



## Initial Access to Validation Quality and Capacity Panel Report

### Assessment of Capacity and Approval of QA Procedures

#### Part 1 Details of provider

##### 1.1 Applicant Provider

Registered Business/Trading Name:	Accounting Technicians Ireland
Address:	47/49 Pearse Street, Dublin 2
Date of Application:	13 June 2017
Date of panel meeting:	29 – 30 June 2017
Date of site visit (if applicable):	N/A
Date of recommendation to the Programmes and Awards Executive Committee:	14 July 2017

##### 1.2 Profile of provider

Accounting Technicians Ireland (ATI) is a trading name of the Institute of Accounting Technicians in Ireland (IATI), which was founded in 1983 and is a partner body with Chartered Accountants Ireland and an associate member of the International Federation of Accountants (IFAC).

ATI is a professional membership body providing an internationally recognised accounting qualification across the entire island of Ireland. ATI's qualification is delivered through a well-established network of 70 Approved Partner Colleges throughout the Republic and Northern Ireland. ATI's Approved Partners range from Institutes of Technology (such as Cork Institute of Technology and Institute of Technology Tallaght), to Education & Training Boards (ETBs) and well-recognised private colleges (e.g. Griffith College Dublin).

The mission of ATI is the "development, guidance and representation of our students and members as specialists par excellence in the arena of accounting, business and finance". There are over 5,500 fully-qualified active Members of the Institute and on an annual basis ATI would have approximately 4,000 students registered on its programme across the island. ATI's extensive member network includes four active District Societies (Leinster, Ulster, Munster, Western).

ATI's main offices are located at Chartered Accountants House on Pearse St in central Dublin, and this is where its 24 full-time staff are based.



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ATI is a registered charity and a not-for-profit company limited by guarantee. It is governed by a Board of Directors which has ultimate responsibility for oversight and strategy of the organisation. The Board has established a number of committees with delegated responsibility for ensuring quality in all areas of the organisation

ATI is also a recognised Awarding Organisation in Northern Ireland, regulated by the Council for Curriculum, Examination & Assessment (CCEA). Prior to 1st May 2016, regulation was carried out by Ofqual.



## Part 2 Panel Membership

Name	Role of panel member	Organisation
Jack O’Herlihy	Chair	Retired Head of Development in Letterkenny IT.
Keith Brumfitt	QA Expert	Education and Training Consultant, EQAVET
Angela Whiteside	QA Expert	Retired Quality Improvement Adviser for Dept. for Employment and Learning in Belfast, now the Department for the Economy
Dr. Pat O’Connor	Subject matter expert - Business Programmes / QA	Head of School of Business & Humanities, IT Blanchardstown
Prof. Pauline Weetman	Subject matter expert - Accountancy Programmes	Emeritus Prof. of Accounting, University of Edinburgh Business School and currently Chair of the Academic Panel of the Institute of Chartered Accountants of Scotland
Sylvia Boylan	Learner Representative	Accounting Technician, Anne Brady McQuillan’s Accountants

## Part 3 Findings of the Panel

### 3.1 Summary Findings

The panel notes this is Accounting Technicians Ireland (ATI)’s second submission for QQI approval of its quality assurance procedures. It acknowledges the time, effort and resources committed by ATI to improving the quality assurance system.

ATI has demonstrated a willingness to accept the advice given by the panel and by the Approvals and Review Committee (ARC) last year and has used them to re-evaluate and rebuild their quality assurance system. There is now a much fuller acceptance of their quality assurance responsibilities as a coordinating provider for an apprenticeship programme.

The panel did have advice, listed in this report, which they feel will improve further ATI’s quality assurance and, ultimately, the programmes and services offered to learners. However, the panel felt that overall, the system and resources to be deployed by ATI will have the capacity to implement and quality assure an apprenticeship programme validated by QQI.



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### **3.2 Recommendation of the panel to Approvals and Reviews Committee of QQI**

The panel recommends that the Approvals and Review Committee approve the draft quality assurance procedures of Accounting Technicians Ireland and permit it to submit to QQI for validation programmes which fall within the scope of provision listed in Part 7 below.



