



2020 Client and Stakeholder Satisfaction Research



AMSRO



ESOMAR
member

Accreditations

Wallis Market and Social Research achieved accreditation to the International Standard ISO20252 in September 2007. The Company is committed to maintaining administrative and operational procedures which comply with these accreditation requirements and to improving its performance in all aspects of the service it delivers to its customers.

In 2020 Wallis sought and attained certification to ISO 27001. This is the highest standard for information and data security. Wallis made the strategic decision to become certified to ISO 27001 because we recognise the absolute necessity for our clients to be assured that their data is secure. Wallis is one of the first research companies in Australia to achieve certification to this standard.

Wallis is an active participant in the market research industry, with senior staff making significant contributions to the Research Society (TRS) and the Association of Market and Social Research Organisations (AMSRO). As such we actively pursue the ethical objectives of the industry.

In addition to having attained the highest Industry accreditation, Wallis also participates in the Australian Achiever Awards, which recognises the customer service excellence of Australian companies. The Company has been awarded a high commendation every year since the inception of these awards in 1999.

Wallis is an acknowledged leader in data protection and privacy. Our system is regularly subjected to external penetration testing and we are a Privacy Awareness Week supporter – committed to sharing our knowledge with others.



A note to readers on the interpretation of qualitative findings

In the results which follow the reader is reminded that qualitative research seeks to develop insight and direction rather than provide absolute measures.

Given the sample sizes, the special recruitment methods adopted and the objectives of the study, it should be understood that qualitative research work is exploratory in nature.

There are no statistical degrees of confidence in qualitative findings and they are not necessarily representative of the broader population.

Qualitative findings should therefore be viewed as a frame of reference and indicative in their nature.



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Tools

Tailored COVID-19 questions were included across all instruments – quantitative and qualitative. Questions focused on the VRQA’s responsiveness and confidence in the broader sector.



Approach

Communication material acknowledged the challenging environment. Reminder activities were redesigned to take into account the trying circumstances. Survey completion dates were relaxed for some groups.



Findings

Research findings for this report includes a COVID-19 specific section.





- **The COVID-19 context provides a distinct lens through which this year's results need to be interpreted.** COVID-19 forced a fundamental shift in operation and delivery for all sectors and changed the way in which the VRQA needed to interact. There is evidence that some operational or transactional interactions were more challenging in 2020, but at the same time, perceptions of the VRQA remain positive.
- There was wide appreciation of the VRQA's flexibility in adapting the way it works. **Most clients and stakeholders were supportive of the VRQA's performance of its role throughout the COVID-19 pandemic.**
- **The Home Education sector, in particular, provided outstanding ratings of the VRQA's performance during the COVID-19 pandemic.** Even amid some concerns regarding timeliness of reviews, many metrics are the highest since measurement began in 2018.
- **Among schools and RTOs, overall satisfaction edged down.** Unsurprisingly, given the complexities and fast pace of change in the sectors in 2020, the falls in satisfaction occurred alongside lower ratings for the VRQA's responsiveness, and timely information and advice.
- **In spite of some of the challenges related to service delivery the VRQA and its overall role continues to be viewed extremely positively by the sector.** An overwhelming majority of schools feel that the VRQA contributes to the quality of the education sector, while a similar proportion of RTOs feel the VRQA promotes and encourages continuous improvement of the sector.
- 2020 has undoubtedly been challenging for VRQA and the sectors it regulates. However, **silver linings are easy to spot.** Feedback from the sector shows participants have appreciated new and flexible ways of interacting and use of video resources has become more important as part of the mix. There was no discernible disengagement in attendance at the VRQA's events, even as their formats changed, and participants continued to rate their helpfulness highly.

Section 01: Introduction





Knowledge

Client and stakeholder understanding of the VRQA and its functions.

The level of client and stakeholder awareness of the VRQA and its functions.



Expectations

Client and stakeholder expectations (including types of support expected and valued).

How clients and stakeholders would like to engage with the VRQA (including types of support expected and valued).



Delivery

Areas for improvement in engaging clients and stakeholders.

How clients and stakeholders would like to receive communication.

Understanding of levels of and shifts in satisfaction amongst clients in particular in relation to delivery during the COVID-19 period.

Methodology

Note: All fieldwork (both qualitative and quantitative) was conducted in Victoria.



Setup / Development

Quantitative

- Sample cleaning
- Development and revision of questionnaires and survey invitations
- Approval of questionnaires and survey invitations
- Programming and testing of questionnaires
- Development of COVID-19 questions

Qualitative

- Set up of stakeholder interviews
- Development and revision of discussion guides
- Development of COVID-19 questions

July - August 2020



Survey Fieldwork

Quantitative

- Fieldwork (online / CATI) for A&T and employer survey
- CATI interviewer briefing
- Fieldwork (online) for home educators
- Fieldwork (online) for education provider survey (with CATI reminders)
- Fieldwork (online) for stakeholders
- Coding

Qualitative

- In-depth interviews

August - October 2020



Reporting

- Preliminary key findings
- Presentation to the board
- Main report

November - January 2021

Research participation



Education providers

n=268 (Target: 300*)



Apprentices and trainees

n=100 (Target: 100)



Employers

n=268 (Target: 100)



Home educators

n=981 (Target: 300)



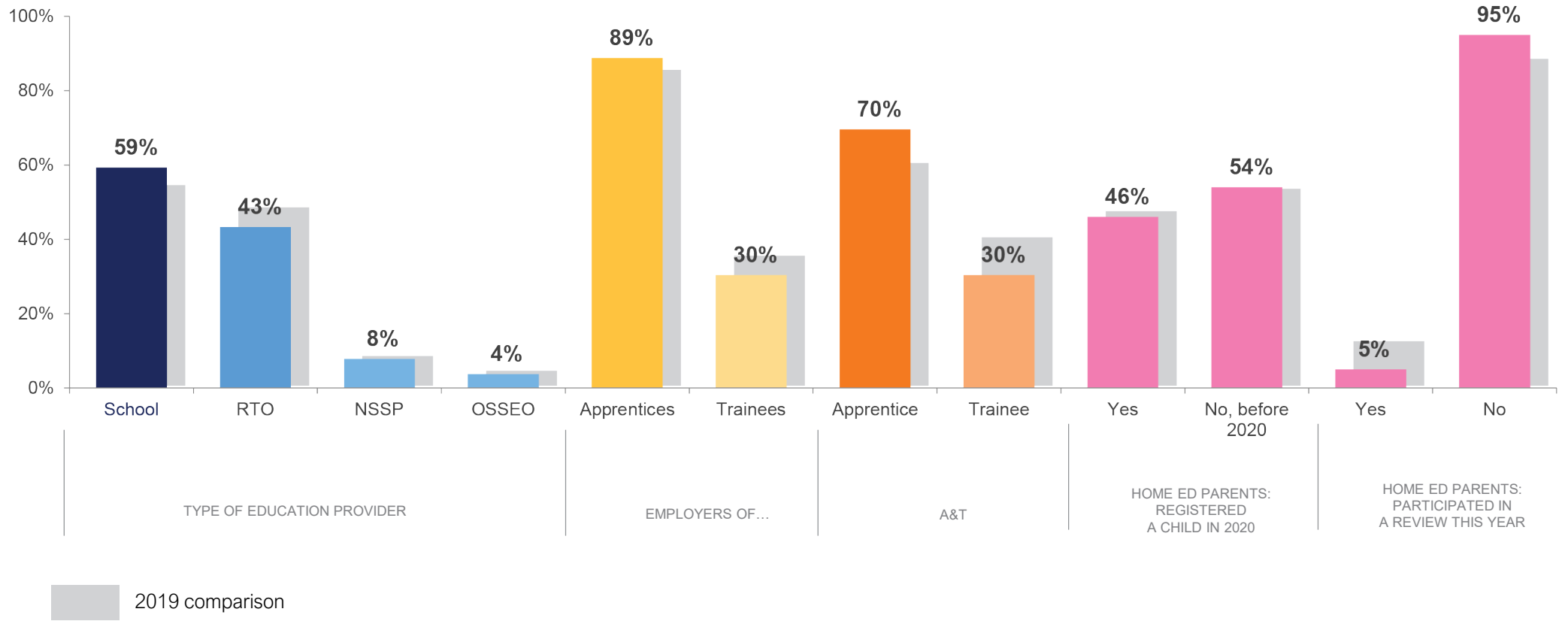
Stakeholders

Quantitative: n=70 (Target: n/a)

Qualitative: In-depth interviews

46 total (14x education stakeholders, 10x education providers, 10x apprentice and trainee stakeholders, 2x home education stakeholders, 10x home education parents/providers).

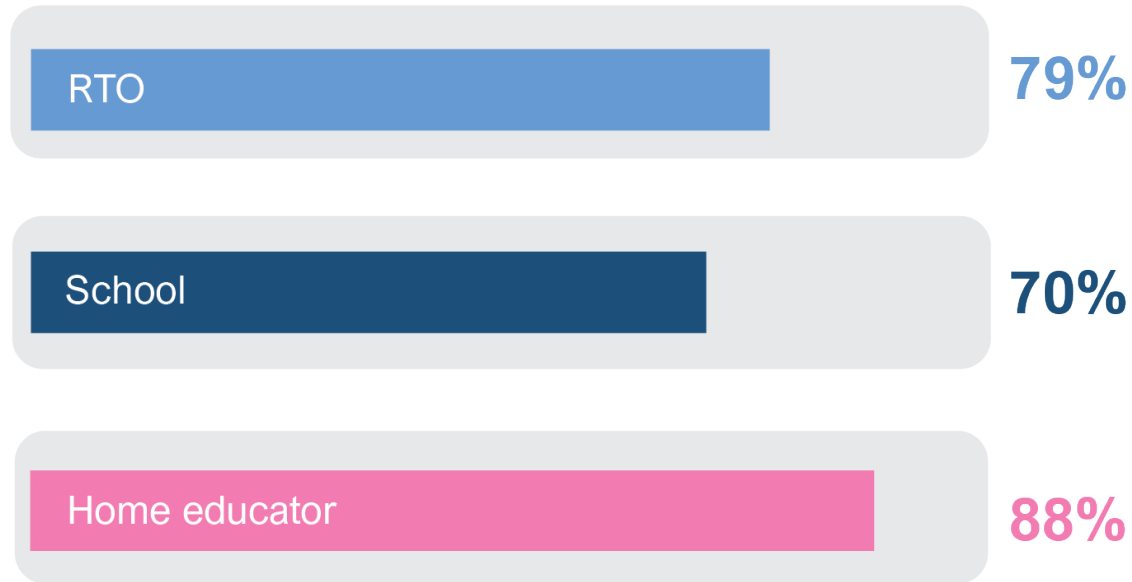
Respondent profile



Section 02:
COVID-19



High levels of satisfaction with the VRQA's service during the pandemic- particularly high ratings among home educators.



(net fully/mostly agree)

These sentiments were echoed in the qualitative research.



The VRQA has not used COVID as an excuse not to complete their obligations but have found ways to complete the reviews they have deemed necessary to ensure compliance. - Stakeholder



They have done well under the COVID circumstances. - Stakeholder



(The VRQA provided...) good service that was flexible to meet both the educational needs of my children and the requirements of this crazy pandemic. No unnecessary red tape, no discourteous service, no assumptions of ineptitude, just a willingness to help... - Home Ed



They kept us informed about the review changes due to the pandemic. They also provided education resource ideas during the pandemic via their Facebook page. - Home Ed

Sources of friction during the COVID response included responsiveness and communication.



