



Analysis of BIZ Provider Interviews

Prepared for Kay Switzer,

Ministry of Economic Development

by Claire Massey, David Tweed and Shirley Barnett

The New Zealand Centre for SME Research

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Executive Summary

In June 2000 the Ministry of Economic Development contracted a team of researchers to undertake an evaluation of the BIZ Programme. The team consisted of researchers from the Bureau for Economic Research (BERL), the National Research Bureau (NRB) and the New Zealand Centre for Research into Small and Medium Enterprises (at Massey University).

Their brief was to assess how well the BIZ programme is meeting its objectives, and in order to gain the perspective of the different groups involved (or potentially involved) in the programme, the overall research design included seven different components. The Massey University team focused on those organisations involved in delivering BIZ. They visited a number of BIZ providers and they also conducted telephone interviews with a further group of providers.

This summary presents the key themes that emerged from these interviews.

- The **scope of the provider organisations** that were interviewed varied widely: Some offered social services as well as assistance with economic and business development while others were more narrowly focused on the provision of specific training courses (e.g. computer training). In terms of BIZ services there was no 'standard' set of services available to clients, although most could be described as falling into the four categories of i) seminars, ii) courses, iii) mentoring iv) networking.
- In terms of **target groups**, the providers' perception was that delivery to their **women** clients had been easiest to achieve. **Maori** were perceived as being the next easiest to deliver to, although some providers commented on eligibility issues. By contrast with the success rate in achieving targets for Maori and women, and the animated discussion that was generated on the issues relating to this, almost all respondents commented on the difficulty of achieving **Pacific People** targets. There was some feeling that not all the potential target groups had been recognised, particularly in reference to business **immigrants** and business **start-ups**.
- There was a variety of **monitoring systems** in use for counting numbers of clients from target groups, and it appeared to the researchers that their quality varied. There is a perception that there would be value in the BIZ Unit developing a single system for providers to use.
- In general there were three types of **operational models** used by the respondents' organisations:
 1. Those that employ specialised trainers and expect them to run the entire programme by themselves,
 2. Those that do all the administrative work for the trainers and just expect them to do the face to face delivery.
 3. Those that take on a high level of responsibility for the entire delivery. They take a lead role in generating enquires and enrolments for the course, training and selecting appropriate trainers and tutors, designing and reviewing course content and overseeing the evaluation.

Those in the last group most often described their role as being engaged in quality control (cf. training support), and a number of these providers could be described as exhibiting **best practice**.

- All providers were able to identify some **service improvements** that they would make and most answers focused on improving the services for clients. Others addressed the problems being experienced by the provider organisations (e.g. several mentioned the benefit of charging at this point, as a way of avoiding 'no-shows').
- While almost all appeared familiar with the BIZ Unit **eligibility criteria**, there was a large variety in responses once the researchers probed more deeply. For example there was some discussion on what constitutes an SME in New Zealand, i.e. whether it includes part time businesses, and those that may be described as 'hobby' businesses. There was a degree of tension here – most of the respondents genuinely wish to help clients that approach them and find it difficult to turn them away even if they appear to be outside the eligibility criteria. There was some suggestion that this is a particular issue for Maori providers and/or Maori clients.

- Most organisations had relatively standard **evaluation and quality control systems** that asked attendees to assess the training received. Some of these were quite detailed and also focused on the longer-term impact on the individual or the business. Given that most of the forms were very similar in their overall intent (although the level of detail varied widely) there seems to be value in identifying best practice examples and offering them as an resource to all providers.
- There was a consistent response that **charging** (a nominal fee) might help minimise the numbers of people enrolling in courses who subsequently failed to attend. However, most respondents also commented on the difficulties of administering the charge, and questioned whether the cost to the organisation might outweigh the benefits gained. A smaller number of respondents said no to any charge. They were concerned that this could have a negative impact on numbers attending and that it was inconsistent with promotion that describes the courses as free.
- There was an almost unanimous perception that BIZ has had an **identifiable impact** on the individuals who have attended the training, based on the feedback from the evaluation forms and the direct feedback from attendees. Specific areas of impact included: personal growth, increasing motivation, developing specific skills, helping attendees build new networks, and alerting the individual to the value of continued education.
- In relation to the BIZ Unit, most respondents primarily identified contract management as its primary role. A significant number of respondents also commented on its role in disseminating information, liaising between providers, and facilitating networking. Many respondents identified services they would like the Unit to provide **in the future**:
 1. Developing of practical resources for the providers.
 2. Taking a stronger role in quality assurance.
 3. Developing of a computerised client management system.
 4. Becoming more active in facilitating networking between providers.
 5. Becoming more active in promoting the BIZ programme.
 6. Simplifying the reporting process.
- In terms of the performance of the BIZ Unit, an overall summary of the responses indicated that they found its staff **'responsive'** and **'supportive'**.
- Questioning providers on **services for Maori and Pacific People** generated a diverse range of opinions that are not easily categorised by provider type: Some were of the view that Maori clients want to be part of 'mainstream' services so they can network and interact with other business owners, whereas others felt that they want customised services that recognise a Maori cultural context. Here there was the suggestion that the most successful Maori business owners are those who have worked out how "to combine the best of both Maori and western values in their operations". There is also the recognition that Maori clients are often at a different and **earlier stage** of development in terms of their business skills and need services pitched at a different level. Another issue was **eligibility**: trusts are the structural form under which many Maori conduct their business operations, and these organisations are looking for the kind of services that BIZ provides. However trusts are currently ineligible for assistance.
- Overall there was **overwhelming support for BIZ to continue**. It was felt that more resources should be allocated and that the government needs to signal a long-term commitment to business development. A specific comment came from the Maori providers: that the programme had been slow to gather momentum with this target group, but now it has the capacity to have a considerable impact.
- However, there was considerable concern about the **relationship between BIZ and BIZinfo**. Several respondents suggested that more resources should be directed at BIZ training and less at BIZinfo. A particular issue was improving the system by which BIZinfo clients were referred to BIZ providers.
- In terms of what how BIZ should develop in the future, one area of concern was provision of services for **new businesses**. Another issue was what BIZ will do next for **existing businesses**. Thinking about the

next phase for BIZ training, a number of respondents commented on the need for the BIZ Unit to be aware of the need to “take it up a level – targeting the businesses that are going to survive or medium sized businesses”.

- A number of respondents also talked about the need to broaden the scope of BIZ beyond the provisions of i) training and ii) information to a more formally **integrated package of business assistance**, which could include pre-assessments, mentoring and other one-to-one interventions.
- Several respondents commented on the need to improve the **contract negotiation process**. Specific comments were concerned with the transparency of the negotiation/purchasing process and the ease of preparing for the negotiations.
- In terms of the **contract structure**, some were happy with the degree of flexibility it offered, while others suggested a more structured framework, with a ‘menu’ of services that the provider can pick and choose from in terms of delivery. This was thought to be particularly helpful for agencies that are new or where the individuals responsible for putting together the tender are inexperienced.
- There was an almost unanimous feeling that **standardising courses** across the country would be valuable, with the caveat that the standardisation should be a framework only (i.e. not a whole course in detail). There was strong feeling that this would provide a foundation/template for the providers that they could then tailor to their own local conditions and/or target groups, by for example, adding relevant local content. Most believed that this would add to the quality of the course, and would genuinely enhance the BIZ brand.
- However **accrediting courses** was not seen as desirable. One respondent commented that imposing accreditation of any sort would be unfair on non-accredited providers. A policy of this sort was seen as having the potential to exclude them from the provision of BIZ. There was also a perception that accrediting programmes would have an impact on the ability to provide training for free.
- There was an overwhelming desire from respondents to explore new ways of **sharing best practice** amongst providers.