## Part 4 Evaluation of provider capacity

### 4.1 Legal and compliance requirements:

- 4.1.1(a) **Criterion:** *Is the applicant an established Legal Entity who has Education and/or Training as a Principal Function?*
- 4.1.2(a) **Criterion:** *Is the legal entity established in the European Union and does it have a substantial presence in Ireland?*
- 4.1.3(a) **Criterion:** *Are any dependencies, collaborations, obligations, parent organisations, and subsidiaries clearly specified?*
- 4.1.4(a) **Criterion:** *Are any third-party relationships and partnerships compatible with the scope of access sought?*
- 4.1.5(a) **Criterion:** *Are the applicable regulations and legislation complied with in all jurisdictions where it operates?*
- 4.1.6(a) **Criterion:** *Is the applicant in good standing in the qualifications systems and education and training systems in any countries where it operates (or where its parents or subsidiaries operate) or enrolls learners, or where it has arrangements with awarding bodies, quality assurance agencies, qualifications authorities, ministries of education and training, professional bodies and regulators.*

### Findings

**Does the provider's application provide evidence that these criteria have been met?**

ATI has addressed the criteria above in its application form and provided evidence of its legal status as a registered limited company based in Ireland without subsidiaries. It has confirmed its compliance with applicable legislation and regulations.

It has supplied evidence of its legal standing and good standing with professional bodies and awarding bodies in both the Republic of Ireland and Northern Ireland.

It has also set out its relationships with partner organisations who will work with it in the delivery of its apprenticeship programme.

**Where criteria are not met, please identify and state the reason(s) why.**

The panel is satisfied that these criteria have been met.



## 4.2 Resource, governance and structural requirements:

- 4.2.1(a) **Criterion:** *Does the applicant have a sufficient resource base and is it stable and in good financial standing?*
- 4.2.2(a) **Criterion:** *Does the applicant have a reasonable business case for sustainable provision?*
- 4.2.3(a) **Criterion:** *Are fit-for-purpose governance, management and decision making structures in place?*
- 4.2.4(a) **Criterion:** *Are there arrangements in place for providing required information to QQI?*

### Findings

#### **Does the provider's application provide evidence that these criteria have been met?**

In its presentation to the panel, ATI demonstrated substantial financial resources and reserves. As part of its strategic plan for the next five years it demonstrated how and when its apprenticeship programme, if validated, will generate a surplus.

If approved as suitable for a new statutory apprenticeship by the Apprenticeship Council, state funding for the programme is guaranteed if validated. This funding will go to the ETBs to fund the delivery of the programme, but ATI will generate income from registration and exam fees as well as sales of textbooks etc.

ATI has proposed a governance structure for the oversight of its quality management. The panel has made some recommendations with regards to governance (see part 5 below) but on the whole is satisfied that the proposed system has the potential to provide adequate oversight and separation of academic and commercial decision making.

#### **Where criteria are not met, please identify and state the reason(s) why.**

The panel is satisfied that these criteria have been met.

## 4.3 Programme development and provision requirements:

- 4.3.1(a) **Criterion:** *Does the applicant have experience and a track record in providing education and training programmes?*
- 4.3.2(a) **Criterion:** *Does the applicant have a fit-for-purpose and stable complement of education and training staff?*
- 4.3.3(a) **Criterion:** *Does the applicant have the capacity to comply with the standard conditions for validation specified in Section 45(3) of the Qualifications and Quality Assurance (Education and Training) Act (2012) (the Act)?*
- 4.3.4(a) **Criterion:** *Does the applicant have the fit-for-purpose premises, facilities and resources to meet the requirements of the provision proposed in place?*
- 4.3.5(a) **Criterion:** *Are there access, transfer and progression arrangements that meet QQI's criteria for approval in place?*
- 4.3.6(a) **Criterion:** *Are structures and resources to underpin fair and consistent assessment of learners in place?*
- 4.3.7(a) **Criterion:** *Are arrangements for the protection of enrolled learners to meet the statutory obligations in place (where applicable)?*

**Findings**

**Track Record:** ATI has a long track record as an examining / awarding body working with colleges to enable learners to achieve its qualifications. It has recent experience of coordinating a non QQI accredited apprenticeship type programme (Praktikum) which involves the partners who would be involved in delivering a QQI accredited apprenticeship.

