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COMMON ASSESSMENT FRAMEWORK

SMART GOVERNANCE: PEOPLE-CENTRED, EFFICIENCY-DRIVEN

10th European CAF Users' Event

10th April 2025, Warsaw

EIPA | European Institute of Public Administration

This publication contains the speeches and interventions delivered at the 10th European CAF Users' Event, as well as descriptions of good CAF practices, both Golden 18 - presented at the conference and other practices submitted to the conference.

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Introduction

The **10ᵗʰ European CAF Users' Event** was held on 10 April 2025, at the National Stadium Conference Centre in Warsaw, under the Polish Presidency of the Council of the European Union. This landmark event, organised in close cooperation with the **European CAF Resource Centre at EIPA** and the network of CAF National Correspondents, brought together 130 participants from 21 countries to explore the theme: **"Smart Governance: People-Centred, Efficiency-Driven."**

The primary objective of the conference was to promote the Common Assessment Framework (CAF) as a strategic tool for strengthening the resilience, effectiveness, and citizen-focus of public administrations across Europe. The event aimed to stimulate dialogue on the benefits of CAF, foster peer learning, and create a space for the exchange of best practices in quality management. It also sought to reinforce the European community of CAF users and experts, while encouraging the adoption of CAF in new contexts and countries.

The event was the result of months of dedicated preparation and international collaboration.

A central feature was the presentation of the **Golden 18** — a curated selection of 18 outstanding management practices from 13 countries: **Austria, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Georgia, Greece, Hungary, Italy, Montenegro, Poland, Portugal, Serbia, Slovenia, and Spain**. These practices were selected from 34 submissions by a CAF Users' Event Steering Committee composed of representatives of the CAF National Correspondents' Network **Margarida Martins** (Portugal) and **Isabelle Verschueren** (Belgium), representatives of the European CAF Resource Centre – **Gracia Vara Arribas** and **Tihana Puzic**, and representative of the Polish Presidency – **Katarzyna Dudzik** and **Witold Stelmaski**. Special thanks for the diligent and professional evaluation and versification of the best of the best based on innovation, impact, results orientation and transferability.

The Golden 18 were presented in six thematic breakout sessions, each facilitated by a team of international experts from across Europe. Special thanks go to facilitators: **Begoña Lázaro Álvarez** (Spain), **Kenan Avdagić** (Bosnia and Herzegovina), **Slaven Bucarica** (ReSPA), **Katarzyna Dudzik** (Poland), **Greta Hrehova** (Slovakia), **Mimi Jotova** (Bulgaria), **Michael Kallinger** (Austria), **Loredana Leon** (Slovenia), **Witold Stelmaski** (Poland), **Isabelle Verschueren** (Belgium), **Hrachik Yarmaloyan** (GIZ), and **Barbara Zupanc** (Slovenia). Thanks to the commitment of these great experts, the break-out sessions were very well prepared and efficiently conducted to the benefit of the participants as well as the presenters themselves.

The Event was further strengthened by the support of key international organisations: **OECD/SIGMA, Regional School of Public Administration (ReSPA), GIZ, and the Polish National School of Public Administration (KSAP)**. We are especially grateful to **ReSPA and GIZ** for their invaluable contribution in ensuring broad representation from the EU candidate countries and Eastern Partnership countries. Thanks to their engagement, we were able to expand and deepen cooperation on the CAF model across a wider European landscape, reinforcing our shared commitment to quality, innovation, and inclusive governance.

The 10th CAF Users' Event not only served as a platform for showcasing excellence, but also as a space for dialogue, learning, and inspiration. It reaffirmed the CAF model as a powerful tool for building resilient, innovative, and citizen-focused public administrations.

We extend our sincere gratitude to all contributors — the authors and presenters of the Golden 18, the authors of all cases submitted to the Event, the keynote speaker, panelists, facilitators, and organisers — for their commitment and collaboration. Your efforts have made this event a true success and a source of inspiration for the entire European public sector community.

Dear Reader, with this publication, we are pleased to place in your hands a comprehensive summary of the discussions held during the 10th European CAF Users'

Event – but above all, a detailed presentation of the most outstanding management practices implemented across Europe through the use of the CAF model. We invite you to explore this publication with curiosity and ambition. May the practices and insights shared here inspire you to adopt and adapt quality management tools like CAF — not only to improve your organisation but to better serve citizens across Europe and beyond.

Enjoy the read — and let it inspire your next step toward excellence!

Polish Presidency of EUPAN Team

Welcome speech of Anita Noskowska-Piątkowska, Head of Civil Service in Poland

Ladies and Gentlemen, Dear Guests, Colleagues, Friends,

It is both an honour and a privilege for me to welcome you today to the 10th European CAF Users' Event, held under the Polish Presidency of the Council of the European Union.

We are proud to host this unique Event, co-organised together with the European Institute of Public Administration in Maastricht.

Let me take this opportunity and express my appreciation to Mr Marco Ongaro, Director-General of EIPA, Ms Gracia Vara, Head of the European CAF Resource Centre, and Ms Tihana Puzić, Deputy Head. From the very beginning, your commitment has played a key role in making this gathering possible. Your profound expertise, and strategic insight have been influential in shaping both the vision and the high standard of this Event.

I would like to extend my thank to our distinguished guests:

- Ms Cecilia Wikström, Chair of EIPA's Board of Governors
- Mr Gregor Virant, Head of the SIGMA Programme
- Ms Małgorzata Bywanis-Jodlińska, Director of the National School of Public Administration from Poland
- Ms Maja Handjiska Trendafilova, Director of ReSPA
- Mr Nick Thijs, Senior Advisor, Team leader Service Delivery and Digital Government, OECD/SIGMA

Dear guests, your presence is an asset to this Event and an asset to our upcoming discussions.

Let me direct my special thanks to Ms Maja Handjiska Trendafilova and Mr Hrachik Yarmaloyan, Member of Management Team of GIZ Country Office in Armenia. Without your support such a strong and visible presence of representatives from candidate countries and Eastern Partnership countries would not have been possible. Your involvement shows how much can be achieved when we work together across borders and institutional frameworks.

In expressing my gratitude today, I cannot – and would never want to – leave out the invaluable contribution of the CAF National Correspondents from across Europe. You have played a crucial role at every stage – from promoting the event nationally, through the pre-selection of good practices, to taking part in the final selection of the Golden 18. And today, many of you will be taking the lead in the sessions we are about to begin.

Finally let me also thank the team of the Polish Presidency from the Civil Service Department of at the Chancellery of the Prime Minister of Poland, who have shown dedication, professionalism, and enthusiasm in preparing this event. Marta, Katarzyna, Witold and Krzysztof - your work is not only appreciated – it is essential.

This very good international cooperation has brought us to where we are today – to this room, to this moment, and to this inspiring community of practice.

However, the true heroes of today are the "Golden 18" – the teams behind the 18 best management practices in Europe, all made possible through the application of the CAF model.

I am delighted to welcome the authors and presenters of these remarkable practices from 13 countries: Austria, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Georgia, Spain, Poland, Portugal, Serbia, Slovenia, and Italy. You are the living proof that change is not only possible – it is happening, every day, in public administrations across our continent. I would like to take this opportunity, having the privilege to speak first, to congratulate you for your courage, your commitment, and your determination – for not being afraid to challenge the status quo, and for striving to continuously improve public services for the benefit of the citizens and the whole European community.

These best of the best experiences and solutions – shaped through the CAF model – will be presented in six thematic breakout sessions during today's Event dedicated to:
- People and Leadership,
- Strategy, Partnerships and Results Orientation,
- Innovation and Digitalisation,
- Public Sector Excellence - A Vision for digital transformation and innovation,
- Result orientation: continuous innovation and improvement,
- Social responsibility: attractiveness of the public sector.

These sessions will be more than just presentations – they are opportunities to learn directly from those who have walked the path of transformation, often in demanding and complex contexts.