The team also interviewed the partners of the National Business Information Service (NBIS), the organisation that is contracted to offer BIZinfo. Some of the suggestions that emerged from these interviews follow:

- Reconsider the role of the BIZ shops – either by increasing the resources available to them and/or bringing them under the direct control of NBIS.
- Consider extending scope of call centres by offering advisory services.
- Develop performance measures which “measure more than numbers”.
- Review methods of delivery and resource allocation to Maori and Pacific Peoples.
- Improve communication with other government departments.
- Accredite trainers and advisors as a way of improving quality.
- Extend eligibility to include start-up businesses.
- Strengthen linkages between BIZ and BIZinfo and also with organisations like BITC.
- Improve marketing and advertising, particularly in relation to Maori and Pacific Peoples.

1.0 Introduction

In June 2000 the Ministry of Economic Development contracted a team of researchers to undertake an evaluation of the BIZ Programme. The team consisted of researchers from the Bureau for Economic Research (BERL), the National Research Bureau (NRB) and the New Zealand Centre for Research into SMEs (at Massey University).

Their brief was to assess how well the BIZ programme is meeting its objectives, and in order to gain the perspective of the different groups involved (or potentially involved) in the programme, the overall research design included seven different components. This included a survey with BIZ clients (administered by telephone), a survey with SME owners/managers (also administered by telephone), analysis of the documentation collated by the BIZ Unit and a 'mystery shopper' assessment of the BIZinfo service. A further component was focused on seeking the views of those involved in delivering BIZ.

The New Zealand Centre for SME Research at Massey University led this segment of the research, and three interviewers were involved: Claire Massey, David Tweed and Shirley Barnett. They visited a number of BIZ Providers and conducted interviews with staff who were most closely connected with the BIZ programme. They also conducted telephone interviews with a further group of providers.

The research team also identified the key individuals from organisations delivering the BIZinfo element of the programme. Face to face interviews were carried out with one of the parties and the remaining partners were interviewed by telephone.

1.1 RESEARCH SPECIFICATIONS

The contract required the research team to undertake a survey of 32 BIZ providers, including:

- (a) A minimum total of 15 in-depth, face-to-face interviews with providers who deliver a substantial proportion of their services to Maori and Pacific peoples. The minimum sample of providers of services to Pacific peoples should be 5 completed interviews
- (b) Interviews with the 12 largest BIZ providers
- (c) Telephone interviews with sufficient other BIZ providers to provide a representative sample of providers of different sizes and service type and locations.

The survey was designed to assess BIZ providers'

- (a) Perceptions of:
 - (i) The effectiveness of the programme and its impact on SMEs
 - (ii) The contracts and the contract management process operated by the Ministry and their performance in relation to this
 - (iii) Their general satisfaction with the services provided to them by the BIZ Unit of the Ministry
 - (iv) Opportunities for improvement
 - (v) How they monitor and respond to market demands.

- (b) Views on:
- (i) How they target client needs
 - (ii) Whether the uptake of their services is as they expected and if not, what action they take
 - (iii) How they assess the quality and effectiveness of the services they provide to clients.

1.2 PREPARING FOR THE FIELD WORK

The research team identified the 12 largest organisations from information provided by staff from the BIZ Unit. This list included 11 organisations that deliver a substantial proportion of their services to Maori clients, and 5 organisations that deliver to Pacific People. In order to meet the contractual specifications a further 4 organisations were selected that deliver to Maori clients (see Table 1). NBIS (the National Business Information Service) was also identified as a key provider.

Table 1: BIZ providers that were visited

<i>Organisation</i>	<i>Included on basis of:</i>
Auckland New Ventures	One of 12 largest contracts Provision of services to Maori Provision of services to Pacific People
Bay of Plenty Development Foundation (Rotorua Development Foundation)	Provision of services to Maori
Canterbury Development Corporation	One of 12 largest contracts Provision of services to Maori Provision of services to Pacific People
Carich Computer Training	One of 12 largest contracts Provision of services to Maori Provision of services to Pacific People
Co-ordinating Consultants Rangiwehewhi (KMG)	Provision of services to Maori
Economic Development Agency (Tauranga)	Provision of services to Maori
Federation of Maori Authorities	One of 12 largest contracts Provision of services to Maori
Gosling Chapman Chartered Accountants (Auckland)	One of 12 largest contracts Provision of services to Maori
Hauraki Enterprise Agency	Provision of services to Maori
Ngai Tahu Development Corporation	One of 12 largest contracts Provision of services to Maori

Otago Southland Employers' Association	One of 12 largest contracts
Taupo Business Development Agency	Provision of services to Maori
Te Puawaitanga Consultancy	One of 12 largest contracts Provision of services to Maori
Venture Taranaki	One of 12 largest contracts Provision of services to Maori
Vision Manawatu	One of 12 largest contracts Provision of services to Maori Provision of services to Pacific People
Waitakere Enterprise Trust Board and Te Whanau o Waipareira Trust	One of 12 largest contracts Provision of services to Maori Provision of services to Pacific People
Wellington Regional Chamber of Commerce	One of 12 largest contracts Provision of services to Maori
Whakatane District Council	Provision of services to Maori
Whanganui Economic Development Corporation	Provision of services to Maori

The research team devised a set of questions to address the requirements of the contract and this was circulated amongst team members. The Ministry of Economic Development approved a revised version (attachment 1). This questionnaire schedule was designed to act as a framework for a semi-structured interview. The researchers were also free to follow any particular line of questioning that seemed to be of value. An information sheet was also designed and sent to the interviewee prior to the interviews (attachment 2).

1.3 DATA COLLECTION – FACE TO FACE INTERVIEWS

The researchers carried out the majority of the site visits in the week of July 15-19. They visited the 16 organisations that had been identified as critical in terms of the contract specifications, and a further three organisations, in case any data proved to be invalid. In total, 19 BIZ providers were visited and at one organisation the researcher interviewed the manager and one of his main contractors separately (because of the geographical distance).

The interviews lasted between one and three hours. The variation in length was mainly due to the number of people present, as some providers chose to include those involved in the delivery of services to a particular target group as well as the BIZ manager.

1.4 DATA COLLECTION - TELEPHONE INTERVIEWS

Once the face to face interviews were complete the researchers identified the questions that seemed to be generating the most interesting responses - in relation to the overall objective of the evaluation. This set of 9 questions (attachment 3) was used as the basis for 12 telephone interviews.

Table 2: BIZ providers that were interviewed by telephone

Agriculture New Zealand
Business Excellence
Capital Development Agency
Gisborne Small Enterprise Trust
Pacific Quality Projects
Tautoko Pakihi Group
Te Hau Ora O Te Tai Tokerau
Te Runanga O Turanginui A Kiwa
The Open Polytechnic
Wanaka Work Initiative
Whitireia Community Polytechnic
YMCA Hawkes Bay

1.5 DATA COLLECTION – BIZINFO

As a key provider to the Ministry the National Business Information Service (NBIS) was also interviewed. This organisation is made up of four partner organisations. One of these organisations was visited and representatives of the other partner organisations were interviewed by telephone.

2.0 Data Summary

The data set was collected from all respondents using a semi-structured interview format and in the following sections a summary of findings is presented in a way that focuses on its qualitative nature. First there is the material gathered from the BIZ providers through face to face interviews.

In their analysis the researchers have sought to identify the recurring themes and/or points of difference in the comments. Where possible the researchers have commented on any interesting differences in responses, given the size of the organisation's contract, its target groups, and the type of service offered.

2.1 SUMMARY OF DATA – BIZ PROVIDERS

In the following section all the data is summarised and presented in relation to the 38 questions that were asked face to face and the 9 questions that were asked by telephone. No providers or respondents are identified by name, but to illustrate specify points some non-attributed direct quotes have been used.

The data was collected using a semi-structured interview format and is presented in a way that focuses on its qualitative nature. In their analysis the researchers have sought to identify the recurring themes and/or points of difference in the comments. Where possible the researchers have commented on any interesting differences in responses, given the size of the organisation's contract, its target groups, and the type of service offered.

SECTION 1: THE DELIVERY OF THE ORGANISATION THAT WE ARE VISITING

Q1. Can you first explain what your organisation does?

This question was designed as an 'ice-breaker' – to help establish a relationship of trust between the researcher and the respondent, and to help the researcher ask appropriate questions throughout the interview.