**Staffing:** While reliant on partner organisations, ETBs and employers, to deliver the training, ATI has a complement of staff dedicated to the management and quality assurance of an apprenticeship programme. In addition there is a significant staff complement of staff in its examinations, recruitment and registration systems who can support the apprenticeship programme as well as ATI's established programme.

The panel did seek commitment and supporting evidence from ATI that it would deploy ongoing resources to support proactive management of the quality assurance system. While it accepted that additional dedicated staff had been allocated to the programme and that other senior staff have part of their time allocated to the programme, the panel was keen to ensure that these arrangements are solidified and additional support is given to assist the work of the apprenticeship manager in monitoring the quality of the on and off the job aspects of the apprenticeship.

**Access, transfer and progression** arrangements are included in the ATI Draft QA Manual. How ATI deals and doesn't deal with the Recognition of Prior Learning and Learner Information was discussed. These were areas where the panel had advice for ATI as to how its systems could be enhanced.

**Assessment:** The panel meeting spent time focussing on the assessment arrangements currently in place and planned by ATI. While the panel had reservations about the conservative nature of the proposed assessment methodologies of ATI, it accepted that graduates of any Accounting Technician apprenticeship programme have to meet the expectations of the professional bodies if existing progression arrangements are to be maintained. While recognising that the employers have also expressed a preference for current arrangements, nonetheless, the panel felt that opportunities for a radical review of how some of the programme learning outcomes could be assessed had been missed.

**Protection of enrolled learners** requirements do not apply to apprenticeship programmes which are entirely state funded. Hence this topic did not form part of the panel's evaluation.

***Where criteria are not met, please identify and state the reason(s) why.***

The panel is satisfied that these criteria have been met.



#### **4.4 Evaluation of Capacity to provide the proposed education and training provision - Overall finding:**

The panel is confident of ATI's commitment to this programme and its capacity to coordinate its delivery and assessment. The panel was particularly impressed with ATI's acceptance and use of the findings of the quality and capacity panel in 2016. ATI has demonstrated significant progress in its understanding and implementation of its role as coordinating provider of an apprenticeship programme.





## Part 5 Evaluation of draft QA Procedures submitted by ATI

*The following is the panel's findings following evaluation of Accounting Technicians Ireland's quality assurance procedures against QQI's Core Statutory Quality Assurance Guidelines (April 2016). This section of the report follows the structure and referencing of the guidelines.*

### 1 GOVERNANCE AND MANAGEMENT OF QUALITY

#### **Panel Findings:**

As an established entity, ATI is extensively audited by external regulatory authorities (CEEA), quality standards organisations (ISO), and industry-specific representative bodies (IFAC) and has achieved consistently positive reviews. Its track record, industry recognition, financial stability and extensive member network are testament to its strong governance and quality management.

The focus for the panel however was on its governance of an apprenticeship for which it would be the coordinating provider as this was an area where significant need for improvement was identified by the panel in 2016.

It was evident that ATI has devoted considerable thought as to how its governance system should be structured to reflect its role as a coordinating provider. Its governance now includes:

- Consortium Steering Group
- Programme Board
- Education Board
- Assessment Board

ATI observes the principle of externality and all panels and boards with a role in governance and/or programme management include external members. It is recruiting a full time Programme Director for the apprenticeship programme. This role will be part of the internal management of ATI as the individual will have a role in relation to the governance boards and committees. In addition, there is a full time Apprenticeship Manager responsible for supporting learners and monitoring the quality of providers.

In its self-assessment report, ATI recognised its new structures and systems need to be integrated with existing governance and quality assurance systems (ISO). It has therefore committed to reviewing its QA system annually at a minimum.

