

THE COMMON ASSESSMENT FRAMEWORK AND THE BALANCED SCORECARD

MAASTRICHT (NL), 16-18 JUNE 2010



INTRODUCTION

The Common Assessment Framework (CAF) is a total quality management tool (TQM) based on the Excellence Model of the European Foundation for Quality Management and the model of the German University of Administrative Sciences in Speyer. It has been specifically designed for the development of TQM in public-sector organisations, starting with a self-assessment of their organisational performance. Since the launch of the first version in 2000 and the revised version in 2002, more than 1000 organisations in many European countries have implemented the CAF. Many lessons have been learned and have led to the third revised version, the CAF 2006. This CAF training will be based on the CAF 2006 version.

In the same period, the Balanced ScoreCard (BSC) was discovered by the public sector and adapted; it is now increasingly used. This training will discuss both tools, compare their specific characteristics and consider the most appropriate way to use them. Should the CAF and BSC be used in an integrated way or should they be used separately, each model delivering the benefits it was designed for? In doing so, how can both models complement each other?

Cases from different countries will illustrate how both tools strengthen the performance of public-sector organisations.

Objectives of the seminar:

At the end of the seminar the participants should have a clear understanding of

- the CAF 2006 quality model itself, the self-assessment process and the impact on the organisation;
- the Balanced ScoreCard as used in the public sector;
- the key points of difference in approach, process and benefits;
- their common features;
- how to implement them together.

As a result, the participants will be better prepared to implement the CAF and BSC in public-sector organisations.

The methodology used will be a mixture of presentations, specific case studies, experiences and interactive discussions in a combination of workshops and plenary sessions.

Profile of the participants

Trainers as well as quality and change managers involved in introducing quality management techniques and management tools in the public sector (ministries, agencies, regional and local administrations, education, police, health care, etc.).

Organisation

EIPA's CAF Resource Centre (CAF RC) Seminar Team:

Patrick STAES, Seminar Leader / Seconded National Expert,
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Nick THUIS, Seminar Leader / Lecturer, tel + 31 43 3296 253

Ann STOFFELS, Programme Organiser, tel + 31 43 3296 317

Email: caf@eipa.eu, website <http://www.eipa.eu/caf>

DRAFT PROGRAMME

Wednesday 16 June 2010

08.45 Arrival and registration

09.15 Welcome and introduction

Presentation of programme and speakers,
Principles and objectives of the training
Patrick Staes, Seconded National Expert, EIPA CAF Resource Centre, Maastricht (NL)

09.30 Introduction of the participants

Individual self-presentation by participants, including their interests and expectations
Patrick Staes

Module 1: The Common Assessment Framework (CAF)

10.00 Introduction to the CAF

Brief overview of the CAF model: its origins, aims and targets, as well as its structure, self-evaluation technique, and its implementation and results.
Patrick Staes

11.00 Coffee break

11.30 The CAF model in practice

Through a practical exercise in working groups, the structure and functioning of the model will be exposed by defining its different sub-criteria.

12.30 Learning lessons about the CAF in plenary

Exchange of conclusions from the practical exercise by the working groups in a plenary session so as to further develop insights into the model through discussion.

13.00 Lunch

14.30 Towards organisational improvement with the CAF

Ten steps to improve the organisation using CAF. The different steps are described as starting with the decision to launch the model, carrying out a self-assessment and implementing an action plan to improve the organisation.
Patrick Staes

Module 2: The Balanced Scorecard (BSC)

15.00 Using the Balanced Scorecard in the public sector

The general structure of the BSC will be presented and discussed. How can the BSC be used in public-sector organisations, and what are the advantages, pitfalls and shortcomings.
Nick Thijs, Lecturer, EIPA

15.45 Coffee break

16.15 Using the Balanced Scorecard in the Public sector

CASE TO BE DECIDED

17.45 End of the first day

Thursday 17 June 2010

09.00 The Balanced Scorecard: a strategic and/or operational management tool?

The evolution, and uses, of the BSC at managerial level will be presented and discussed, 2GC's 3rd Generation BSC introduced and not for profit sector challenges mentioned
William Barney, 2GC Active Management (UK)