Dear participants of the 10th European CAF Users' Event, this conference is about people working together, about public servants who believe in better government, and about the power of collaboration. These have become particularly important today, in so complicated geopolitical situation.

So let us leave here today not only inspired, but energised and united, with a renewed belief that together, we can shape better public services for all Europeans – and beyond. I wish you a day full of inspiring conversations, thought-provoking discussions, and eye-opening ideas.

Good luck – and enjoy the day!

Enjoy your stay in Poland!

Welcome speech of Marco Ongaro, Director General of EIPA in Maastricht

Dear Polish Presidency team, dear hosts,

Distinguished guests and speakers,

Dear members of the CAF community,

Dear Colleagues,

Ladies and gentlemen,

It is an honour and a pleasure to be here today with you at this landmark 10th CAF Users Event. First of all, I would like to extend my sincere gratitude to our Polish hosts, whose commitment, vision, and dedication have made this event possible. Under the Polish EU Presidency, Poland has once again demonstrated its strong leadership in fostering quality management in public administration across Europe. Thank you to the entire Polish team, the National CAF Correspondents from Belgium, Poland, and Portugal, and the European CAF Resource Centre at EIPA whose efforts in the Steering Committee of this event have brought us together in this vibrant forum. A special thank you as well for the colleagues joining us from the Western Balkan and Eastern partnership countries as well as from GIZ and the OECD.

As the Director-General of EIPA, I take great pride in witnessing how the Common Assessment Framework (CAF) continues to shape the European public sector. At a time when Europe faces unprecedented challenges — from digital transformation to climate imperatives, from trust in public institutions to the need for resilient governance — CAF stands as a cornerstone of modern, effective, and accountable administration. More than just a self-assessment approach and the total quality management model for the public sector, CAF is a driving force for change, a vehicle for institutional improvement, and a pillar of transparency, accountability and excellence. CAF drives the innovation, the trust, internally and externally and is building bridges towards other reforming areas.

We meet today in a time of great urgency. The world is evolving rapidly, and so must we. Public administrations are under growing pressure to deliver services that are more efficient, greener, and more digitalised. Citizens rightfully expect quality, transparency, and responsiveness from their governments. And we — policymakers, public servants, and quality management professionals — must meet these expectations with determination. That is precisely why CAF is more important today than ever before. It provides a structured, evidence-based approach for improving public sector performance. It fosters a culture of continuous learning, innovation and adaptation, ensuring that our institutions not only keep pace with change but lead it. It promotes

collaboration across levels of government, across borders, and across sectors, strengthening European administrative capacity and unity.

Today, we are gathered to celebrate and learn from the best of CAF implementation. The Polish team, in collaboration with the European CAF Resource Centre, invited the CAF community to submit their most inspiring best practices. The response was outstanding: we received 34 remarkable cases, each of them a testament to the transformative power of CAF in driving real change. Every single submission is a winner, as they all represent efforts to build stronger, more resilient, and more accountable public administrations.

With great care and rigorous evaluation, the Steering Committee identified 18 Golden CAF Cases that stand as shining examples of how CAF can reshape public administration. These cases span local, regional, and national levels, covering EU Member States, the Western Balkans, and Eastern Partnership countries. They demonstrate how CAF fosters innovation, efficiency, and sustainability—not just in words but in tangible, measurable results.

These success stories send a clear message: CAF is not just a quality framework and approach in the public sector—it is a transformative movement. It is empowering public administrations to deliver better services, create healthier work environments, and drive sustainable, digital, and citizen-centric governance. Each case shared today offers valuable lessons and inspiration for others to follow.

Let us take a moment to celebrate not just the 18 selected Golden CAF Cases but all the incredible initiatives that were submitted. Each contribution plays a vital role in shaping the future of quality management in public administration.

As we look ahead, let us recognise that CAF's journey is far from over. The work of embedding quality in public administration must continue, expand, and deepen. We must remain committed to innovation, adaptive to new challenges, and relentless in our pursuit of excellence.

To achieve this, we need:

- Stronger collaboration between the European CAF Resource Centre, EUPAN, and National CAF Centers.
- More widespread adoption of CAF at all levels of government.
- Continued investment in training and peer learning to build CAF expertise.
- A commitment to sharing best practices—because every success story strengthens the entire CAF community.

Dear colleagues, the responsibility of building a high performing, trusted, and transparent public administration rests in our hands. CAF has already proven its value for 25 years—now it is up to us to scale it further, embed it deeper, and make it a permanent fixture in European governance.

Let this 10th CAF Users Event be more than just a celebration of past achievements—let it be a launchpad for the future. A future where quality management is the foundation of public service, where institutions operate with excellence and integrity, and where citizens benefit from truly modern, resilient, and high-performing governance.

Thank you for your dedication to quality in public administration. Thank you for your belief in CAF as a driver of change. And thank you for the work you continue to do for the future of Europe.

I wish you a wonderful day of learning, sharing and networking.

The CAF Network and its European Resource Centre: Navigating challenges and driving change successfully by Gracia Vara Arribas and Tihana Puzić – Head and Deputy Head of the European CAF Resource Centre, EIPA

Driving change with a human-centric vision

At the heart of the European CAF Resource Centre lies a deep commitment: building a public sector that is not only efficient and accountable but also human-centric. Our mission is grounded in the Principles of Excellence, which inform every step we take, every tool we develop, and every partnership we build.

The strength of our work lies in the CAF Network—a vibrant, committed community of national CAF centres and correspondents, supported by national CAF experts. With their continuous support, and through strategic partnerships with organisations, initiatives, technical assistance and networks such as EUPAN, anthe European Commission, OECD/SIGMA, ReSPA, GIZ, and UNDP, we promote the values of good governance and quality in public administration throughout Europe and beyond.

CAF is not simply a framework for self-assessment. It is a vehicle for continuous improvement, a platform for shared learning, and an anchor for employee- citizen- and results-centred governance.

Tackling Today's Challenges

Like many public administrations, we face persistent challenges:

- Maintaining transformation momentum within overstretched and underfunded administrations;
- Securing space for quality approaches and managing quality on political agendas;
- Aligning quality initiatives with national, regional, and EU-wide priorities.

To tackle these, we focus on three priorities:

1. Strengthening the CAF Network and our community of experts.
2. Building capacity through training, research, and user-driven content.
3. Fostering collaboration within EU and global quality management (QM) communities.

Capacity building in practice: Responding to real needs

In early 2024, we launched a Training needs analysis targeting CAF users, experts, and national correspondents. Key findings pointed to high demand for training in:

- The CAF self-assessment process;

- Facilitation and soft skills;

- The External Feedback Procedure – now updated with a new name: CAF Excellence Recognition.

In response to these findings, we organised the International CAF trainer's day, a pilot training event, in November 2024 in Maastricht. With 30 participants from 13 countries (plus ReSPA from the Western Balkans and GIZ Eastern Partnersip), the feedback was overwhelmingly positive. This shaped the approach for CAF training and materials now freely available on EIPA's learning platform.

In the same spirit, the event offered a platform for intergenerational learning. As CAF expert Italo Benedini put it: "It's not just about experience—it's about the will to learn."

Research and policy impact

In cooperation with EPSA 2023–2024, we conducted a Study on institutionalising quality management across 27 EU and candidate countries. The results revealed varied levels of maturity and highlighted the need for:

- Sustained political commitment;

- Stronger competence centres;

- Enhanced cross-border cooperation.

We also finalised and approved the new model CAF Education 2024, published in January 2025: it aligns with European education priorities and the Sustainable Development Goals (SDGs), offering a structured QM approach for the education sector as well.

Evolving tools and recognition systems

We continue to refine the CAF feedback system itself. In collaboration with national partners and CAF experts from Austria, Italy, Slovakia, Slovenia, and others, we have updated the CAF External Feedback Procedure, culminating in a final submission to the EUPAN working group in spring 2025.

