

UNI-QM

Guidelines for processes and indicators in LLL management

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GUIDELINES for PROCESSES and INDICATORS for LLL MANAGEMENT

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GUIDELINES for PROCESSES and INDICATORS for LLL MANAGEMENT

Introduction.

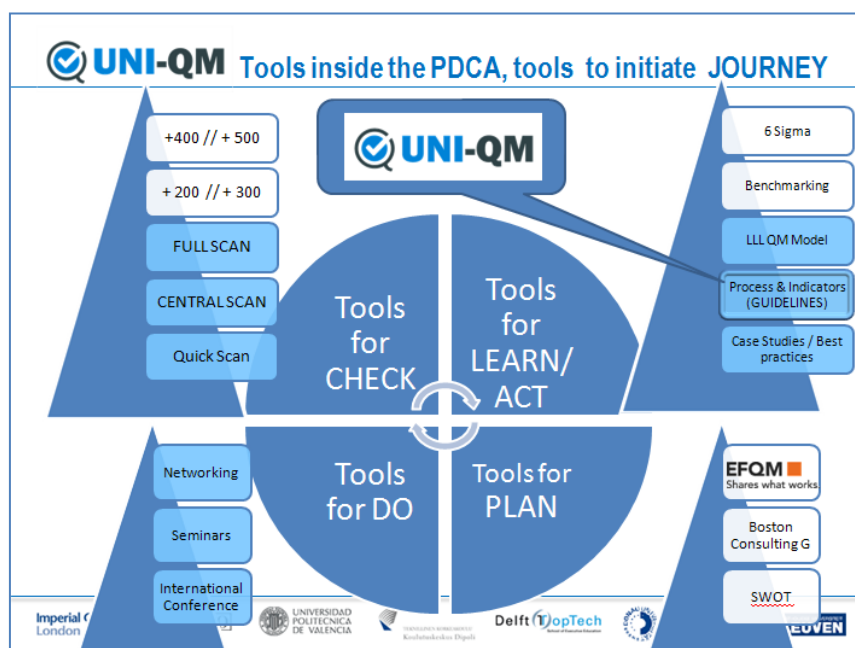
The main objective of this document is to introduce the principles of **MANAGEMENT by PROCESSES** and **INDICATORS** to Lifelong Learning Centres at university institutions in order to guide them in the steps proposed by the authors from their experience. The different experiences of the Lifelong Learning Centres participating in the UNIQM Project in setting up management systems based on processes and indicators endorse the conclusions and proposals outlined here.

In the **first** part, the specific **objectives** of this document will be as follows:

- To outline what is understood by a PROCESS Management.
- To learn to Identify key processes.
- To apply the identification of PROCESSES to Lifelong Learning Centres.
- To be able to describe a process and the related procedures.

In the **second** part, the specific **objectives** of this document will be as follows:

- To introduce the different categories of **INDICATORS** associated with the *European Foundation for Quality Management (EFQM)* excellence model.
- To outline a DIRECT and INDIRECT indicator model
- To describe specific a PERCEPTION and PERFORMANCE INDICATORS from a Lifelong Learning Centre



PROCESSES serving VISION and MISSION. The purpose of processes

A first definition of PROCESS would be the “series of actions, decisions, activities and tasks linked together in a sequential, ordered form to achieve a result that fully satisfies the requirements of the **customer** it is aimed at”. In other words, a process is no more than a succession of organizational steps and decisions followed to carry out a particular activity or task which, when working from a Total Quality viewpoint, shall be guided to satisfy the needs of our clients.

A **PROCESS** can be defined as "a series of sequential activities executed by the staff that transforms a series of inputs (resources, capital and/or information) into the desired results (products and/or services), giving the customers added value".

Process management aims to reduce the unnecessary variability that usually appears when certain services are produced or supplied and tries to remove inefficiencies associated with the repetitive nature of actions or activities, the inappropriate consumption of resources or other activities carried out without achieving a specific objective efficiently and effectively.

All processes include a succession of activities that need to have some preceding activity and that will naturally have another one afterwards until their conclusion. The gap between the limits established for each process is known as the scope of the process.

A process is normally viewed in chart form, which graphically describes the way in which people carry out their work. These diagrams or charts can be applied to any sequence of activities that are repeated and which can be measured, regardless of the length of their cycle or their complexity, although they must allow some simplicity and flexibility to be really useful.

To use process management at an organization, its mission has to be clearly described (what it consists of, what it exists for and for whom), subsequently specifying inputs and outputs and identifying their customers and suppliers. It should be possible to measure the quantity and quality of what is produced, the time between inputs and outputs and the cost invested in added value; and, finally, it must be possible to assign responsibility for completing the process mission to someone (usually called the process owner).

A first step that must be covered prior to categorising and classifying processes consists in the necessary definition of the VISION and MISSION of the CENTRE. The ULTIMATE RAISON D'ÊTRE of the Centre is explained in the MISSION, the VISION explaining its medium and long term activities. Performing this nominal exercise makes it possible to align both efforts and present and future activities, as well as focussing all the staff's attention in one single direction.

PROCESSES shall be used to carry out the MISSION and to achieve the VISION defined. A process approach without the conceptual vision/mission framework leads to a significant disorientation of Centre staff.

Both definitions shall be memorized and manageable. There is always an academic temptation to give an extensive, detailed definition. A Mission or Vision that cannot be defined in two or three lines starts to be a statement of intentions, rather than a definition of the Centre's ultimate raison d'être or of where it wants to go.

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<p>Vision</p> <p>To make the institution a national and international reference as a University offering lifelong training of recognised quality</p>
<p>Mission</p> <p>To put new energy into the University Community in order to offer innovative, high quality Lifelong Learning that stimulates the development of our social and economic environment</p>

Example of Mission and Vision definition at a Lifelong Learning Centre

Different methodologies exist to define the Mission and Vision of a Centre. An individual approach by management and/or Centre coordinators, the **MISSION** corresponds to the reasons why the Centre was created. Since there are many, varied reasons, they shall be reflected in the mission definition. Some reasons identified in the MISSIONS of Lifelong Learning Centres in Europe include concepts such as those listed below:

Lifelong Learning Centres Mission examples
Offer educational services to the Society
Give educational services to former students by using teaching staff from anywhere
Offer educational services to academic staff from the actual University
Give educational services to any professional with international teaching staff

At least 3 elements shall be defined: the scope of activity, the customers the Centre is aimed at and the type of product and service to be developed and established as its own. Answering the question **“what is the ultimate aim of this Centre?”** usually gives excellent results.

With respect to **VISION**, every institution shall try to answer a question related to the medium and long term. As in the case of the mission definition, answering a couple of questions usually gives results that are at least surprising: **“Where do we want to be in ten years? How do we want our Centre to be identified?”** Once again the question involves 3 parts, the scope of the activity, the purpose of the activity and the focus of Centre activities.

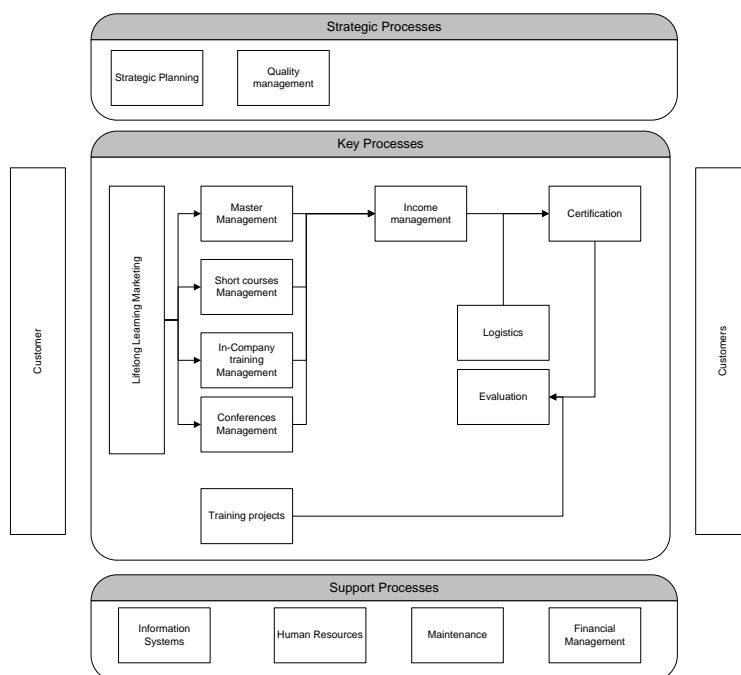
Processes shall in any case be aimed at satisfying both MISSION and VISION. This approach to mission, vision and strategy makes it possible to categorize processes according to their approach and purpose into different types.

