NGOs do not have the resources to do this. (This issue was first raised in 2003).

*The role of the counterpart trainer needs to be reviewed to have a clear training focus. This could be achieved by attaching counterpart trainers to the trainer, not to the requesting organisation. This means that they will need to be paid from ICT funds rather than by the requesting organisation as at present.*

## **Training course management issues**

Stakeholders raised a number of course management issues, which indicate a need for clearer guidelines covering processes and responsibilities. This need has been recorded regularly since 2004.

Issues raised include:

- The form for requesting training (see above)
- Managing training allowances
- Responsibility for booking travel
- Lines of contact for requesting organisations
- Responsibility for approving the year's programme (see above)
- Training equipment for courses
- STTC staff members accompanying overseas trainers to the outer islands for the whole period of training (in addition to the counterpart trainer)
- Payment for counterpart trainers.

Having clearer guidelines and processes would cover these, but all parties would need to agree to them and provide the resources needed to implement them. The MSC or a consultant could help the STTC design appropriate forms for requesting proposals and for collecting information on tracer studies but routine, timely administration should be part of the STTC's core business (as set out in their publicity pamphlet).

At present the STTC has many demands on its limited resources. The situation will change in July when the STTC and the Employment Division are merged into the Training and Employment Services Centre. If the In-Country Training Programme is to remain a valuable part of the training spectrum, it will need to be given enough resources

to administer it effectively, or alternatively, the administration of the programme could be outsourced.

*Clearer guidelines covering processes and responsibilities need to be developed and accepted by all parties. Acceptance needs to be evident in the commitment of resources.*

Trainers, participants and requesting organisations wanted greater flexibility in the timing and delivery of courses.

- Outer Islands courses need to be provided in the off- season i.e. November to April.
- Participants wanted shorter sessions i.e. half days spread over two or more weeks or evening sessions to accommodate work and other commitments
- Participants in technical courses wanted more formal arrangements for obtaining support and advice once courses had finished.
- They also wanted a follow up session after six months to reinforce and extend their learning.

Being able to meet these requests would make the learning more sustainable but there is little scope for doing that within the current arrangements. The issue of follow-up and sustainability was raised in the 2002 Review but the recommendation has not been implemented.

## **4.2 Monitoring and accounting for expenditure**

The MSC has monitored and accounted for expenditure appropriately.

Actual and projected expenditure has been reported in progress and end of year reports and explanations have been given for discrepancies between actual and projected expenditure.

In 2004/2005, final expenditure was close to budget with a 0.17% over spend. In 2005/2006, 99.3% of the budget was spent, while in 2006/2007 the proportion spent dropped to 91%. This was because the November 2006 PCC meeting was cancelled due to the riots on 16 November.

### **Training Allowances**

Management of training allowances has been an issue since at least 2003. Various arrangements have been tried, including asking New Zealand trainers to take cash to Tonga to pay the allowances, with reimbursement at the end of the course. The latest agreement is that trainers will keep a roll and pass that to the Programme Officer at the NZHC in Tonga, who will then pay allowances. Given that this is an administrative matter, the payments should be handled through the STTC, on the basis of an attendance roll kept by the trainer.

The level of the allowances has fallen behind the cost of living, which has risen substantially in recent years. A minimum rate of \$10TOP per day should be set for people

attending training within their own island, and \$30TOP per day for those who are required to travel to another island.

*Payment of training allowances should be the responsibility of the STTC.*

### **Other costs**

The practice of an STTC officer accompanying trainers and counterpart trainers to Outer Islands to assist with administration should cease, unless there are exceptional circumstances that warrant it.

## **4.3 Monitoring, analysing and reporting on progress**

### **Goals and objectives**

Achievement measures are agreed each year. Performance against these measures is summarised in the table below.

*Course data shows that the MSC has met or exceeded most of its targets each year.*

**Table 1 Achievement against indicators**

<b>Indicator</b>	<b>2004/2005</b>	<b>2005/2006</b>	<b>2006/2007</b>	<b>2007/2008 5 courses only</b>
Programme evaluation rating of 4 or more 80% to 100% of the time	91%	86% average 4.43	91% average 4.5	83% average 4.42
At least 50% gender equality	46% - M 54% - F	24% - M 76% - F	42% -M 58% - F	33% - M 67% - F
A minimum of 20% participants from OI	22%	19%	44%	18%
Achieve 20% + participants from NGO and Private Sector <sup>2</sup>	19% Private 48% NGO	18% Private 51% NGO	14% Private 26% NGO	80% Private 2% NGO

### ***Programme evaluations***

The programme evaluation form has remained unchanged over the contract. In the overall rating, administrative matters such as notice of training and the quality of the venue and food are given equal weight with more substantive factors such as relevance, quality of handouts and building on current knowledge. Administrative aspects typically score lower than the more substantive factors. If they were excluded, the overall rating would have been higher. The reports of overall scores give no indication of the range between courses or whether some courses achieved better results than others.

### ***Sector participants***

Reporting by sector is confused by terminology changes. It is not clear who the “public” category refers to, but presumably it means that courses were open to the public. It may

therefore cover people who are working in neither the private or state sectors i.e. they are unemployed or working in the “informal” sector. If that is the case, the categories for 2004/2005 are surprising as they suggest that no public servants took part in training that year. The categories were:

- 2004/2005 Public, SOE, Private, NGO.
- 2005/2006 Public, TGOV, Private, NGO
- 2006/2007 Public, TGOV, Private, NGO
- 2007/2008 TGOV, Unemployed, Private, NGO.