We also launched tools like the CAF Compass interviews, the CAF E-Tool (available in 10+ languages), and expanded the reach of the CAF newsletter, now serving over 2,500 subscribers.

Looking ahead: Challenges and next steps

The road ahead is promising but not without hurdles. Three challenges stand out:

1. Ensuring political will and sustained investment in QM.

2. Developing capacities to embed EU values through quality approaches.

3. Integrating quality management into governance structures.

To respond, we will:

- Expand our training offer; In a close collaboration with the CAF National Centres and with our strategic partners, we will seek for offering more structured training offers, starting with webinars towards leadership and master classes, covering specific quality principes.

- Develop SMART CAF – a more user-centric CAF approach, making it easier to use CAF, especially for first-time users. The SMART CAF shall be a platform of inspiration for EU-wide innovative approaches on client and employee management, process optimisation, project management, social responsibility and other projects and initiatives that will contribute to a more efficient promotion and use of already existing approaches for implementation of identified improvement actions, as part of the CAF introduction.

- Deepen cooperation within and beyond the CAF Network; Our aim is to invite to the table also other quality approaches, and to embed the proven quality models in CAF, as a connector.

- Keep aligning with EU priorities by fostering innovative, green and socially responsible actions and contributing to administrative burden reductions.

A Final word: Making change together

As we look back at the journey to convey this memorable event, which began in meetings like the CAF Correspondents' gathering in Madrid, October 2023, and now culminates in the 10th CAF Users Event in Warsaw, we are reminded of something simple yet powerful:

"Making memories with a smile—even in challenging times—is the best way to navigate."

Together, we will continue to build a public sector rooted in excellence, collaboration, and trust.

General findings of the breakout sessions by Gracia Vara Arribas and Tihana Puzić – Head and Deputy Head of the European CAF Resource Centre, EIPA

General findings of the breakout sessions

The six parallel breakout sessions held during the CAF Users Event in Warsaw highlighted once again that CAF remains a dynamic and effective instrument for internal and external transformation of public organisations. The discussions confirmed several overarching trends and insights:

- Employee satisfaction management is gaining attention as a fundamental pillar of institutional performance and leadership.

- Client satisfaction management continues to drive the refinement of services, prompting more citizen-focused, tailored approaches.

- CAF supports better internal and external communication, fostering transparency, cooperation, and greater engagement among employees and stakeholders.

Additionally, participants underlined:

- The impact of external evaluation processes in reinforcing quality principles.

- The strategic value of the continuous use of CAF to maintain momentum and ensure sustainable improvement.

Breakout Session 1: Leadership and Constancy of Purpose, Values

This session featured contributions from:

- Austria (Federal Ministry for Arts, Culture, Civil Service and Sport)

- Belgium (Brussels Unemployment Services – ACTIRIS)

- Greece (Region of Crete)

Key reflections included how CAF prompted a data-driven approach to leadership, focusing on user satisfaction management and fact-based decision-making.

Quoting Aristotle: "We are what we repeatedly do. Excellence, then, is not an act, but a habit."

Participants noted that:

- Communication channels and messages must be aligned with users' realities.

- CAF supports employee-centric approaches through digital innovation in project and people management.

- Stronger internal and external communication strategies lead to higher satisfaction for both employees and clients.

Breakout Session 2: People Involvement: Cooperation and Co-Creation

Highlights came from:

- Italy (Region of Apulia)

- Greece (Municipality of Volos)

- Poland (Social Insurance Institution, Bydgoszcz Branch)

This session showcased the power of multi-level cooperation:

- Italy shared its CAF Competence Centre approach for local municipalities, with a focus on empowering trainers and fostering a culture of excellence.

- Volos presented the importance of IT as a key enabler of process ownership and internal training programmes.

- Poland emphasised stakeholder engagement as a force for transparency and positive organisational change, offering a nine-step stakeholder management guide.

All speakers reinforced the value of structured project management and PDCA cycles in building a culture of continuous improvement.

Breakout Session 3: Organisational Culture: Wellbeing and Work-Life Balance

Insights came from:

- Portugal (Local Health Unit of the Aveiro Region)

- Portugal (National Institute for Agrarian and Veterinary Research)

- Slovenia (Ministry of Higher Education, Science and Innovation)

Portugal demonstrated how employee input was gathered through interviews, surveys and brainstorming to shape wellbeing strategies, aligning with national standards for work-life reconciliation.

The second Portuguese case emphasised design thinking, internal communication and adaptive leadership. Slovenia presented CAF as a change engine, promoting strong internal communication and a mindset of continuous learning.

Breakout Session 4: Public Sector Excellence – A Vision for Digital Transformation and Innovation

Experiences shared by:

- Belgium (GITO School Overijse)

- Poland (Financial Supervision Authority)

- Bulgaria (Institute of Public Administration)

Belgium presented a compelling case of CAF actions using real-time data in education, improving both teacher adoption and student performance through causal loop diagrams.

Poland illustrated how robotic process automation enhances regulatory efficiency. Bulgaria introduced "chIPA", a support platform tailored to CAF users and designed to help busy public servants streamline their quality journeys.

Breakout Session 5: Result Orientation – Continuous Innovation and Improvement

Contributions came from:

- Bosnia and Herzegovina (Civil Service Agencies and PARCO, supported by UNDP)

- Croatia (Ministry of Justice, Public Administration and Digital Transformation)

- Serbia (Human Resource Management Service – CAFefficiency monitoring tool)

The session centred on practical CAF-based tools designed to capture, measure, and communicate institutional performance and innovation. Participants were invited to review key papers outlining these instruments.

Breakout Session 6: Social Responsibility – Attractiveness of the Public Sector

Speakers included:

- Spain (Madrid City Council – Línea Madrid)

- Bulgaria (Regional Administration, Lovech)

- Georgia (Public Service Hall under the Ministry of Justice of Georgia)

Madrid showcased "Línea Madrid", an initiative prioritising service to citizens aged 65+, highlighting empathy, inclusion, and accessibility. Bulgaria shared efforts to strengthen internal communication, while Georgia described its internal benchmarking and staff rotation programme across 123 branches, reinforcing internal knowledge and peer learning.

Conclusion: "It's all about results, baby." (As one speaker quoted—echoing CAF's impact with a smile.)

From digital innovation to social inclusion, the 18 Golden Cases shared during the breakout sessions demonstrate CAF's dynamic role in transforming public administration across Europe and beyond. As underlined throughout the event, CAF fosters:

- Strategic leadership and foresight

- Transparent and participatory decision-making

- Service orientation grounded in real user and employee needs

- A strong culture of learning and performance

Together, these sessions showed how CAF continues to support not only internal improvements but also cultural transformation, digital innovation, and enhanced public trust. The messages from Warsaw are clear: public sector organisations are increasingly result-oriented, people-driven, and committed to continuous learning and improvement.

Importantly, all 18 Golden Cases were featured throughout the sessions, ensuring full visibility and recognition of excellence from across Europe and beyond. These cases not only reflect the diversity of CAF users but also the shared ambition to shape public administrations that are smarter, more responsive, and truly citizen-focused.

PART II

THE GOLDEN 18 CASES

Destriptions of the 18 cases selected by the CAF Users' Event Steering Committee as the best managerial practices, implemented through the use of CAF

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PART II – the golden 18 cases

Description of the 18 Golden Case 2025, selected to the 10th European CAF Users' Event "Smart Governance: People-Centred, Efficiency-Driven":

1. Austria: The Strategic Implementation of the CAF in Austria's Directorate General III of the Federal Chancellery: A Transformative Case of Public Sector Innovation

2. Belgium: Leertrac. GITO Overijse

3. Belgium: Strategic approach of employers to increase public services relevancy and employment rate in the Brussels Region. ACTIRIS

4. Bosnia and Herzegovina: Standardization of the improvement of local self-government units and assessment of digital readiness. Civil Service Agency BiH (BiH CSA)/ Civil Service Agency of Federation of BiH (FBiH CSA)/ Civil Service Agency Republic of Srpsa (RS CSA) /Public Adminstration Reform Coordinator's Office (PARCO) /UNDP

5. Bulgaria: chIPA: Digital Communication Revolution.
   Institute of Public Administration.

6. Bulgaria: Creating a Culture of a Quality Development in the Regional Administration Lovech.
   Regional Administration – Lovech.