Responsiveness

More decisive action is necessary in a crisis like the pandemic we are going through. All decision making should not be left in the hands of schools. The VRQA needs to participate more actively in determining what actions schools need to take and inform them of it.

- **School**

Providing advice re RTOs' response to COVID in a more timely manner. - **RTO**



Communication

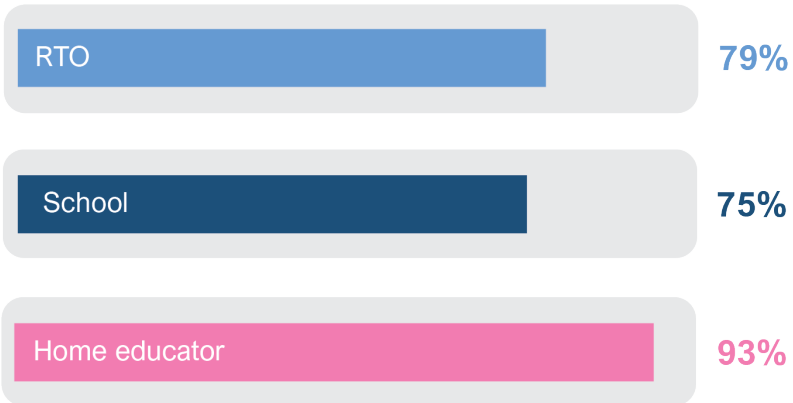
I expected more communication from a regulatory body during COVID times. - **RTO**

Communication during COVID has been slow and lacking on website updates. Especially, info around registration. - **RTO**

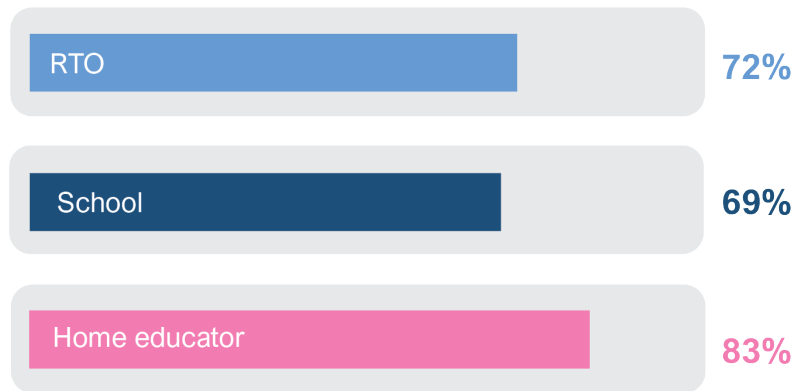
Home Educators were particularly appreciative of the VRQA's performance during the pandemic. Areas of challenge included support and information needs for schools.



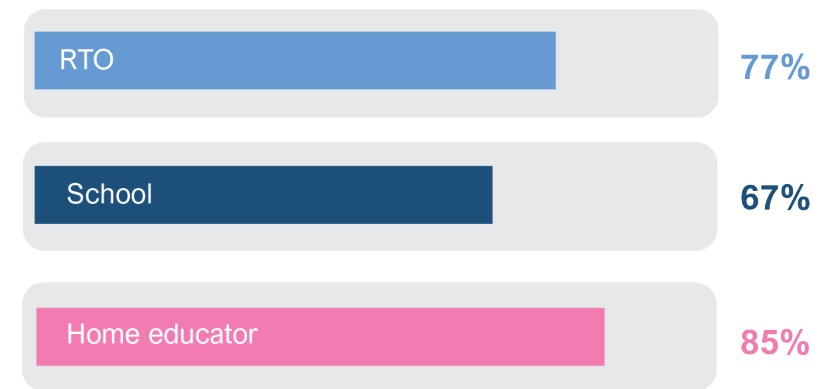
The VRQA adapted its regulatory processes adequately



The VRQA provided timely and relevant information to my organisation



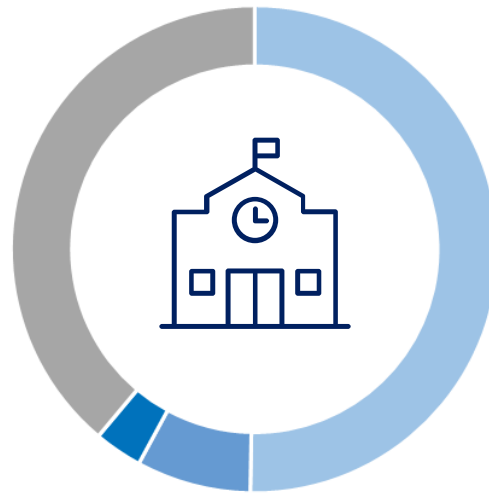
The VRQA has been supportive through the pandemic



■
■
■
 fully/mostly agree



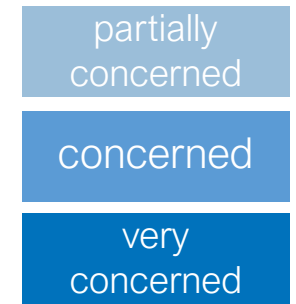
RTOs are considerably more concerned about what the next 12 months will bring.



61%
of **schools** feel some level of concern



79%
of **RTOs** feel some level of concern

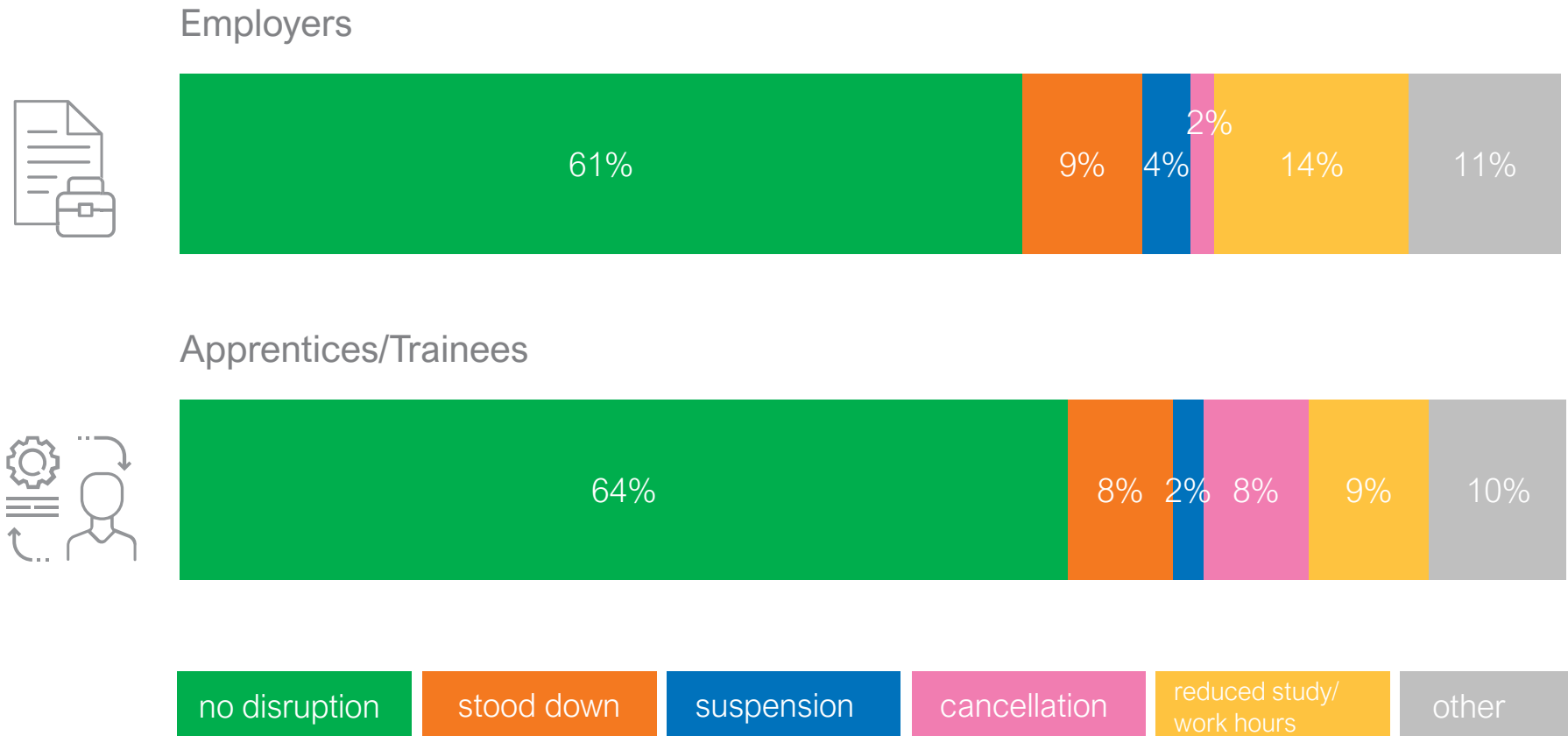


...how do you bridge this gap...my major concern is around the vocational learning and the experience of the kids are not necessarily having from the point of view of structured workplace. - **RTO**

EPS24: Thinking about the next 12 months, how do you feel about your organisation's operations?
Base: n=254 (total), n=157 (school), n=97 (RTO)

The majority of employers and apprentices/trainees reported no effects on their training as a result of COVID disruptions.

Reduced study/work hours was the most mentioned effect from COVID.



Eight out of ten employers have some level of concern for their industry.

Economic uncertainty is the leading source of concern.



83%
of employers feel
some level of
concern over the
health of their
industry



Reasons for concern



41%

business/economic/regulatory uncertainty



36%

business/economic downturn



21%

problems with costs



9%

problems with training/training providers

Apprentices/Trainees exhibit lower levels of concern than employers, with six in ten concerned for their industry.

Economic uncertainty is also the leading source of concern.



64%
of apprentices and trainees feel some level of concern over the health of their industry