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In all organizations, including Universities and Lifelong Learning Centres, different types of processes are present depending on their purpose and sphere of activity:

- **Key processes**, those that represent the organization's raison d'être (a unit that provides lifelong learning in this case), the main purpose of the activity, those that give SATISFACTION to the Centre's CUSTOMERS. Those that directly serve the MISSION definition.
- **Support processes**, the purpose of which is to support one or more key processes, including those related to logistics
- **Strategic processes**, which guide and direct all processes, by setting out the strategy of the Centre. Decisions regarding these are the sole responsibility of the Centre Management.

A way of displaying a key process in diagram form can begin by delimiting its "output", its "input", its strategic setting, its customers and, subsequently, how it interacts with other processes. Without a doubt, the first decision the Centre should be clear on is who its CUSTOMERS are, i.e. who obtains benefits and added value from the activities carried out by the Centre. The first thing will be to get to know the strategic setting of the company or institution where the key processes are carried out (legislation, institution strategy, etc.). It is normally unrelated to the actual Unit, Service or Department. It is then necessary to clearly identify what the key processes are (those that justify our raison d'être) and the support processes that facilitate their effective operation. We will then be able to establish our particular process map where we will see all the processes of our Centre, Institution or Unit reflected. The process map will include details of the relationships between the processes identified and how they are incorporated to facilitate the objectives and the mission. We will name and identify each of our key processes and we will identify those responsible for them (normally called owners), any person that is concerned with them and who has responsibility for putting them into practice, supervising them, coordinating them and evaluating them to introduce improvements when this is applicable. After this, and once the suitability of the process map has been checked, we will be able to develop working instructions for each process. Processes shall be developed so that the steps needed to implement them are made sufficiently clear. I.e. a stage by stage explanation is necessary of the activities making up the process.

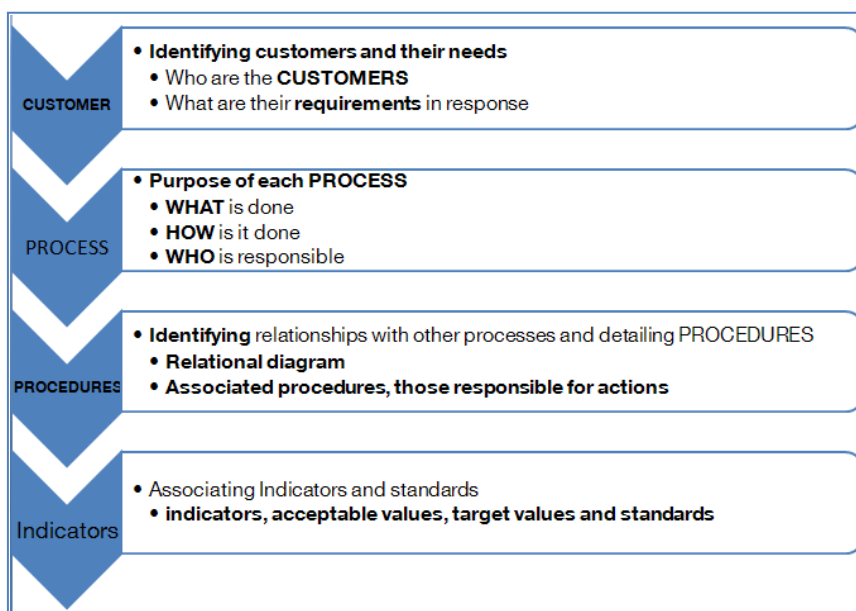


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To describe a Lifelong Learning Centre process, it is advisable to follow the stages below:

1. **Identify who the CENTRE'S CUSTOMERS are:** describe their expectations and needs, describe "services" that can be offered to them.
2. **Define the SERVICES we offer them, grouping these PROCEDURES together according to the various PROCESSES:** specify what they involve, their limits and the people responsible. Define their mission and objectives.
3. **Describe the Services/Procedures associated with the Process**
4. **Graphically describe** the activities included in the process, its elements, diagram, sequence, "inputs" and quality requirements.
5. **Identify the INDICATORS to be used to measure the activity, the perception and the performance;** this series of measures will be adopted to introduce improvements in the process, which includes determining the objectives we aim to achieve.

Each of the processes identified shall correspond to the following considerations



Something too avoid is confusing PROCESS with PROCEDURE/SERVICE. A Process consists of a series of activities that can be grouped together and labelled as SERVICES. Synonyms of Service in this context are PROCEDURES and/or FUNCTIONS. Regardless of the terms used, it is essential to understand that any organization will have different approaches that are called PROCESS MAPS. A University has at least 3 PROCESS MAP layers according to whether the processes represent the main mission activity (teaching), the second mission (research) or the third mission (services to society). Every element in the third mission (lifelong learning, technological transfer, entrepreneur training, employment services, social activities, etc) will in turn have its own process map. The superimposition of all of these will represent the complete university institution map. And without a doubt, a complete university process map will at least be complex and full of inter-relationships. It is therefore advisable to take a top/down approach to the problem and to first of all define process maps for the Units responsible for processes. And the case that concerns us is Lifelong Learning.

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Identifying CUSTOMERS: needs and expectations.

Any Lifelong Learning Centre has a sustainability mechanism established for satisfying needs and fulfilling customer expectations. To do this, it is necessary first of all to identify them, to know who the customers are for a Unit, Institute, Agency or Centre that channels lifelong learning at an institution towards the market and society. Customers are those individuals who use the services offered by the Centre to obtain a benefit and to satisfy a motivation.

There are many ways to identify customers, but it is advisable beforehand to distinguish between two basic types of customers

- Internal customers: individuals or services in the actual University that receive our products or services to use them in their work.
- External customers: these are the final customers, those who enjoy the Centre's products or services.

To identify our customers we just have to ask the following: who receives our products/services? The aim of this question is to achieve a list of customers from which we must try to establish their needs, i.e. what do customers expect us to offer them. In the case of Lifelong Learning, and without being exhaustive, the classification could be as follows:

TYPE OF CUSTOMER	INTERNAL OR EXTERNAL	JOB AREA
COURSE PARTICIPANTS	external	Professionals working for SMEs Professionals working for Large COMPANIES Self-employed professionals Civil Servants
TEACHERS	internal	The actual University
CONTACT PEOPLE PROCURING SERVICES FROM THE UNIVERSITY	external	Company managers (Production, HR; Logistics, Quality, General Management) procuring educational services Consultants Training managers from other Public or Private organizations Social Representatives (of Trade Unions or Companies) procuring educational services

Course PARTICIPANTS procure educational services for themselves and finance them in most cases from their own pockets. It may be the case that OTHER CUSTOMERS procure educational services for employees (the first case, but financed by a third party) in their organizations. They have the role in this case of contact customers for special made to measure educational services.

University teaching staff may be considered in two ways. If the teachers themselves receive services to develop learning and they themselves manage the resources obtained (after the appropriate retentions), they are in this case internal customers. If on the other hand the Centre hires teachers

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from anywhere without those from the actual University having any priority and if management (both income and expenditure) is the responsibility of the Centre, they are then treated as knowledge suppliers. Mixed formulas can undoubtedly be found. This is why it is important to define the list of customers. Every customer will have access to a type of PROCESS that, as we will see in the next section, will be broken down into procedures that will correspond to formal, repetitive activities that every CUSTOMER has in order to satisfy their needs.

Identifying customer REQUIREMENTS will correspond to the first identification of CENTRE PROCESSES. Every customer or customer category will have certain expectations with respect to solutions to be received to satisfy their needs and expectations. Categories of solutions and services can be generically called PROCESSES.

PROCESS definition. A “top-down” approach

As indicated above, the first step that has to be covered before defining the PROCESS Mission is to define the VISION and MISSION of the CENTRE, the ULTIMATE RAISON D'ÊTRE of the Centre and the medium and long term scope of its activities.

Once these two prior definitions have been established, it is possible to define the mission of the Learning Centre PROCESSES. The need to list the customers and the services they expect to receive from the Centre has been stated in the above section. This first consideration will make it possible to identify KEY ORGANIZATION PROCESSES.

In the case of individual participants, the services that might be expected from a Lifelong Learning Centre (without once again being exhaustive) may be as follows:

TYPE OF CUSTOMER	INTERNAL OR EXTERNAL	SERVICES EXPECTED
COURSE PARTICIPANTS	external	Information about courses offered Course enrolment Payment for their participation Classroom Service Teaching Documentation Services Certificates for courses received

These PROCESSES shall be adapted to the actual situation of each Learning Centre and are only proposed as examples of the most common PROCESSES that might be identified at Lifelong Learning Centres. This collection of services is in any case only proposed to respond to a professional who comes to a University institution to learn to solve problems, to update their technical, scientific, humanistic or artistic skills or to increase their employability or specialisation.