The main comment that needs to be made about the responses is that the provider organisations that were interviewed varied widely: Some are community and/or iwi organisations that offer social services as well as assistance with economic and business development. Others offer a narrower range of services, e.g. the Chambers of Commerce are solely concerned with economic and business development. A third group is more narrowly focused again – on the provision of specific training courses, such as computer training. The researchers were not aware of any organisation that had been solely established for the purpose of gaining a BIZ contract.

In terms of BIZ services the organisations also vary: some offer seminars only, others offer seminars and courses (a series of linked sessions), and others offer a broader spread of services, for example pre-assessment of individuals, mentoring etc. There did not appear to be a 'standard' set of services available to clients, although most could be described as falling into the categories of i) seminars, ii) courses, iii) mentoring and iv) networking.

Q2. Going back to when you got involved in BIZ, how did the organisation identify its specific target groups?

There were a wide variety of responses to this question: Some providers had been working with identifiable target groups for a number of years (either through the Business Development Programme or through other government/community-funded programmes), and already had a strong feel for the numbers of attendees they could expect. Providers in this group also made extensive use of previous experience and personal and organisational networks.

Those organisations that were new to working with specific groups had more limited ways of collecting appropriate data to provide a baseline. In terms of identifying actual proportions, most of the latter group used local population statistics, rather than *business* population statistics (which may have been more reliable).

From those organisations with experience in business development there was be some feeling that not all the potential target groups had been recognised, particularly in reference to business **immigrants** and business **start-ups**. In this context one respondent pointed out that it was the MED that identified the target groups, and the providers had just responded to the tender guidelines.

Q3. Have these target groups been represented on your courses in the proportions you expected?

This question was designed to identify whether the respondents were *aware* of how well they were delivering to different target groups – their actual performance was not the focus, as this had been addressed in the audits that had recently been conducted.

For some respondents the question was irrelevant, as not all had identified specific target groups in their contract: other organisations were delivering to a single group only .g. Maori.

Of those who answered, most were able to comment on their organisation's performance without consulting their records – indicating that monitoring target groups was a matter of concern, and that they were aware of variations between targets and performance. In this context a number of respondents mentioned issues such as the variability between reporting quarters and the inadequacy of their original forecasts. This supported the researchers' impression that most providers were very aware of their contractual obligations on this issue.

Overall their perception was that delivery to their **women** clients had been easiest to achieve. Some suggested that if a couple is involved in a business then it is the woman that will come to the training. One commented that their contract could have been extended by four times to deliver to the amount of demand that was being experienced for courses for women.

Maori were perceived as being the next easiest to deliver to, although some providers commented on eligibility issues. For example, there was some discussion about the way in which the eligibility criteria seemed to exclude iwi organisations, and some providers offered an interpretation of the criteria that allowed access to those representing 'business-like' organisations, such as those set up to deliver to government contracts (also see Q 9 and Q 33). Another issue was attendance, with a number of respondents commenting that with a tightly targeted group an event such as a tangi could mean that a course would fail to achieve its target numbers. (Some other issues are explored under the comments on Q 25 and Q 30).

The main difference of opinion lay in whether Maori clients have different needs from other clients. Some respondents felt this to be the case strongly, while others commented that the difference was not connected to ethnicity- the issue was that Maori clients are often at a different level in their business.

By contrast with the success rate in achieving targets for Maori and women, and the animated discussion that was generated on the issues relating to this, there was very little comment about **Pacific People**. Almost all respondents commented on the difficulty of achieving Pacific People targets.

The researchers also observed that the organisations that were most successful in achieving targets had long standing relationships with these communities, rather than short term commercial arrangements that exist solely for the sake of the contract.

Q4. How is the uptake of the services monitored?

All of those asked seemed to have adequate systems for monitoring attendance at the various types of service offered, and the respondents were confident in their use. Given the recency of the audit this was not surprising.

However, there were a variety of systems in use, and it appeared to the researchers that their quality varied. This is to be expected given that many of the organisations have a long history outside the BIZ programme and have different sources of funding (and therefore different reporting requirements). There is a perception that there would be value in the BIZ Unit developing a single system for providers to use. (At this point many respondents commented on the changes that have been made to the reporting system, and the suggestion that a single system be developed was clearly made with the hope that this would minimise any future changes).

Q5. Who uses this information, and for what purpose is it used?

Most respondents commented that this data was collected primarily as the basis for **generating invoices** for the BIZ Unit. Some commented that the data would be used for planning if the contract needed to be renewed. A significant number of respondents commented on the value of the data for their own uses (other than planning), but no clear pattern emerged in the organisations that they represented.

Q6. Has the contract with the BIZ Unit been modified to reflect any difference between what was expected and what has occurred (or for any other reason)?

A large number of the organisations interviewed had been offered contract variations. Some of these were initiated by the BIZ Unit and others were initiated by the provider. Partly the answer to this question was related to the degree of flexibility in the original contract – where this was already flexible providers were able to reallocate funding after informal approval from the contract manager, whereas those organisations with very specific contracts had to negotiate contract variations. It was notable that very few respondents reported that a contract variation had not been approved when it has been sought.

Q7. Did you need to appoint new staff for the delivery and/or contract it out? How were these individuals selected?

There was a wide variety in the responses to this question, depending on whether the organisation used contractors or delivered service using its own staff, the type of services offered and the scale of the contract.

Almost half of the organisations with the largest contracts commented on the need for extra **administration** staff, and almost all others identified extra people offering services on behalf of the organisation (compared to prior to BIZ).

It was noticeable that the providers that have appointed new non-administration staff (such as **trainers**) have identified very specific skills. While many identified suitable new staff on the basis of content skills (marketing, finance etc), a significant number were able to talk about a variety of aspects of good presenters such as skill in instructional design and desktop publishing.

A number of providers **moved people** into the BIZ programme from other positions within the organisation. The practical effect was that existing expertise was made available to BIZ that had been developed within other organisations or under other government-funded programmes.

On the basis of the information gained through these interviews the researchers are not able to comment on whether the in-house delivery or contracting out model was more effective. However, it does appear that some providers had a clear appreciation of i) the **range of skills** required to run BIZ successfully, and ii) the need for **high levels of expertise** in specific areas (e.g. training delivery, instructional design etc). It is likely that larger providers will possess the range and depth of skills implied.

Q8. If you were applying for funding today, what would you do differently?

This question generated a lot of discussion, with all providers able to identify some changes that they would make. These ranged from those that reflected concerns with improving the 'big picture' (e.g. "we want to make sure that providers work in a complementary fashion and don't duplicate services) to the pragmatic "we will stop providing food at training sessions".

The majority of answers were focused on **improving the services for clients** (e.g. a number mentioned the need to develop 'second level' courses on topics that the clients had already been introduced to). However, some addressed the problems being experienced by the provider organisations (e.g. several mentioned the benefit of charging at this point, as a way of avoiding 'no-shows'). Another issue was the need to build in greater **contract flexibility**, i.e. some providers commented that contract variations could have been avoided if their contracts had not been so specific. This particular issue may well have been a function of the way in which the original purchase round had been conducted - with both purchasers and contractors being new to the BIZ programme.

A number of respondents took the opportunity to comment on how they would approach the next contract round. On the whole this original negotiation process was felt to have been too rushed, with the providers having little control over what was described as a 'shopping trip for the Ministry'. One commented (in relation to another round of negotiation); "we would be more outspoken, and would not undersell our capacity to perform".

Q9. Now we want to talk about the actual delivery of courses by your organisation. It would help if we could talk about a specific course. Can you first explain who is eligible for the courses?

This question was designed to elicit respondents' views on the BIZ Unit criteria of eligibility for those attending courses, and was also to check that the criteria were known. While almost all appeared familiar with the criteria, there was a large variety in responses once the researchers probed more deeply. For example there was some discussion on what constitutes an SME in New Zealand, i.e. whether it includes part time businesses, and those that may be described as 'hobby' businesses. Two respondents mentioned the difficulty of identifying a 'beginning point' for an enterprise. For those respondents that were aware of the definition that is based on numbers employed by a particular enterprise, there was considerable variation in the upper limit that was identified. The researchers' impression is that it is sometimes easier for providers to identify an enterprise that is **not** an SME.