09.45 Use of the 3rd Generation Balanced Scorecard: Where are you going - Destination Statements

What is a Destination Statement and how do you create one with a Management team?
William Barney

10.30 Coffee break

10.50 The 3rd Generation BSC in practice (Part 1)

Through a practical exercise in working groups, the structure and functioning of the 2GC model will be exposed by building a Destination Statement for a BSC.
Working Groups

12.20 Use of the 3rd Generation: What do you need to focus on - Strategic Linkage Models

What are the objectives for the short to medium-term? How to decide these using a cause and effect model divided between Activities and Outputs/Outcomes
William Barney

13.00 Lunch

14.30 The 3rd Generation BSC in practice (Part 2)

Carrying on with the practical exercise in working groups, they will now build a Strategic Linkage Model using the Destination Statement created before lunch.
Working groups

15.30 Coffee break

16.00 The BSC: from performance measurement to performance management

Developing the BSC also means formulating targets and determining indicators. The search for targets and appropriate indicators is the focus of performance measurement and allows steering and managing the organisation.
Nick Thijs

17.00 End of the second day

19.30 Social dinner

Friday 18 June 2010

Module 3: Improve the performance of your organisation with the CAF and the BSC

09.00 Introduction

09.15 The missing link – The CAF and the BSC in the Bygholm Agricultural College

Lotte Ipsen, Head of Education, Bygholm Agricultural College (DK)

DRAFT PROGRAMME (CONT.)

10.15 Coffee break

10.45 CAF & BSC: similarities, differences and common grounds

Discussions in working groups comparing the two models.

12.00 Drawing conclusions about the CAF and the BSC

13.00 Lunch

14.00 Combining the conclusions

Cross-connecting the CAF and the BSC

Nick Thijs

15.00 Improving organisations from a change management perspective

What should a large-scale improvement initiative focus on? What do the CAF and the BSC have in common from a change management perspective and what is typical for each of them in terms of communication, leadership, process control, etc.?

Tony Bass, seconded National Expert at EIPA (IE)

16.00 Overall conclusion and outlook

16.30 Evaluation and end of the seminar

GENERAL INFORMATION

Programme

The seminar will commence on Wednesday 16 June at 09.15 hrs and will finish with an evaluation of the seminar on Friday 18 June at 16.30 hrs.

Seminar venue

EIPA - Bordeaux Conference Room (1.16), O.L. Vrouweplein 22, NL-6211 HE Maastricht, Tel.: +31.43.3296222, fax: +31.43.3296296

Working language

The seminar will be conducted in English. Simultaneous interpretation into French will be provided - subject to a minimum number of participants requiring translation. Please indicate your language of preference on the registration form.

Fee

The participation fee is € 990 and includes documentation, 3 lunches, 1 dinner and refreshments. Accommodation and travel costs are at the expense of the participants or their administration.

EIPA offers its members a reduction of 10% of the registration fee. This reduction is available to all civil servants working for one of EIPA's member countries (i.e. AT, BE, BG, CY, CZ, DK, EE, FI, FR, DE, GR, HU, IE, IT, LT, LU, MT, NL, PL, PT, ES, SE, UK).

Officials of EU Institutions, bodies and Agencies which have signed a framework contract under LOT 8 are entitled to a 20% discount. This applies to officials coming from the following EU Institutions: European Commission, European Parliament, Committee of the Regions, Council of the European Union, European Economic and Social Committee; and European Agencies: Translation Centre (CDT), European Centre for the Development of Vocational Training (Cedefop), Education, Audiovisual and Culture Executive Agency (EACEA), European Agency for Reconstruction (EAR), European Environment Agency (EEA), European Food Safety Agency (EFSA), European Monitoring Centre for Drugs and Drug Addiction (EMCDDA), European Medicines Agency (EMA), European Railway Agency (ERA), European Training Foundation (ETF), European Union Agency for Fundamental Rights (FRA), Executive Agency for Competitiveness and Innovation (EACI), European Agency for Safety and Health at Work (OSHA). Other EU agencies not listed above may benefit from this discount through DG ADMIN, European Commission.