### ***Tracer studies***

The MSC and STTC are to be commended on the considerable effort they have put into tracer studies. STTC staff have organised interviews, tracked down participants and visited Outer Islands in their follow up studies<sup>2</sup>.

All the reports show a self-assessed improvement in skills. The degree of change depends in part on how highly participants rated themselves at the start of the course.

- 2004/2005 Average improvement 62% Range 20% - 186%
- 2005/2006 Average improvement 54% Range 37% - 67%
- 2006/2007 Average improvement 52% Range 22% - 87%<sup>3</sup>

Participants’ perceptions of how much use they made of the knowledge they gained in the course is averaged across all courses. This makes it difficult to assess the

- 2004/ 2005 Used knowledge all or three-quarters of the time 75%
- 2005/2006 Used knowledge all or three-quarters of the time 88%
- 2006/2007 Used knowledge an average of 75% of the time, with 38% using their knowledge 100% of the time.

The tracer studies are useful and certainly indicate a high level of satisfaction but they do have some limitations.

Where only one participant can be found from a course, their results should be excluded from the table, although they could be reported in a footnote. They may not be representative of the course, and with such low numbers it is easy to distort averages. Ideally, at least 20% of participants should be interviewed and in the last two rounds, that has been achieved in nearly every case.

The tracer studies would also benefit from including more objective outcomes measures such as:

- Employment gained
- Promotion achieved
- Income generated

---

<sup>2</sup> The 2005/2006 tracer study was incomplete. Some requesting organisations were affected by the riots of 16 November and were unable to complete the surveys; some information collected earlier in the year was misplaced when the STTC shifted offices. Information was only available for half the courses offered.

<sup>3</sup> Note: the way the rates of change are presented in the table in the 2006/2007 tracer study is misleading. The correct figures are in the text.

- Businesses established or business plans prepared
- Further training pursued.

The tracer studies could also explore why people have not been able to use the skills and knowledge they gained on the course. This would help trainers and requesting organisations understand why programmes have less impact than they hoped.

The most recent report is a marked improvement on earlier reports because it includes participants' comments and suggestions for improvement as well as the summaries of self-reports on changes in and use of skills. In some cases, comments by managers are included and add useful information. However, there is no analysis or summary of the themes that emerge from participants' comments or suggestions of ways to address the issues raised.

*The tracer studies need to be strengthened to provide more robust outcome information.*

## **Reporting**

The reports prepared by the MSC have been timely and are generally clear and well-presented, but they rarely include the full range of information required in the contract. For example, the quarterly reports include little information on:

- Key issues affecting progress
- Emerging risks
- Risk management strategies
- Third party issues
- Proposals for improved efficiencies.

This minimalist approach may be a response to a request for brief reporting but it does mean that some issues go unrecorded and unaddressed. Some trainers also questioned whether the end of course reports they wrote were ever read or actioned.

## ***Risks and constraints***

Three of the main risks to the programme identified in interviews were:

- The pressure on resources at the STTC and the impacts of this on administration.
- The lack of priority given to the PCC, with no consistent representation at senior management level.
- The lack of a clear authoritative role for the PCC.

Other issues have been raised elsewhere in this report.

*The request for fuller reporting (as set out in the contract) needs to be supported by a formal process for dealing with any issues raised.*

## **Exit strategy**

The requirement for the MSC to prepare a handover plan was first put in the contract in 2004. The caveats expressed in file notes<sup>4</sup> stating that handing over would need to be

---

<sup>4</sup> see emails on NZAID file for October and November 2003

contingent on an appropriate level of resourcing and good systems being in place were never built into the contract.

The MSC's main exit strategy at present is developing the capability of local trainers so that they can run more courses, and the MSC has made very good progress in this regard.

The MSC has also taken some steps to localise the administration of the programme, including the management of training requests and the administration of the Tracer Study. But the pressures on the STTC have increased and to be effective it will need more resources, better systems, and more succession planning so that institutional knowledge is more widely spread. That would make the programme less vulnerable if one person was to leave or move to another area, but it is unlikely to happen before the end of the MSC contract.

#### **4.4 Value for money**

At around \$130,000 per year, the MSC generally absorbs about one third of the annual ICT budget. Their fee pays for the work associated with finding and supporting trainers, financial management and two visits to attend the PCC meetings, shortlist programmes and meet with NZAID, STTC and other stakeholders in Tonga.

The remaining two-thirds of the budget supports around 15 to 17 training programmes per year. Each course costs around \$NZ15000 to run.

The MSC has always completed its agreed programme within budget and to the satisfaction of participants and requesting organisations. Without robust outcome measures it is difficult to assess the long-term impact of the programme but it is well managed and well-run and to that extent provides value for money.

The fact that many stakeholders (a) were able to identify areas in which Tongan trainers can provide training and (b) supported a move to a greater focus for ICT on employment-related training can be taken as one indication of the success of the programme in the past.