Furthermore, and without once again attempting to be an exhaustive list, a teacher who comes to a Lifelong Learning Centre at their institution can expect (amongst others) any of the following services:

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TYPE OF CUSTOMER	INTERNAL OR EXTERNAL	SERVICES EXPECTED
TEACHERS	internal	Support in course Design MARKETING Services Classroom Services Logistics Services Evaluation and Certification Service Income management service Expenditure management service

Considering teachers as CUSTOMERS will once again give rise to a series of services that do not have to coincide at all educational institutions. Depending on the degree of sophistication and complexity in the centrally supplied service, greater or fewer economies of scale may be established. Experience indicates that the amount of activity and the resources generated increase significantly as greater economies of scale are generated. “Diseconomies” of scale, on the other hand, create confusion, untraceable and unrepeatable services and significant learning costs. In the end, centralization of specialised services is also a key to competitiveness in the lifelong learning environment.

For each process, it is necessary to identify the main objective of the service, its *raison d’être*. It is therefore much easier to determine what our key process consists of and what objectives are pursued. Once the SERVICES expected to be received have been identified, it is now time to group them together into CATEGORIES of SERVICES that respond to the PROCESS concept.

TYPE OF CUSTOMER	SERVICES EXPECTED	PROCESSES
COURSE PARTICIPANTS	Information about courses offered Course enrolment Payment for their participation	EDUCATION OFFERED
	Classroom Service Documentation Services Certificates for courses received	Non LOGISTICS TEACHING

This TOP-DOWN formula makes it possible to go into greater detail and to categorize more exactly. It is not the only method, but it is the one that the authors have seen as the most effective in the process of defining PROCESSES. A PROCESS defined by this procedure shall consist of the following INFORMATION:

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PROCESS Name	EDUCATION OFFERED
Description	Giving support in course enrolment, offering information to potential customers and offering an INTERNET based enrolment system
Procedures/Services EXPECTED	Information about courses offered Enrolment Managing payment
PROCESS OWNER	Coordinator for Education Offered
When does it START?	At the request of a participant who meets course requirements
When does it FINISH?	When the bill has been received and the participant is notified by email of the classroom where the educational activities will take place
CUSTOMERS?	Any professional interested in continuous learning offered by the University
CUSTOMER Expectations	Good service, accurate information, possible payment through the Internet Effective response in time
ASSOCIATED DOCUMENTATION	Enrolment application form // receipt of payment
PROCESS Indicators	OVERALL Results <ul style="list-style-type: none"> • No. of courses offered • No. of participants accepted on courses • OVERALL income

The second part of this document will go into specific detail in defining INDICATORS. It should however be pointed out that PROCESS indicators will result from adding together the details obtained from SERVICE/PROCEDURE indicators. The no. of overall courses or the total no. of participants will be the result of adding up partial indicators that describe the activity carried out as a whole.

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Description of Procedures/Services associated with the Process

As stated in the previous section, a PROCESS is made up of series of services or procedures that the CUSTOMER expects from our Centre to satisfy certain needs and/or expectations.

The CUSTOMER has a view of the services offered to them. From a management point of view however, it is best to categorize them TOP-DOWN to be able to define significant indicators that describe both the performance and the activity of each SERVICE. These PROCESS indicators will also make it possible to establish the TRACEABILITY of Centre activities and to predict OVERALL RESULTS based on developing specific improvements in particular services/procedures. For course participants, information, enrolment and payment services are totally visible. From an organizational point of view, it is possible to distinguish between the 3 services from the perspective of the type of product (short course/long course/congress), giving overall results from a PROCESS perspective (education offered).

PROCESSES	PROCEDURES/ SERVICES EXPECTED
EDUCATION OFFERED	Information about courses offered <ul style="list-style-type: none"> • Short-term • Long-term Course enrolment <ul style="list-style-type: none"> • Short-term • Long-term Payment for their participation

The addition of repetitive activities will make it possible to TRACE and REPEAT activities between different groups and people. The PROCEDURE shall be described and classified to ensure its repeatability and traceability. **Repeatability** seeks to make the procedure of the person or people who usually performs it independent, facilitating job rotation and multiple specialization by staff. Unlike legislation, a procedure leaves no room for interpretation. Procedure ensures the transparency of the service and prevents any that solely “interpret” legislation from becoming organizational bottlenecks. Once a repeatable procedure has been defined and documented, the role of the manager focuses on dealing with exceptions. A good measure of quality in defining procedures is the amount of exceptions handled a year. If the number of exceptions exceeds the amount of times the procedure is specifically carried out by 20%, then it is recommendable to redefine the procedure/service.

Traceability also allows systematic, sustained measurement of procedures through indicators. A formally defined procedure makes it possible to set improvement targets for the process. Improvements added to the procedure shall have an immediate effect on indicators, regardless of their categorization. Finally, procedure traceability makes it possible to predict future results on the basis of trends marked out by the indicators. The variable behaviour of each procedure will be measurable via deviation with respect to the average behaviour of particular indicators. Indicators shall not only characterise the amount of activity but also the quality perceived by the customer and the performance of the process. These 3 dimensions will make it possible to establish targets for improving activity, performance and quality.

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PROCESS Name	EDUCATION OFFERED
PROCEDURE Name	ENROLMENT
Description	Giving support in course enrolment, offering information to potential customers and offering an INTERNET based enrolment system
CUSTOMERS	Any professional interested in the continuous education offered by the University
PERIODS	1 month to enrol when the course has been opened. Enrolment ends three days before the start of the course
APPLICATION CHANNELS	Enrolment at the university // INTERNET enrolment
SERVICE COMMUNICATION	Sending the RECEIPT to the participant. Notice of acceptance when payment is confirmed
SERVICE TIMETABLE	Enrolment at the university: Mon-Fri 9.30 - 14.30 // Tu and Th 16.30 - 18.30 Internet 24/7/365
INDICATORS of	PERFORMANCE <ul style="list-style-type: none"> • Average waiting time in queue at university • Average time from payment to receipt of acceptance
	PERCEPTION <ul style="list-style-type: none"> • Amiability of counter service • Efficiency in enrolment time
	OVERALL RESULTS/ACTIVITY <ul style="list-style-type: none"> • No. of participants enrolled on short courses • No. of participants enrolled on long-term courses • No. of INTERNET <> UNIVERSITY enrolments

In the second part of this document we deal with indicator categories in more detail. It should however be pointed out that both performance and perception indicators are closely associated to each particular procedure. Activity indicators (or, following EFQM terminology, Overall Results) can however be analysed from an overall perspective (adding up results corresponding to homogeneous product groups) and from the particular perspective of a specific product line. Possible PRODUCT lines in Lifelong Learning could include:

Activities OFFERED	Activities REQUESTED
short courses offered, long-term courses offered, national conferences, international conferences.	courses requested by companies. courses requested by institutions.

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







Charting Procedures/Services associated with the Process

Proper graphic representation of procedures is just as important as their characterization. There are different symbols, logic and terminology available to graphically represent the services that constitute a process. Members of the UNIQM consortium recommend the combined use of algorithmic language with natural language. Graphic representation that is solely algorithmic has a major disadvantage: only the authors- some of them after a time-are able to remember what should be done in each of the “boxes” that represent the different possible sequences. Graphic representation without any description in natural language means the effort expended in production and representation is in vain, insofar as process traceability is lost and we are once again faced with possible interpretations to be made. The advantage of having a written procedure is lost as soon as the stages HAVE TO be interpreted. The description of a process shall not leave any room for interpretation, doubt or argument. If the description is only in graphic form, we will therefore have a procedure that is incomplete or unusable in the medium term.