However, most of the discussion touched upon the enterprises that are excluded from BIZ training: start-up businesses and community trusts. The overall response seemed to be that the BIZ Unit has developed the eligibility criteria and to a point the providers are happy to apply them. However, there is a degree of tension here – most of the respondents genuinely wish to help those that approach them and find it difficult to turn them away even if they appear to be outside the eligibility criteria. There was some suggestion that this is a particular issue for Maori providers and/or Maori clients (see discussion under Q 25).

Q10. How are those delivering this course supported by the organisation and/or the BIZ Unit?

This question elicited a large variety of responses, but in general there were three groups of respondent: First are those organisations that employ specialised trainers and expect them to run the entire programme by themselves - from sending out advertising material, taking charge of enrolments, running the courses and administering the post course evaluation. These organisations provide almost no support; “that’s what we employ trainers for”.

Second, a number of organisations do all the administrative work for the trainers and just expect them to do the face to face sessions. Again, these organisations provide almost no support for those delivering the training.

Third are a smaller group of organisations that take on a high level of responsibility for the entire delivery. Organisations like this take a lead role in generating enquires and enrolments for the course, training and selecting appropriate trainers and tutors, designing and reviewing course content and overseeing the evaluation. Those in this group most often described their role as being engaged in quality control (cf. training support), and a number of these providers could be described as exhibiting best practice.

Although this question was originally designed to capture responses concerning the BIZ Unit, in the field this was omitted, and Section 2 provided the forum for this discussion.

Q11. Can you explain the different ways in which this course would be evaluated?

Although there was some variation in the answers to this question, the differences were chiefly in the detail (i.e. between the different **evaluation forms**). Almost without exception respondents answered that the main form of evaluation for the training was a form filled in at the end of the course. There were differences in practice between the organisations, some of which would be important if the evaluation for a course offered by one organisation was to be compared with that of another, but on the whole the practice was fairly standard. So standard in fact that there seems to be value in adopting a single format for evaluation and an agreed process for administering the forms.

A smaller number of organisations commented on the value of evaluations that were done at some interval after the training. Some had built this practice into their contract, but others were trying to add it on as additional way of evaluating the impact of their training. Several of these respondents commented that they were behind their self-imposed timetables on this follow-up.

Two respondents mentioned other forms of training evaluation such as having an **expert review** the material. None conducted peer evaluation, although one organisation was considering it as an option.

Q12. What specific features of this course would be evaluated?

Most organisations had relatively standard evaluation forms that asked attendees to assess the training under the headings of ‘content’, ‘delivery’ and ‘resource materials’. Some of these were quite detailed and also focused on the longer term impact on the individual (“did the training increase your confidence”) or the business (“will you be able to use your new skills in your business?”).

Some used the opportunity to ask attendees about future training needs, and included details such as the most suitable time of the day for them to attend training.

Given that most of the forms were very similar in their overall intent (although the level of detail varied widely) there seems to be value in identifying best practice examples and offering them as an resource to all providers.

Q13. How is this information used? For example, does it influence modes of delivery, course content, delivery style, training material, advertising to potential attendees?

All respondents commented on the value of the information for improving the course, and most were very explicit about the process that was followed and the specific aspects that would be changed. For example, a number of respondents gave immediate feedback to the trainers involved and also held regular meetings for all the people involved in delivery to discuss feedback. Others had less formal systems but there was no discernible pattern in terms of which organisations were more likely to take this approach.

Q14. In relation to this course, are there any differences between the versions you deliver to different target groups?

The answers here depended on whether i) the organisation was delivering to one or several target groups and ii) whether its contract specified that delivery to different target groups would be done through distinct courses. Where separate delivery was the case the researchers found two distinct trends; i) where the course is identifiably different and ii) where it is essentially the same course, with minor changes such as the examples used to illustrate different learning points.

Those promoting the different course approach argued that there is a need to recognise the **differences of attendees**, whether women, Maori or Pacific People (although there were few actual examples of how a course would be changed to meet the needs of women). These respondents also argued that a major benefit of training is having people of a similar level learn together as a way of encouraging them to form a network. They felt this was enhanced with a separate course.

By contrast those that were using the same course argued that differences between participants were less related to ethnicity or gender, but rather related to their **'level' of business knowledge**.

These two approaches also emerged in response to Q3, Q25 and Q30, and clearly suggests that there is an issue with delivery to target groups that needs to be resolved in the next contract round for BIZ. Depending on the discussions that are made following this evaluation, there are a number of options for the BIZ Unit: it could be more explicit about the types of service that will be purchased, based on a policy of recognising *'attendee difference'* or it could focus on *'business difference'*. Alternatively the BIZ Unit could continue with its current policy – of seeking advice on what to purchase based on the expertise of the providers.

Q15. If you deliver courses yourself, and had the time to design a completely new course, would you do things the same as you are now or would you modify it?

While a few respondents commented on changes that they would make, the vast majority were happy that the approach that they are currently taking is adequate. However, the researchers note that this judgement was made in the absence of any independent assessment of their courses and of their support material. There was a huge variation in the standard of the written material we viewed, with some offering substantial workbooks designed specifically for the BIZ programme and others circulating material that appeared out of date (in terms of content) and poorly produced (in terms of print quality and/or layout).

The researchers suggest that the answers to this question may have been quite different if providers were familiar with more material from other providers. Greater awareness of 'high quality' material would no doubt have an impact on improving quality, and would also assist in the development of BIZ as a quality brand, with some level of standardisation .

One respondent commented that in another tender round the organisation she represented would not necessarily invest as much time in developing the courses, despite acknowledging that this would probably compromise their quality.

Q16. Is charging for courses a good idea? Who would it help and who would it deter?

There was a consistent response that charging (a nominal fee) might help minimise the numbers of people enrolling in courses who subsequently failed to attend. However, most respondents also commented on the difficulties of administering the charge, and questioned whether the cost to the organisation might outweigh the benefits gained. Those respondents that recognise the complexity of charging as a policy were more likely to be those from organisations with larger BIZ contracts.

A smaller number of respondents said no to any charge. They were concerned that this could have a negative impact on numbers attending and that it was inconsistent with promotion that describes the courses as free.

The fact that this question received such a **mixed response** (and that even those who were keen to charge could also see the problem associated with it) suggests that a policy change could meet with resistance from some providers and clients. However, this could be minimised by helping providers identify specific aspects of the services that could legitimately attract a charge (e.g. food, stationery etc).

Q17. What impact do you think your organisation's services have had on the owners and managers of SMEs?

There was an almost unanimous perception that the training has had an **identifiable impact** on the individuals who have attended the training, based on the feedback from the evaluation forms and the direct feedback from attendees. Some providers ran specific follow-up surveys in an attempt to assess the impact more formally, although most were aware of the difficulties in assessing change.

Several commented on the part the training plays in **personal growth** and in increasing motivation. More than one respondent used the phrase "opening their eyes" in describing the experience of training attendees and spoke of the way in which this sort of training alerts people to different options and choices. This response was likely to come from an organisation that also offered social programmes.

Others spoke more specifically about how the courses contribute to the development of specific **skills** – which can then be used in the context of the business.

Another theme mentioned by a number of respondents was the way attending training helped attendees build new **networks** and develop links to other providers of business related services (e.g. accountants).

Several respondents commented that the experience of attending a single course has a long-term value – in alerting the individual to the value of **continued education**.

A number commented that the impact on the individual is either difficult to measure or that it is almost irrelevant – unless the individual used their new skills within the business. As one noted "the real outcome is the added value to the business".

Q18. What impact do you think your organisation's services have had on SMEs?