## **5. The design and management of future NZAID support to METYS and ICT**

### **5.1 Joint Tonga/New Zealand Programme Strategy 2008-2018**

The joint Tonga/New Zealand Programme Strategy (NZAID 2007) provides strategic direction for the NZAID programme to Tonga for 2008-2018. Its goal is to:

*Reduce hardship in Tonga through activities that promote good governance, equitable access to quality education and increased economic opportunities.*

The three priority areas of governance and civil society, broad-based growth and sustainable livelihoods and education align with both NZAID's Pacific Strategy and with Tonga's Strategic Development Plan (SP8)<sup>5</sup>.

This section describes ways in which the design and management of NZAID support to METYS and ICT can be improved to provide a more efficient and effective programme that is in accord with NZAID and Tonga's priorities and supports the Strategic Framework for Short-term Training 2007<sup>6</sup>. The Strategic Framework has recently been approved by the Government of Tonga. Its key components are that:

- Short-term training must be guided by and aligned with the broader framework of policy and strategies of key partners such as other Government agencies and aid donors.
- Short-term training is a 'bridge' that can be used to close the training gap in order for the trainees to move forward and undertake more formal training at certificate and diploma levels, especially those without formal secondary qualifications.
- Training can also be 'refresher' in terms of providing training for persons who are performing a trade but whose skills have not been formally recognised through training and certification.
- Training is the 'staircase' for persons to start from basic and move to advanced level before entering certificate and diploma training.

### **5.2 The training context**

In-country training for young people, adults and organisations can take a number of forms. Table 2 below categorises these into nine types and indicates how they are currently managed in Tonga as well as how they might be managed in the future. The following pages expand on this table<sup>7</sup>.

---

<sup>5</sup> Kingdom of Tonga (2008) *Looking to the future, building on the past: Kingdom of Tonga Strategic Development Plan 8 2006/07 – 2008/09*

<sup>6</sup> Ministry of Training, Employment, Youth and Sports (2007) *Strategic Framework for Short-term Training 2007*.

<sup>7</sup> CFST refers to the Civil Society Forum of Tonga; TESC refers to the Training and Employment Services Centre which is to be established in July 2008 through a merger of the STTC and the Employment Division of MoTEYS.

**Table 2 Types of In-Country Training**

	<b>Type</b>	<b>Comment</b>	<b>Current management</b>	<b>Proposed management</b>
1	Courses to strengthen community organisations	Usually short courses, often run as a series covering different aspects of administration, management and governance	STTC with ICT support	CSFT with ICT support
2	Generic skill courses	Typically short courses covering topics such as work ethic, pre-employment skills, career planning	STTC with ICT support	TESC through Government of Tonga funding
3	Adult education courses	Short courses, can be held in the evenings, over half days or in the weekends. Usually have no academic pre-requisites and no link with accredited training	STTC with ICT support	TESC through Government of Tonga funding
4	Bridging or foundation courses	Courses that enable participants to gain credits at Level 1 equivalent in a particular industry or sector; often act as introductory or taster courses. Credits are recognised in further training.	Local technical institutions + some STTC with ICT support	Local MSC with ICT support
5	Accredited industry & professional training	These courses may vary in length but usually leads to a recognised qualification	Local technical institutions + ICA, STTA and scholarship support	Local technical institutions + ICA, STTA and scholarship support
6	Validation or updating courses	Many qualifications need regular validation or upgrading; Qualified staff may also need workshops to keep up to date	STTC with ICT support	Local MSC with ICT support
7	Entrepreneurial skills	Courses aimed at those who want to establish a business – planning, budgeting, marketing	STTC with ICT support	Local MSC with ICT support
8	Business management courses	Courses aim to strengthen management, leadership, administrative skills at middle management level	STTC with ICT support	Local MSC with ICT support
9	Train the trainer courses	Courses aim to build local training capacity	STTC with ICT support	Local MSC with ICT support

### **5.3 The focus of the In-Country Training Programme**

This review strongly supports a redesign of the ICT programme, and particularly to aligning it with the short-term training strategy produced by MoTEYS. Agreement was strong across all sectors on the need for courses that:

- are relevant to Tonga's training needs
- are associated with a recognised certificate or offer recognised credits
- are provided by accredited tutors
- are run in a flexible manner
- include follow-up support and opportunities for ongoing training.

#### **Types of programmes**

As Table 2 suggests, the focus of NZAID support to MoTEYS should be on bridging and foundation courses (Type 4) and on validation and refresher courses, entrepreneurial and business courses and courses for training trainers (Types 6-9).

**Type 1 courses aim to strengthen NGOs and community organisations** and improve governance in civil society. This review proposes that NZAID outsource these programmes to the Civil Society Forum of Tonga (CSFT) with funding being based on an annual workplan, budget and agreed accountability/outcome measures. The Forum would need extra personnel to do this, but is well supported through its links with the UNITEC Management of Not for Profit Organisations programme.

**Type 2 generic skills courses** can be provided locally and are properly the responsibility of the Government of Tonga. They could be managed by the Training and Employment Services Centre (TESC) which is to be established in July and use local trainers.

**Type 3 'adult education' courses** should also become the responsibility of the Government of Tonga. This would be a clear demonstration of the Government's commitment to pro-poor policies. The courses could be run using existing facilities in schools, and church and government training institutions in the evenings, weekends and school holidays. Courses could be run at times to suit local tutors and participants, and could be delivered in each of the island groups. MoTEYS could either administer these programmes themselves through the TESC or outsource the programme administration. The latter option would enable MoTEYS to focus on policy, advocacy, and quality control through monitoring and evaluation.