The panel accepted that the structures are significantly improved and have the potential to oversee and maintain quality. However it identified areas for improvement:

- The composition of the Programme Board and the Consortium Steering Group is too ETB focused at present and should have more employer representation to maintain the employer led focus of the apprenticeship. This is a rebalancing rather than a radical restructuring and it was accepted that employers will be more involved as the programme becomes more established.
- There are procedures to collect a lot of data from learners, delivering colleges and employers. Making the best use of this data, and acting on the analysis of the findings is crucial to improving quality. It will be important to develop good reporting systems so that useful and timely



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information is passed to the appropriate board in order for them to take action which improves the quality of the provision i.e. Programme, Education or Assessment. Procedures should identify what information is in each report, what frequency and to which governance board the report is presented



## 2 DOCUMENTED APPROACH TO QUALITY ASSURANCE

### **Panel Findings:**

The documentation which details ATI's quality assurance policies, procedures and systems is now housed in a Quality Assurance Manual (QAM), which reflects the headings in QQI guidelines. This is in response to a recommendation from 2016 and it is a significant improvement. The QAM will be subject to ATI's document management system and will be updated annually by the Programme Director following an annual programme /QAS review and the publication of ATI's annual Quality Report.

The panel had some concerns on reading the documentation which were alleviated when they were able to speak directly to ATI representatives and evidence was provided. This was an issue with both the quality assurance and the programme documentation i.e. there are some elements of the system which are not fully documented.

The panel recommends that the quality assurance documentation be reviewed to ensure that it is reliable and effective in communicating the roles and responsibilities of ATI as an organisation and that of its staff, governance committees and partner organisations. The information provided about the roles and responsibilities of the Programme Director and Apprenticeship Manager probably undersold what they do. When described in detail at the panel meeting, these roles gave reassurance to the panel.

There are some areas which still need to be documented i.e. the rules and systems of grading / classification of learner outcomes in individual modules and the award. It was accepted by the panel that this is an area where further guidance may be required from QQI.

Overall, it was acknowledged by the panel that the QAM was constructed to be an 'active' document which will develop as ATI develops as a provider.



### 3 PROGRAMMES OF EDUCATION AND TRAINING

#### **Panel Findings:**

The proposed Accounting Technician Apprenticeship programme is the entire focus of ATI's quality assurance system at present.

#### **Programme Design and Development**

The panel acknowledged the context in which the new programme is being developed i.e. ATI reported that it felt it did not have much room for innovation or flexibility in its programme design or assessment given the existing expectations of employers and professional bodies based on the established Accounting Technician programme.

However the panel strongly encouraged ATI to consider in any review of the programme, how it will ensure and enhance the employer led nature of the apprenticeship model and how this could be reflected in the programme. For example, could there be less focus on the exam based assessment and more thought given to how some at least of the learning outcomes could be assessed solely on the job?

It is very important that the direction of travel in programme design is from the Occupational Profile to MIPLOs to Assessment rather than the reverse.

The panel did recognise that the development of this apprenticeship will enhance the opportunities of many, including school leavers, to access a well-recognised qualification in a new way.

#### **Access, Transfer and Progression**

QQI's requirements for Access, Transfer and Progression are met by ATI's systems. These are dealt with more fully in the programme validation documentation.

There is potential for improvement in the following areas:

- RPL: it is not clear that any recognition of prior experiential uncertified learning is available to learners.
- Learner information needs to be comprehensive – especially on what would be the time, effort and commitment expected from each learner. This would be particularly important for school leavers.
- Transfer and progression opportunities which may be broader than what is available within the established programme need to be investigated

**4 STAFF RECRUITMENT, MANAGEMENT AND DEVELOPMENT****Panel Findings:**

ATI's own procedures for recruitment, management and development of its staff are comprehensive.

However the panel was of the view that there is not enough clarity in the quality assurance procedures as to how ATI manages the allocation and monitoring of ETB staff who would be working on the apprenticeship programme coordinated by ATI.

Information was given to the panel about 'checking of tutor credentials' which did not seem to be in the documentation even though it was the practice.

It remains a critical part of the quality assurance model, that the coordinating provider must have the procedures to ensure that

- (i) appropriately qualified staff are allocated to the programme by colleges and employers
- (ii) contingency plans are in place to provide cover for staff should they be absent or, in the on the job context, a workplace mentor is moved to another role.
- (iii) the effectiveness of these tutors and mentors is monitored and reported on.

ATI recognises this and states in its self-assessment report:

*'Following approval of ATI's quality assurance of policies and procedures and the validation of the ATA programme, ATI will need to continue to evaluate its internal capacity to meet all the obligations of being a coordinating provider and need to build this assessment into its annual performance appraisal systems and budgeting.'*



## 5 TEACHING AND LEARNING

### **Panel Findings:**

The panel found that the approach to Teaching and Learning in ATI is still influenced by the traditional methodologies employed in the established Accounting Technician programme and that further work needs to be done to introduce new and innovative methods appropriate to a new, work based programme.

It is acknowledged that ATI are doing some 'reverse transfer' by plans to amend the established programme through the introduction of more work based assessment. It also has plans to increase the role for blended learning.

Both the panel and ATI recognised the value of national and international networking and benchmarking as a way of building capacity in workplace learning and assessment strategies .

While the panel recognised the use of individual training plans for on the job training, it was not clear how individualised they were or how they took account of learning styles. It was recommended that this area be developed further.

## 6 ASSESSMENT OF LEARNERS

### **Panel Findings:**

As an examining body of long standing and high repute, ATI has very good procedures for fair and consistent assessment of learner achievement and is recognised as such.

ATI has worked on the enhancement of its workplace assessment so as to have

*'tasks that appropriately reflect the specified learning outcomes, briefs with which both the workplace mentor and apprentice can effectively engage, and, critically, academic standards that ATI can quality assure.'*

ATI has also

*'appointed workplace assessment moderators to moderate work-based assessments based on ATI's sampling strategy. These moderators, who must have experience of work-based learning and assessment, will review a sample of assessment submissions to check for consistency and fairness in marking both within and between employers and to confirm that the assessment instruments are fit for purpose.'*

The panel acknowledged the steps ATI has done to promote and quality assure its workplace assessment. It feels that more can be done to integrate the assessment and moderation of on the job and off the job learning and to reduce the focus on exams. It proposes that ATI consider using subject experts and external moderators who would have responsibility for both learning modes. This would enhance the profile of on the job learning and assessment in the spirit of apprenticeship.

The panel also states that ATI needs to document further its rules for final grading taking into account opportunities to repeat exams and assessment tasks on the job.

**7 SUPPORT FOR LEARNERS****Panel Findings:**

ATI have worked hard to put supports for apprentices into place i.e. in their self-assessment report, they state:

*'In designing and implementing learner supports for the apprenticeship programme, ATI works closely with the collaborating providers (colleges and employers) to ensure that all providers (coordinating and collaborating) are involved in the support of the apprentice at all stages of the programme and that all resources and supports, irrespective of who is providing them, are fit-for-purpose and accessible. ATI provides training and support to the tutors, college and workplace mentors to ensure they are aware of the supports available to both them and the apprentice.*

*Learners are informed about the full range of services available to them at induction, in the Apprentice Handbook, information contained on the ATI website and ongoing basis by their tutors, mentors and members of the ATA team.*

The panel found evidence of this in the documentation and meetings with staff and partner provider organisations.

Given the tri-partite relationship a learner is interacting with on the programme, it is essential that he or she knows who to contact and in what context. The information to learners in handbooks etc should be reviewed regularly based on information gained through monitoring feedback from all parties involved in the programme.

**8 INFORMATION AND DATA MANAGEMENT****Panel Findings:**

ATI has well established systems for maintaining records of students' registration, progress and completion. These will need to be adapted to encompass reporting to Solas and QQI and this is acknowledged by ATI in its self-assessment.

A new CRM system is being developed which will result in a single system for data, information and relationship management.

Such a system will be very important for the monitoring and auditing responsibilities associated with the role of coordinating provider.

**9 PUBLIC INFORMATION AND COMMUNICATION****Panel Findings:**

ATI have good systems for providing information about their programmes and services. Its website <http://www.numbersindna.ie/> is comprehensive.

It is currently developing an Apprentice Handbook, which is viewed as a key document in providing information to apprentices. ATI is designing the Handbook to act as a single repository for information on all aspects of the programme. The Handbook will be available for the 2017/18 academic year and will be updated annually thereafter as part of our annual review of programme materials.

**10 OTHER PARTIES INVOLVED IN EDUCATION AND TRAINING****Panel Findings:**

As coordinating provider in an apprenticeship programme, ATI has responsibility to ensure that all parties involved are adhering to their responsibilities in respect to programme quality. This was the main area of concern expressed by the panel in 2016 i.e. that ATI did not have the procedures or instruments to take full responsibility for the quality of its programme as delivered in and by its partner organisations.

ATI has taken significant steps since then to enhance its governance structures and procedures in such a way as to enable it to fulfil its responsibilities as coordinating provider. In its self-assessment report it states:

*'ATI has the same responsibilities to all learners, whether it delivers the programme directly or in collaboration with providers, and it must monitor the achievement of programme objectives and learner satisfaction on programmes delivered in collaboration with other providers.'*

*The relationship between ATI and employers is fully documented in a Memorandum of Understanding which each employer is required to sign before being ratified as a collaborating provider. They will also be vetted by SOLAS to become a Statutory Apprenticeship employer and be subject to their ongoing quality assurance process and Code of Practice. This will be supplementary to ATI's role.*

*There are new procedures to approve, quality assure, monitor and evaluate the performance of collaborating colleges and the college itself and then its respective staff who deliver the off-the-job elements of the programme. The Roles and Responsibilities of each of these positions are set out and a formal agreement with the college is documented through a Memorandum of Understanding signed by the relevant Education & Training Board. The college mentor has a critical role to play in ensuring apprentice's progress; acting as both tutor and providing pastoral care and attending workplace QA visits.'*

The panel acknowledges these changes and the procedure documentation which underpins them in the Quality Assurance Manual.

The panel did have concern that a lot of responsibility to ensure the effective implementation of these procedures falls on the apprenticeship programme manager. It has asked the organisation for a commitment that sufficient resources will be deployed to support the APM to proactively audit the quality of provision in the partner organisation in a scheduled manner.



**11 SELF-EVALUATION, MONITORING AND REVIEW*****Panel Findings:***

ATI has established a system to maintain contact with all the parties involved in the programme i.e. apprentices, colleges and employers and to monitor provision there.

Given the multi-party nature of an apprenticeship programme and the layered nature of its governance system, it is important that, as the coordinating provider, ATI has access to relevant and appropriate information at the right time and in the right decision making forum. i.e. from a quality assurance perspective, it will be critical that the right data is collected and the appropriate information generated and sent for decision / action to the appropriate forum. And these actions are recorded and their impact monitored.

Decisions need to be made by ATI on what indicators to monitor, how and when to monitor them and what to do with the information gathered.

The panel recommends that ATI builds on existing practice to establish a clear schedule to ensure that it consistently and proactively monitors activity and generates the information it needs to assure the quality of its programmes in a timely manner i.e. not to wait till the end of a programme or a year.

It further recommends that such a schedule of monitoring / proactive quality audits be buttressed by resources so that the apprenticeship manager is adequately supported to carry out such a role.

The panel noted the quality of the self-assessment report submitted as part of ATI's submission. They found it very useful and demonstrated the capacity to honestly appraise current strengths and areas for improvement, a key characteristic of any quality assurance system.



## Evaluation of draft QA Procedures - Overall panel findings

While identifying some areas for improvement, the panel recommends to QQI that the draft quality assurance procedures of Accounting Technicians Ireland be approved with a scope of provision as set out below.

### Part 6 Changes to Quality Assurance Procedures

#### 6.1 Mandatory

1. Amend the procedure for self-evaluation, monitoring and review to ensure that the programme is reviewed comprehensively after its first intake has completed. This review should be agreed with QQI and be as broadly based as possible and consider all aspects of the programme, including teaching and assessment methodologies.

#### 6.2 Advisory

1. Rebalance the composition of the programme board and strategic governance group to have more of an employer focus than presently.
2. Initiate a system of proactive quality audits i.e. on the ground visits to colleges, employers and apprentices. These should be designed to monitor practice but also function in quality improvement and sharing of good practice.
3. Maintain and enhance the Schedule for Monitoring to ensure that monitoring activity is proactive rather than reactive. The schedule should be shared with the partner organisations. The current system of regular Apprenticeship Team Meetings to be continued.
4. Consider appointing subject matter experts for each subject to advise on content and learning outcomes and where they can best be achieved i.e. on and / or off the job.
5. Consider appointing an external moderator for each subject who will be responsible for overseeing assessment for each module and cover both on and off the job, rather than separating moderation on and off the job.
6. Rules for grade classification at both the module and award level, and handling of repeats need to be documented for learners and for QQI.
7. Ensure that learner information communicates the significant demands there will be placed on any learner in terms of time and effort.