For these reasons, members of the UNIQM consortium recommend using as system that:

- Includes the name of the PROCESS this PROCEDURE belongs to
- Represents a process on one single page
- Outlines the sequence of activities carried out
- Includes a description in natural language of the different stages, together with the sequential diagram
- Includes the OVERALL process map in each process description
- Include INDICATORS associated to this specific procedure

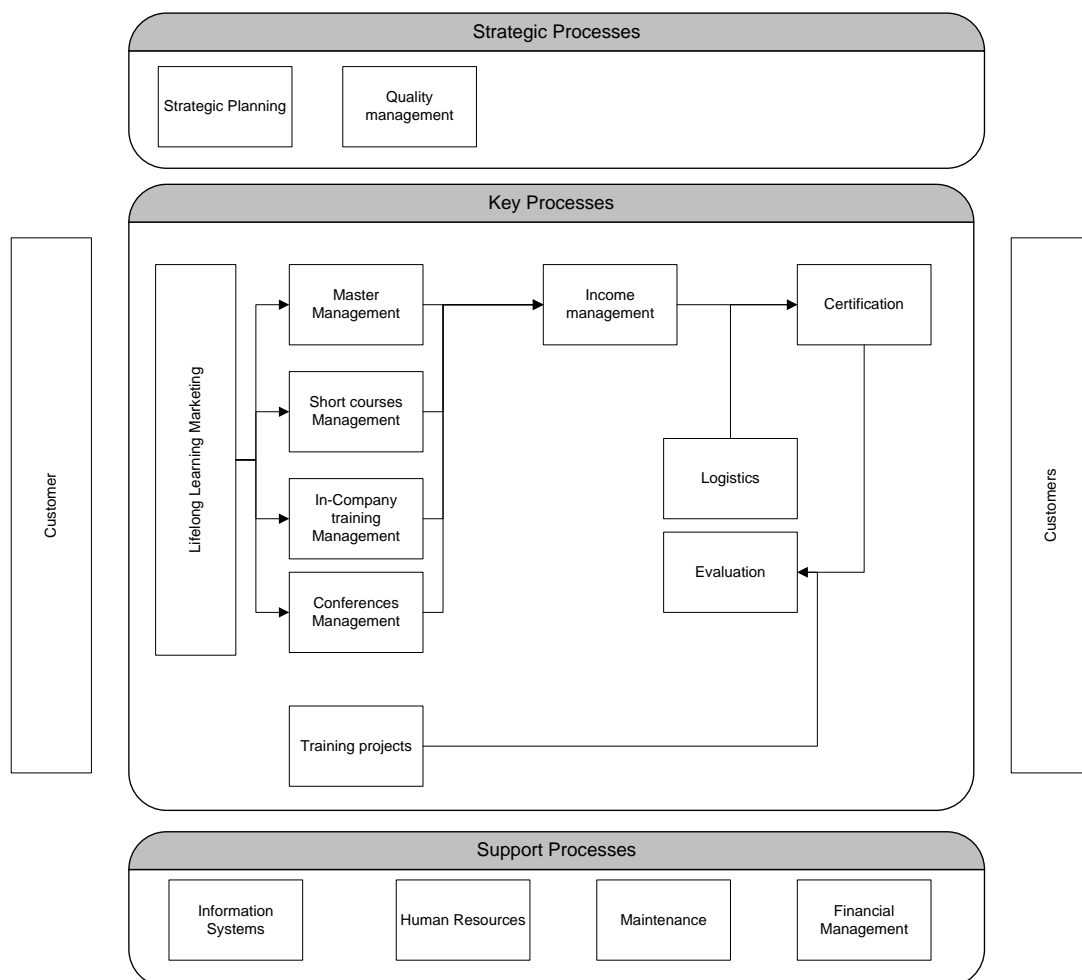
An example of where it is possible to see all the elements described appears on the next page. Nevertheless, these recommendations shall always be considered as such, never as rules to be followed without analysing available materials, culture and tools. Finally, the most common symbols used for charting processes can be found in the annexes to this document. Some useful symbols would be the ones below:

SYMBOL	Name	DESCRIPTION	SYMBOL	Name	DESCRIPTION
	Asynchronous start	The start of the process is set off at the request of the user.		Process call	Symbolizes the start of another process since the start of the current one
	Synchronous start	The start of the process is set off by a temporary event.		Activity	Represents each of the activities in the process we consider to be separate.
	End	Symbolizes the end of both a process and a procedure.		Procedure	Represents a non-separate process (procedure) that is dealt with in an attached diagram
	Loop	Symbolizes that the activity is carried out repeatedly until something is achieved		Activity grouping	Provides a mechanism to group activities together visually. It is usually associated with a loop.

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Standard Processes and Procedures related.

Define standards (in any knowledge area) is a “full of grey” task, no black or whites are easy to identify. Some examples of standard procedures are showed in this section. To standardise always is a non easy task but in Lifelong Learning, the Value Chain concept can be used to identify those process and procedures able to be identify as “the most common ones”. The important question is to have them IDENTIFIED, more than copy the specific details from the standard or from any other organisation. Each Lifelong provider will organise internally to give answer to the “how” questions. Each organisation will have its own process map and definition and their procedure definition.



Lifelong Learning Centre (CFP) of the Universidad Politécnica de VALENCIA process map (2009)

Once a process has been standardised, its improvement will be planned in two types of circumstances:

- internal process opportunities to improve effectiveness and efficiency and
- external opportunities due to changes in the environment that make it advisable to modify the process so that results are better adapted to expectations.

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As in the stabilization phase, effectiveness and efficiency indications will tell us if we have been able to achieve our objective, maintaining maximum control, as in the case above, over variability in the process. And finally, some of the most common processes (9) and procedures (25) present in most of the Lifelong Learning Units analysed during the project are, for “Offered Continuing Education” are the next:

PROCESS	PROCEDURES == CUSTOMER'S EXPECTED SERVICES
Demand Analysis	<ul style="list-style-type: none"> • Demand analysis : demand and feasibility studies of the courses • Sectoral needs analysis
Course design	<ul style="list-style-type: none"> • Support in course content design, definitions and methodology • Support in academic design: agenda and teachers selection. • Organizational design of the course: hour planning, budget, rooms to be used, contracts with companies and sponsorship • Course authorization: check out the documentation and follow up on the approval process
E.learning	<ul style="list-style-type: none"> • Course material production • Course delivery
Conference Support	<ul style="list-style-type: none"> • Technical assistance on design and budgeting • Contracting external services • Logistics (space, support staff, coffee & lunches and gala dinner)
Marketing	<ul style="list-style-type: none"> • Management of the publicity and promotion (press advertisement, leaflets, mailings and web) • Customer relationship management • Information: who offers the information about the program to the possible customers
Enrolment	<ul style="list-style-type: none"> • Participant selection and admission • Scholarship management • Participant registration
Economical Management	<ul style="list-style-type: none"> • Income management • Financial management: accounting, financing and support for auditoria's • Payments administration
Logistics	<ul style="list-style-type: none"> • Support to the teaching: documentation management • Support to the teaching: rosters and assistance control • Support to the teaching: room reservation
Quality Control	<ul style="list-style-type: none"> • Course quality evaluation survey on teacher quality • Organizational quality evaluation survey
Certification	<ul style="list-style-type: none"> • Printing and delivery of the Certificates and diplomas • Diplomas check
Post sales	<ul style="list-style-type: none"> • Management of the participant work “internships” • Services for former participants • Employment bureau

This list is not intended to be exhaustive. Just gives an idea of “what must be defined” is if is developed. In the next pages 2 different procedures will be showed, just to give an idea of the kind of tasks that should be programmed if the Center’s management team wants to define all the process.

- Continuing Education Marketing**
- E.learning**

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Continuing Education Marketing

Continuing Education Marketing

Process Description: To provide sufficient information to the target group on the service (programme) to convince them to acquire it.

Owner: Marketing manager/director or programme owner

Scope: CE programmes from the university

Beginning of the process:

Having a programme to sell

End of the process:

Enough enrollments to run it

Inputs:

Program description e.g.. Target group, contents, schedule, format, trainers/teachers, practicalities

Outputs:

WWW-pages, brochures, advertisements, text for CRM, e-mailings, normal mailings, calendars & links

Clients:

Potential course participants, Networks

Providers:

University Teachers & Printing and mail Companies.