7. Croatia: Using the power of digitalisation for shared process and quality knowledge management: Croatian digital tool eSUK (https://kvaliteta.gov.hr). Ministry of Justice, Public Administration and Digital Transformation

8. Georgia: Facilitating the Exchange of Best Practices Among Employees Across Various Branches. LEPL Public Service Hall (Under the Ministry of Justice of Georgia).

9. Greece: Systemic implementation of the Common Assessment Framework: fostering digital innovation in project management to improve team collaboration, efficiency, and decision-making. Region of Crete.

10. Greece: CAF's implementation in Municipality of Volos. Municipality of Volos

11. Italy: Apulia region as CAF competency center for local municipalities. Apulia Region

12. Poland: Development and implementation of a stakeholder engagement management project. Social Insurance Institution (branch in Bydgoszcz)

13. Poland: Implementation of robotic process automation technology in the Polish Financial Supervision Authority. Polish Financial Supervision Authority.

14. Portugal: Conciliar + Project - Implementation of Portuguese Standard 4552:2022 – Reconciliation of Professional, Personal and Family Life. Unidade Local de Saúde da Região de Aveiro, EPE.

15. Portugal: Staff development and involvement. National Institute for Agrarian and Veterinary Research.

16. Serbia: CAF Efficiency platform – CAFficiency. Human Resource Management Service.

17. Slovenia: CAF as a Change Engine: Driving Towards Continuous Improvements. Ministry of Higher Education, Science and Innovation (MHESI).

18. Spain: Línea Madrid: Preferential Attention for People Over 65. Ayuntamiento de Madrid (Madrid City Council).

Austria: The Strategic Implementation of the CAF in Austria's Directorate General III of the Federal Chancellery: A Transformative Case of Public Sector Innovation

Federal Chancellery
Republic of Austria

Introductory Information

Title of the Good Practice: The Strategic Implementation of the CAF in Austria's Directorate General III of the Federal Chancellery: A Transformative Case of Public Sector Innovation

Name of the Organisation: Federal Ministry Arts, Culture, Civil Service and Sport

City/Country: Austria

Project Manager's/Contact Person's First and Last Name: Michael Kallinger, Head of Unit Public Management and Governance, Sandra Rodrigues, Project Manager

Email, Phone Number to the Project Manager's/Contact Person's: caf@bmkoes.gv.at

Level of Organisation/Project: national / federal

Sector: Administration

How many times the CAF Was Used? 4

Main Focus: Leadership and constancy of purpose, values,

Key Words: standards & values for performing leadership, digitalisation, communication

Executive Summary

In 2023, the Directorate General for Civil Service and Administrative Innovation within the then Austrian Federal Ministry for Arts, Culture, the Civil Service and Sport embarked on a significant quality transformation initiative through the renewed implementation of the Common Assessment Framework (CAF). This fourth CAF application was neither symbolic nor routine. Rather, it marked a determined and methodologically grounded effort to strengthen the institution's strategic performance, internal coherence, and service delivery orientation.

About the Organisation

Within a federal administrative system characterized by its complexity and multi-level governance—consisting of federal institutions, nine provinces, and more than two thousand municipalities—the Directorate General III (DG III) holds a unique position. It serves as a central player in shaping human resource policy, innovation strategies, and the overarching quality management structures that affect thousands of civil servants and, indirectly, millions of citizens.

Quality Improvement Aspects

The broader European context into which this case is embedded emphasizes the increasing importance of high-performing public institutions that are responsive to societal change, resilient in times of crisis, and actively contributing to digital, ecological, and cultural transformation. The 10th European CAF Users' Event, held under the auspices of the Polish Presidency of the EU Council, framed this vision clearly. Under its thematic pillars—ranging from greening public administration to embracing ethical digital innovation—the Austrian case demonstrated how CAF can function not merely as a diagnostic tool, but as a transformative engine for cultural and procedural renewal. In a time when the public increasingly expects government institutions to be transparent, user-centered, technologically competent, and socially responsible, DG III's commitment to CAF was both timely and emblematic of a shifting administrative ethos.

Stakeholders and Communication

From the outset, the leadership of DG III articulated its motivation not simply in terms of compliance or periodic review, but as a proactive endeavor to deepen and extend the culture of continuous improvement. The Directorate had applied CAF three times in previous cycles—2006, 2011, and 2015—establishing a foundation of experience and learning. Yet with the 2023 iteration, there was a palpable desire to embed this experience more permanently into the institutional fabric. This meant moving beyond the framework's formal application and instead cultivating the reflexive capacities of the organization: its ability to analyze itself critically, engage in inclusive dialogue, and enact meaningful, collectively supported change.

Implementation Process/Approach

This process began with the establishment of a CAF Self-Assessment Group comprising 15 employees representing various functional areas and hierarchical levels. The selection process emphasized diversity in all dimensions—professional backgrounds, seniority, gender, age, and departmental affiliation—to ensure a panoramic view of the

organization's strengths and challenges. Recognizing that sustainable innovation requires a shared vocabulary and mutual understanding, the group underwent comprehensive preparatory training. This phase was particularly focused on internalizing CAF's core concepts—stakeholders, users, outcomes, impact—and adapting its language to fit the specific operational culture of the Directorate General. The process was more than technical; it was pedagogical and cultural. It invited participants to reframe their assumptions about the organization and its mission.

The design of the assessment was grounded in both methodological rigor and organizational empathy. The adaptation of the CAF questionnaire ensured that the language was accessible, relevant, and reflective of the Directorate's unique internal discourse. The stakeholder mapping exercise, which emerged as a cornerstone of the self-assessment, facilitated a multidimensional understanding of whom the Directorate serves and in what ways its services are perceived and experienced. By situating this understanding at the center of the assessment, DG III underscored its commitment to user orientation—not only as a rhetorical gesture but as an operational principle.

Focus Area

Following a period of individual reflection and assessment by the CAF group members, the process culminated in a two-day consensus workshop. This event proved to be a pivotal moment in the organization's trajectory. It was during this session that departmental silos dissolved into a collaborative space of dialogue, critique, and synthesis. Strengths and areas for improvement were not imposed but constructed collectively, with each participant contributing insights derived from lived experience, professional expertise, and shared values. The workshop was not merely a meeting—it was an act of organizational storytelling, where the Directorate's present identity was confronted, interrogated, and reimagined.

The Essence of the Innovation and the Transferability of the Solutions Introduced

The results of this collective effort were both ambitious and concrete. Seventy-five discrete improvement actions were identified, many of which addressed long-standing concerns that had previously lacked either the attention of the management or the operational clarity to be addressed. These individual actions were consolidated into seven strategic improvement packages, each targeting a vital dimension of the Directorate's functionality and internal culture. Among the focal areas were the standardization of leadership values, the restructuring of onboarding processes for new staff, the revitalization of knowledge-sharing systems, and the modernization of remote work structures. One particularly impactful measure involved the improvement of the shared digital folder system and a redesigned break room—simple interventions,

perhaps, but ones that catalyzed both formal and informal communication. These spaces of exchange allowed for cross-departmental insights to flow, relationships to form, and a culture of transparency to deepen.

The commitment to digital transformation was similarly profound. Recognizing that innovation is not merely technological but behavioral, the Directorate initiated a structured digitization program. This involved more than the rollout of new software or platforms—it entailed a reconsideration of how work is conceptualized, managed, and supported in a digital environment. Collaboration tools were introduced, and technical support structures were reorganized to ensure accessibility and reliability. These changes were not isolated; they were interconnected and embedded in a broader vision of service quality and employee empowerment.