This question related to the previous one, and was designed to assess the respondents' understanding of the difference between the impact *on the individual* and the impact *on the business* of a programme like BIZ. Most respondents did show an awareness of the difference, but as with the last question few organisations had any systems in place to formally assess the impact. One commented that this was because he was not sure how to measure something as complex as this; "I think they are using their new skills, but I'm not sure how to best assess this".

This theme (the **complexity of measurement**) was addressed by a number of others. One commented that "the impact on businesses (of attendees) will vary and will take different times to be able to see benefits". In a similar vein one respondent commented that the "main advantage of BIZ is that it speeds up the rate of business development, which would have happened anyway but at a slower rate". Others commented on the

difficulty of separating the impact on the business from the impact on the individual; “the people and the businesses are related. What you do for the people helps their business”

Others spoke of the constraints of time which meant that they were not able to do the sort of follow-up that they felt would be valuable; “at the moment all the focus is on the delivery”

SECTION 2: THE PERFORMANCE OF THE BIZ UNIT

Q19. Can you explain your role in the organisation (in relation to the BIZ programme) and tell us who you deal with in the BIZ Unit?

This question was designed to help the researchers understand how the provider organisations interface with the BIZ Unit, and we expected many respondents to name more than one person in the Unit, given our impression that those employed here have distinctly different roles e.g. the unit manager, as opposed to the contract managers. However, most did not – naming their contract manager only.

Q20. Has this person/people changed since you have been involved?

Janet Takerangi’s replacement of Jaewyn McKay was mentioned, but otherwise there seems to have been continuity in terms of contract management.

Q21. What does the Unit do for your organisation?

Most respondents commented on the role of the BIZ Unit primarily in relation to **contract management**. Here they mentioned specific tasks such as paying the providers, considering contract variations, monitoring performance, and sending out new reporting requirements.

A significant number of respondents also commented on the role of the BIZ Unit in **disseminating information**, liaising between providers, and **facilitating networking** (e.g. through the meeting held in Wellington in November 1999).

Q22. Are there services that you would like the Unit to provide?

A small number of respondents commented that they were happy with the services provided by the BIZ Unit and were not seeking any extension of these. However, the larger group identified services they would like the Unit to provide, or to extend.

A number of respondents thought that the Unit could be much more active in developing **practical resources** for the providers. A number suggested specific resources, such as standard courses (see the discussion under Q 33), resources for Maori and Pacific People clients (the Maori Business Directory idea was mentioned here).

Others talked about the role of the BIZ Unit more generally in relation to **quality assurance**.

Another specific suggestion (that was mentioned by several respondents) was that the Unit should develop a **computerised client management system** (including database and reporting functions). This was consistent with the evident concern about the changes in reporting requirements that has already been noted.

A third theme was the potential for the Unit to be more active in **facilitating networking** between providers.

A final comment (that echoes those that were raised by others at different points in the interview) was that the Unit needs to be more active in **promoting the BIZ programme**. The point being made here is that the current promotion focuses on BIZinfo and respondents clearly feel that referrals from this source were not occurring.

Q23. Moving to specifics, can you describe a situation where you were very satisfied with the performance of the Unit (and/or the contract manager)?

This question was designed in this way to help the researcher focus on the satisfaction criteria that the respondents were identifying. The responses to this question are captured under the analysis to Q 27, but it is worth noting here that none of the respondents had difficulty in identifying an event when they were satisfied.

An overall summary of the responses would be that they found the BIZ Unit '**responsive**' and **supportive**'. Specific examples (that were cited more than once) seemed to be most concerned with channels of communication e.g. "he/she offered to visit instead of answer my questions over the telephone", "he/she came back to me really quickly – with the right information".

Q24. Can you describe a situation where you were very *dissatisfied* with the performance of the Unit (and/or the contract manager)?

As with Q 23, the essence of the responses to this question are captured under the analysis to Q 27, but it is worth noting here that not all of the respondents could identify a suitable event in answer to this question. Those that could identify a specific event were mostly concerned with **changes to the reporting requirements** and the way these were communicated.

Q25. Are there any particular issues about the provision of BIZ services to Maori or Pacific clients?

This question was designed to elicit comments on the way in which the BIZ Unit deals with those providers that are offering services to Maori or Pacific People (as opposed to Q 30 which was included to elicit comment on the design of the BIZ programme overall in reference to these groups). In practice respondents tended not to make a distinction between the questions, and the comments below need to be read in conjunction with those to Q 30. The researchers also note that the answers were from providers, who were commenting on their *perceptions* of the needs of the Maori target group (which is not a homogeneous group).

From the responses it is clear that Maori providers have a **diverse range of opinions** on clients' views and expectations that are not easily categorised by provider type: Some were of the view that Maori clients want to be part of 'mainstream' services so they can network and interact with other business owners, whereas others felt that they want customised services that recognise a Maori cultural context. Here there was the suggestion that the most successful Maori business owners are those who have worked out how "to combine the best of both Maori and western values in their operations". The only distinction between the groups holding the two opinions seemed to be in reference to their own services: some providers offer training that already has a strong cultural context, and they were most convinced that this is necessary. Those providers that offer training that is more generic were equally convinced that this is the most suitable delivery approach.

As already noted, there is also the recognition that Maori clients are often at a different and **earlier stage** of development in terms of their business skills and need services pitched at a different level (see the discussion under Q3 and Q14). One provider stated that Maori are "often less trained and skilled than their Pakeha counterparts" and thought that a greater level of funding could be needed to help close the gaps. It is worth noting that during the period when these interviews were being conducted it became clear that a number of the providers would also be bidding for funds from Te Puni Kokiri, in relation to its new programme for start-up businesses.

Providers pointed out that there are a lot of requests for start-up assistance from Maori and that these are difficult to turn away under Maori kaupapa. BIZ is targeted at the owner/manager, however Maori look beyond the individual to the group (such as hapu or iwi) and this requires **greater flexibility** in the targeting of service delivery.

Another issue was **eligibility**: trusts are the structural form under which many Maori conduct their business operations, and these organisations are looking for the kind of services that BIZ provides. However trusts are currently ineligible for assistance.

There was also recognition that the Maori context can sometimes be abused and there was some disagreement about the extent to which funding should follow **traditional tribal channels**. Whichever approach is used, respondents echoed a comment that was made by almost all providers; “that it is often difficult to identify the people within the business that need training and to get them to attend courses”. This was felt to be particularly the case with men.

Q26. Do you feel the BIZ Unit has helped you to develop your capabilities as a provider?

The answer to this was overwhelmingly no, as this was not seen as a key function of the BIZ Unit. However some respondents commented that their organisation’s involvement in BIZ as a programme had helped them to develop.

Q27. On a scale of 1 to 5 (where 1 is poor and 5 is excellent), how would you rate the BIZ Unit?

This was an extremely difficult question for respondents to answer, and of the 18 who were asked this question only half were able to identify a single overall assessment. For this group their assessment was **overwhelmingly positive** – between 3 and 5.

However, most respondents wished either to differentiate between different people within the BIZ Unit or between the BIZ Unit as an entity and the staff member they have most frequent contact with (usually the contract manager). Some also wished to differentiate between the past and the present, with most commenting that performance seems to be improving (although almost all respondents who had been in contact with Jaewyn commented with regret on her departure).

Another issue was that most respondents wished to identify specific assessment criteria rather than commit to a single overall assessment. However, in answering this question the providers gave a valuable insight into their expectations of the BIZ Unit.

Most commonly mentioned were qualities that described the **service** that the BIZ Unit provides. Words like ‘level of support’, ‘responsiveness’, ‘speed’ and ‘accuracy’ seemed to point at those qualities that the providers regard highly, and that they felt were demonstrated (to varying degrees) by the BIZ unit.

Another cluster of ideas concerned the way in which the BIZ Unit **communicates with** and **relates to providers**, and here there were both positive and negative perceptions. To one provider the unit takes a ‘big brother attitude’. Others commented on the need for the unit to be ‘approachable’, ‘flexible’, ‘non-bureaucratic’ and to ‘stay out of the way’.