Activity indicators:

- Number of MK activities
- Cost of MK Activities
- Size of the target group

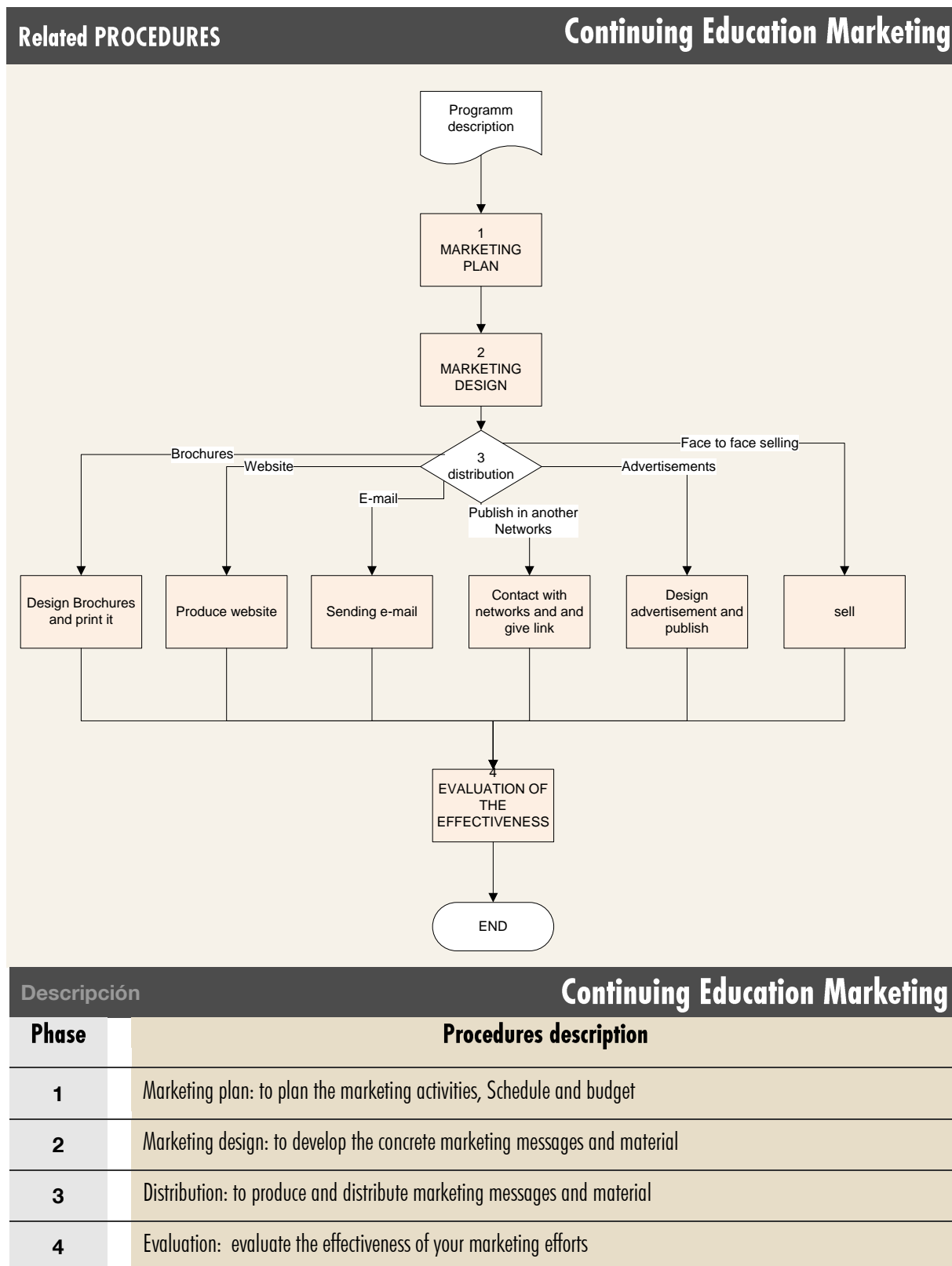
Result Indicators:

Number of students registered by mk activities
Revenue & Surplus (Incomes-cost) vs MK costs
courses started (% , number of hours...) vs MK Costs

Quality indicators:

Effectiveness of every channel
(choose the correct channel to the correct group (segmentation))

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E.learning

e-LEARNING

Process Description: Design and Develop e-learning courses that answer specific competence needs in a marketplace

Owner: CE (e-learning) programme process manager

Scope:
Set of e-learning CE programmes from University

Beginning of the process:
Idea of a programme/course

End of the process:
Satisfied and competent customers

Inputs:

- Identified needs, universities expertise

Outputs:

- e-learning programmes/courses

Clients:

-

Providers:

Activity indicators:

- Number of pre-registrations
- Cost of production
- Number of lesson produced
- Number of invoices
- Number of certificates
- Number of tutorial activities: p.e e-mails sent, forums, etc.
- Time system usability (the system is on)

Result Indicators:

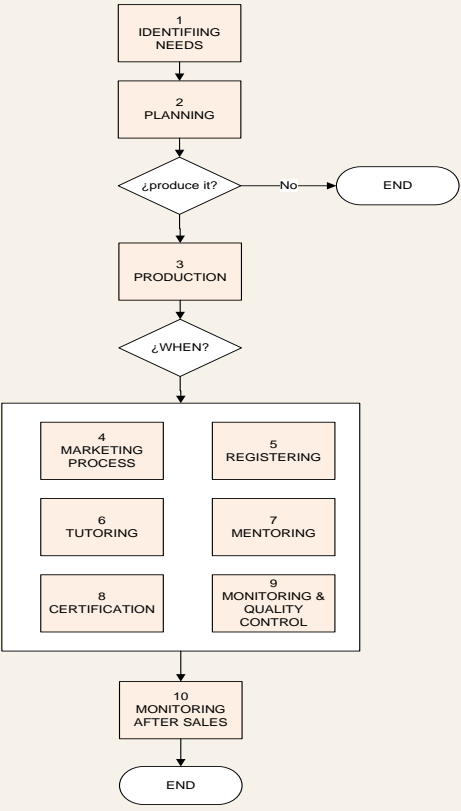
Number of on-line courses
Number of registrations
Revenue & Surplus (Incomes-cost)
courses started (% , number of hours...)
% people who finish/registered people
Loyalty → % registered people who come back

Quality indicators:

Customer Satisfaction
Partners satisfaction (tutors & mentors)

GUIDELINES for PROCESSES and INDICATORS for LLL MANAGEMENT

Related PROCEDURES	e-LEARNING	
PHASE	Procedures description	
1	Identifying needs: to find out potential customers' competence needs	
2	Planning: to design a CE programme	
3	Production: to produce e-learning programme	
4	Marketing: to promote it	
5	Registering: to enroll a customer	
6	Tutoring: to transfer the academic contents of the training	
7	Mentoring: to guide the participant through the learning process	
8	Certification: to give credits or certificate of attendance	
9	Monitoring and quality control: to evaluate learning and customer satisfaction	
10	Post sales activities: to follow up the impact, to identify further needs	



```

graph TD
    A[1 IDENTIFYING NEEDS] --> B[2 PLANNING]
    B --> C{¿produce it?}
    C -- No --> D([END])
    C -- Yes --> E[3 PRODUCTION]
    E --> F{¿WHEN?}
    F --> G[4 MARKETING PROCESS]
    F --> H[5 REGISTERING]
    F --> I[6 TUTORING]
    F --> J[7 MENTORING]
    F --> K[8 CERTIFICATION]
    F --> L[9 MONITORING & QUALITY CONTROL]
    G --> M[10 MONITORING AFTER SALES]
    H --> M
    I --> M
    J --> M
    K --> M
    L --> M
    M --> N([END])
    
```

PHASE	Procedures description	
1	Identifying needs: to find out potential customers' competence needs	
2	Planning: to design a CE programme	
3	Production: to produce e-learning programme	
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GUIDELINES for PROCESSES and INDICATORS for LLL MANAGEMENT

Procedure example: Room reservation in a LLL Centre

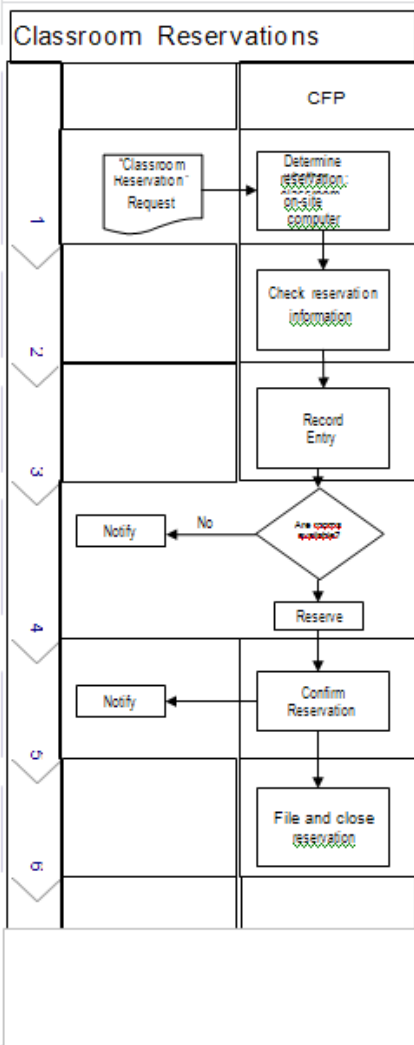
LOGISTIC SERVICES
Internal Procedures

Room reservation

Objective: Plan, monitor and reserve classroom in the most effective manner possible in order to provide the highest quality services to CFP customers.

Scope: All classroom reservations made in the CFP.