**Type 4 short-term bridging or foundation courses** should remain under the auspices of the In-Country Training Programme and could be administered by a local MSC (see section on Administration and Management below).

Distinguishing between Type 3 and Type 4 courses will sometimes be difficult but the difference may lie in whether or not the requesting organisation identifies a clear link between the course and the opportunity to go on to more formal training at certificate or diploma level.

**Type 5 accredited industry and professional training courses** should continue to be funded as at present, with NZAID contributing through the Scholarships and Short Term Training Attachment Programmes and the In Country Awards Scheme, which reimburses 50% of the fees of successful students in eligible programmes.

**Type 6 to 9 validation or updating courses, business management courses and train the trainer courses** should continue to be supported through a revamped In-Country Training Programme. Support for ‘train the trainer’ courses will expand the range of tutors qualified to teach courses at Level 1 or 2.

## **5.4 Programme management**

A revamped In-country Training Programme will need a strong local administrative and management system, with clear roles and responsibilities.

### **Role of PCC**

The PCC needs to be strengthened so that it has a clearly articulated role in setting policy within the broad framework and guidelines set by NZAID and the Government of Tonga. The PCC should also oversee the development and delivery of each year’s work programme.

Its membership should be limited to five or six people. It could include representatives of NZAID, MoTEYS and other Government ministries as appropriate, the programme implementing agency (see below), the private sector, the newly formed vocational and technical training associations, and possibly community agencies or NGOs.

The chairmanship of the PCC needs to be reviewed. The role could be filled by someone who is independent of NZAID and MoTEYS or it could remain within MoTEYS. In either case, it needs to be filled by someone who is senior, has authority and is familiar with the training, community and employment context.

### **Implementing agency**

An implementing agency needs to be appointed to manage the programme. The agency would be similar to an MSC in New Zealand, in that it could probably be managed by one person with secretarial support, but it does need to be led by someone fully committed to training.

The agency could theoretically be within MoTEYS but it would need to be quite separate from MoTEYS’ policy and advocacy arm. One suggestion was that the Training Institute of Science and Technology could take on this role with additional clerical support.

Another, and probably preferable, arrangement would be to contract the management to a training or management organisation in Tonga. There are a number of such organisations in Tonga who could perform this role.

It would be necessary to retain links with a training organisation such as the current MSC in New Zealand who could source overseas trainers where they were required, but the financial and administrative management needs to shift to Tonga.

## **Information**

The work of the implementing agency would be greatly assisted by having an up to date database of accredited trainers or trainers who would like to become accredited in Tonga.

The EU, the Peace Corps and the SPC are all engaged in providing training in Tonga. It would be useful to document what they and any other donors are offering to reduce overlap and make the best use of resources.

Given the range of interest in accreditation, it would be useful to undertake a mapping exercise to document which training providers in Tonga accredit courses through New Zealand, Australian and other educational institutions.

Mapping facilities would also be useful. For example, MAFF has been given money by the EU to build a training and research facility on Tongatapu next year; Mailefihi College on Vava'u has asked the King for some land on Vava'u to build a vocational training centre and is optimistic about that; the Vava'u Youth Congress has a training facility and administrative capacity; the Tongatapu Chamber of Commerce and MoTEYS are establishing the Business Development Centre.

## **Administration**

With clear guidelines on processes and responsibilities, the implementing agency should be able to take over most of the administrative tasks associated with In-Country Training. This would reduce the load on the NZHC and provide a clear communication channel for requesting organisations and for trainers in both New Zealand and Tonga.

## **5.5 Programme content and delivery**

### **Focus**

All stakeholders agree that the ICT would benefit from having a sharper focus and a clearer philosophical or “editorial” base. As noted earlier, the selection of programmes is currently guided by 15 criteria, which is somewhat unwieldy. Combining the components of the Strategic Framework for Short-term Training, where short-term training is seen as having “bridge”, “refresher” or “staircase” functions, with NZAID’s equity criteria would be a useful start.

The focus should continue to be on providing training for the community and private sectors rather than for Government ministries.

## **Content**

The Training Needs Analysis (TNA) taking place in January should guide In-Country Training priorities, although tourism, agriculture including food production and food processing, and fisheries are expected to be high on the priority list.

The ADB report on further development of the Micro-Enterprise Project for Youth, also expected in January, will provide additional guidance on priorities for training programmes for young people.

## **Accreditation or recognition**

Ideally, bridging and foundation programmes should link into recognised certificate or diploma training that offers opportunities to advance, either in Tonga or overseas.

Certificate and diploma courses are often accredited through benchmarking or “twinning” with an institution in New Zealand or Australia. For example, a number of tertiary institutions have links with either Auckland University of Technology, Manukau Institute of Technology, The Open Polytechnic of New Zealand, Unitec Institute of Technology or Whitireia Community Polytechnic.

As part of its development of the Australia Pacific Technical College, AusAID is taking a particular interest in course accreditation. The programme is not aimed at school leavers but at people with a Tongan qualification that does not reach the Australian standard. They can apply for a scholarship that will allow them to attend a course at a training institution in either Samoa, Vanuatu, Papua New Guinea or Fiji. Scholarships for students and trainers have already been awarded in Tonga.

## **Trainers**

Trainers need to be qualified to teach courses supported by the ICT. According to stakeholders, they also need to understand the Tongan context and culture, have practical, first-hand experience in the area in which they are teaching, and if possible, use Tongan examples.