If you are eligible for a discount, please tick the box in the registration form. Please note that reductions cannot be accumulated. For more information, please visit EIPA's website: www.eipa.eu (FAQ-special discounts).

Hotel reservations

The European Institute of Public Administration will be pleased to make reservations for you at a hotel in Maastricht. We have made a block booking at:

Hotel Beaumont****, www.beaumont.nl, € 101,85 p.p.p.n.

Hotel Mabi****, www.hotelmabi.nl, € 98,50 p.p.p.n.

These prices include breakfast and tourist tax.

Should you wish to make use of this possibility, please indicate the name of the hotel and the dates of arrival and departure on the registration form. Payment is to be made directly and personally to the hotel on checking out. Should the hotel of your choice be fully booked, you will automatically be placed in the other hotel. Please note that if you register after the closing date, hotel reservations cannot be guaranteed.

Meals

The lunches will be served at the Institute's restaurant and dinner will be at a restaurant in town. Should you require a special menu (e.g. vegetarian, diabetic), please inform us so that this can be arranged.

Registration

Kindly complete the registration form and return it before 12 May 2010 to Ms Ann Stoffels, Programme Organiser, EIPA, P.O. Box 1229, NL-6201 BE Maastricht, tel.: +31.43.3296317, fax: +31.43.3296296, e-mail: a.stoffels@eipa.eu. You can also submit the online registration form which can be found on EIPA's web site: <http://www.eipa.eu>. (training)

Your name and address will be part of EIPA's database for our mailing purpose only. If you do not want to be included in our mailing database, please tick the box in the registration form.

Confirmation

Confirmation of registration will be forwarded, together with other relevant details, to participants on receipt of the completed registration form, provided we have sufficient participants.

Payment

Prior payment is a condition for participation. Please indicate the method of payment on the registration form. In any case, the participant or his/her administration will receive an invoice for the payment of the registration fee. For cancellations received in the two weeks prior to the seminar we will have to charge an administration fee of € 150 unless a replacement participant is found.

Cancellation policy

EIPA reserves the right to cancel the seminar up to 2 weeks before the starting date. EIPA accepts no responsibility for any costs incurred (travel, hotel, etc.). For EIPA's cancellation policy, please visit our website www.eipa.eu (legal notice).

REGISTRATION FORM

" THE CAF AND THE BALANCED SCORECARD" - Maastricht, 16-18 June 2010

Surname: Title: M/F
First name:
Current position:
Organisation:
Department:
Work address:
Postal code & town: Country:
Tel. no: Fax no:
E-mail address:

Language skills: **English:** active passive none **French:** active passive none
Language preference: English French

Payment p:\1020601

The participation fee includes participation in the seminar, documentation, 3 lunches, 1 dinner and beverages **€ 990**

Discount 10% (Please check first the conditions at www.eipa.eu (FAQ – special discounts)) discount

Method of payment

Bank transfer

The participants or their administration will receive an invoice for the payment of the registration fee.

Invoice address (if different from the abovementioned address):

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E-mail:

Credit card

American Express Card Eurocard/Mastercard Visa Card

Card no.: Expiry date: /

Name Card holder: (in case this differs from above)

Address Card holder: (in case this differs from above)

Postal code: Country: (in case this differs from above)

Card Validation Code: (the last three digits on the BACK of your card)

(Exempt from VAT by virtue of Article 11, para. 1 (o), subpara. 2 of the Dutch Law on VAT of 1968)

HOTEL RESERVATION

Please reserve hotel accommodation for me at hotel:

Date of arrival: Date of departure: No. of nights:

No hotel reservation required.

MEALS

Lunch day 1: will attend will not attend Dinner day 2: will attend will not attend

Lunch day 2: will attend will not attend Vegetarian: yes Other dietary requirements:

Lunch day 3: will attend will not attend

As the number of places is limited, please return the completed registration form before 12 May 2010 to:

Ms Ann Stoffels, EIPA

Tel.: +31.43.3296 317; Fax: +31.43.3296 296

P.O. Box 1229, NL-6201 BE MAASTRICHT

E-mail: a.stoffels@eipa.eu



Your name and address will be part of EIPA's database for our mailing purpose only.
Please tick if you do not want to be included in our mailing database.