Classroom Reservations



Indicators: % room use during natural year (total), computer rooms and I2I rooms) represented on hours per day // n° of rejected reservations // user satisfaction with the service –CE promoters

Step	Description
1	The Event Manager submits the Classroom Reservation Request to Classroom Services. Document: Classroom Reservation Request. The request may be presented directly at the CFP or by fax. Determine whether the room reserved is a regular classroom or a computer classroom. Note: All CP, BT or BD courses are considered events.
2	Check information on request form. There are two situations: 1. If the information is not correct, Classroom Services will contact the person in charge of the course to verify the information. 2. If the information is correct go to step 3.
3	Register request in REGICION.
4	Check the availability of classrooms in the CFP. There are two cases: 1. If a room is available: make room reservation. Enter the the following information into the application: - Type of course: B/D/CP/Event - Person in charge of the course / extension / email - Contact person / extension / email - Software needed (for computer classroom reservations) - Record No. Make a copy of the reservations for the following day on the Open Rooms' Calendar of the application (go to step 5). 2. In the event no rooms are available: Classroom Services will notify the person in charge of the course that there are no rooms available by email or fax. If there is no availability, the reservation made will be filed and closed.
5	Send confirmation of classroom reservation to the person in charge of the course by email or fax including the following information: • Reservation dates • Days reserved • Schedule • Classroom's reserved • Software installed
6	File and close the reservation. To do so: • Attach classroom reservation notification to the Reservation Request • File by Registration No. in the Classroom Reservation file

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05

03

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Lifelong Learning Management Indicators.

Once the **PROCESSES** and **PROCEDURES** have been defined, the next logical step is to define the **INDICATORS** that are going to show us the quality and quantity of the services supplied by the working team. Indicators are numerical representations that display both the amount of activity taking place at a Centre and the effectiveness of the services supplied, the relative effectiveness of the services and the effectiveness perceived by customers. Faced with change and crisis situations, they will only be effective and make sense if they are carried out from a quality perspective, a perspective that makes it possible to measure the effectiveness of the service offered to customers and the satisfaction that these customers obtain from the organization activity.

Effectiveness does not lie in achieving a good product based on good initial conditions, but in leading to progress by all customers from their own individual circumstances. The concept of “education quality” as a target for all educational institutions assumes an overall management approach at the institution geared to the achievement of quality targets for everyone and with the collaboration of all those involved in educational organization. The quality achieved is related to the quality of the intended targets, taking the form of objectives, criteria and standards that guide their performance and check their achievement. This has a great effect on Lifelong Learning Centres, given that their activities are NOT USUALLY for FREE or **SUBSIDISED**. This characteristic makes the approach of Lifelong Learning Centre significantly distinct from OFFICIAL Education where the voluntary nature does not exist insofar as participants MUST STUDY certain compulsory subjects to obtain certain specific professional competencies.

Quality covers all functions and activities at Lifelong Learning Centres and should be linked to the relevant needs of CUSTOMERS in a given area and context. This context may be as wide as the University decides, without any geographical or spatial restrictions. Requirements and objectives that will guide the compilation of the learning offer, as well as the establishment of processes and services, shall be specified to respond to these needs, even if there are sometimes needs that become clear afterwards, meaning that their satisfaction will contribute added value to what has already been specified. Developing quality at the organization means having a Quality Management System, and being based on existing evaluation models.

University Lifelong Learning Centres do without a doubt belong to a specific context that allows them to share elements of perceived quality that are the responsibility of the Institution in which they are situated. These factors must however be used and included as services for CENTRE CUSTOMERS as far as possible. Factors conditioning quality in LIFELONG learning include the following:

- **The positions, concept of education and role of experts participating in courses:** considering andragogical and educational principles, attending to course participants, availability to guide them, good communication with them and evaluation that is suited to the type of course and the professionals participating as participants.
- **Material resources and infrastructure available:** university classrooms, computer resource rooms, virtual platforms for communication and exchange of course materials, WIFI, access to library and University sporting facilities, housing services, suitable furniture and educational resources.
- **Teaching staff competency:** level and current nature of their theoretical and practical knowledge, capacity to transmit this, educational skills, continuous training, participant/teacher ratios and time involved.
- **Course content:** theoretical and practical content, suitability to participants and demands of the corresponding professional profiles.
- **Educational organization:** actual, public and published planning, adjusted to the timetable needs of professionals.

GUIDELINES for PROCESSES and INDICATORS for LLL MANAGEMENT

- **Quality evaluation:** of both MANAGEMENT PROCESSES and LEARNING PRODUCTS.
- **Participation of all interest groups:** participatory leadership, favourable working climate, personal development and growth...

In spite of the fact that European universities have undergone a major transformation in recent years in both size and organization, giving themselves greater autonomy (and, therefore, responsibility for resource management) and placing them in the social context where they were present, it was not until the beginning of the nineties when Lifelong Learning Centres (**LLC**) started to develop and directly compete with the most important part of university activity, research, establishing themselves as strong supporting points in the system in the last ten years.

European Lifelong learning centres do not have a quality model that is compulsory for everyone. The best known models are: ISO 9000/2000, EFQM, EQUIS, National university models. The UNIQM Project has chosen the European Foundation for Quality Management model to establish elements for Lifelong Learning Management,

The **EFQM** model establishes nine critical factors for the proper functioning of the organization, and which it calls criteria. These criteria are based on elements and indicators. Systematic checking to see whether or not these indicators exist at the institution, as a self-evaluation procedure, make it possible to find out how the Centre functions based on evidence, and in order to prepare projects and improvement plans in line with the needs detected. The use of self-evaluation for collecting information as a continuous improvement tool enables progress to be made in achieving a Centre policy and strategy, concentrating, amongst other things, on the learning and educational objectives of students, taking into account staff training and the resources needed for excellence.

Of the 9 critical factors in the Model, 4 examine results (criteria 6-9), i.e. what the organization achieves for each of its players (Customers, Employees and Society); i.e. the effects of the organization's activity. The other 5 are the Agents (Criteria 1-5) and refer to the way this activity is carried out and improved. These 5 criteria are aspects of the organization management system and more specifically outline aspects such as leadership, policy and organization strategy, people, alliances and resources and processes. These aspects are the causes of results, those whose participation allow "results" to be obtained. Criteria that form part of "results" and that are measured through indicators are:

6. **Customer satisfaction and results.** The customers are those who use Centre services, either to obtain direct utility and satisfaction (final customers) or to distribute them or use them as entry to their own value chain (intermediate customers). The creation of utility for certain groups and satisfying their needs and expectations is the purpose of the Centre's activity, whether this is motivated by the generation of resources for the University or for any other consideration.

The Model therefore considers **the views CUSTOMERS have** of its **products and services**, their usefulness and how easy they are to use. These considerations are essential for organization long-term success as well as the way in which **customers relations with the organization** are conducted. "Excellent" Learning Centres establish their indicators to exhaustively measure the results their CUSTOMERS expect to achieve with respect to what is defined in their mission. The result in this case is made up of two groups: **Perception Measurements** and **Performance Indicators**.

7. **Staff satisfaction and results.** This refers to the level to which the organization satisfies the needs and expectations of its **EMPLOYEES** and fundamentally affects the good performance of its activities, as well as the establishment of satisfactory relations with customers and with the University's internal environment and the Centre's external environment.

GUIDELINES for PROCESSES and INDICATORS for LLL MANAGEMENT

Contrary to the traditional identification of organizations with their shareholders, staff is in this case the EMPLOYEES of the Centre. This is why a high level of organizational excellence is incompatible with dissatisfied or unmotivated employees. This satisfaction, as in the case with customers, is expressed by subjective views that the organization will know about by taking an interest in them and asking employees systematically and by using suitable techniques. Objective indicators such as absenteeism levels, education given, amount of social activities, investment in employee awards, productivity bonuses received and participation in improvement projects will also be useful to complement this knowledge.

“Excellent” Learning Centres shall in this case exhaustively measure the results they expect to obtain from the people that go to form them. This is why they have to bear in mind the expectations generated by the VISION and MISSION of the centre (the approach and demands it requires), and EMPLOYEE Satisfaction with management running of the Centre. The result in this case is also made up of two groups: **Perception** Measurements and **Performance** Indicators.

- 8. Satisfaction and results in society.** All Universities (Public or Private) are immersed in the society that finances them, either by partial subsidies or by the fees paid. University Lifelong Learning Centres maintain relations with both the individuals that occupy their physical environment as well as organized social bodies (social representatives, regional, national, European or international authorities, cultural associations or those of other types, etc.). Its employees are also involved in a professional, political and legal network of relations within the actual University.

All of these relations will give rise to perceptions of the various social groups regarding the activity of the organization and how it affects them. These effects may also be measured directly through the corresponding indicators, which could include the impact on the level of learning, participation in removing pollutant waste or the contribution of social activities, environmentally friendly ones or those of a social and non-profit making nature. This is another point Learning Centres need to take into account in order to be considered as “excellent” Learning Centres. To do this they should know what results they expect to achieve in society, grouped into the two categories above (perception and performance).