Both Tongan and New Zealand trainers can meet these criteria but:

- it takes time for New Zealand trainers/consultants to develop the understanding and resources they need to be effective in Tonga
- it takes time to build a pool of accredited and qualified local trainers.

Given the desire to localise training as much and as soon as possible, NZAID needs to invest in upskilling local trainers. This can be done by:

- bringing New Zealand trainers to Tonga who can validate or update local trainers’ existing qualifications
- providing more substantial “train the trainers” courses that lead to certification.

The STTA scheme might be useful in some circumstances to upskill trainers but the programme has drawbacks in that only one person is trained at a time. If that person leaves the country or moves out of training, their knowledge and skill go with them. It

would be preferable to invest ICT funds in more substantial ‘train the trainer’ courses backed with follow up support.

Overseas trainers will be needed for some time for specialist courses and to update local trainers’ skills or qualifications in technical areas.

### **Counterpart trainers**

As noted in Section 4, the role of counterpart trainer attracted considerable comment. Stakeholders’ preference was for the role to have a stronger training focus. This can be achieved by:

- attaching them to the primary trainer rather than having them based in the requesting organisation
- ensuring that they are able to participate in a minimum of three courses before they are considered ready to run a course themselves
- providing some form of certification to those who are considered competent to run training programmes.

Counterpart trainers could strengthen their skills by taking responsibility for two aspects of course delivery:

- preparing a realistic brief on what the training should cover - this would require them to meet with the requesting organisation to clarify the level and focus of the course
- doing follow up visits to provide support - the trainer can assist in this by preparing a follow-up brief that sets out what the counterpart trainer should look for when they check how people are doing, the questions they should ask and ways to identify the next steps for the participant.

(Note: this model was recommended in the previous review, but the recommendation was not pursued).

At the moment the requesting organisation pays for the counterpart trainer, but under the proposed model, that would become a cost to the ICT programme.

### **Delivery issues**

A number of delivery and follow up issues have already been identified in this report. All stakeholders wanted more flexibility in delivering courses through, for example.

- offering them two or three half days a week
- holding evening and/or weekend sessions over several weeks
- including practical visits to participants’ workplaces
- contracting overseas trainers for a set number of days within a given period to deliver first and second level courses and provide follow-up
- clustering courses to reduce costs and improve service
- providing courses in the Outer Islands between November and April when there are fewer tourists.

Ideally, overseas trainers would spend much longer than they do now in-country – periods could range from three weeks to three months, compared with one or two weeks

as now. A longer stay would allow trainers to become familiar with Tonga as they deliver courses over a longer period and to spend more time developing the skills of their local counterparts. Options for arranging this include:

- contracting a trainer to provide a certain number of days' training over a given period
- exploring options with VSA for developing three month placements for mature people who are willing to share their expertise.

If fewer courses are run under ICT but repeated more often, keeping trainers in the country for longer is unlikely to be much more expensive than flying trainers in and out more often. The airfares make up a considerable part of the cost of courses.

Opinion was divided as to whether courses should be delivered in Tongan or English. The preference for English was stronger among those working or training in Hospitality and Business, where English was seen as an essential part of the job.

### **Follow up support**

Refresher or follow up training is vital to the learning process and should be built in to each course design. Follow up can be provided by the trainer or the counterpart trainer or a mix of both. It can be in the form of:

- a brief refresher course to discuss issues and practical problems
- visits to participants' workplaces as an opportunity for the trainer to talk with the employer as well as the learner and to see the context in which the participant operates
- a more advanced course to extend participant's knowledge and skills.

Trainers could also offer new basic level courses alongside their follow up visits if enough new participants were interested.

### **Cross cutting issues**

It would be more equitable to deliver more courses in the Outer Island groups, particularly Ha'pai and Eua, rather than always bringing participants to Vava'u or Nuku'alofa.. It would also "ground" learning where it is to be applied and may encourage the development of a wider range of local organisations.

The gender balance of courses has favoured women every year for the last four years. While this should continue to be monitored, it appears to be less of an issue than in the past.

### **Training allowances**

Under the proposed model, TA for 'adult education' courses will become a matter for the Government of Tonga. If NZAID were to take over payment for counterpart trainers, it would be reasonable to ask the Government to pay allowances for employment-related courses.

Either the TESC or the implementing agency could be responsible for managing the payments.

## **Monitoring and evaluation**

Gathering monitoring information should be the responsibility of the implementing agency. Ideally this should be through a database recording variables relevant to training, such as gender, location, attendance, type, level and duration of course. Ratings and comments from end of course evaluations and trainer reports can be added as courses are completed.

Once the outcomes of tracer studies are added it may be possible to assess the effectiveness of courses on a more reliable basis. (Obviously this will depend on how confidentiality issues are managed).

Regular monitoring reports MoTEYS and NZAID should clearly identify trends, note any emerging issues and suggest ways to address them. Some issues will be able to be resolved at this point. Issues that have policy implications will need to be put before the PCC.

The implementation agency should report six monthly to the PCC on the outcomes of training, issues arising and suggestions for addressing these.

### ***Evaluation***

Evaluation can occur in two ways:

- through regular tracer studies, which should become the responsibility of the implementing agency
- through a review within two years of the implementation of the revamped programme to identify any areas that might need modification.