Reasons for concern



32%

business/economic/regulatory uncertainty



16%

problems with training/training providers



16%

business/economic downturn



8%

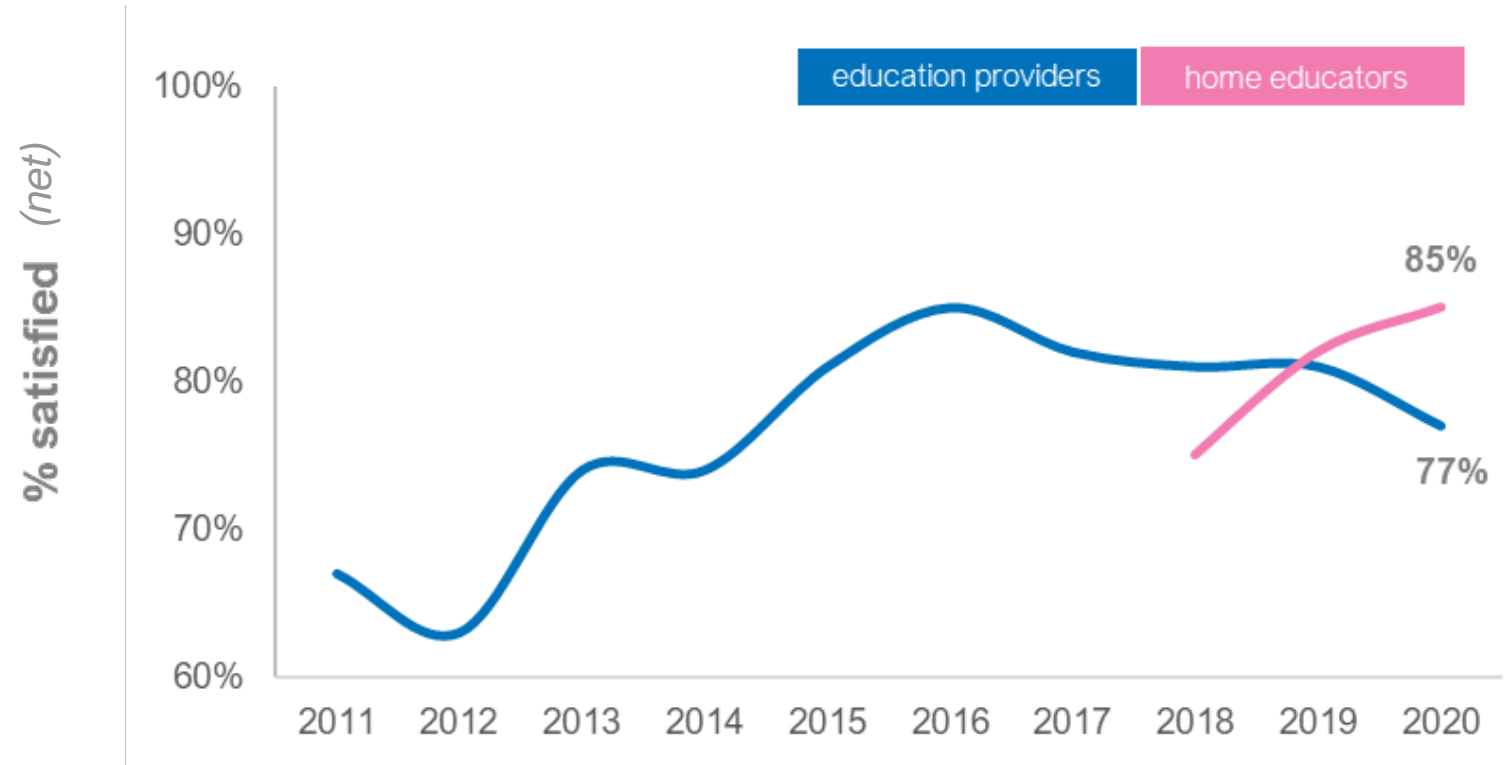
problems with costs

Section 03:
Satisfaction and
assessment of
effectiveness

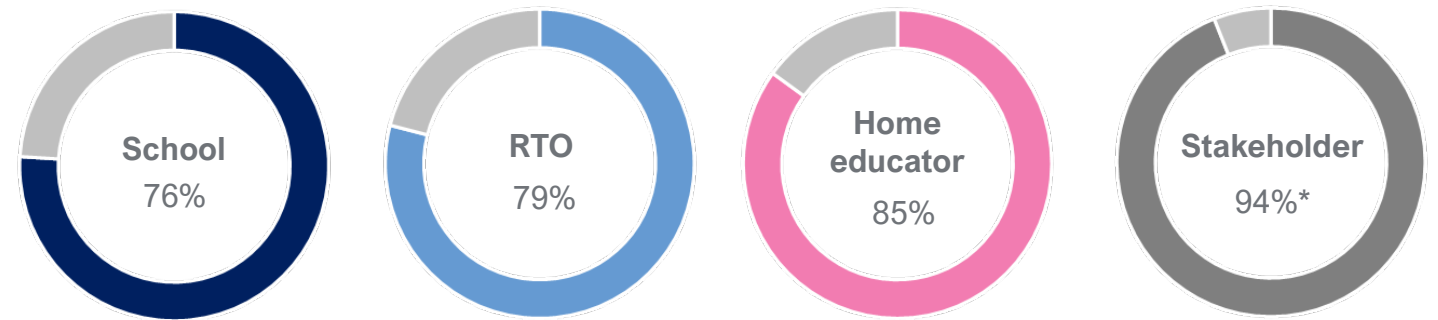


Improvements in satisfaction amongst home educators, while overall satisfaction with the VRQA has declined slightly among education providers.

Stakeholders consider the VRQA to be an effective regulator.



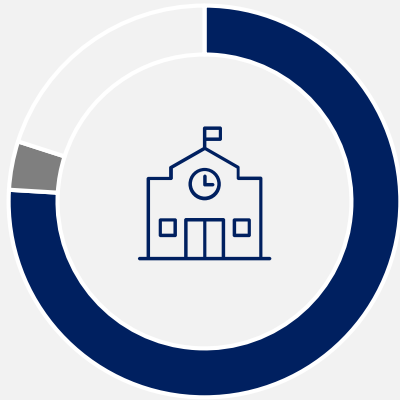
satisfied top 2 box



EPS10/HE14: Overall, how satisfied are you with the VRQA and its services over the last 12 months? Base: n=268 / Base: n=981

STK1: Thinking about how effective the VRQA has been in performing its regulatory function, would you rate the VRQA as being... Base: n=70

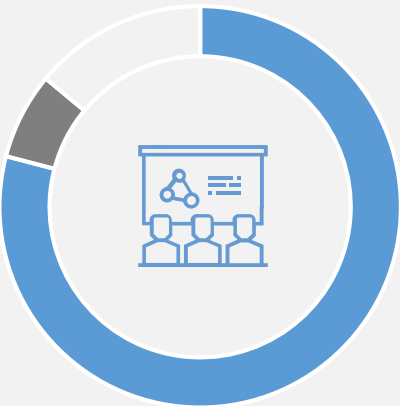
Note: Stakeholder metric based on perceived effectiveness, not satisfaction



School

Satisfaction 76%

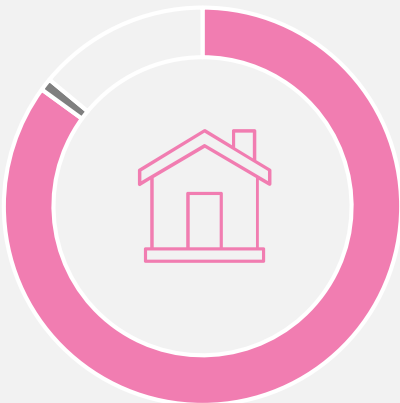
Dissatisfaction 4%



RTO

Satisfaction 79%

Dissatisfaction 7%



Home ed

Satisfaction 85%

Dissatisfaction 1%

Moderate to high levels of satisfaction with the VRQA across all sectors



Always able to talk to someone at the VRQA and they are always helpful and are able to clarify information. We appreciate that we are able to call and that all the correspondence is not just through enquiry forms. - **RTO**



Open and transparent. All of our enquiries are promptly answered. We have all of the required information readily available to us. - **School**



Full, comprehensive information, responsive, great support and realistic approach. - **Home ed**

Reasons for dissatisfaction included perceptions of slow communications

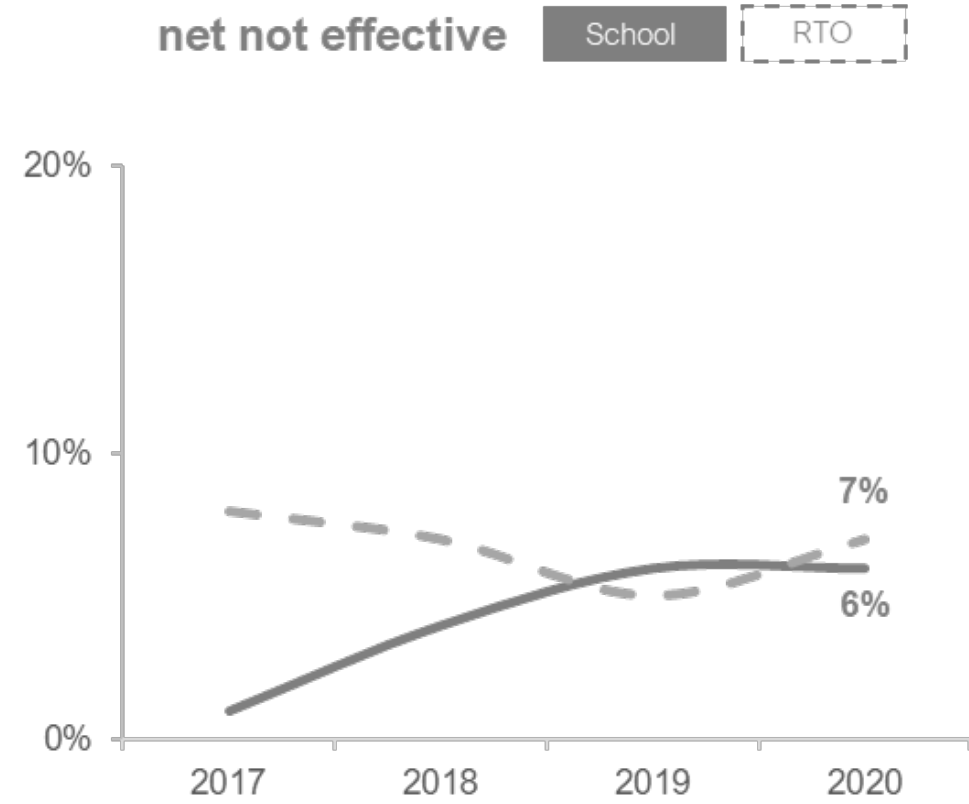
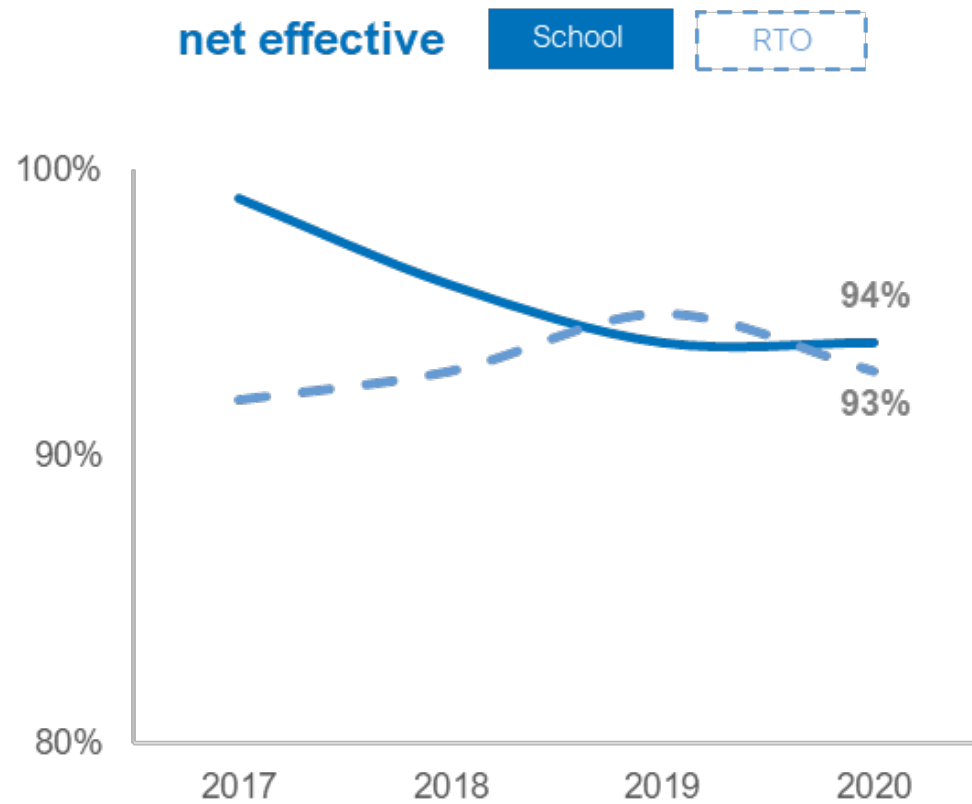


Slow to communicate, incredibly slow to respond, unwilling to engage in dialogue that seeks to understand our organisation's context and history, seemingly not prepared to adequately read carefully through our correspondence and accompanying documents. - **School**



While in a review we receive very little communication regarding the process. We have consistently had promises of 'final steps' submitted information on short timelines only to have no response for months on end. - **School**

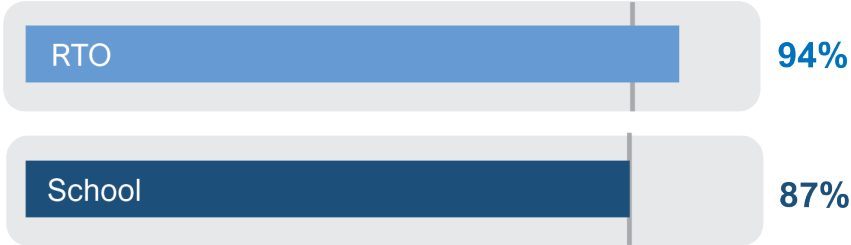
Schools and RTOs perceive the VRQA as an effective regulator.