- 9. Overall Performance.** All organizations pursue a series of targets and final objectives. This criterion examines the degree to which these targets and objectives are achieved.

If it involves a profit-making company, the final performance will necessarily include items such as income, expenditure, profit, the value of the action etc. It also sometimes includes market share, the number of customers and other related areas.

In other cases, performance will be measured by other parameters: measurements related, for example, to the knowledge taught, the effectiveness of health care and so on, depending on the nature of the organization. Costs and budgetary observance will normally be important here as well.

A distinction is made between key results (truly final ones) of indicators (generally the results of intermediate processes, such as depreciations, product or service delivery periods, school failure rates, etc) that, together with the former, usually make up the “factbook”.

As with the above criteria, “excellent” Learning Centres exhaustively measure the results they expect to achieve with respect to key items of their policy and strategy. Results here also consist of two items: Perception Measurements and Performance Indicators (these indicators measure educational results and other services provided by the centre).

Each of the nine criteria is given a mark to check the situation at the organization by self-evaluation, as well as to evaluate Award applications and Quality recognition. One of the possible applications recommended by the UNIQM project in a possible “road map” for the integration of excellence is **self-evaluation**, from which a series of strong points is obtained, together with a list of areas that could be improved. Working on this basis, and once prioritization work has been carried out, it is possible to construct an action plan designed to maintain any strong points and to make

GUIDELINES for PROCESSES and INDICATORS for LLL MANAGEMENT

improvements corresponding to the latter. The UNIQM consortium does therefore recognise that there are many approaches to achieve sustainable excellence in all areas of action, even if ALL OF THEM are based on the following premise:

"**QUALITY** at **LIFELONG LEARNING** CENTRES means looking for **excellent results** with respect to achieving their targets and the satisfaction of customers, staff and society. This is achieved by leadership and by guiding policy and strategy via its staff, its partners and resources and its processes".

The purpose of the **TOOLS** Developed in the **UNIQM Project** (applied to the area of university Lifelong Learning Centres) is to find out the actual situation of the centre through self-evaluation and external evaluation in order to reflect this. This will make it possible to prepare plans and strategies for improvement and innovation. These two characteristics, together with the involvement of all STAFF in the self-evaluation and decision making process, are considered to be factors that affect improvement in the quality of services provided by the Educational Centre to society.

It should be considered that, according to the idea of quality adopted, concepts regarding what is considered to be an efficient Learning Centre will vary. Efficiency will vary in accordance with the achievement of certain specific end.

A basic question prior to improving processes is measurement, this being due to the fact that you cannot improve what you don't know. It is necessary to establish a series of items related to the process we wish to measure and this is where the importance of **indicators as a measurement tool** comes into play.

Not all aspects of an organization can be measured in terms of quantity, and it is therefore important to distinguish between non-measurable aspects of the process we are interested in evaluating and the indicators. Indicators are variables directly related to the process and the procedures and the rest of criteria of the EFQM model. There may be more than one indicator for each. An indicator is information that aims to reflect the state of a situation, or of some particular aspect, at a particular moment and in a certain space. It is usually a statistical detail that tries to resume information provided by various parameters or variables that affect the situation we wish to analyse.

An indicator is taken or measured in a particular period of time to be able to compare different periods. By comparing measurements it is possible to see evolution over time and to study trends relating to the situation measured, thereby acquiring great value as a tool in evaluation and decision making processes. Several indicators are usually necessary to evaluate a system, and it is must be taken into account in evaluation that the indicators are not restricted to one specific action, since the same indicator may be used to measure the impact of items considered.

Indicators shall simplify information taken from a series of complex data as much as possible and shall at the same time satisfy criteria relating to clarity, representativeness and reliability. They shall also be updated at the same time as their sources, which shall have to be reliable and periodic to allow continuity in the analysis of how indicators evolve over time; and they shall not only be analysed from a time perspective, but also from the point of view of the most interesting demographic-social/economic variables in each case.

The preparation of a file for the indicator to outline its characteristics may facilitate its understanding. A good indicator file is one that outlines information regarding its definition, means of calculation, updating frequency and subject area of the indicator, information sources used and an analysis of results obtained. Indicators may be of different types according to the objective pursued.

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This variety may cause problems when it comes to defining an indicator, and it is therefore recommendable to bear the following criteria in mind when it comes to establishing an indicator:

- Should not be ambiguous and should be defined in a uniform way throughout the Centre
- Indicators used between different perspectives shall be clearly connected and shall be used to set realistic objectives
- It should be an easy, uncomplicated process
- A balance shall be sought between result indicators and performance indicators (inducers).

It is never advisable to use an indicator as the basis for defining an objective, the correct thing being to establish what the objective is first. The logical and internationally accepted sequence is: Objective, indicator, target. The indicator definition process requires clear definition of “what to measure, how to measure, when to measure, the measurement source and the person responsible”.

Once the indicators have been defined, it is necessary to validate them. The aim of indicator **validation** is to check that they are useful and to ensure that the cost of obtaining them does really produce benefits for the organization. The result of validation is expected to lead to a clear idea about the suitability of indicators to fulfil the purpose for which they were created. To do this it is vital to ask the following questions:

- Is the indicator useful? Can the indicator be used to take decisions?
- Does it symbolize and clearly represent the item we want to know?
- Is it compatible with other indicators so that results may be checked?
- Does the utility it generates compensate the information compilation and development cost of the indicator?
- Is it sufficiently well defined to allow the result to be compared in time without any doubt?
- Is the graphic representation used clear?
- Is it redundant with other indicator already defined?
- Is the frequency established sufficient? Does a simpler form of obtaining information exist?
- Are computer means suitably exploited to optimise the process of obtaining the indicator?
- Has the level of disclosure and confidentiality required by the indicator been defined?
- Is the indicator communicated to people involved in the area, activity or process?

To validate indicators, systematic measurement is needed. And as showed in the next table, two levels must be maintained due to normally process indicators are the results of procedure indicators aggregation.

	Customer satisfaction	Staff satisfaction	Social impact	Global results
PROCESS 1	Perception Measures and Performance Indicators	Perception Measures and Performance Indicators	Perception Measures	Key Results and Indicators
procedure 1.1				
procedure 1.n	Perception Measures and Performance Indicators	Perception Measures and Performance Indicators	Perception Measures	Key Results and Indicators
PROCESS n				

The Lifelong Learning Centre (CFP) of the UPV INDICATORS definition

Focussing more particularly on a specific case, the Lifelong Learning Centre at the UPV, and its POSEIDON corporate application, has an indicators system destined to measure the performance of processes/procedures and general activities related to lifelong learning management. The data obtained by these indicators are obtained automatically and instantly from the POSEIDON database via a Web based computer system that allows it to be updated and consulted from any computer connected to the Internet. The results of the indicators are obtained directly in Excel format. Indicators are checked monthly at coordination meetings and used to detect areas for improvement, which are used as a base or are included to establish strategic policies and objectives in the strategic plan for the LLC.

Data from the indicator platforms used to detect areas for improvement, as well as to set objectives, are classified into different areas for better consultation by each of the working groups involved. Current indicators areas (related to the Centre process) are:

- Global results
- Courses offered
- On demand courses
- Certification
- Surveys
- Economic Management
- Marketing
- Information Systems and
- Staff Surveys

Each of these areas includes its own indicators for keeping a check on activities, as well as the overall results area. Successive checks of the indicator system that have taken place in the last decade have made it possible to evolve from a version based on manual data to a Web based version for automated indicator control that obtains database results from the lifelong learning management system at the Centre. The latest version also includes the possibility of documenting the meaning of each indicator, establishing approval dates for indicators proposed and establishing objectives.

A table is included below to outline the indicators used at the CFP for next criteria;

- Customer satisfaction
 - Perception Measures
 - Performance Indicators
- Staff satisfaction
 - Perception Measures
 - Performance Indicators
- Social impact
- Global results
 - Key Organization Performance Indicators

As mentioned beforehand, indicators may vary according to the measurement for which they have been designed. In the specific case of LLC-UPV “perception measures” and “results indicators” are used. Results obtained from all of these are split into types of courses and years, making a more detailed analysis possible of the evolution of each course type.

GUIDELINES for PROCESSES and INDICATORS for LLL MANAGEMENT

UPV Lifelong Learning Centre Indicators			
CRITERION 6.- CUSTOMER SATISFACTION			
Perception Measures	Results	Performance Indicators	Results
Overall satisfaction of organizers with LLC services	The results obtained remain above the objectives set, achieving a satisfaction level of 7.5 out of 10 (corresponds to approaches 1a 2d and 4e).	Number of Lifelong learning customers	Results show sustained growth of more than 7% a year. Comparing this result with the growth obtained by the UPV , the number of participants in lifelong learning is growing while the number of 1- and 2- stage participants is falling (corresponds to approaches 2d, 4e and 5d).
Average UPV participant rating of LLC services	The results obtained remain above the objectives set, achieving a satisfaction level of more than 3.5 out of 5 , being above the average level achieved at the UPV (corresponds to approaches 1a, 2d and 4e)..	Loyalty of Lifelong Learning participants	Results obtained show a positive trend. They even manage to easily exceed the objective set: 500 more participants that repeat every year (Corresponds to approaches, 1b, 2a, 2d, 4e and 5d).
Satisfaction of organizers with LLC processes	In this case, the organizers of enrolment and certificate survey groups obtain a satisfaction level of more than 7 (set as the objective). Neither the classroom reserves nor the graduation groups, however, reach this level, although they tend to increase their level, moving ever closer to the objective set (corresponds to approaches 1a 2d and 4e).	Loyalty of Companies with training demanded	According to this indicator, company loyalty with respect to the education demanded has continued above 40% since 2002 , there being more than 10 companies that repeat applications for courses demanded (corresponds to approaches, 1b, 2a, 2d and 4e).
Satisfaction with services provided by UPV administrative and management units	In this case, the first study was carried out in 2008, using the survey as a research tool. The result of this involves the delta in the pay framework variable proposed by the management (corresponds to approaches 1a 2d, 3e and 4e).	Loyalty of Lifelong Learning organizers	The loyalty of Lifelong learning organizers in this case has been over 50% since 2001 , there being 254 more organizers that repeat each year. Organizing lifelong learning by academic year.

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UPV Lifelong Learning Centre Indicators			
CRITERION 7.- STAFF SATISFACTION			
Perception Measures	Results	Performance Indicators	Results
Overall Satisfaction of LLC staff	Overall Satisfaction of LLC staff is more than 7 out of 10 .	Staff according to source of expenditure	Shows continuous growth in university investment in staff allocated to lifelong learning.
Staff satisfaction with training opportunities	With respect to the staff satisfaction level in this area, results do not meet the objective set of obtaining a mark of more than 7 out of 10 .	No. of Training hours per employee	The objective set for this indicator has been satisfied in the last few years, the number of training hours having increased to 50 hours per person in the working timetable, this increase being included in the UPV Annual Training Plan.
Staff satisfaction with Resources and Technology suitability	The satisfaction level meets the objective set, achieving a level of 7 out of 10 .	Job creation	The results of the associated indicator show a period of reduced job creation, inversely proportional to the growth in permanent posts at the University.
Satisfaction and use made of training given by UPV staff	The objective set in the following points is satisfied: <ul style="list-style-type: none"> - The training measure has fulfilled my knowledge and/or skill needs. - The time and duration of the training has been suitable. Yet, in spite of the score obtained being close to the level indicated by the objective, it is not reached in the following aspects: <ul style="list-style-type: none"> - Doing this course will allow me to carry out my job better. - Course contents can be practically applied in my job. - My expectations of the course have been satisfied 	LLC Staff (% of time) according to Type of Contract	The objective established is fulfilled with respect to this indicator, since those hired through chapter VI represent less than 30% of total university staff.

GUIDELINES for PROCESSES and INDICATORS for LLL MANAGEMENT

UPV Lifelong Learning Centre Indicators	
CRITERION 8.- SOCIAL IMPACT	
Perception Measures	Results
No. of Congratulations for LLC	This perception measure has a motivating function for LLC staff. It aims to compile congratulations to inform staff and motivate those involved.
Publication of best environmental practices	This monitors environmental Guidelines.
Free environmental training days	An obvious increase in the number of recipients has been noted.
Satisfaction with environmental training received	Satisfaction levels remain above 3.5 on a liker scale ranging from 0 to 5.
Level of presence in means of communication	The LLC has a constant presence in the press and means of communication that present the results of its management and research activities.
Documentary management at registration	The percentage of scanning has increased over the year in order to achieve a level of scanned records of over 90% .

GUIDELINES for PROCESSES and INDICATORS for LLL MANAGEMENT

UPV Lifelong Learning Centre Indicators	
CRITERION 9.- Key RESULTS	
Key RESULTS & Indicators	Results
Income from Lifelong Learning	Income obtained from Lifelong Learning has been reflected each year in the UPV budget since 1993
Number of Lifelong Learning Courses	The results of this indicators show a continuous 5% annual increase in the number of Lifelong Learning courses offered with respect to other Spanish universities. Last 2009 UPV offered more than 2.200 CE courses. UPV is at this moment the European University with more LLL offered.
Lifelong Learning Hours Offered	The number of Lifelong Learning hours offered exceeds 100,000 hours and fulfils expectations.
Lifelong Learning participants	According to objectives, the last 15 years a progressive increase of 10% has been fulfilled.
Lifelong Learning Income at Spanish Universities	The UPV has the third income volume of all Spanish Universities in Lifelong Learning (data obtained from 2008).
Income from other education vs. 1st and 2- mission incomes	UPV results for this indicator exceed the national averages and those for the Valencia Community in all cases.
Lifelong Learning Income vs. Teaching and Research Staff	In this respect, the UPV is usually in one of the first three positions with respect to Spanish universities, being way above the average.
Income per post in the LLP	Lifelong Learning income increases (or decrees) by €350,000€ whenever there is an additional post. A positive trend has also been noted in the last 18 years.
Attempted credits per participant	By following the evolution of this indicator, it is possible to appreciate a slight downward trend in the average number of attempted credits per participant, meaning that the increase in turnover is directly due to the increased number of participants.

Conclusions and Recommendations

Process and indicators management methodology makes it possible to design the process according to the environment and available resources, standardizing the activities and information transfer of all people who participate in it, ensuring efficiency, effectiveness and service quality.

Process management methodology provides a structured way to:

- **Identify** process and procedures/services.
- Learn to identify **customer satisfaction** requirements.
- **Classify** Centre **activities** on critical (those process that generates customer satisfaction), support (those needed to develop the critical activities but doesn't generate direct customer satisfaction) and the strategical ones, those that only the director is able to conduct and decide personally.
- Allow easy **responsibilities** and task assignment.
- Remove unnecessary or **mistaken actions** that do not provide any added value to the services given by the Centre.
- Identify process **resources** consumption and their relations with the process outcomes.
- Define a structure of **indicators** based on process and procedures systematic deployment that makes it possible to follow how effective and efficient the Centre is.
- Detect opportunities for systematic **improvement**.

An essential part of process management however is the collection and analysis of information thought indicators. To manage using indicators gives managers an essential way of following partial results, to identify and predict future challenges, to control derivations over standards and finally, to act over those procedures that are needed to be improved.

To manage using process is also a good tool that helps to survive non professional management approaches. To “manage by happy ideas”, to propose frivolous changes in the University management arena is so usual that always professional managers seek for a “philosophers' stone” that avoids (or at least, minimize) the presence of “temporal managers” that acts with no previous analysis of what is being done. Process, procedures and indicators management is (at least) a front-end tool to fight against improvisation and “happy ideas management”.

To apply this methodology consistently, Centres should have a process map defined that includes key processes identified in its list of services, preferably depending on their impact on the results of the organization in terms of customer satisfaction, staff satisfaction, cost minimization and maximum effectiveness. To define the process map is the first step. To decide “where to go” is needed “to know where you are”. And to know which are the critical, support and strategical process, procedures and indicators is the real first step, normally compatible with strategical management approaches.

Authors

Patricio Montesinos - Mónica López - Carlos Ripoll

Guidelines for processes and indicators in LLL management

The main objective of this publication is to introduce the principles of MANAGEMENT by PROCESSES and INDICATORS to Lifelong Learning Centres at university institutions in order to guide them in the steps proposed by the authors from their experience. The different experiences of the Lifelong Learning Centres participating in the UNI-QM Project in setting up management systems based on processes and indicators endorse the conclusions and proposals outlined here.

Gestión de la Educación Continua basada en procesos e indicadores

El objetivo principal de esta publicación es introducir los principios de gestión por procesos e indicadores para los Centros de Formación Permanente de las Universidades con el fin de orientarlos en las medidas propuestas por los autores desde su experiencia. En esta guía se incluyen las conclusiones y propuestas expuestas por los diferentes Centros de Formación Permanente participantes en el proyecto UNI-QM, las cuales están basadas en su experiencia en cuanto al establecimiento de sistemas de gestión basados en procesos e indicadores.