The tracer studies need to include specific outcome measures, such as jobs obtained, promotions achieved, new or expanded business opportunities, enrolment in further training, qualifications gained as well as recording participant and employer/supervisors' subjective perceptions of skills gained and used.

The comments gathered during meetings with participants and their employers/supervisors need to be analysed rather than simply reported.

The implementing agency should report its findings six monthly to the PCC.

## **Cost implications**

The cost implications of a switch to a Tonga-based MSC are likely to be relatively modest. Basing the MSC in Tonga and making greater use of local trainers should reduce costs. Having overseas trainers in country for longer periods will add to costs but this can be offset to some extent by clustering courses. The costs of using a New Zealand-based organisation to locate trainers should be much reduced, if administration and payments are the responsibility of the Tonga-based MSC.

## Next steps

The change process will involve a number of steps and stakeholders. The following table is indicative only and does not include timeframes. Early attention to the appointment of an implementing agency would be helpful but obviously, considerable thought will need to have been paid to the final design before that can happen.

<b>Tasks</b>	<b>Stakeholders</b>	<b>Led by</b>
Agreement that the programme be redesigned	NZAID, GoT	NZAID, GoT
TOR for redesign prepared and contract let	NZAID	NZAID
Design phase begins	NZAID, GoT	NZAID/contractor
TOR for PCC prepared	NZAID, MoTEYS	NZAID/contractor
Specifications/tender documents prepared for implementing agency (MSC) – including provision for an arrangement with a NZ-based agency	NZAID, MoTEYS	NZAID/contractor
Tender process for appointing implementing agency	NZAID, MoTEYS	NZAID
Guidelines on processes and responsibilities	NZAID - AIDPAC and NUK, MoTEYS	NZAID/contractor
Redesign of Request for Training form	NZAID, MoTEYS, MSC,	NZAID/contractor
Development of database of trainers, including potential trainers from other Pacific countries	NZAID, MoTEYS, MSC, requesting organisations, training providers	MoTEYS
Collating information on training support provided by other agencies	NZAID, MoTEYS	MoTEYS
Mapping exercise to document courses in Tonga twinned or accredited through overseas institutions	NZAID, MoTEYS	MoTEYS

## Annex 1 List of people consulted

<b>Government of Tonga Ministers</b>	
Hon Tu'ivakano	Minister of Training
<b>Government of Tonga officials</b>	
Mr Edgar Cocker	Director of Tourism
Ms. Polutu Fakafanua-Paunga	Deputy Director, Ministry of Education, Women's Affairs and Culture
Dr Caroline Fusimalohi	Central Planning Department
Dr Taniela Fusimalohi	CEO, Ministry of Training, Employment, Youth and Sport (MOTÉYS)
Mr Bruno Kautoke	Officer in Charge, Tourist Visitor Bureau, Vava'u
Mr Sione Maumau	Ministry of Labour and Commerce
Mr Oto Misi	Principal, Technical Department, Tongan Institute of Science and Technology
Mr Fehi Moala	Officer in Charge, Ministry of Agriculture, Fisheries, Food and Forestry, Vava'u
Ms Luceane Taufu	Women's Division, Ministry of Agriculture, Fisheries, Food and Forestry
Mrs Apisake Soakai	Secretary, Public Service Commission
Mrs Jeffrey Taufu	Principal Training Officer, MOTÉYS
Mrs Tu'ifua Takauputolo	Deputy Director, Community Development and Training Centre, Ministry of Education
Mr Alipate Tavo	Ministry of Agriculture, Fisheries, Food and Forestry
Mrs Tapu Tonga	Training Officer, Tonga Visitors Bureau
Ms Leodi Vainikolo	Ministry of Agriculture, Fisheries, Food and Forestry
<b>MFAT and NZAID</b>	
Mr Edward Ablett-Hampson	Deputy High Commissioner, New Zealand High Commission, Nuku'alofa
Ms Kirsty Burnett	Development Programme Manager - Tonga
Ms Megan McCoy	Development Programme Officer - Tonga, Pacific Health and Education
Ms Keasi Pongi	Programme Officer, NZHC, Nuku'alofa
<b>AusAID</b>	
Ms Kirsten Hawke	First Secretary, AusAID
<b>MSC</b>	
Mr David Glover (by telephone)	Managing Director, David Forman Ltd
Mr Holona Lui	Programme Manager, David Forman Ltd

<b>Non-government training providers</b>	
Mr Feleti Atiola	Director, Free Wesleyan Church Education System
Mr Savelio Atuekaho	Director, Free Church of Tonga Education System
Mrs Falasima Kautoke	Catholic Education System
Sister Koleti	Principal, Ahopanilolo Technical College
Ms Lilio Fakava	Deputy Principal, Mailefihi & Siu'ilikutapu College, Vava'u
<b>Private sector organisations/ services</b>	
Ms Alisi Meade	Ikapuna Store, Vava'u
Ms Lee Miller	Tonga New Zealand Business Association
Mr Elmer Sonosa	'Uta'atu and Associates
Ms Liz Sullivan	Billfish Bar and Restaurant
Mr Paula Taumoepeau	Tonga Chamber of Commerce
Mr Brian Welch	Pacific Finance Management
<b>Community organisations</b>	
Ms Sepa Folaumoetu'i	Civil Society Forum Trust
Mr Ma'u Halaifonua	Tonga National Youth Congress, Vava'u
Ms Emeline 'Ilohahia	Civil Society Forum Trust
Mr Manitasi Leger	National Training/Monitoring and Evaluation Officer, Tonga National MORDI* Programme
Mr Soane Patolo	National Programme Coordinator Tonga National MORDI* Programme
<b>Trainers</b>	
Mr David Gollings	Management Learning Associates Ltd
Mr Gerry Hassan	Kiwihost
Mr David Henton	
Mr Sam Lala	Trainer, Tonga Airlines
Mr David Pooch	David Pooch and Associates, Auckland