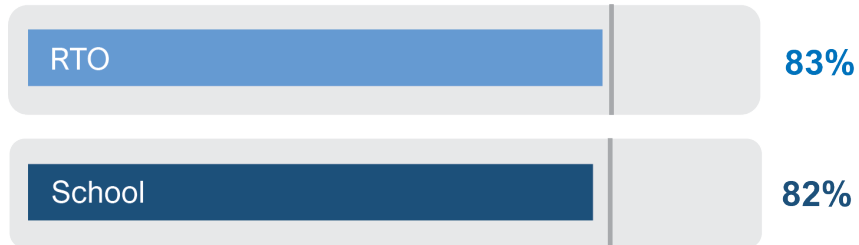
Again, outstanding results were achieved on key regulatory functions. Overall, the sector places considerable value on the role of the VRQA.



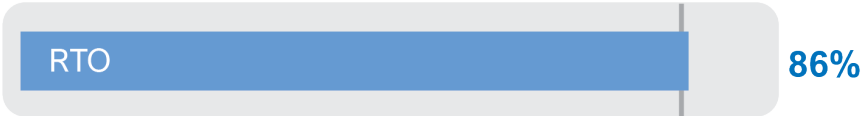
The VRQA contributes to the quality of Victoria's education and training sector



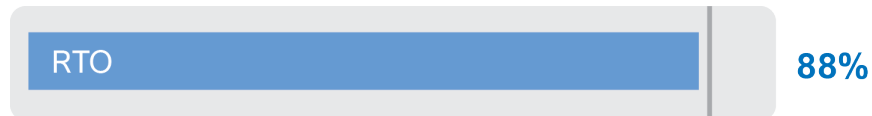
The VRQA engages appropriately with the regulated community



The VRQA improves the quality of VET outcomes in Victoria



The VRQA promotes and encourages continuous improvement of registered training organisations



Legend: ■ ■ Fully/mostly agree

2019 comparison

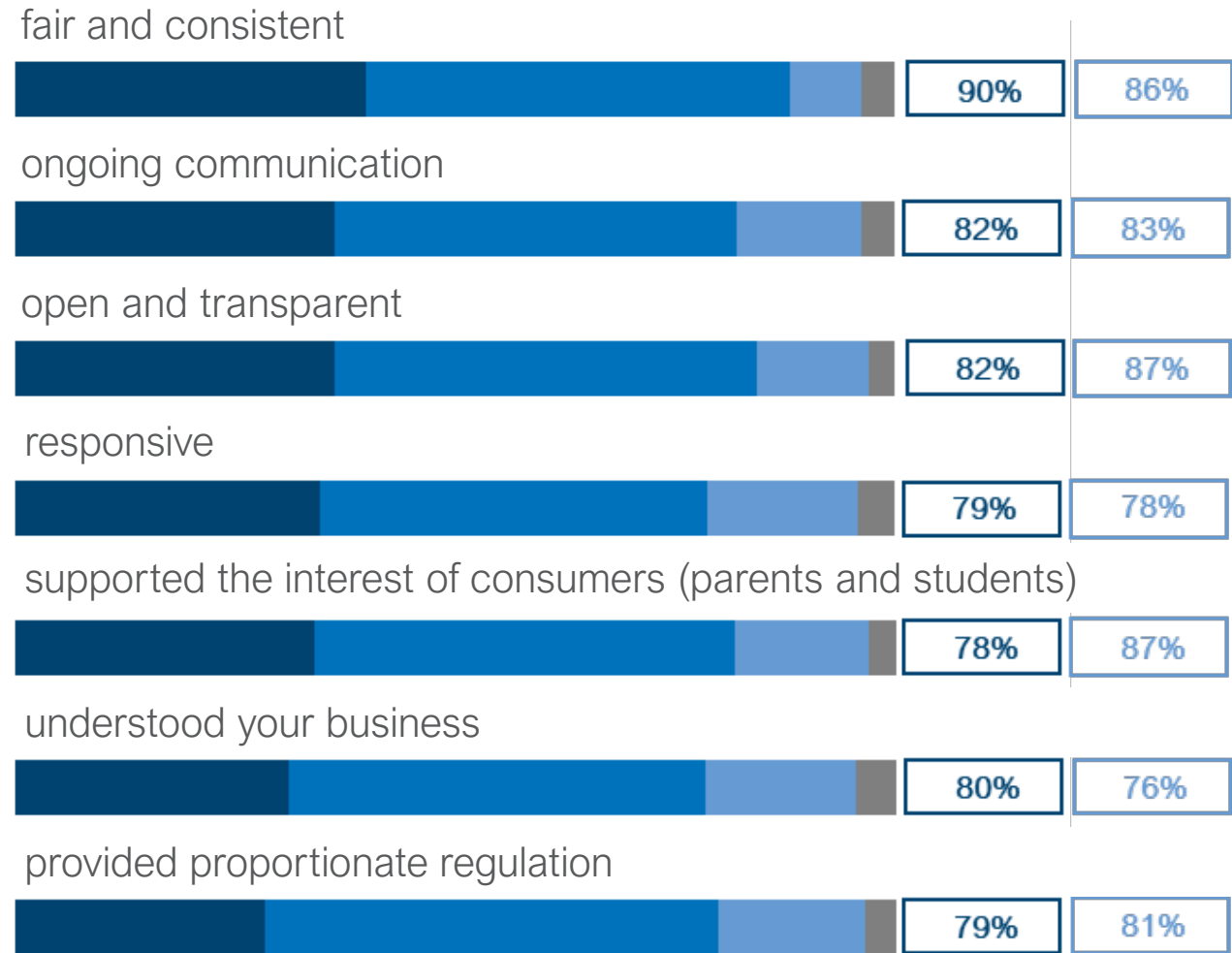
Why stakeholders rated the VRQA as highly effective.



Section 04:
The VRQA's
performance
and processes



Education providers continue to give high ratings of the VRQA performance.



Percentages are subject to rounding, and hence nominal values do not necessarily sum to 100%

EPS7: In the past 12 months, to what extent do you agree that the VRQA's performance aligned with each of the following?
Base: n=268

agreement:

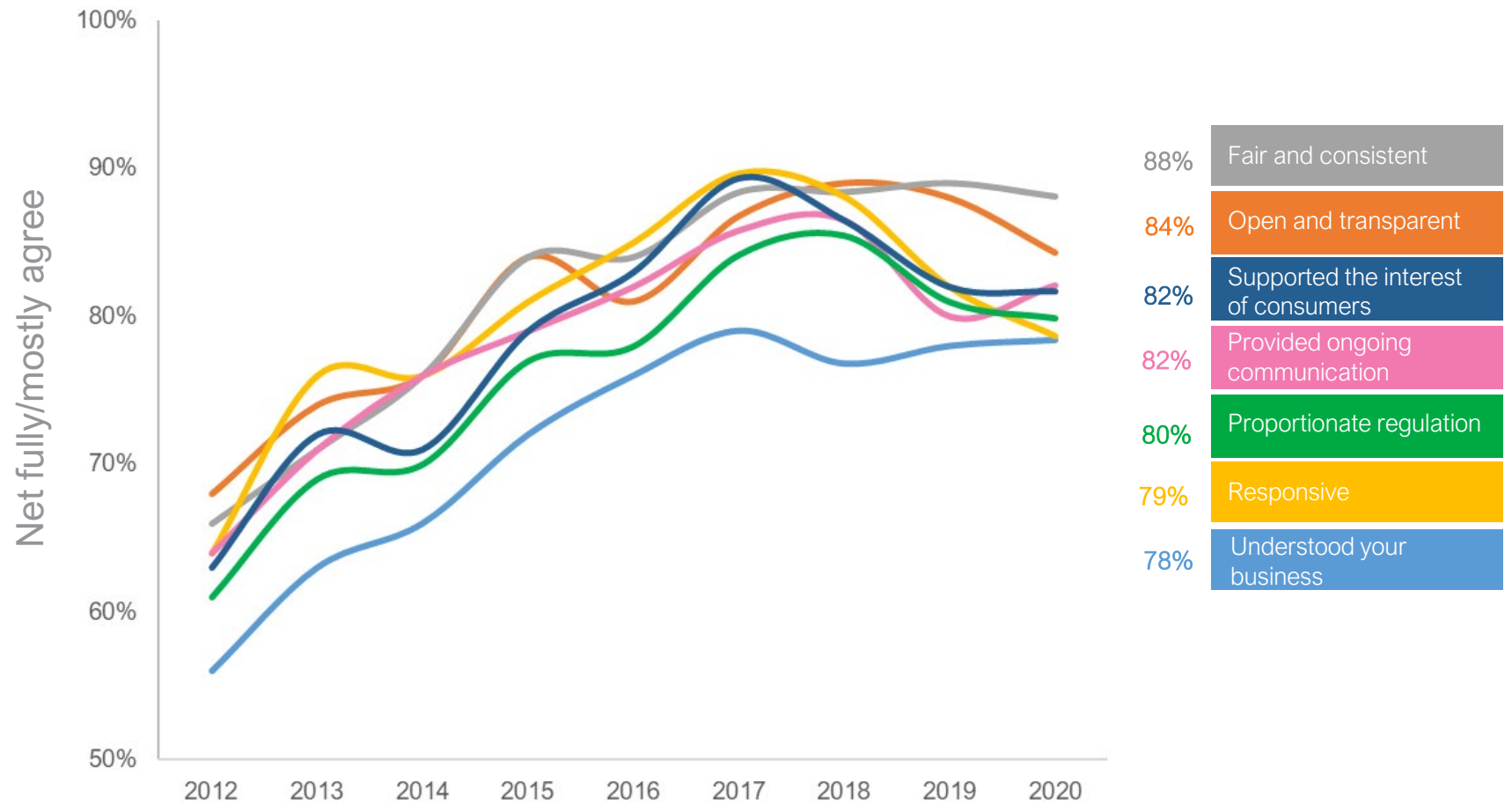


Ratings of the VRQA's performance have remained strong in absolute terms.

In the midst of a challenging year 'ongoing communication' has edged up, along with 'understanding your business'.

Falls were observed across 'openness and transparency' and 'responsiveness'.