At the leadership level, new standards were developed through dedicated workshops. These standards articulated shared expectations around communication, feedback, diversity sensitivity, and performance management. Importantly, they were not prescriptive mandates but co-created guidelines born from dialogue and collective intelligence. In this sense, the CAF process fostered a form of leadership that is dialogical rather than directive, reflective rather than reactive.

To ensure that momentum was not lost following the assessment phase, a monitoring and reporting system was instituted. This framework assigns clear responsibilities and timelines for each improvement initiative and reports regularly to the Director General. Employees received transparent updates on implementation progress, reinforcing the sense of shared ownership and institutional accountability. What began as a quality management exercise thus evolved into a system of distributed leadership and collaborative governance.

The cumulative impact of these efforts was recognized externally as well. The Directorate General III was awarded the prestigious "Effective CAF User" label—an acknowledgment not only of procedural compliance but of strategic excellence and innovation in public administration. Yet for the members of the Directorate, the deeper reward lay in the transformed internal dynamics: the emergence of a workplace culture defined by trust, mutual respect, and a willingness to engage with complexity.

In reflecting on the experience, members of the CAF Self-Assessment Group described a shift in how they viewed their roles—not merely as functionaries within a bureaucratic system, but as co-creators of a living institution. The process cultivated new capacities for listening, mediating, and imagining alternatives. It taught them that quality is not a destination but a discipline, one that must be practiced daily in the ways they communicate, decide, and act.

Lessons learnt

CAF, in this context, became more than a tool. It became a language for describing aspiration, a method for surfacing contradictions, and a framework for enacting possibility. It demonstrated that when public institutions make space for dialogue, diversity, and deliberate reflection, they do more than improve processes—they redefine what it means to serve.

Belgium: Leertrac. GITO Overijse

Introductory Information

Title of the Good Practice: Leertrac – Data-Driven Educational Insights at GITO Overijse

Name of the Organisation: GITO Overijse

City/Country: Overijse, Belgium

Project Manager's/Contact Person's First and Last Name: Marc Rabaey / Ingeborg Maes

Email, Phone Number to the Project Manager's/Contact Person's: directie@gito-overijse.be / ingeborg@insigthful.be

Level of Organisation/Project: Local, with potential for national impact

Sector: Education

How many times the CAF Was Used? First Implementation: 2023-2024

Main Focus: Digital transformation and innovation

Key Words: Learning analytics, digital transformation, Moodle, systems thinking, causal loop diagrams, student performance, educational decision-making, AI in education, open-source dashboards, data-driven learning

Executive Summary

The Leertrac project at GITO Overijse integrates learning analytics into student deliberations by utilizing Moodle and a Learning Record Store (LRS). The project applies systems thinking through causal loop diagrams (CLD) to improve data-driven decision-making. Additionally, Leertrac fosters teacher autonomy over instructional material and transitions educators from isolated publisher-driven systems to a generative AI-supported approach.

About the Organisation

GITO Overijse is a secondary school in Flanders governed by the municipal council. It provides education tailored to higher education and regional labor market needs, with an emphasis on STE(A)M, Sports, and vocational training.

As a progressive institution, GITO Overijse actively pursues digital transformation, leveraging technology to enhance pedagogy. The school employs Moodle as its Learning Management System (LMS) and has engaged in innovative projects such as Leertrac, aligning with the CAF/OK framework. The initiative aims to improve the quality of education through learning analytics, supporting students' competency development while ensuring that decisions at various levels of school governance are informed by data.

Quality Improvement Aspects

The motivation behind Leertrac stems from challenges identified in student deliberation processes. Typically, discussions about student progress and performance relied heavily on final grades, with limited contextual data from teachers. While Moodle already stored vast amounts of learning activity data, it was not systematically utilized to inform decision-making.

The objectives of Leertrac include:

- Centralizing learning analytics to support student deliberation with meaningful data.

- Facilitating real-time monitoring of student progress toward learning competencies.

- Reducing reliance on proprietary publisher-driven systems, encouraging teachers to develop their own educational content.

- Applying systems thinking, specifically causal loop diagrams (CLD), to model learning dynamics and identify underlying factors affecting student performance.

Causal loop diagrams (CLD) are a visual representation of cause-and-effect relationships within a system. In education, these diagrams help map out the various factors influencing student learning outcomes, such as motivation, engagement, assessment feedback, and instructional quality. By identifying feedback loops—where certain actions reinforce or counteract each other—educators gain insights into how specific interventions impact overall learning outcomes.

This project also aligns with institutional goals for digital transformation, the integration of AI-supported learning, and the promotion of open-source educational resources.

Stakeholders and Communication

The project was initiated by the leadership of GITO Overijse, with the school director overseeing its development. During a personnel meeting, the CAF self-assessment process was introduced, and interested teachers and staff members volunteered to participate. The city council was also informed to ensure alignment with governance priorities.

Key stakeholders include:

- Teachers and Staff: Actively engaged in CAF self-assessment, feedback collection, and dashboard development.

- Students and Parents: Provided input via surveys regarding their needs and expectations.

- External Partners: Collaboration with GO! CVO Antwerpen, KU Leuven (Augment – Computer Sciences) and Eummena vzw to develop and refine the interactive dashboards.

- Consultants: Ingeborg Maes (Insightful.be) facilitated CAF sessions and merged CAF and the Quality framework of the Flemish Ministry of Education, with additional support from Isabelle Verschueren (SPF BOSA of the federal Belgian government).

Communication was maintained through structured internal meetings, stakeholder workshops, and digital updates via the school's Moodle platform. The project's progress and outcomes will be shared externally through CAF events and contributions to the Moodle community.

Implementation Process/Approach

The implementation of the Leertrac project followed a structured, multi-phase approach to ensure the effective integration of learning analytics into the student deliberation process. Below are the main process steps undertaken:

1. Planning and Needs Assessment

The project began with an internal needs assessment facilitated by a CAF-driven self-evaluation. Teachers, administrators, and external consultants participated in discussions to identify major challenges in student evaluation and performance tracking. Key findings included:

- A lack of centralized, real-time student performance data.

- Underutilization of Moodle's built-in analytics features.

- A need for a more holistic approach to decision-making that goes beyond grades.

2. Defining Objectives and Mobilizing Resources

After identifying the gaps, the school leadership defined the following objectives:

- Develop dashboards to visualize student performance trends.

- Enhance teacher involvement in learning analytics through training and participatory design.

- Integrate causal loop diagrams (CLD) to help educators understand interdependencies in student learning.

Resources were mobilized both internally and externally:

- Internal Resources: School IT staff, Moodle administrators, and teacher focus groups.

- External Resources: Collaboration with GO! CVO Antwerpen, KU Leuven (Augment – Computer Sciences) and Eummena vzw for dashboard development.

3. Development of Dashboards and Learning Analytics Integration

The project team designed and built three interactive dashboards to track key student performance indicators. These dashboards were integrated into Moodle and connected to the Learning Record Store (LRS).

- The first dashboard focused on competency progress tracking.

- The second visualized student engagement metrics, including participation in online discussions and assignments.

- The third identified learning bottlenecks, flagging students who needed extra support.

The causal loop diagram (CLD) methodology was introduced to model feedback loops influencing student performance. These diagrams provided teachers with insights into the interconnected nature of motivation, engagement, and assessment outcomes.

4. Pilot Testing and Feedback Collection

Before full implementation, the project was piloted with a small group of teachers and students. Feedback was collected through structured surveys and focus groups. Key adjustments made included:

- Simplifying dashboard navigation.

- Providing additional data interpretation training for teachers.

- Refining CLD models to better reflect real classroom dynamics.

5. Full Implementation and Training

Following successful pilot testing, the dashboards were deployed across the entire school. A series of workshops were conducted to train teachers on how to:

- Use learning analytics to support student evaluations.

- Interpret CLD diagrams for pedagogical decision-making.

- Incorporate insights from dashboards into student feedback sessions.

6. Costs and Challenges

Internal and External Costs:

- Internal costs included staff training time, IT infrastructure upgrades, and administrative planning hours.

- External costs included consultancy fees for technical integration and software development support funded by imec.

Main Challenges and Resolutions:

1. Teacher Resistance to Data-Driven Approaches:

   o Solution: Hands-on training workshops and active involvement in dashboard design.

2. Limited Technical Expertise Among Educators:

   o Solution: Dedicated support from the IT team and creation of user-friendly guides.

3. Ensuring Data Privacy and Compliance:

   o Solution: Adhering to GDPR regulations and implementing strict access controls.

7. Key Success Factors

- Early Stakeholder Involvement: Teachers and administrators were included in the development phase, ensuring relevance and usability.

- Continuous Training: Ongoing professional development helped ensure widespread adoption.

- Evidence-Informed Decision Making: The use of CLDs and dashboards led to more informed deliberations.

- Scalability: The project was designed with flexibility in mind, allowing for future expansion and integration with additional educational data sources.

The successful implementation of Leertrac has positioned GITO Overijse as a leader in integrating data-driven decision-making into the educational sector. The structured approach to implementation, combined with strong stakeholder engagement, has ensured that learning analytics become a valuable tool in enhancing student outcomes.

Success Measurement: Main Results with Regards to the Focus Area

The success of the Leertrac project is evaluated through a combination of qualitative and quantitative indicators, providing a detailed understanding of its impact on teaching, learning, and institutional decision-making. This section presents key improvements, success metrics, and strategies for long-term assessment.

1. Teacher Adoption Rate

A major success indicator of the Leertrac project is the degree to which teachers incorporate learning analytics into their teaching practices. Before implementation, data from Moodle were rarely consulted beyond basic grade management. Following the integration of the new dashboards, it is assumed that after the full rollout over 80% of teachers now actively use these analytics tools to track student engagement, assess progress, and provide timely interventions. This shift demonstrates that the training and usability efforts are leading to meaningful adoption.

2. Student Performance Monitoring

One of the primary objectives of the project was to enable early identification of struggling students. The dashboards provide an early-warning system that flags students who show decreased engagement, low assignment completion rates, or patterns of underperformance. As a result, the number of proactive interventions by teachers has increased by 30% compared to the previous school year. These interventions include personalized learning plans, additional tutoring, and increased communication with students and parents.

3. Improved Data Accessibility

Previously, retrieving student performance data required labor-intensive manual collection, often leading to delays in decision-making. With the Leertrac dashboards, structured, real-time student data is readily accessible, reducing retrieval time by 60%. This improvement has streamlined the deliberation process, allowing educators to make informed decisions efficiently. Additionally, the automated visualizations provide a clearer understanding of trends, reducing cognitive load and improving usability.

4. Enhanced Decision-Making in Student Deliberations

Before implementing Leertrac, student evaluations were primarily based on final grades with limited contextual understanding of student progress. Now, deliberations will

integrate comprehensive data points such as participation levels, engagement in learning activities, and formative assessments. This will lead to more data-informed decision-making, ensuring that teachers can account for students' learning trajectories rather than just their summative assessments.

5. Teacher-Created Digital Content Growth

The introduction of analytics has also influenced the way teachers create and manage course content. Since Leertrac's implementation, there has been a small but promising increase in teacher-created resources on Moodle, reducing dependency on proprietary publisher-driven content. Teachers are now more engaged in content personalization, ensuring that learning materials better reflect student needs and institutional goals.

Long-Term Effects Measurement

To ensure sustained success, a series of ongoing monitoring and evaluation mechanisms have been established:

1. Annual Evaluations: The system undergoes yearly reviews to assess effectiveness, user adoption, and areas for improvement. Regular feedback is solicited from teachers, students, and administrators to refine functionalities and address any emerging challenges.

2. Student Academic Progression Tracking: To measure long-term impact, student performance is tracked across multiple school years. Patterns of progression, retention rates, and competency achievement are analyzed to identify trends correlated with dashboard usage.

3. Surveys and Feedback Mechanisms: Regular surveys are conducted to gauge the ease of use and perceived effectiveness of the dashboards. Teachers and students provide qualitative insights that inform refinements in the system's design and implementation strategies.

4. Integration with the Student Information System (SIS): Future plans include the integration of Leertrac with the SIS to provide a more holistic view of student performance. Combining LMS analytics with SIS data will enable even more refined student profiling and individualized learning pathways.

Impact on Institutional Decision-Making

Beyond improving teaching and learning, Leertrac has significantly influenced institutional-level decision-making. School administrators now rely on analytics insights to allocate resources effectively, identify at-risk student populations, and shape curriculum strategies. The ability to visualize trends over time will provide a data-driven approach to school management, reinforcing transparency and accountability.

The Essence of the Innovation and the Transferability of the Solutions Introduced

The Leertrac project stands out as an innovative approach to digital transformation in education, particularly in the use of learning analytics for student support and decision-making. Unlike traditional student evaluation systems that focus primarily on final grades, Leertrac integrates data-driven insights, making it a forward-thinking and exemplary initiative for other educational institutions.

Why is the project innovative or a good example for other institutions?

The core innovation of Leertrac lies in its combination of learning analytics, causal loop diagrams (CLD), and systems thinking to provide a holistic view of student progress. Traditional student assessment relies on static data points, but Leertrac ensures real-time monitoring of student engagement, activity completion, and performance, allowing for timely interventions.

Additionally, this project is leading to a fundamental cultural shift in the way teachers and administrators use data in education. Teachers are encouraged to analyze patterns of student engagement rather than relying solely on summative assessments. The integration of CLD further provides insights into reinforcing or balancing feedback loops affecting student learning, helping educators address underlying issues rather than just symptoms of poor performance.

Furthermore, Leertrac is an example of how an open-source approach can be leveraged for institutional improvement. By integrating Moodle and a Learning Record Store (LRS), the system ensures data interoperability while maintaining an adaptable, cost-effective framework that can be replicated elsewhere.

Is the project transferable to others? If so, which elements? Have other organizations already adapted the whole project or elements of it?

Yes, the Leertrac model is highly transferable. The key elements that can be easily adapted by other institutions include:

1. Learning Analytics Dashboards: Other institutions using Moodle can integrate similar dashboards with their Learning Record Store to enhance data-driven decision-making.

2. Causal Loop Diagrams for Educational Insights: The use of CLD as a systemic approach to education can be adopted by schools seeking to understand and influence student behavior and performance dynamics.

3. Teacher-Driven Digital Content Creation: Encouraging educators to create their own instructional materials rather than relying on publisher-based systems can foster greater autonomy and customization in teaching.

4. Open-Source Development and Collaboration: The dashboards and analytical tools developed in Leertrac are intended to be shared within the broader Moodle and open-education communities, making them accessible to institutions worldwide.

While the project is still in its early stages, there has been interest from regional educational authorities and other secondary schools in adopting parts of the Leertrac model. Some institutions have already begun piloting dashboard-based analytics as a first step in improving student data utilization.

Are there special factors that contributed to the success of the project you see as needed to additionally highlight?

Several factors played a crucial role in the success of Leertrac:

- Leadership Support: The proactive role of school leadership ensured smooth adoption and resource allocation.

- Teacher Engagement: Through training sessions and pilot testing, teachers were equipped with the necessary knowledge to make effective use of learning analytics.

- External Expertise: Collaboration with GO! CVO Antwerpen, KU Leuven (Augment – Computer Sciences) and Eummena vzw provided technical expertise that was instrumental in developing the dashboards.

- CAF Framework as a Guide: The use of the CAF methodology ensured a structured self-assessment and continuous improvement cycle.

What would you pass on to someone who would like to benefit from your organisation's experience?

Institutions looking to implement a similar initiative should consider the following key takeaways:

1. Start with a self-assessment: Understanding the gaps in student performance tracking before implementation is crucial.

2. Leverage existing digital infrastructures: Utilizing platforms like Moodle can help avoid the need for costly new software solutions.

3. Engage stakeholders early: Teachers, students, and administrators should be involved from the planning phase to ensure smooth adoption.

4. Provide continuous training and support: Teachers need hands-on training and follow-up sessions to effectively integrate data analytics into their teaching.

5. Promote an open-source culture: Sharing solutions with other educational institutions fosters collaboration and continuous improvement.

In what situations can the experience of the project be used?

The principles behind Leertrac can be applied in various educational and administrative contexts, including:

- Other Secondary Schools: Institutions looking to enhance student performance monitoring can replicate the analytics dashboard approach.

- Higher Education Institutions: Universities and colleges can implement similar data-driven systems to track student engagement and performance at a more advanced level.

- Vocational Training Centers: Training institutions that need to monitor competency-based learning progress can benefit from a real-time analytics model.

- Government Education Policy Initiatives: Educational authorities can use a similar framework to implement nationwide data-driven learning strategies.

By integrating data analytics, systems thinking, and teacher-driven content creation, Leertrac is paving the way for a smarter, more informed approach to education. The project not only improves student outcomes but also empowers educators with the tools and insights needed to drive meaningful pedagogical change.

Lessons learnt

Lesson 1: The Importance of a Structured Self-Assessment Process

One of the most crucial takeaways from the Leertrac project is the value of conducting a structured self-assessment before launching a major digital transformation initiative. By using the CAF framework, GITO Overijse was able to identify gaps in data utilization, pinpoint inefficiencies in student deliberation processes, and align project goals with the school's broader educational objectives.

Many institutions overlook this critical step, often implementing digital solutions without fully understanding their needs or existing challenges. By contrast, the self-assessment process helped the school recognize that learning analytics were already available in Moodle but were underutilized. This insight allowed for a more targeted approach to developing dashboards that addressed specific needs rather than adopting a generic analytics system.

For other institutions considering similar projects, it is highly recommended to invest time in a thorough self-assessment. Engaging teachers, administrators, and external partners in discussions about pain points and desired outcomes ensures that the project is strategically aligned with institutional needs.

Lesson 2: Effective Stakeholder Engagement is Key to Adoption

Another significant lesson from the Leertrac project is the importance of engaging stakeholders throughout the process. While technical solutions like learning dashboards and causal loop diagrams provide valuable insights, their effectiveness ultimately depends on how well educators, administrators, and students use them.

At GITO Overijse, early engagement with teachers was a key success factor. Teachers were not merely introduced to a finished product but were involved in the development and pilot testing phases. This participatory approach ensured that the final dashboards were intuitive, user-friendly, and addressed real pedagogical needs.

Moreover, external partnerships with organizations such as Eummena vzw provided critical expertise, allowing the project to benefit from state-of-the-art technological and methodological support. Schools looking to implement similar projects should actively involve all relevant stakeholders from the outset. Regular feedback loops, training sessions, and collaborative development ensure that innovations are embraced rather than resisted.

Lesson 3: Data-Driven Decision Making Requires a Cultural Shift

A key realization from implementing Leertrac is that using learning analytics effectively requires more than just technology—it demands a cultural shift within the institution. Teachers and administrators must transition from traditional grading and assessment models to a more holistic, data-informed approach.

Initially, there was skepticism among some educators about relying on dashboards for decision-making. However, through training and hands-on practice, teachers came to appreciate the value of integrating real-time analytics into their evaluations. The use of causal loop diagrams (CLD) also helped visualize complex student learning dynamics, making abstract relationships between engagement, performance, and interventions more tangible.

For schools considering similar initiatives, it is crucial to recognize that introducing data-driven decision-making requires time, patience, and ongoing professional development. Simply implementing dashboards or AI-powered tools will not automatically lead to improved outcomes unless teachers are comfortable interpreting and applying the data.

Conclusion

The Leertrac project represents a significant step forward in integrating data-driven decision-making into education. By leveraging learning analytics and systems thinking, GITO Overijse is successfully transforming student assessment processes, making them more holistic, transparent, and efficient.

One of the core achievements of Leertrac is its ability to empower educators with real-time insights, enabling them to make informed interventions that directly benefit student outcomes. The increased adoption of learning analytics by teachers

demonstrates a cultural shift toward data-driven pedagogy, while the integration of causal loop diagrams (CLD) has provided a deeper understanding of the factors influencing student performance. These tools have enabled a proactive rather than reactive approach to student support, reducing dropout risks and improving overall academic success rates.

Furthermore, Leertrac has enhanced institutional decision-making. School administrators now rely on comprehensive data to allocate resources strategically, optimize curriculum planning, and ensure that students receive the support they need when they need it. The system's integration with Moodle and its planned extension to the Student Information System (SIS) highlight its scalability and adaptability, making it a model for other educational institutions seeking similar improvements.

In addition to its impact within GITO Overijse, Leertrac provides a replicable framework for other schools, colleges, and training institutions. Its open-source philosophy, combined with the use of widely adopted platforms like Moodle (also open source software), makes it an accessible and cost-effective solution for institutions looking to harness learning analytics. The project also illustrates how a structured self-assessment process, such as the CAF framework, can be instrumental in identifying challenges and implementing targeted, sustainable improvements.

Looking ahead, GITO Overijse plans to further enhance Leertrac by expanding its data integration capabilities and refining its predictive analytics models. Continuous feedback loops will ensure that the system remains responsive to the evolving needs of students and educators. The school also aims to collaborate with other institutions to share best practices and contribute to the broader discourse on digital transformation in education.

Ultimately, the success of Leertrac underscores the potential of learning analytics to drive educational excellence. By fostering a culture of data-driven decision-making, GITO Overijse has not only improved internal processes but also set a precedent for how schools can leverage technology to enhance teaching, learning, and student support. As digital transformation continues to shape the future of education, initiatives like Leertrac will play a crucial role in ensuring that data serves as a tool for empowerment, innovation, and student success.

But it all started with CAF!

Belgium: Strategic approach of employers to increase public services relevancy and employment rate in the Brussels Region. ACTIRIS

Introductory information

Title of the Good Practice: Strategic approach of employers to increase Public services relevancy and employment rate in the Brussels Region

Name of the Organisation: ACTIRIS

City/Country: Brussels, BELGIUM

Project Manager's/Contact Person's First and Last Name: Sébastien ROCHEDY

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Level of Organisation/Project: regional

Sector: administration, employment, public services

How many times the CAF Was Used? 3 years

Main Focus: Leadership and constancy of purpose, values

Key Words: Attractivity / Value Proposition / Employers / Public Employment Service / Brussels

Executive summary

Actiris - Brussels' public employment service - aims to increase the relevance of its services and improve the employment rate. We've developed a plan to better serve the employers (better meet their needs, adapt our offer and enhance user experience) and improve internal cooperation.

About the organisation

As its regional employment office, Actiris is the most important provider of employment solutions to both job seekers and employers in Belgium's capital, Brussels.

Our missions:

- We join our forces and means to offer quality support to all **job seekers**. Our goal is to find a quality employer and a sustainable career move for everyone. Our partners help us with various, often very specific, solutions. Together we aim to augment the employment rate in Brussels.
- We also offer solutions to **employers.** In order to guarantee optimal matching, we collaborate with our partners to offer simple, efficient and cost-free services.

The employment rate objective in Belgium is at 80% (in 2030). In 2023, this rate was at 72,1% (20-64 years old) and was at 60% in Brussels. In addition to *Active Labour Market Policies* (ALMPs = measures to help individuals enter the labour market or to prevent already employed individuals from losing their jobs), the **employers are key** to tackle the challenge.

Within Actiris, a division focused on employers has been created years ago to better work with them.

By augmenting the employment rate, Actiris also contributes to the economic and fiscal well-being of the entire Brussels Region. We believe this **service to the community** strengthens society.

Quality improvement aspects

Employers are the key stakeholders in the labor market to achieve our goal objective to increase the employment rate. Indeed, they create values, propose job offers and they diffuse job positions. Improving our relationship with them is a strategic and sustainable lever.

Based on our insights (brand and satisfaction surveys), we saw that:

- **Actiris is not top of mind for (non-client) employers** looking for information or in a recruitement process.
- **Actiris provides the same services to all employers** for information, recruitment guidance, inclusion and financial support.
- **Employers („client" of Actiris) are satisfied of specific services** (recruitement / tools / human interaction) and **less by the job seekers or other tools and communication**.

We used to set 'business' targets only on the number of job offers to collect and diffuse to job seekers in total. We were not looking at the dynamics of each sector and the segmentation of the market.

Therefore, the main challenges of the project were to **set leadership goals:**

- **Set Actiris as the key player** towards employers **on the active labour market**

- **Cooperate with the employers** to better know their needs and adapt our offer & communication;
- **Ease, stimulate and monitor** transversal organisation and common actions based on targets and reportings.

Stakeholders and communication

Based on the leadership goals described above, we first sat up **a transversal team with expert people** (marketing expert, product specialist, communication, sales and support representative). The steering group has enabled **to work and clarify goverance responsibility of a strategic and operational plan to get in touch with employers.**

This approach was mainly driven by the marketing and the 'employers' department with the involvment of all the concerned internal teams for input and feedback. This was made essentially via internal communication (intranet and meetings).

Externally, the employer's federations - per sector (retail / restaurants / industry / personal care…) – were very precious stakeholders in our approach. **Bruxelles Formation", public institution for the trainings** was also part of the projet as it is a crucial way to ease the recruitment. The support from the minister of employment has given a specific weight to our case.

Finally, we have involved a **research institute** and a **communication agency** to ease the production of insights and communication.

Implementation process/approach

Our first step, mid-2021, was to make **a first scene settings on the available insights, scope and the goals set** (communication / value proposition and transversal cooperation) to ensure end-to-end cohesion for the people involved in the process development and the production.

We had then an **internal brainstorming** to identify the levers and defined the process steps for the project.

- **2021/2022 Identify and size Employers needs – quantitative and qualitative survey**

We have launched a **large survey towards the employers of Brussels Region and bind partnerships with federations** to collect the needs from the employers in the thematic of recruitment services (self or assisted), informations (format / channel) / diversity and trainings in a perpective of a recruitement.

This survey has been conducted by an external research institute and was twofold: a quantitative survey based (CAWI & CATI) end 2021 and, based on the insights, a qualitative wave with interviews during spring 2022.

We wanted to ensure that the incoming anwsers were representative of the labor market employers breakdown – percentage of SMEs, large companies and all sectors.

End 2021, a media campain „your needs, our solutions" with media advertising and a close work with the federations have enabled us to get the most diverse and representative answers. Therefore, we got a clear view on our (potential) users & partners needs.

- **Clarifying our value proposition & communication – based on the market reality**

The results were shared, in a transparent way, with our partners. The survey was insightful as the main conclusion is that 85% of our offer was aligned with the needs of our target audience. However, development in communication, adaptations in our services and channels were needed. Actions have been undetaken to better match with market needs and specificities.

During the second semester 2022, we have developped our value proposition and market approach with three axes:

- **Segmentation and sectorisation:** depending on the size and sector activity of the company, needs are not the same (e.g.: rapidity to recruit / presence or absence of HR department…) – it was a major change from 'the same offer to all' to 'we know your business reality' and we might be your partner for recruitment questions or process.
- **Diversification:** communication and channels have to match our users reality (e.g. use of digital / attendance to a meeting);
- **User Experience & satisfaction:** Ensuring that we are all user oriented, and the relevant processes are improved on a regular basis, we measure the satisfaction and use insights to better adapt our offer.

- **Production and roll-out – 2023/2024**

The production was split into the 'commercial approach' and 'value proposition' development.

➢ The annual 'commercial' plan was set up based on the needs and the reality of the market (e.g.: market coverage is not only getting job offers / grow is not the

same in all sectors...) – Main targets were on market coverage / Brand & user experience / specific services;

➢ Support and value proposition: changes to be made on our communication support (website, prospection, webinars...) both in general and for the 'sectorisation' of services were coordinated and followed-up centrally. Some developments are still ongoing beginning 2025.

This pragmatic, evidence-based customer centricity and market approach is now annually renewed to ensure continuously our services relevancy.

Success Measurement . Main results with regards to the focus area

The leadership vision and evidence-based work has highly optimized the transversal people cohesion and process enhancement. Backed to the initial objectives, without going through the steps of the approach, we could not have reached them.

1/ Set Actiris as the key player towards employers on the active labour market

We measure every two years **the notoriety of Actiris and its services**. In the 2024 survey, notoriety is good, especially towards clients and larger companies.

There is always a structural challenge in getting in touch with the SMEs. They are the most numerous in Brussels Region but not recruiting much for many reasons.
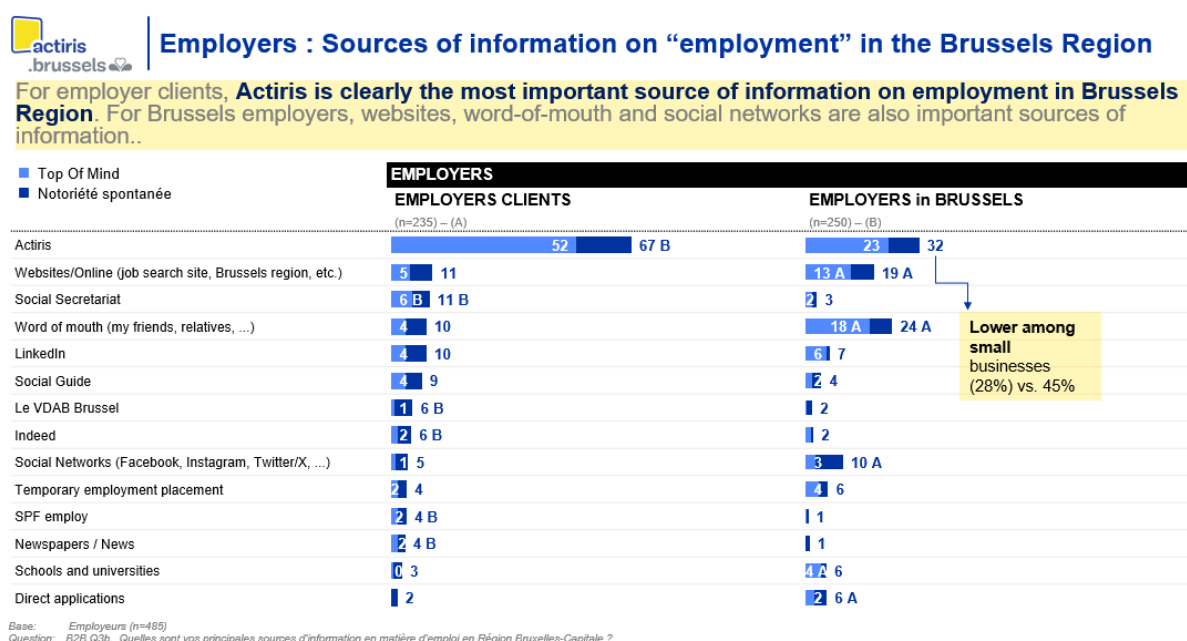
Figure 1: source of information on 'employment' matters in the Brussels Region

Figure 2:awareness of Actiris services by employers in the Brussels Region

Beside the targets, the cooperation with the federation representing the sectors and the employers has enabled a beeter long-term collaboration.

2/ Cooperate with the employers to better know their needs and adapt our offer & communication

The external communication towards partners and employers has been harmonized through the touchpoints (people better know what to say for each purpose) and both internal and external satisfaction are increased.

Each two years, we conduct an independant survey towards our employers clients to measure their satisfaction with our services, channels and communication. Their feebacks and experience are important to discuss the action plan. