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EMOLL

EFFICIENCY MEASUREMENT OF LIFELONG LEARNING, USING OF BALANCED SCORECARD CONCEPT

Efficiency Measurement of Lifelong Learning, using of Balanced Scorecard Concept

Progress Report

Public Part

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Beneficiary organisation:		EuroProfis, s.r.o.
Project coordinator:		Katerina Vyhnankova
Project coordinator organisation:		EuroProfis, s.r.o.
Project coordinator telephone number:		+ 420 774 711 679
Project coordinator email address:		katerina.vyhnankova@europrofis.cz

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Executive Summary

Wide range of companies and organizations needs to improve their competitiveness and efficiency through training of staff. Lot of money invested to this target is wasted due to lack of tools for measurement of efficiency of trainings and development activities, especially with accent on link between organization performance, strategy and trainings of individual employees. This project will respond to this gap in no-existence of clear methodology for educational efficiency measurement applicable for organization and companies standing out formal and non-formal life-long educational system, i.e. organizations with primary orientation to the industry, services, administration etc. Therefore the project will develop and verify the efficient methodology that is able to solve this problem found. This innovative methodology will be based on Balanced Scorecard (BSC), what is well known in the strategy management and used by efficient and competitive companies. The project products are developed to be used in management of organization in the business, non-profit and public sector.

The project partner consortium consists of seven organizations from six European countries. There is balanced representation of three elementary types of partners: higher education and research area, adult education and consultancy providers, representative of beneficiary organizations. This cooperation enables us to develop the products based on needs from practise, expertise with education and HR development, and in framework of standardized research and development methodology and level of knowledge on the one hand as well as to implement it to the target users on the second hand.

The project consists from two main phases – development and pilot implementation. It means during the first year of the project life the innovative EMOLL methodology was developed and for the second year its verification and exploitation is planned. The first phase is already finished, the products are in semi-version, i.e. waits for its verification in the practise, the feedback from implementation to target users will be processes.
Instead of these two main phases regarding to creating the products, the other important activities such as quality assurance and dissemination are continuously executed by the complete partnership.

Detailed list of results achieved during the first project period is available in the section 3 of this document; generally it is about entry analysis, development of methodology, its supporting tools and familiarization with them across the partnership.

More information are available at the project website: www.emoll.eu too.

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1. Project Objectives

The project aim is to react to the no-existence of clear methodology for measurement of efficiency of education and HR development in the organizations. Our effort is to develop the methodology and verify its implementation in the target organizations, i.e. companies or non-profit such as public administration institutions.

The main objectives are:

a) To develop the methodology for measurement of HR development and education efficiency in the organizations (with the respect to knowledge from entry analysis about approaches and tools existing).

b) To develop the computer-based simulation model for modelling of cost-benefit ratio concerning HR development and education in the organization. It is to be used by implementation to the target beneficiary.

c) To familiarize the consultants (EMOLL experts) with the methodology, supporting tools and implementation process.

d) To implement the methodology to the beneficiary organizations (12 in 6 countries). It is to verify the methodology and the process of implementation as well as to exploit the results to the beneficiaries.

e) To promote the results to the target groups.

The project products are oriented to two target groups:

a) Consultants (EMOLL experts):

They are experts/ consultants for the beneficiary organizations in the process of EMOLL implementation, they are external to the beneficiary organization. It means the trainers, lectors, consultants, facilitators etc., i.e. staff of educational or consultation organizations providing their expert services to the other organizations mentioned ad b), and they will be also the multipliers for this project results.

The basic approach is to have two various consultants working together in/for one target organization. The first is the expert for HR processes and the second is the expert for indicators (KPIs) setting and observation. They are able to provide and couch the implementation of EMOLL methodology and to impact the organization more effective and on complex way.

In the short-term approach they are the staff of project partners.

b) Management of organizations where the EMOLL method is to be implemented in practise.

They are the members of top-management of the organizations, human resources (HR) managers, specialist in in-service training, members of middle (line) management, i.e. staff of the organization who are responsible or decision-making in the field of management and development of human resources and shall closely cooperate by implementation of the methodology for evaluation and measurement of educational efficiency within the organization.

The EMOLL methodology shall impact their strategy management thinking and doing. They will be couched by EMOLL consultants to plan strategy for HR development and its efficiency. The BSC and EMOLL methodology will be introduced, the simulation learning environment will be used to present the complexity as well as the relations within the organization processes and other perspectives. The instruments for strategy management as strategy map and KPIs will be developed specific to each client-organization. The participation of each key staff is necessary.

2. Project Approach

The project approach is in principle obvious from the objectives and results planned. Generally we respect the principle of constructivism by creating the innovative methodology for the target users (companies, non-profit organizations, public administration, resp. their top management). It means we endeavour to find the approaches, methods and tools already used by them and develop this innovative methodology based on this background. Therefore we provided the entry analysis of methods of education efficiency evaluation and measurement, used in practise, in the begging of the project to identify the current situation in details, and to get the elementary fundamentals, grounding for the next development. In the other point of view we decided to use the concept of Balanced Scorecard (BSC) as a background, since BSC is widely known and used in the potential target group as a method for strategic planning and management used align the business activities to the vision and strategy of the organization and monitor organizational performance against strategic goals, in addition it works with metrics – key performance indicators from the various fields of organization life. For these reasons the BSC is acceptable background for the target users (organizations).

The EMOLL methodology is a consultancy product and cognitive-based method. Its implementation to the target users (beneficiary organizations), what is one of the main project results, is based on close cooperation of the consultant (EMOLL expert) with top management; it´s not about train them, but more about couch them. The customized products, specific to each target user are the relevant products; that´s why the definitive list of KPIs (output D3) for general use cannot be prepared. Each beneficiary will create his own way and measurable indicators for improving own strategy and performance.

The approach of EMOLL is based on the Balanced Scorecard methodology and its purpose is to elaborate the KPIs (key performance indicators) in the field of efficiency of HR development. The project team combines BSC structure of four perspectives (Learning to growth, Internal processes, Financial perspective, Customer perspective) with widely known methods and tools for training evaluation and efficiency measurement (mainly Kirpatrick´s evaluation model and ROI model (Return of Investment) after J. Phillips). The instruments to be set up by implementation phase specifically to each target organization are: strategy map, set of KPIs as well as its monitoring and evaluation (will be described and verified during the pilot implementations in 2012). Strategy map is the instrument for strategy management and shall be planned and used by top management of the organization. It shows the key strategy topics in connection to the organization´s vision; the topics are devided in four mentioned perspectives. In the EMOLL project our approach is to cascade the BSC method and perspectives to the HR field and set the strategy topics as well as its elaboration in particular KPIs concerning HR development, HR processes, its impact to clients and financial efficiency.

In addition we prepared the simulation model – it is computer-based “management flight simulator” what will be used for learning about EMOLL methodology, to imagine the complexity of organizational reality and behaviour. The simulator works with dynamic scorecard strategy map and basic KPIs. It can show the differences between planning and management without or with specific indicators for HR field.

Considering the continuous project activities supporting the high-level quality of the results - such as quality assurance and dissemination, the strategies are planned and continuously executed. The quality plan is internal product for the project partnership only.

The dissemination strategy has three main aims:

a) To short-time clients (pilots),
b) To long-time clients, i.e. promote new product to the potential target group
c) To wider public – elementary publicity

Because this is the type of development project, both of a and b are the most important to verify and ground the project products, thus the most of dissemination activities planned are oriented to this project target group.
Considering the timing, the dissemination is starting in bigger amount now after development phase is finished for the reason to share only finished and internally approved results and to avoid of content-misunderstanding in case of not completed product. The dissemination to both of short- as well as long-term target users is one of the challenges for the second project phase.

3. Project Outcomes & Results

After the 1st phase (1st year of the project) the methodology as well as supporting tools are drafted and ready for pilot implementation and verification.

The main achievements and results done till 9/2011 are:

a) The entry analysis of existing approaches and tools for efficiency measurement of education in organizations

The analysis was done in the beginning of the project to identify the methods and tools widely used and known for evaluation and measurement of efficiency of education. The survey was done in each partner country primary as desk research and elaborated in selected cases as in-depth analysis. In order to compare the data a standardized "Evaluation form Trainings' efficiency measurement method" was created. The analysis is based on comparison (pros and cons of each method; and to compare it with the method of Balanced Scorecard (BSC)).

b) The innovative EMOLL methodology developed

EMOLL is innovative methodology for efficiency measurement of education and HR development in organizations, using of Balanced Scorecard concept.

Methodology and working approach is described in Unit 2 - Project approach, mainly in 2nd and 3rd paragraph.

c) The description of innovative EMOLL methodology

The approach of EMOLL and methodology is presented in this report. It consists of 3 main parts: a) the summary of widely used methods and tools for evaluation of education and its efficiency, b) principles of Balanced Scorecard, c) presentation of EMOLL method for evaluation and measurement of education and HR development..

d) The packet of KPIs for inspiration

KPI means "key performance indicators". KPIs shall be customized, created during the implementation process specifically to the target organization. The example of its design (kinds and structure of information) is attached to the report Description of EMOLL methodology. They are divided in 4 perspectives (Learning to Growth, Internal processes, Finance, Customer) and connected with the issue of HR development efficiency.

e) The computer-based simulation model

This instrument as management flight simulator will be used for learning about BSC/EMOLL by managerial game. It includes key performace indicators, strategy map and relations between measures. The example of imaginary industry company is used and the "players" shall make strategy decisions (e.g. internal and HR processes, aims for products and to clients etc.) and manage the life of this company. He/she can observe the quantified results (financial and customer satisfaction).

f) **The consultants (EMOLL experts) trained both in methodology as well as using of simulation model**.

The training was held in September 2011 for internal project team.

The products a + c (analysis, methodology description) are for public use and available on the project website: www.emoll.eu

The other products (d, e) are connected with the complete implementation process, therefore are available for each potential beneficiary organization. Please contact us in case of your interest (the contacts to co-ordinator as well as each partner are available on the project website).

4. Partnerships

Considering the project aims to analyze, develop and implement the innovative methodology in the field of strategy and HR management, the involvement of various types of knowledge and expertise is necessary. We respond to this challenge by creating the partnership based on three types of organizations:

a) HEA/research to achieve the standards of research and development work;

b) Consultancy, adult education providers with experience and knowledge about the sector of target beneficiaries for improving of products, communication and implementation processes regarding the target sector.

c) Industrial company representing the target beneficiaries to give input needs, obstacles, challenge as well as continuous feedback to the development and implantation processes and products.

The partnership is based on 7 organizations from 6 European countries. The partners represent a) the HEA (higher education area)/research organizations – University of Blaise Pascal, FR; Scienter, IT; b) the consultancy and adult education providers – EuroProfis, CZ; CTC Polska, PL; G. Popov consulting, BG; OPAL, TR; c) the beneficiary company – TRW, CZ.

The European added value of the multi-country partnership is the purpose and the need of such methodology across the Europe. This lack is occurred in various environments and is confirmed by our entry analysis. On the other hand the participation of more countries brings more mind approaches and content-background, thus can contribute to improvement of the final products to be more universal, applicable and shareable.

5. Plans for the Future

The first project phase (development phase) is finished, the results are created (in some cases in semi-version, because waiting for verification in practise).

The second project phase (October 2011 – September 2012) is about involvement of the target group of beneficiary organization and implementation of the methodology developed.

The following activities are:

a) achieving the pilot organizations (12 organizations in 6 countries)
b) implementation process
c) verification of project results
d) dissemination

6. Contribution to EU policies

The project is about delivering the systematic approach in quality and efficiency of education in the organizations. By having complete overview and control of education activities in connection of visions, strategic goals as well as the financial investments (return of investments) the organization (potential project target group) is able to manage the HR development and education inside, control the investments to staff and plan as well as evaluate its performance. It is the project´s contribution to European policy in life-long learning as well as improvement of competitiveness of European companies (Lisabon, Education and training 2020,) by providing the instrument for support education performance to the organizations.

The project closely refers to the topic of quality in education, what is hot European education policy topic (Copenhagen declaration, Bruges communiqué). It

7. Extra Heading/Section

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