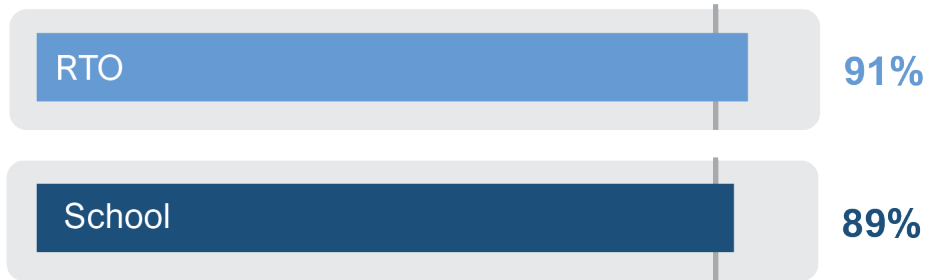
Performance ratings (RTO and schools combined)



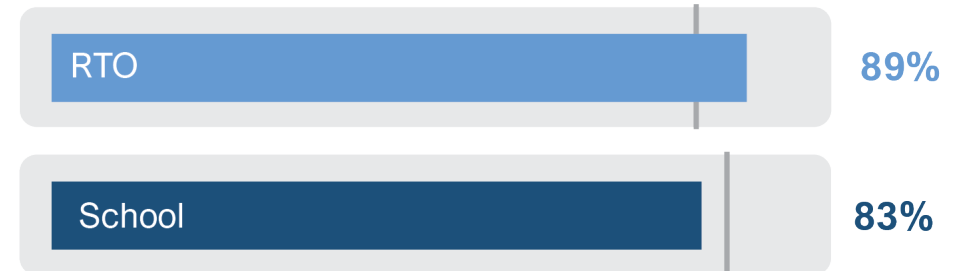
Agreement remains high that the VRQA operational processes are straightforward.

RTO ratings are now higher than ever across each of the four measures.

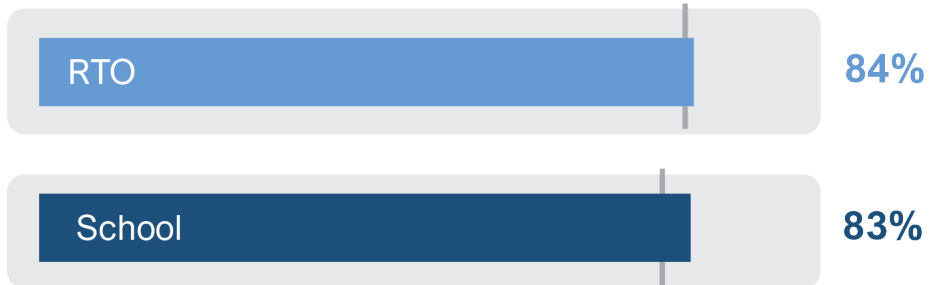
The VRQA's **forms** are clear and easy to understand



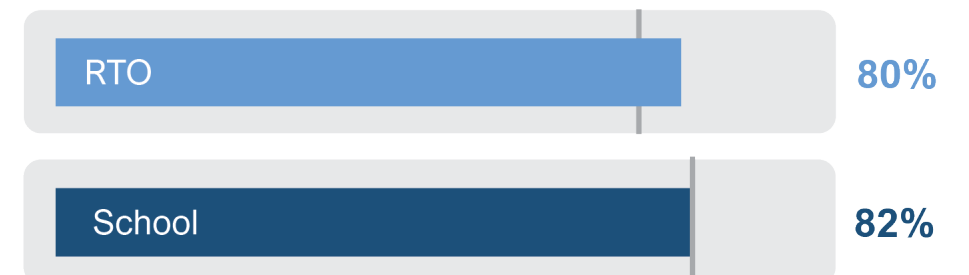
Procedures are easy to understand and follow



Regulatory requirements are clearly stated



Other requirements including evidence are clearly stated



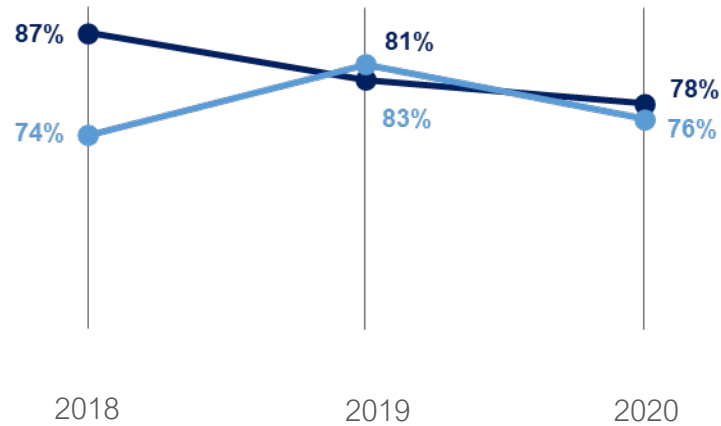
Fully/mostly agree

2019 comparison

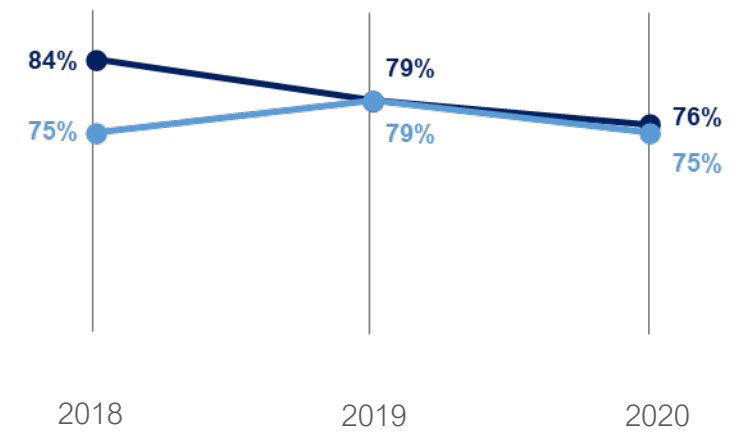
Perceptions of customer service levels remain robust, with 'engaging effectively' falling back closer to 2018 levels.

Falls in net Excellent/good ratings tended to be driven by increasing 'fair' ratings, rather than poor/very poor ratings.

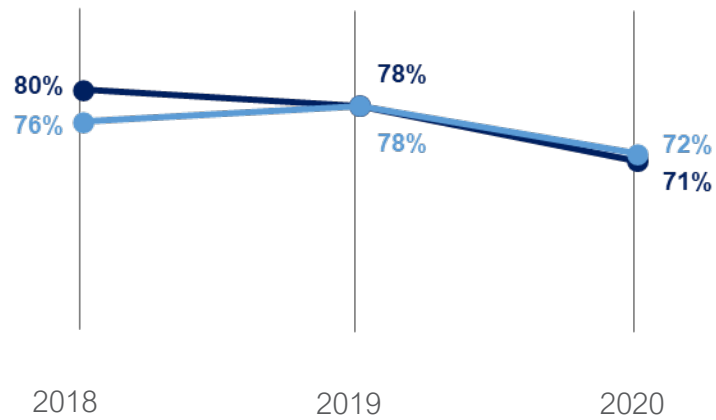
Providing **timely information** about regulatory changes/general directions



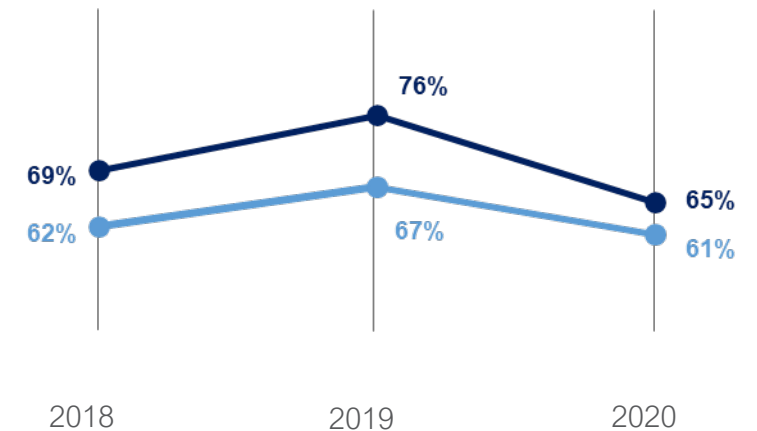
Providing **sufficient contact information** so that I can contact the VRQA



Providing **timely, quality advice** about my sector to my organisation



Engaging effectively with stakeholders in the regulation of the sector



● Net excellent/good (RTO) ● Net excellent/good (School)

Accessibility and responsiveness were highlighted as areas for perceived improvement.



Accessibility



Information is not presented in a user-friendly way. Too much padding. - **School**



We needed to report changes to organisation...nothing on your website that I could find tells you how to do that or who to contact about it. - **Non-School Senior Secondary Provider**



Responsiveness



No reply email to questions asked of the regulator until after a deadline had passed [regarding re-registration audit]. - **RTO**



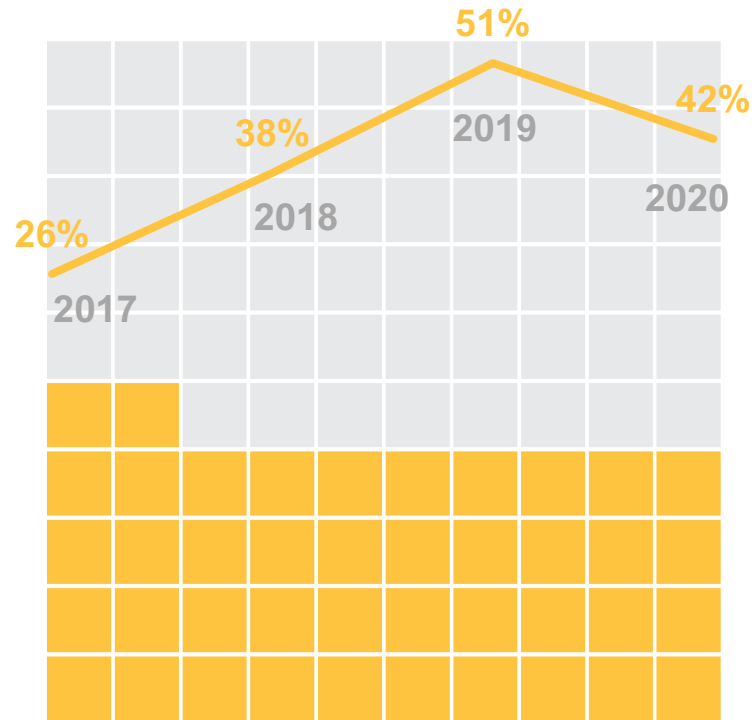
When I needed to contact and get feedback / guidance, it seemed the organisation was in disarray, so messages weren't returned, action wasn't handed over and lines or responsibility were unclear. - **School**

Section 05:
Engaging with
Employers,
Apprentices and
Trainees

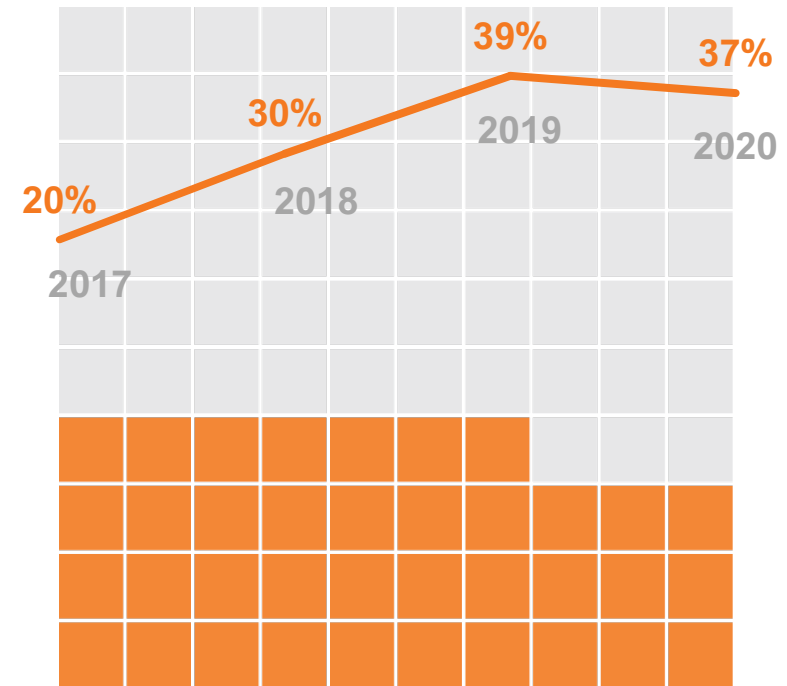


Levels of awareness of the VRQA have declined in 2020 – more notably among employers.

Employers

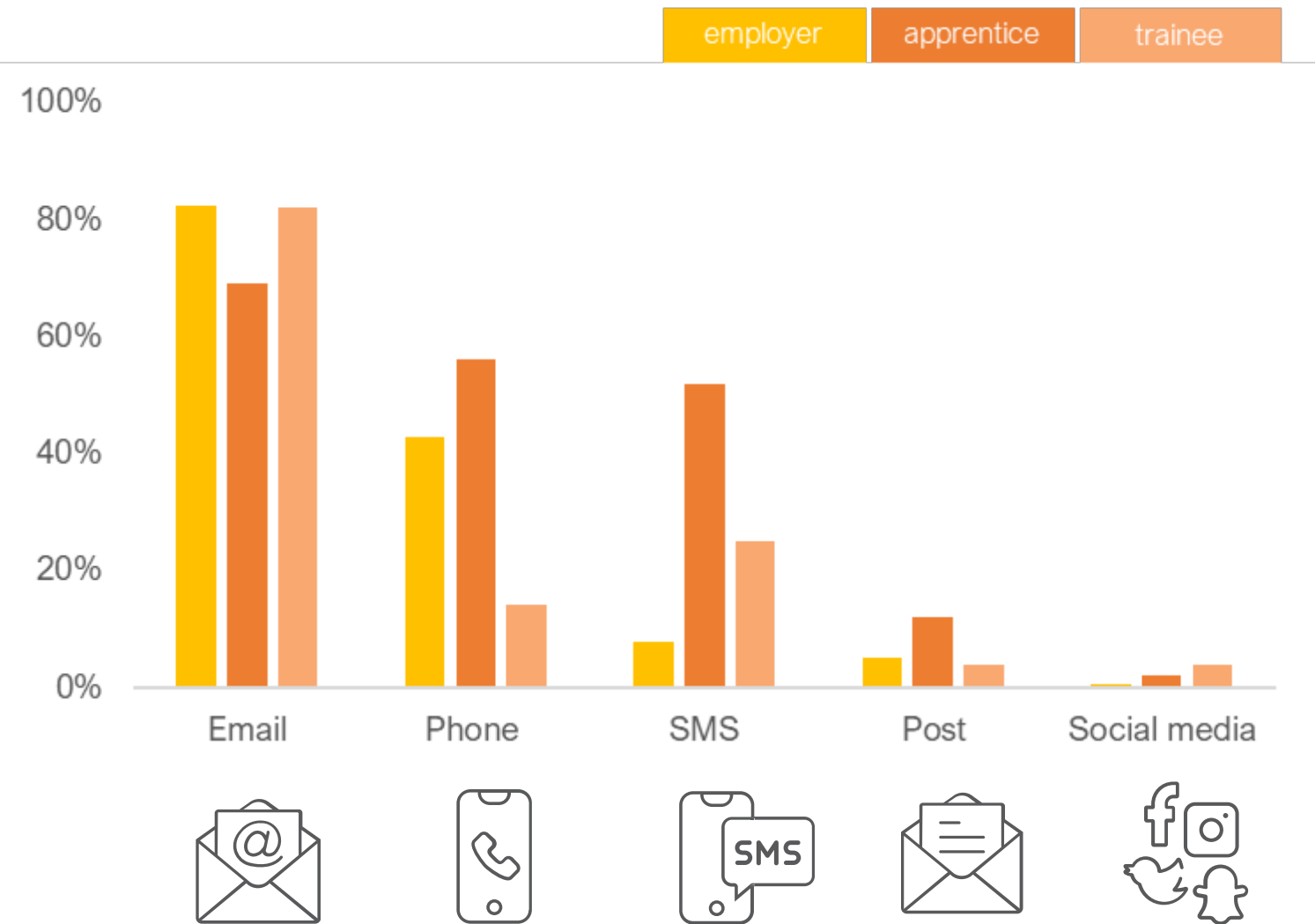


Apprentices/Trainees



Email remains the preferred mode of contact across all cohorts.

Apprentices continue to be more open to being contacted via SMS or phone.



Section 06: Engaging with Education Providers

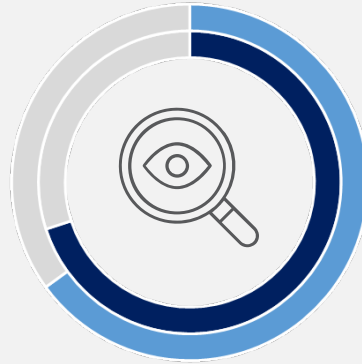


85%
have used the
website in the
past 12 months.

School users report gaining more utility from the website than RTO users.

However, ratings for 'I can easily find what I'm looking for' have declined year on year for schools, from 83% in 2018.

EPS2A: Which of the following VRQA publications/communications have you accessed/used in the past 12 months? EPS3: Thinking about the VRQA website, to what extent do you agree with each of the following statements? Base: n=268



70% schools 65% RTO

Can easily find what they are looking for on the VRQA website



82% schools 73% RTO

The VRQA website clearly explains regulatory requirements for their organisation



80% schools 69% RTO

All the information they need is on the VRQA website

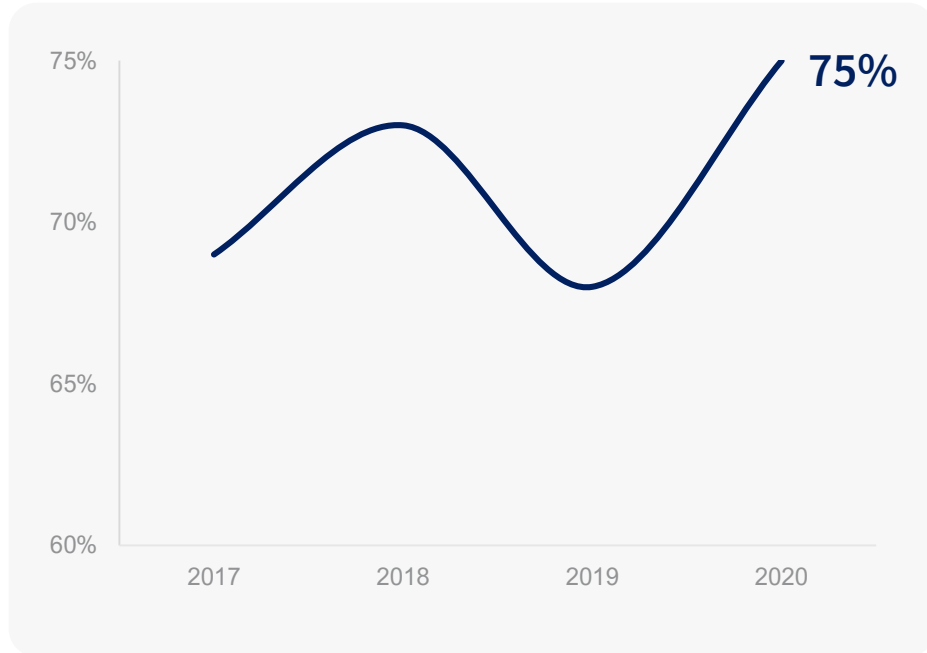
Fully/mostly agree

Participants appreciated the VRQA's flexibility in adapting delivery of events, with engagement remaining steady.

Most who engaged with events found them helpful.

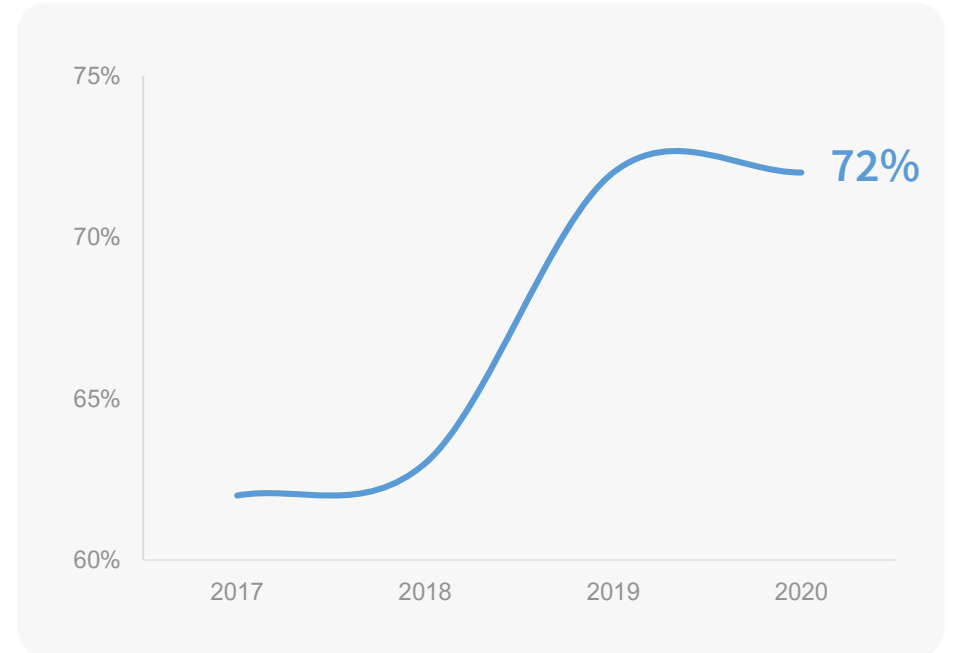
Schools

% helpful (net fully/mostly agree)



RTOs

% helpful (net fully/mostly agree)



Being regionally located I have found the virtual workshops very helpful and would love to see this opportunity continue. – **School**

Compared with previous years, the VRQA's video resources are perceived as relatively more useful – moving to the category of 'hidden gem'.