A final category of ideas concerned the **overall purpose** of the BIZ Unit. Respondents talked about a need for the unit to be ‘skilled in promoting the BIZ programme’, display a ‘high quality of decision making’, and be ‘proactive’ and ‘accountable’.

The researchers strongly suggest that these concepts are tested further with the providers and that a specific instrument is then developed to give the BIZ Unit a way of measuring perceptions of their performance over a period of time.

Q28. How do you feel about reporting on-line?

Most respondents commented that they already email their reports to the BIZ Unit (with a backup hard copy) and it was not clear what the implication of on-line reporting would be. In the field this question was modified to focus on issues concerned with reporting, which most respondents had already identified as a real issue.

This was partly connected to the number of **reporting changes** that had been made by the BIZ Unit (the researchers were told that three significant changes have been made to the reporting to date). *All* respondents were critical of this: as one commented “each time the requirements change we have to get a computer programmer in to reorganise our system – and we have to pay”. Another commented that “the providers need an integrated management information system that produces the required results” (referring to the template format).

However, there were also some respondents that work for organisations that have been in existence for some years, and/or that have contractual relationships with other agencies. For this group the issue of reporting is more complex, as all of the funding agencies require different outputs, and a standardised system would not necessarily improve their situation.

SECTION 3: THE PROGRAMME OVERALL

Q29. Are there any changes/ improvements that you would like to see made to the programme?

Here we were seeking the respondent’s opinion on changes that they would like to see made to the BIZ programme overall (including BIZinfo and BIZ training) as opposed to the improvements that they are expecting to make to their own organisation’s delivery of the programme. A number of specific themes emerged.

Not unexpectedly the first theme that emerged was **overwhelming support for BIZ to continue**. It was felt that more resources should be allocated and that the government needs to signal a long-term commitment to business development. A specific comment came from the Maori providers; that the programme had been slow to gather momentum with this target group, but now it has the capacity to have a considerable impact.

However, there was considerable concern about the **relationship between BIZ and BIZinfo**; “BIZinfo is not working for us” was a comment from more than one respondent and a specific concern (mentioned several times) was that there is no system of tracking referrals from BIZinfo to specific BIZ providers (this was in respect of referrals to specific BIZ providers rather than the general tracking that currently occurs). This lack of a system was raised as an overall problem, and also as an issue in areas where there is more than one provider: there is a perception in these areas that the BIZinfo staff have ‘favoured’ providers, and refer clients to them no matter what their need.

In the absence of a formal system for tracking referrals, BIZ providers are identifying the referral source by asking client as they make contact with them. On the basis of this info, more than one respondent commented “over the duration of the programme we have not had a single referral from BIZinfo”.

Several respondents suggested that more resources should be directed at BIZ training and less at BIZinfo. In the discussions on BIZinfo some respondents also questioned the purpose of BIZinfo particularly in relation to marketing BIZ courses. A typical comment was “both BIZ Training and BIZinfo should be retained, but must be much more cohesive”.

Another area of concern was provision of services for **new businesses**. Several respondents echoed the comment made by one; “where do start-up businesses go?”

A different stance was taken by those who were concerned with what BIZ will do next for **existing businesses**. Thinking about the next phase for BIZ training, a number of respondents commented on the need for the BIZ Unit to be aware of the need to “take it up a level – targeting the businesses that are going to

survive or medium sized businesses”. In this context they were clear that they would be better able to provide ‘the next level’ of services if the BIZ Unit took a stronger role in providing **good quality resources** to providers.

A number of respondents also talked about the need to broaden the scope of BIZ beyond the provisions of i) training and ii) information to a more formally integrated package of business assistance, which could include pre-assessments, mentoring and other one-to-one interventions.

They also identified a need for the BIZ Unit to take a stronger role in **quality control**; updating programmes, helping providers share best practice and designing and implementing better audit systems.

Another theme that emerged was the role of the BIZ Unit in providing **feedback** to all providers on the impact of the programme; “we need more detail than the bums on seats reports we get now”. Specifically mentioned was the need to move away from measuring outputs to assessing outcomes. One respondent commented; “we need more emphasis on quality and less on quantity”.

Several respondents commented on the need to improve the **contract negotiation process**. Specific comments were concerned with the transparency of the negotiation/purchasing process and the ease of preparing for the negotiations; “we need a RFP that is easy to read, unambiguous, clear about what is wanted, and which sets clear performance targets”. Similar comments were made about **simplifying the reporting process**. A number commented on the need for the contracts to remain as flexible as possible, to allow the providers to meet changing customer needs. Others voiced an opinion that in the next contract round there should be fewer providers, and that more thought should be given to assigning providers to specific areas. There was also comment that providers should be assigning to deliver to specific ethnic groups, rather than having targets set within the overall programmes offered by large, mainstream providers. .

Q30. Are there any particular issues for providers delivering services to Maori or Pacific clients?

Most respondents for whom this question was relevant felt they had already commented under Q 3 and Q 25. A particular issue seems to be the length of time the programme has taken to gain momentum with these target groups and the need for the providers to take time to build long term relationships of trust. This seems to be the case even for those organisations with existing relationships, but is particularly important for those who are servicing these groups for the first time.

Q31. How do you share best practice amongst providers?

The overwhelming response to this question was “we don’t, and we would like to”. In this context a number mentioned the Wellington meeting and felt that this provided an opportunity for sharing best practice that was not fully used. However, on the other hand, more of this interaction is desired by many providers.

A common theme was that most providers have their own networks either of other BIZ providers (e.g. one mentioned a regional meeting organised by one provider) or of other business development agencies (e.g. SBECNZ and EDANZ). There is also some informal networking with agencies that are not BIZ providers.

However as one pointed put; “there is no incentive to network – at the end of the day the process is competitive”.

Q32. Do you think BIZ is displacing existing services, e.g. private training providers, polytechnic courses etc?

While most of the respondents answered no, or that they were not aware of whether this was the case, a number commented that they felt a reverse effect was occurring: People who attended BIZ training may be more likely to attend paid training courses, thus expanding the total being spent on business development in general.

There was also some regional variation here – the Christchurch organisations commented that there had been a local gap that they had been able to fill.

Q33. Is there a need for the courses to be standardised across the country, in terms of eligibility, course content etc, pre-assessments?

There was an almost unanimous feeling that this would be valuable, with the caveat that the standardisation should be a framework only (i.e. not a whole course in detail). There was strong feeling that this would provide a foundation/template for the providers that they could then tailor to their own local conditions and/or target groups, by for example, adding relevant local content. Most believed that this would add to the quality of the course, and would genuinely enhance the BIZ brand. As one said “the BIZ Unit need to get real – how else can quality be maintained?” One commented that this quality control is particularly important as BIZ moves to the next stage.

There was a strong opinion that this developmental work should be paid for by the BIZ Unit, although there was an equally strong feeling that the work itself should be done by a credible independent organisation.

A smaller number of respondents (4) felt that the value in BIZ lies in its customisation; “this work best as we provide what local businesses need”. They were less convinced about the need for standardisation were more likely to be delivering services to Maori and were concerned about the ability of a standard format to fully address the needs of this group.

Q34. Should the programme have accreditation e.g. NZQA?

While the previous question was deigned to seek out the needs of the providers, this question focused on the needs of the clients (as interpreted by the providers). The overwhelming response here was “no – attendees are wanting skills - not certificates”. One respondent commented that imposing accreditation of any sort would be unfair on non-accredited providers. A policy of this sort was seen as having the potential to exclude them from the provision of BIZ, thus restricting the range of providers that would be used. There was also a perception that accrediting programmes would have an impact on the ability to provide training for free.

Q35. Is there confusion between the BIZ programme and BIZinfo?

There was an overwhelming “yes’ to this question, and a concern that this is causing difficulty for clients. Interestingly this was the response even for those organisations where BIZinfo and BIZ are offered out of the same location.

A number commented negatively on the **process of allocating contracts** to BIZinfo providers: “It was a big mistake to split this between providers - the two go very much hand in hand”. Another said “we don’t believe BIZinfo works, in particular the local shop front operations - what is its purpose when people will eventually end up with us anyway? The advertising confuses the business community”.