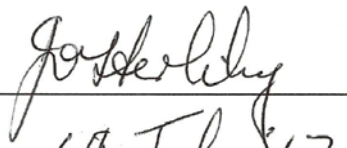


**Part 7 Proposed Approved Scope of Provision for this provider**

NFQ Level(s)	Award Class(es)	Discipline areas	Delivery Methodologies
Level 6	Major	Accounting	Apprenticeship

**Part 8 Approval by Chair of the Panel**

This report of the panel is approved and submitted to QQI for its decision on the approval of the draft Quality Assurance Procedures of Accounting Technicians Ireland

Name:   
1<sup>st</sup> July 17

**Annexe 1: Documentation provided to the Panel in the course of the Evaluation**

<b>Document</b>	<b>Related to</b>
Application Form	
Self-Assessment Report	
Teaching and Learning Strategy	
Quality Assurance Procedures	
Programme Documentation	

**Annexe 2: Provider staff met in the course of the Evaluation**

<b>Name</b>	<b>Role/Position</b>
Gillian Doherty	Chief Operations Officer, ATI
Carol Lacey	Interim Programme Director, ATI
Naomi Lopez	Apprenticeship Programme Manager, ATI
Lorraine Lawlor	Compliance Officer, ATI
Christine Mulcahy	Finance Director, ATI
Robert Cogill	Recruitment Manager, ATI
Aoife Kennedy	Recruitment Executive, ATI
John Fitzgibbon	FET Director, Cork ETB
Shira Mehlman	Chair, AT Apprenticeship Programme Board
Nick O'Callaghan	Programme Director, Cork College of Commerce
Shane McCarthy	Lecturer, Blackrock Further Education Institute
Jennifer Kelly	Workplace mentor, Mazars



### **Annexe 3: Response from provider to Panel Report**

**From:** Gillian Doherty [mailto:gdoherty@accountingtechniciansireland.ie]

**Sent:** Monday 3 July 2017 18:37

**To:** Walter Balfe <wbalfe@qqi.ie>

**Subject:** QQI panel documentation

Mr. Balfe

Please see attached the following attachments as per the panel's request on Friday:

1. *ATA 5 Year Financial Plan. This includes a summary of our 2016 financial statements which illustrate ATI's healthy financial position. The information should be deemed highly sensitive and has been password protected and I will text you the password.*

*Note that the Strategy 2020 apprenticeship figures presented on Friday include the HLA NI programme, are based solely on additional income and expenditure over and above the base budget and registration figures and income recognition is calculated differently.*

*For the purpose of this exercise we have included all income received at the start of each academic year and we have included all direct expense lines. Areas such as Business Development and Marketing cover the apprenticeship within their own annual budgetary processes.*

2. *ATA Team roles and responsibilities have been extracted out of the Quality Assurance Manual Appendices documentation and I have added in highlighted text to give a broader description of individual contributions.*
3. *We have made the necessary amendment to the learning outcome (12.) as requested.*

*I can confirm that Accounting Technicians Ireland will carry out a Programmatic Review of the AT Apprenticeship every 3 years in line with QQI's requirements and based on the advice of the panel.*

*In relation to ATI's application for Initial Access to Validation and for Programme Validation of the AT Apprenticeship, ATI acknowledges and appreciates the Advisory panel's recent recommendations and it commits to fuller consideration of these recommendations over the course of the coming year. ATI will advise QQI of any such implemented changes or improvements to the programme based on these recommendations.*

*ATI would like to also acknowledge the panel's significant collective expertise which has greatly benefited ATI in its ongoing self-assessment of the programme.*



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*If you need any further clarifications please let me know.*

*Thank you again for your support over the course of our application and I look forward to hearing from you shortly.*

*Best regards*

*Gillian Doherty Chief Operations Officer*

The provider response and documents were circulated to the entire panel. All responded and there was consensus that the panel recommended to QQI that the quality assurance procedures be approved as indicated by the Chair's signature.

The panel also recommended that the programme be validated.