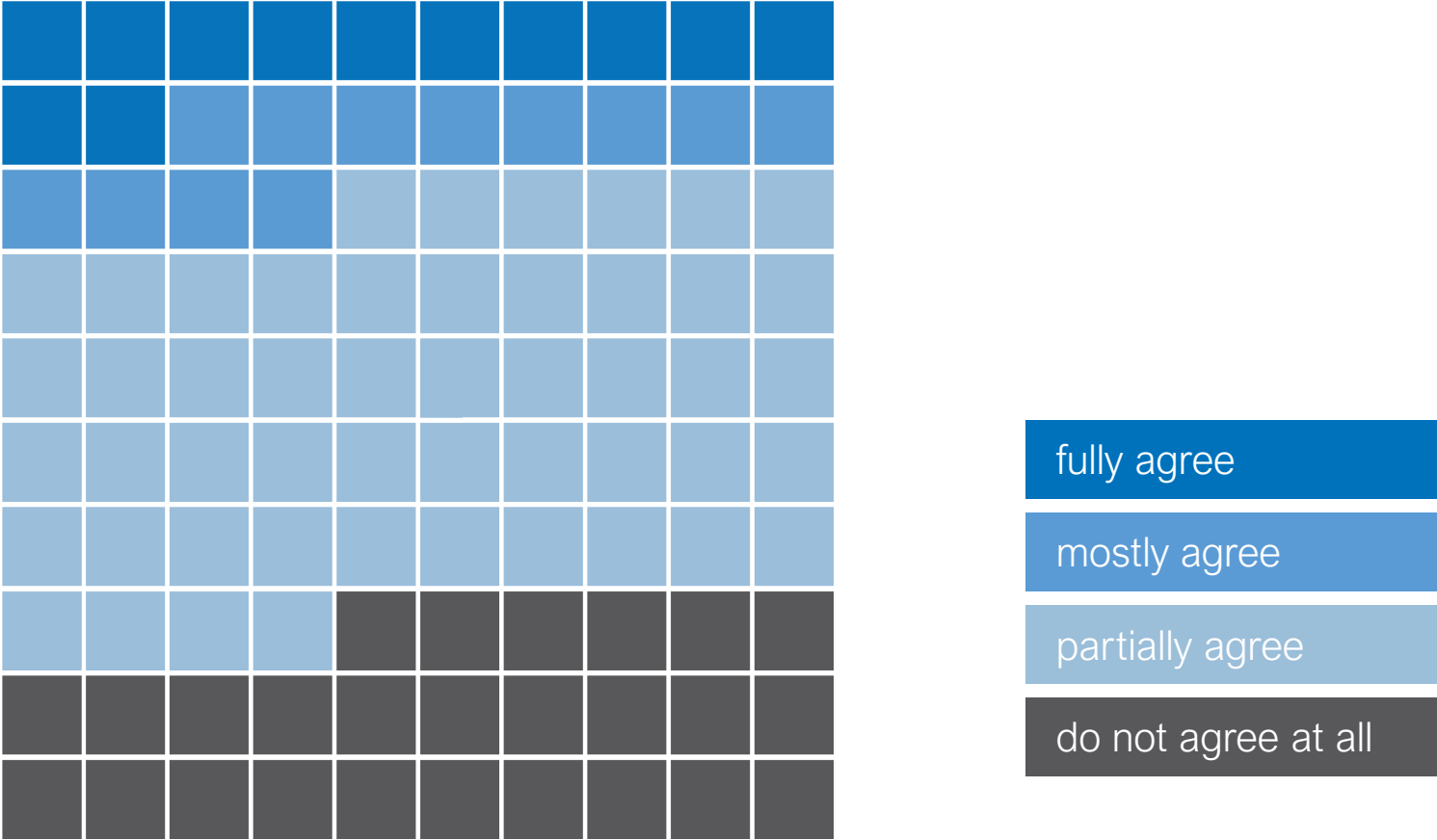
EPS2A: Which of the following of the VRQ's publications/communications have you accessed/used in the past 12 months? **Base:** All (n=268)
 EPS2B: How helpful have you found the following VRQA publication/communication?



Section 07: Child Safe Standards



A majority of schools agree, at least partially, that COVID-19 has exacerbated child safety issues.



Impacts on child safety stem from stresses in the home environment, and increased difficulties for teachers in determining safety of children via the virtual platforms in use.



Parents are experiencing stress due to supporting student learning through remote learning. Parents are not having a break from their children as they normally would. In a small number of cases, stress is impacting parent capacity to meet their children's needs. - **school**



Children that may be unsafe at home do not have someone to talk to because teachers/staff cannot be easily reached. Children are feeling "stuck" and do not know where to get help. It's also difficult for teachers/staff to detect safety issues on a virtual platform. - **community RTO**

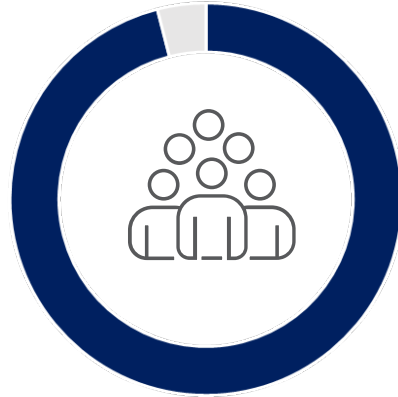


Young people restricted to their less than favourable home situations. Increased mental health, alcohol and drug usage, social isolation and loneliness. - **school**



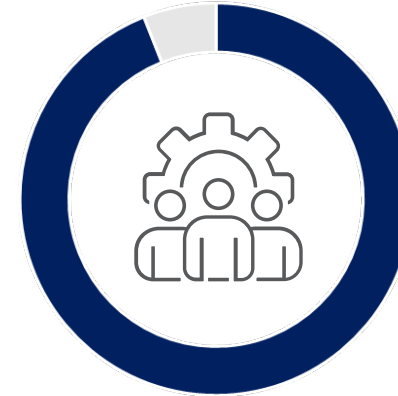
It is now harder to determine the safety of vulnerable children during the remote learning process. This means there are aspects of child safety that are not manageable as there is not always sufficient oversight to be able to do so. - **school**

Very high levels of engagement and participation with CSS continue.



Our school community is actively engaged with the CSS

96%



Governing body is actively engaged with the CSS

94%



CSS helped highlight the need for a culture of child safety at our school

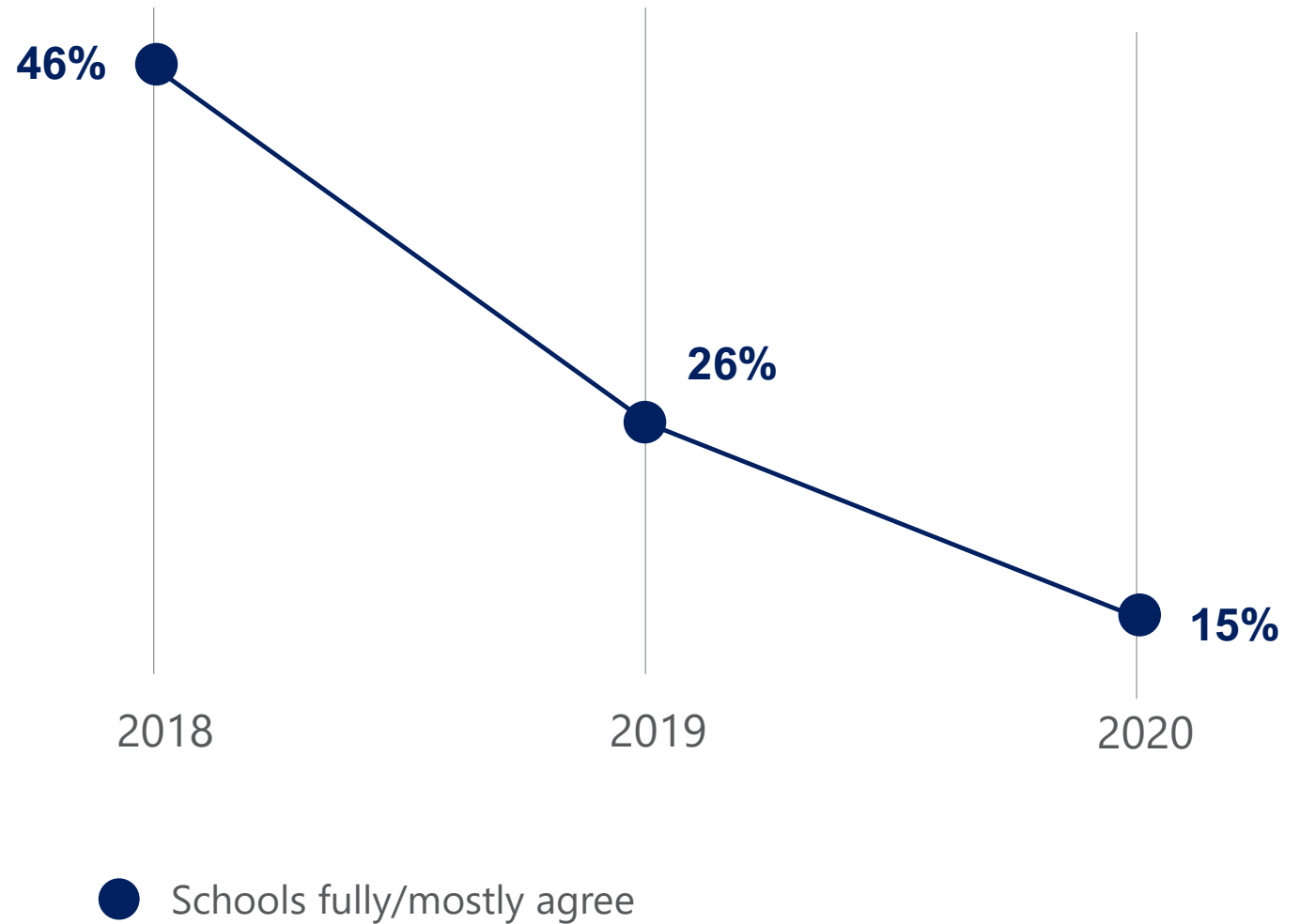
85%



The materials and support from the VRQA have been helpful for our school in adopting the CSS

87%

The proportion of schools requiring further support with the Child Safe Standards continues to fall.



Identified areas of further support



facilitation



communication



support



Resources to use to train and engage staff in an ongoing manner to implement the Child Safe Standards. - **School**



Mainly updates each year would be helpful. - **School**



Regular professional developments to staff and the organisation on how to implement and meet the standards. - **RTO**



There needs to be examples for children with very complex needs where staff are at risk and so is the child ... a framework of decision making that allows for flexibility so that students do not get caught being unable to access school. - **School**



Feedback on our policies and procedures and what we should include in student handbooks. - **RTO**



A support line to consult for individual cases. - **School**



Section 08: Minimum Standards





83% of schools agree that the requirements to comply with the minimum standards are **clear and consistent**.

Seven out of ten (71%) say they do not require further help or support to comply with the Minimum Standards.



● net agree

EPS 20A The requirements, including evidence required, to comply with the Minimum Standards is clear and consistent; EPS 20B My school or organisation does not require further help or support to comply with the Minimum Standards. Base: Have school or non-school senior secondary provider function (n=180 schools)

Those requiring further support with the minimum standards are seeking additional information in the form of advice and examples.



communication



Regular webinars on the minimum standards to provide clarity and ongoing support on what is expected of us and how to meet the requirements. –
Non-School Senior Secondary Provider



Providing templates or examples for documentation and processes would be helpful. - **School**



It would be useful to have a regulatory timeframe provided regarding compliance obligations and more detailed fact sheets/information sheets which make specific reference to the legislative requirements. -
School

Section 09: Home Educators



The VRQA's registration processes were well received by most Home Educators.

Improvements were recorded for **preparing** and **completing** learning plans compared to 2019.

Responding to the VRQA's requests for more information



Completing the application form



Understanding what was involved in the application process



Completing the VRQA learning plan template



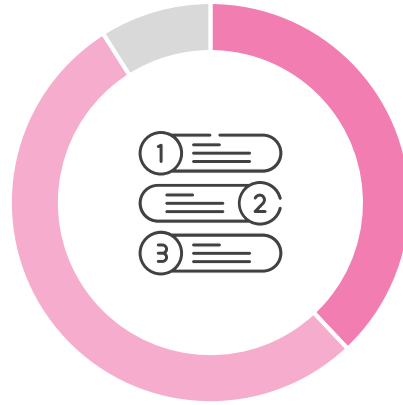
Preparing a learning plan



Review process: Most home educators who participated in a review found the process easy.

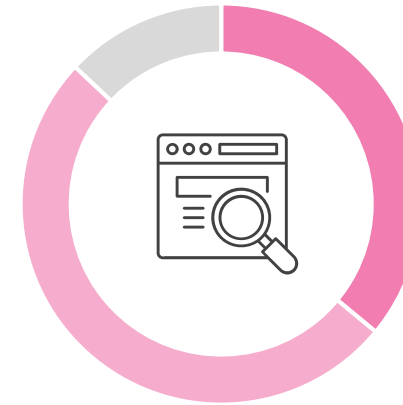
Falls were observed on ‘**working with the VRQA reviewer**’ in 2020 – down from 93% in 2019. Though this may be related to changes in processes due to COVID, as 30% of respondents labelled this question as N/A.