Others focused on the way that BIZinfo is **servicing client enquiries**: “BIZinfo services often use volunteers or people who don’t have a good understanding of business and the way it works” was one comment. Another respondent said “ BIZinfo needs to link much more closely with BIZ - BIZinfo gets the enquiries but can’t handle them or give a sensible answer, so often they end up referring them to us - so why don’t businesses just call us to begin with?”

Several respondents also commented that once they had developed a relationship with a client they were more likely to ring their organisation direct for further assistance. “Clients are already aware of us as a BIZ provider so often call us directly for information – not knowing that BIZinfo even exists. It stretches our resources when we provide this extra service – but it makes no sense to tell them to hang up and call a complete stranger”

A number of comments focused on the future for BIZinfo: "It could be run entirely through the Web page and 0800 numbers rather than 20 individual offices". Others suggested a new name for BIZinfo to differentiate from BIZ training.

Q36. Does the present contract model allow for too much flexibility? Should it be standardised?

Two different answers emerged here: One group was happy with the degree of flexibility the contract offered, while the other suggested a more structured framework. In this context several suggested the approach that WINZ takes to contracting BYOB course, while one mentioned the CEG contract for LEEDS agencies. The common factor in these contracts (as reported to the researchers) seems to be that they provide a 'menu' of services that the provider can then pick and choose from in terms of delivery. This was thought to be a particularly helpful option for agencies that are new/inexperienced, or where the individuals responsible for putting together the tender are new to the process.

CLOSING

Q37. Do you have any questions?

Answers here were dealt with directly by the researchers and were not recorded.

Q38. Is there anything else you would like to say about the programme?

Some respondents did not wish to add anything at this point but most wished to emphasise comments made already in the course of the interview. The main themes were:

- BIZ is seen as an effective programme which is an improvement on the previous programme (the BDP) and which is essential in the new era where jobs for life are not guaranteed.
- There is a need for commit to the continuity of BIZ and work on i) extending it to plug gaps (e.g. start-up businesses and ii) integrating it with other programmes (such as the EAP).
- A belief that the Ministry's reporting mechanisms only collect superficial data and a desire to see this improved, to measure success and quality rather than quantity.
- A perception that the flexibility of the programme has been particularly effective in allowing different providers to offer services to particular target groups, such as Maori and women.

2.2 SUMMARY OF DATA – BIZINFO

The data from the interviews with BIZinfo providers is included in this section of this report. Because of the small number of respondents the commentary has been kept brief in order to maintain the anonymity of those interviewed.

SECTION 1: THE DELIVERY OF THE ORGANISATION THAT WE ARE VISITING

1. Can you first explain what your organisation does (overall, in terms of business/economic development, in relation to BIZ)

The four partners of NBIS all have different roles in relation to the BIZinfo contract. In addition they are all involved in business or economic development outside of the BIZinfo contract.

2. Going back to when you got involved in BIZ, how did the organisation identify its specific target groups? (who was involved, what information was used to influence the decision?)

This was not applicable to the respondents as the specification from the MED was that the BIZinfo service had to deliver globally, rather than to specific groups as was necessary for the BIZ training providers. The more relevant question was why the organisation had become involved in BIZinfo. To some extent (and for some of the partners) this was because the members of the consortium had been brought together by the MED, but once this occurred, all could see involvement in BIZinfo as contributing to the organisation's objectives.

3. Do you consider that these objectives have been met?

All the respondents regarded their organisations' involvement in BIZinfo as having helped them meet their objectives.

4. Have these target groups been represented amongst your clients in the proportions you expected? (why or why not?)

Two of the four NBIS partners have a particular interest in the BIZ target groups (namely Pacific People and Maori), and the respondents from these organisations were aware of the statistics on BIZinfo users from these groups. They were not surprised at the lower uptake of these groups, for reasons noted elsewhere (e.g. the lack of targeted advertising).

5. If you were applying for funding today, what would you do differently?

All respondents indicated their enthusiasm for being involved in another round of BIZ funding, but noted that they would make changes to the bid, especially in the light of the strategic planning exercise that NBIS has recently undertaken.

6. How would you describe the services BIZinfo offers to SMEs in your target groups?

The key issue here was that the respondents saw the BIZinfo service as being “more than just referral or information”. In the words of one respondent: “a ‘successful’ outcome is considered to be one where the client’s problem issue is correctly identified, and choices provided; and where the client takes some action to follow up (or makes a positive choice not to proceed further)”.

7. How are the roles of the various delivery modes, i.e. regional call centres, BIZ shops and the website, delineated?

While the respondents found it easy to describe the roles of the call centres and the website, the BIZ shops proved more problematic, partly because they do not appear to have been completely successful in contributing to the overall design of BIZinfo outlets. While they were designed to provide a service in smaller centres, difficulties have been encountered, as they are usually delivered by agencies with other roles (Chamber offices etc) and which are not under the direct control of NBIS.

8. How do you see your role vis-à-vis BIZ providers? (referral, marketing/ promotion?)

One respondent emphatically described the role of BIZinfo in terms of client needs (rather than in relation to the needs of BIZ providers); “BIZinfo is there to facilitate them (clients) getting what they need”. This was also the view of others interviewed, however there was a perception that BIZ providers see BIZinfo primarily in terms of a promotional arm for them.

9. How do you see your role vis-à-vis non-BIZ providers?

There was no difference here compared to the previous question: the respondents saw their work as meeting the needs of clients, and if they regarded the BIZ providers as the most appropriate for the particular clients’ needs then they would be recommended. However, it was clear that non-BIZ providers would also be recommended if it was felt that their service would be more appropriate.

10. Can you explain how your services are evaluated, generally and in terms of target groups? Is this evaluation approach working?

Evaluation seems to be focused primarily on monitoring the meeting targets (numbers of clients seeking help via the various method of delivery). This was an area of concern from some of the partners, who were keen to develop a method of evaluation that would focus on outcomes cf. outputs, and allow NBIS to measure ‘added value’.

11. How is this information used? (does it influence modes of delivery, information provided, delivery style, advertising to potential clients?)

We were told that the information is provided to the MED and also used by NBIS to provide: feedback to call centres and BIZ shops; input to internal seminars; feedback to BIZ providers; a base for targeting advertising.

12. What impact do you think your organisation’s services have had on the owners and managers of SMEs? (how have you had this impact, and how have you come to this opinion?)

None of the respondents found this easy to answer, although there were opinions expressed on the target groups that “the service is *not* having an impact on”. Again, see the comment on changing the focus from measuring *outputs* to measuring *outcomes*.

13. If you had the time to design a completely new service delivery system, would you do things the same as you are now or would you modify it? (what would you modify, why do you think this would be an improvement?)

The respondents all had different views on this question, and it is worth emphasising that this question was not put formally to the NBIS board, but was put to individuals, some of whom serve on the board. On the whole it appears that the partner organisations are enthusiastic about BIZinfo being continued, but they had very specific ideas about what improvements could be made. These included:

- Reconsidering the role of the BIZ shops – either by increasing the resources available to them and/or bringing them under the direct control of NBIS. There was also some discussion over where they should be sited, and the opportunity for a mobile service for remote communities.
- Increasing the scope for offering advisory services through the call centres.
- Changing performance measures to “measure more than numbers”.
- Increasing resources for Maori and Pacific Peoples’ services, and reconsidering the method of service delivery for these client groups.
- Improving communication with other government departments. This emerged as an issue in relation to the planned service from TPK.
- Improving quality by accrediting trainers and advisors (this was thought to be particularly important in the BIZ shops where the person on the ground has no one else to ask).
- Extending eligibility to start-up businesses.
- Reducing political interference from Ministers’ offices.
- Strengthening linkages between BIZ and BIZinfo and also with organisations like BITC.
- Improving marketing and advertising, particularly in relation to Maori and Pacific Peoples.