\*MORDI = Mainstreaming of Rural Development Initiatives

Note: Ms Fatai Soakai of STTC was overseas for the duration of the review and could not be interviewed

## **Annex 2 Glossary of terms**

CSFT	Civil Society Forum of Tonga
CSO	Civil society organisations
EU	European Union
GoT	Government of Tonga
ICA	In-Country Awards
ICT	In-Country Training
MoTEYS	Ministry of Training, Employment, Youth and Sports
MSC	Management Services Contract
NZHC	New Zealand High Commission
PCC	Programme Coordination Committee
SDP8	Strategic Development Plan
SPC	Secretariat of the Pacific Community
STTA	Short Term Training Attachments
STTC	Short Term Training Centre
TCPS	Tonga Country Programme Strategy
TESP	Tonga Education Support Programme
TIST	Tonga Institute of Science and Technology
TNA	Training Needs Analysis
TVB	Tonga Visitors Bureau
TVET	Technical and Vocational Education and Training

## **Annex 3 Terms of reference**

### **1. Background**

The New Zealand Government's official development assistance programme (administered by the New Zealand Agency for International Development, NZAID, since 2002) has provided assistance for an In-Country Training (ICT) scheme in Tonga since 1994. The goal of the ICT scheme is to 'assist the Tongan Government to provide quality, relevant and timely short-term training in Tonga that meets their priorities and NZAID policy guidelines (participation for men and women from the public and private sectors including NGOs, main and outer islands). The ICT scheme is part of a package of education/training opportunities under the Tonga bilateral (government to government) programme which also includes scholarships (both to New Zealand and Pacific institutions), Short-Term Training Awards (STTA, for short qualifications and work attachments in New Zealand) and In-Country Awards (reimbursement of post-secondary vocational qualification fees).

The ICT scheme provides skilled trainers from New Zealand (and Tonga and other countries as appropriate) for short-term (usually three week) courses on a range of subjects with both the public and private sectors and civil society. Courses for the 2006/07 financial year have ranged from 'Learning Through Play' (through the Tonga Preschool Association) to a 'Documenting Rescue Fire fighting and Emergency Management' (through the Ministry of Civil Aviation).

The scheme is currently managed by a Management Services Contractor (MSC), David Forman Ltd, under Contract with NZAID. Under the overall goal of the programme, the MSC Contract lists three major objectives, to manage and administer the NZAID-funded ICT scheme in Tonga, to monitor and account for all expenditure of NZAID funds for the ICT scheme in Tonga and, finally, to monitor, analyse and report on progress towards achieving the goal and objectives of the programme, identifying risks and constraints and recommending solutions to improve the effectiveness and sustainability of the programme and putting in place an exit-strategy so that Tonga takes on full ownership of the programme at the end of the contract period. The MSC also works with a counterpart organisation, the Short-Term Training Centre (STTC) which is part of the Ministry of Training, Employment, Youth and Sports (MTEYS). In brief, the STTC is responsible for advertising the scheme across the three sectors (public, private and civil society), collating requests and providing day to day in-country support of the courses. The MSC and the STTC work closely together. The MSC and STTC are also part of a Programme Coordination Committee (PCC), which is made up of NZAID and representatives from each sector. This body acts primarily as an information sharing mechanism and has no formal authority. The MSC was selected in 2004 following an open tender process. The contract has been extended to conclude in June 2008.

NZAID commissioned independent consultants in 2002 to undertake a review of the scheme. The review was positive, finding that the ICT programme was largely achieving its goal and training objectives. It made a number of recommendations relating to the programme's future focus and implementation, which were agreed to by both NZAID and Tonga.

The primary stakeholders in this review are NZAID, STTC (MTEYS and other Government of Tonga departments), PCC, public and private sector and civil society.

## **2. Purpose**

NZAID is accountable to Parliament, the New Zealand public and partner governments and communities, to ensure that development programmes remain relevant to the priorities of partners, are achieving the original objectives and are likely to have sustainable results. NZAID is also concerned with learning from both past successes and challenges to improve future practice, and reviews are a key part of this process.

NZAID is entering into a new five year Tonga Country Programme Strategy (TCPS) with the GoT, and is keen to ensure that all training mechanisms offered under the TCPS are consistent with the priorities of both the GoT and the primary pillars of the TCPS itself. This includes reviewing whether the ICT scheme is the most appropriate in meeting the stated needs by the GoT with regard to training and whether it is still an appropriate mechanism for NZAID support. NZAID is also obligated under the MSC contract to review the performance of the MSC (covering management of NZAID inputs and overall monitoring), and progress on the ICT scheme as a whole within the first two years of the Contact (i.e. before 2007). As this review was not carried out due to other priorities in 2006, it is pertinent that it takes place now.

The findings will be reported to NZAID in the first instance and will be used to inform the future direction of support to the MTEYS.