Only 1 in 20 were involved in a home schooling review this year



Understanding what was involved in the review process

91%



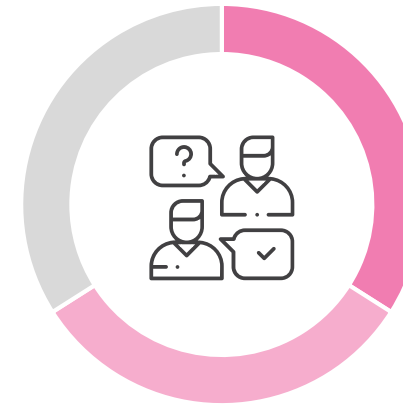
Accessing information and support for the review

87%



Compiling evidence for the review

87%



Working with the VRQA reviewer

66%

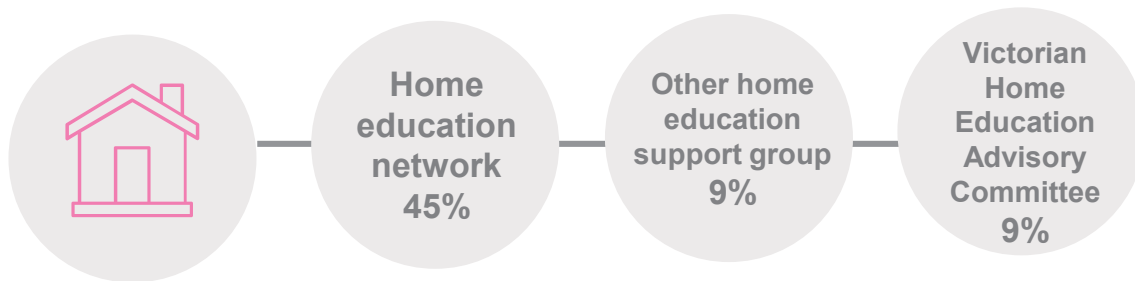


Review process: The VRQA's resources continue to be a key source of information.

Most common of the VRQA resources



Other home education networks



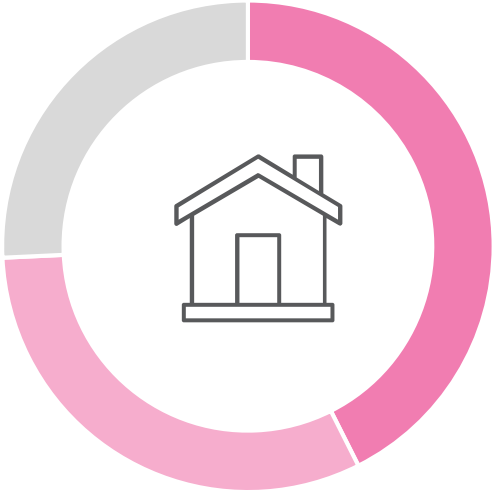
...They regularly post updates and information and briefs and such...I think that's fantastic. Instead of just waiting for an email, they have integrated that. Actually keeping the home-schooling community updated in a more real-time way...
(The VRQA Facebook page)



I spoke with home-schooling friends that had previously been reviewed for advice and insight to their experience.

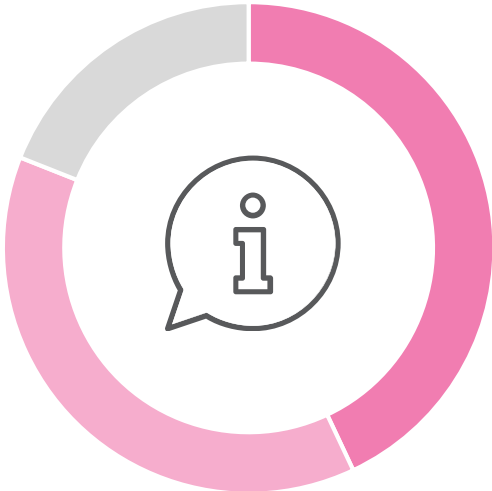
Review Process: High ratings were maintained for provision of information during the interaction.

Potentially, restrictions on how reviewers can engage may have contributed to 'understanding and accommodating your approach' dropping to 74%, down from 91% in 2019.



Understanding and accommodating your home education approach

74%



Providing you with clear information of what is required at review

81%



Review process: Need for prompt feedback



Our review has been submitted (in June) and received by VRQA but I've not heard anything since.



Not enough communication, I'm still waiting for my results after stating that I would like to be reviewed in June.

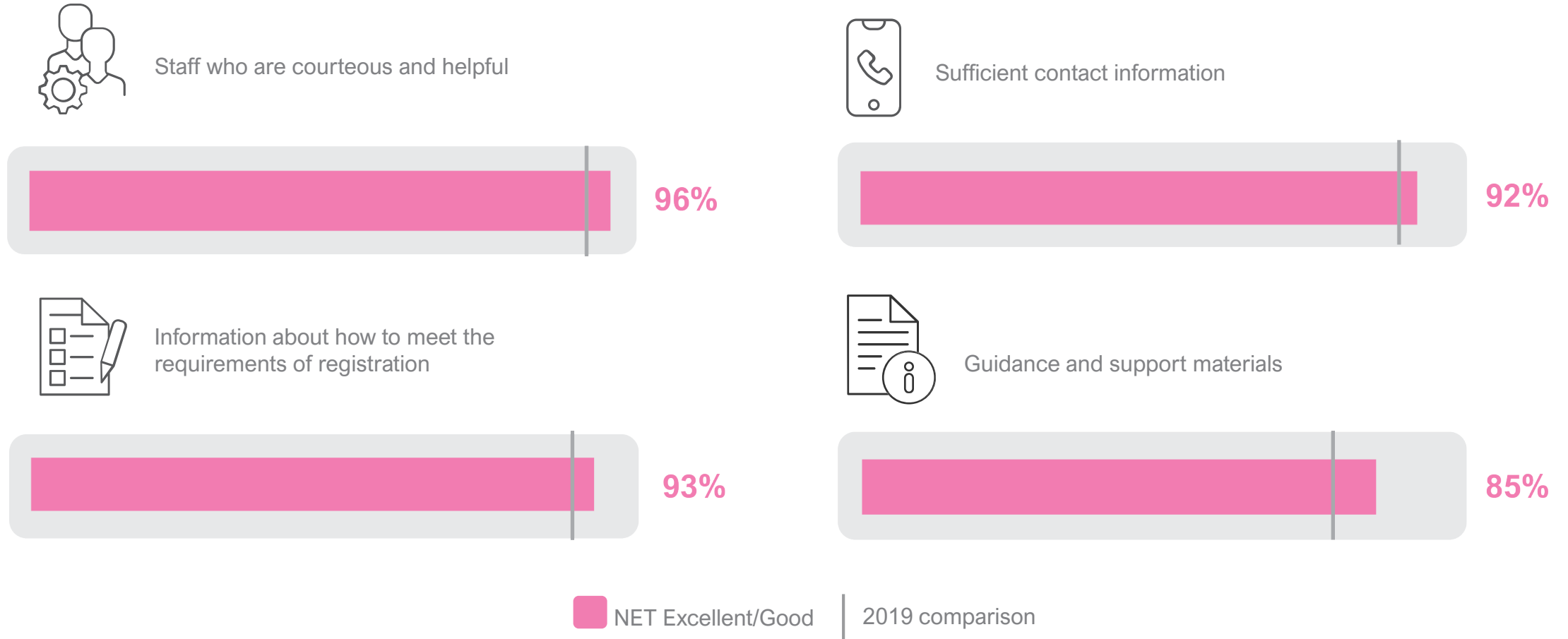


I have not heard back from the review process. I did follow up, I think in August, after I realised that we hadn't heard anything but I did not get a reply. I assumed everything must be ok.

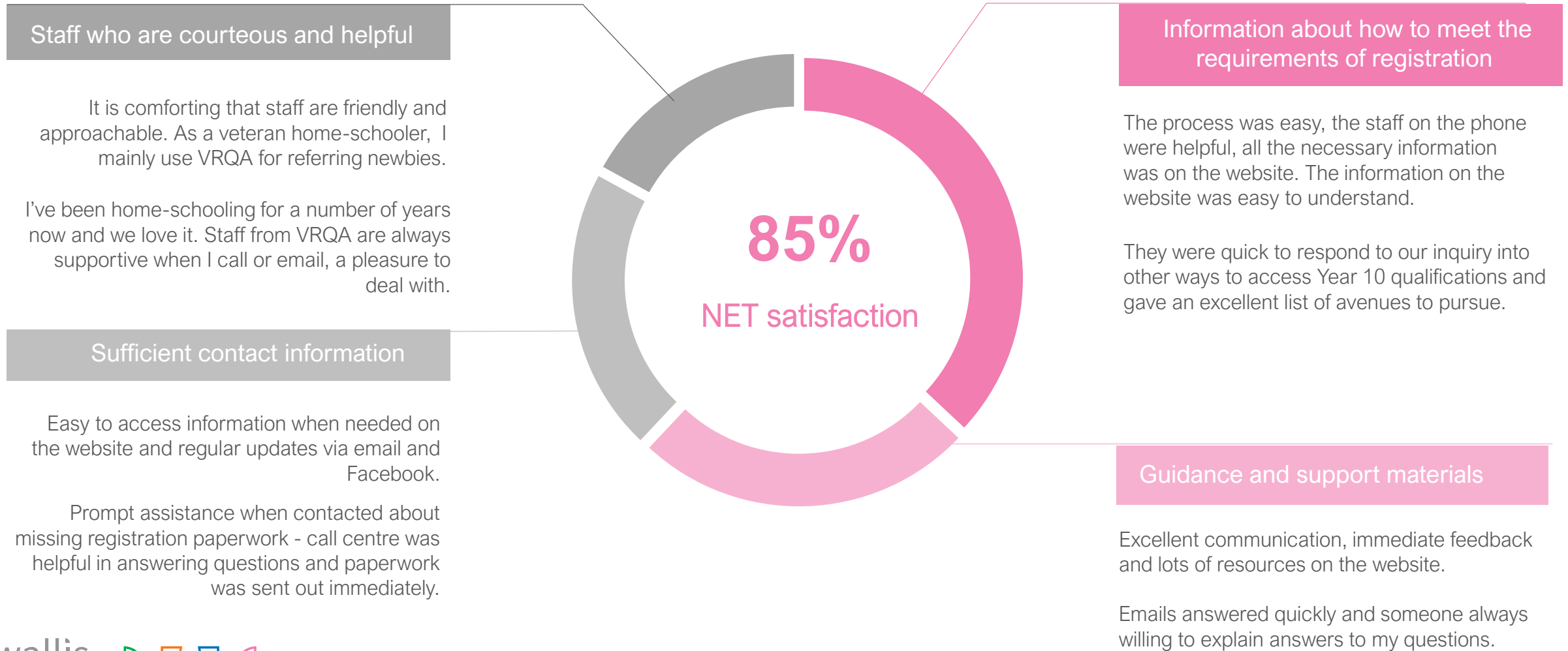


I emailed in June I think to see if I could have the review earlier or later because I was having a baby when my review was due in August. I sent everything off via email required for the review and haven't heard anything or any feedback.

Outstanding ratings of the VRQA's performance, with increases across all measures in 2020, particularly on guidance and support materials.



Primary levers for improving satisfaction among home educators.



wallis.