Attachment 1: Interview Schedule for BIZ Provider Interviews

Note that this schedule forms the basis for an unstructured interview and should be regarded as a guideline only. Other questions may be asked – so long as the researcher takes sufficient notes to give some context to the answer.

SECTION 1: THE DELIVERY OF THE ORGANISATION THAT WE ARE VISITING

1. Can you first explain what your organisation does (overall, in terms of business/economic development, in relation to BIZ)
2. Going back to when you got involved in BIZ, how did the organisation identify its specific target groups? (Who was involved, what information was used to influence the decision?)
3. Have these target groups been represented on your courses in the proportions you expected? (Why or why not?)
4. How is the uptake of the services monitored? (get them to show/explain their recording systems/methods of analysis)
5. Who uses this information, and for what purpose is it used? (e.g. planning, monitoring for payment purposes etc).
6. Has the contract with the BIZ Unit been modified to reflect any difference between what was expected and what has occurred (or for any other reason)?
7. Did you need to appoint new staff for the delivery and/or contract it out? How were these individuals selected? (what criteria were used for the selection?)
8. If you were applying for funding today, what would you do differently?

Now we want to talk about the actual delivery of courses by your organisation. It would help if we could talk about a specific course (get them to name one and explain what it is, how long it lasts etc., and show any training materials such as OHP slides, session plans etc)

9. Can you first explain who is eligible for the courses? (are these your own guidelines or has the BIZ Unit supplied them? Have they been easy to apply? do they need changing/tightening?)
10. How are those delivering this course supported by the organisation and/or the BIZ Unit? (in terms of 'training for trainers', advice on instructional design, assistance with content selection, designing evaluation processes etc).
11. Can you explain the different ways in which this course would be evaluated (e.g. by attendees, peer review/benchmarking etc. is this evaluation approach working?).
12. What specific features of this course would be evaluated (e.g. satisfaction with delivery, usefulness of content, perceived value in terms of a positive impact on the business).
13. How is this information used? (does it influence modes of delivery, course content, delivery style, training material, advertising to potential attendees?)
14. In relation to this course, are there any differences between the versions you deliver to different target groups?
15. If you deliver courses yourself, and had the time to design a completely new course, would you do things the same as you are now or would you modify it? (what would you modify, why do you think this would be an improvement?)

16. Is charging for courses a good idea? Who would it help and who would it deter? (and why do you think this?)
17. What impact do you think your organisation's services have had on the owners and managers of SMEs? (how have you had this impact, and how have you come to this opinion?)
18. What impact do you think your organisation's services have had on SMEs? (how have you had this impact, and how have you come to this opinion?)

SECTION 2: THE PERFORMANCE OF THE BIZ UNIT

19. Can you explain your role in the organisation (in relation to the BIZ programme) and tell us who you deal with in the BIZ Unit?
20. Has this person/people changed since you have been involved?
21. What does the Unit do for your organisation? (tease out expectations cf. contractual obligations)
22. Are there services that you would like the Unit to provide? (how would additional services benefit you, your organisation, your clients?)
23. Moving to specifics, can you describe a situation where you were very satisfied with the performance of the Unit (and/or the contract manager)? How did you communicate your satisfaction with the Unit and how did staff respond?
24. Can you describe a situation where you were very *dissatisfied* with the performance of the Unit (and/or the contract manager)? How did you communicate your dissatisfaction with the Unit and how did staff respond?
25. Are there any particular issues about the provision of BIZ services to Maori or Pacific clients?
26. Do you feel the BIZ Unit has helped you to develop your capabilities as a provider?
27. On a scale of 1 to 5 (where 1 is poor and 5 is excellent), how would you rate the BIZ Unit?

If possible (in terms of time)

28. How do you feel about reporting on-line? (would it make your job easier/harder. Can you see any advantages for the BIZ Unit, your clients, your staff?)

SECTION 3: THE PROGRAMME OVERALL

29. Are there any changes/ improvements that you would like to see made to the programme? (and why/based on what information?)
30. Are there any particular issues for providers delivering services to Maori or Pacific clients?
31. How do you share best practice amongst providers?

If possible (in terms of time)

32. Do you think BIZ is displacing existing services, e.g. private training providers, polytechnic courses etc?
33. Is there a need for the courses to be standardised across the country (in terms of eligibility, course content etc, pre-assessments) Why do you think this (e.g. are there clients who are using more than one provider, career development for training staff etc).

34. Should the programme have accreditation e.g. NZQA?
35. Is there confusion between the BIZ programme and BIZinfo?
36. Does the present contract model allow for too much flexibility? Should it be standardised?

CLOSING

37. Do you have any questions?
38. Is there anything else you would like to say about the programme? (or anything else related to BIZ or bus development more generally).

Attachment 2: Information Sheet



**MASSEY
UNIVERSITY**

Private Bag 11222

Palmerston North

New Zealand

Tel: ++64 6 350 5799

Fax: ++64 6 350 5661

INFORMATION FOR BIZ PROVIDERS

The Ministry of Economic Development has contracted a team of researchers to undertake an evaluation of the BIZ Programme. The team consists of researchers from the Bureau for Economic Research (BERL), the National Research Bureau (NRB) and the New Zealand Centre for Research into Small and Medium Sized Enterprises at Massey University.

Our brief is to assess how well the BIZ programme is meeting its objectives, and we are seeking to gain the perspective of a number of different groups on this question. These include clients of the BIZ programme as well as potential clients. We are also interested in the views of those involved in delivering BIZ.

The New Zealand Centre for SME Research at Massey University is leading the segment of the research that is concerned with gaining the views of the BIZ Providers, and three interviewers are involved: Claire Massey, David Tweed and Shirley Barnett. They will be visiting some 20 BIZ Providers and talking by telephone to another 12. One of the team of three will be interviewing you and seeking your views on the programme.

We are specifically seeking your organisation's opinion on

- The programme overall, including its impact on SMEs and any improvements that you would like to see made
- The performance of the BIZ Unit, including its management of the contract with your organisation
- Your own delivery. Here we are interested in the methods you use for monitoring and responding to market demands, how you target client needs, and whether the uptake of their services is as you expected.

We will need to meet with the person or people who can comment fully on these issues, and this can either be in individual meetings or in a group. We estimate that we will need around an hour and a half to fully cover the questions we have and to accurately summarise your comments.

The researchers will take notes of each discussion and their notes will be summarised into a report that will be provided to the Ministry at the end of July. In accordance with usual interview protocol, any individual comments that are used in the report will not be attributed to specific interviewees, and the Ministry will not have access to the researcher's records of the interview. However, the Ministry will be provided with a list of those organisations that have been visited.

If you have any questions about the content of the questions or the form of the interview please ring the Ministry of Economic Development or Massey University. All contact details are listed below.

Ministry of Economic Development

Kay Switzer 04 4720030 Kay.Switzer@med.govt.nz

New Zealand Centre for SME Research, Massey University

Claire Massey 06 3505799 ext. 2791 C.L.Massey@massey.ac.nz
David Tweed 06 3505799 ext. 2805 D.M.Tweed@massey.ac.nz
Shirley Barnett 06 3505799 ext. 2770 S.J.Barnett@massey.ac.nz

Attachment 3: Telephone Interview Schedule for BIZ Providers

1. Have the target groups you were aiming at been represented on your courses in the proportions you expected? (why or why not?)
2. Has the contract with the BIZ Unit been modified to reflect any difference between what was expected and what has occurred (or for any other reason)?
3. If you were applying for funding today, what would you do differently?
4. What impact do you think your organisation's services have had on the owners and managers of SMEs? (how have you had this impact, and how have you come to this opinion?)
5. What impact do you think your organisation's services have had on SMEs? (how have you had this impact, and how have you come to this opinion?)
6. Are there any changes/ improvements that you would like to see made to the programme? (and why/based on what information?)
7. Are there any particular issues for providers delivering services to Maori or PI clients?
8. Is there unnecessary confusion between the BIZ programme and BIZinfo?
9. Is there anything else you would like to say about the programme? (or anything else related to BIZ or business development more generally)