## **3. Scope of Services**

The review will cover NZAID-funded ICT activities in Tonga (including outer islands) since the MSC contract with David Forman Ltd was signed in April 2004. This assignment will take place in October 2007 and will be for approximately 20 days (including at least 10 days in-country).

## **4. Overall Outcome and Objectives:**

**Outcome:** Efficient and well-managed support to the MTEYS that best meets their needs and is a good fit with the proposed NZAID TCPS.

**Objective 1:** To review the performance of the MSC against the Contract Objectives.

### *Key Questions*

- Did the MSC manage and administer all tasks under Activity One of the Contract appropriately and efficiently? For example, were the courses aligned with NZAID's policy framework, were suitable trainers recruited and was the coordination and reporting to the PCC carried out efficiently?
- Did the MSC monitor and account for all expenditure of NZAID funds (under Activity Two of the Contract) for the ICT scheme effectively and efficiently? For example, was NZAID invoiced regularly (*note NZAID is not expecting a financial audit process, rather a brief indication on performance in this area*)?
- Did the MSC carry out Activity Three under the Contract efficiently and with regard for the capacity of the counterpart organisation? For example, were recommendations to improve effectiveness made regarding the implementation

plans of the programme, were succinct annual reports provided and how has the exit strategy been managed?

**Objective 2:** To make targeted recommendations for the future efficient design and management of NZAID support to the MTEYS.

#### *Key Questions*

- How can NZAID support for training through the MTEYS be aligned with the proposed pillars of NZAID's TCPS and the Strategic Framework of the MTEYS? All of which should be based on the Strategic Development Plan 8 (SDP8).
- If the ICT scheme remains a priority, how would the exit strategy of the MSC (i.e. localisation process) be implemented appropriately (if not already complete)?
  - How can the role of the PCC best meet the needs of the effective running of the scheme?
  - How can the scheme best ensure sustainability (i.e. course knowledge through effective follow-up)?
  - If the tracer study needs to be more rigorous, what is the best way for this to be achieved?
  - How can the courses be appropriately linked to tangible development outcomes (i.e. increased sustainable livelihoods)?

#### **5. Methodology and approach:**

NZAID values a participatory approach to reviews which engage a range of stakeholders. It will be important for the review to consider the impact of this scheme from the lives of people who should have been affected (i.e. course participants). The consultant will also need to plan for a consultation process of draft findings with a range of stakeholders, ensuring that there is opportunity for points of clarification and accuracy to be made.

NZAID expects the consultant to develop the methodology, however there are some components which should be included; a desk review of NZAID files and interviews with key staff in Wellington and post, interviews with the MSC, STTC (and other GoT officials as relevant), trainers and participants in training. This will include an in-depth sampling of a selection of training courses over the Contract period.

The review process may involve some unplanned capacity building of stakeholders, such as the STTC. The consultant should consider this possibility in designing the methodology as participation in the review process will no doubt be useful during the future if the scheme is to move towards localisation.

#### **6. Cost effectiveness/Value for money:**

While an assessment of relevance and sustainability is the primary focus of this review, NZAID also emphasises a 'value for money' approach. The review should therefore provide a brief assessment of how the money spent compares with the broad outcomes, impacts and changes brought about by the scheme.

## 7. Composition of the Review Team:

The review will be undertaken by one consultant. It is essential that the consultant has review/evaluation experience, has worked previously in the Pacific (preferably Tonga), understands and can implement participatory approaches, and is able to work independently. It is desirable that the consultant is familiar with training schemes and working with government departments.

## 8. Reporting Requirements:

The consultant will be required to produce a draft report with two components. The first draft component will report on the findings of Objective 1; NZAID will share this with David Forman Ltd and will provide consolidated feedback. The second draft component will report on the findings of Objective 2; this will be presented to key stakeholders (including NZAID, STTC and representatives from the PCC) through a workshop. Feedback on both draft components will focus on ensuring the output has met the requirements of this assignment, points of clarification and accuracy of reporting.

Following feedback on the draft report, the consultant produce a final report with separate components of Objectives 1 and 2. This will be followed up with a debrief meeting in Wellington where the NZHC will be brought in by teleconference.

The draft and final reports should be submitted to NZAID (Wellington and NZHC) in electronic form only. The consultant should review the NZAID *Guideline on the Structure of Evaluation Reports* for further guidance on recommended section.

## 9. Key Dates:

Due Date	event	milestone
12 Nov 07	Start date of contract	-
1 Dec 07	Completion of Draft Report and consultation workshop	Milestone 1
21 Dec 07	Completion of Final Report	Milestone 2
31 Dec 07	End date of contract	-

## 10. Quality indicators or key performance indicators:

The Consultant shall ensure that the assignment is carried out with all due diligence, efficiency and economy in accordance with the time specified in this Contract, observing sound management and technical practices, and complying with professional consulting standards recognised by relevant professional bodies.

## 11. Review Follow-up:

Following submission of the final report, NZAID (including the Pacific Group, Strategy Advisory and Evaluation Group and the NZHC) will consider the draft report in consultation with GoT. The Tonga Programme will prepare a submission to NZAID's Evaluation Committee. This Committee will make recommendations regarding the distribution of the report within NZAID and advise whether any additional external distribution steps need to be taken. NZAID will then work with the GoT on implementing agreed recommendations.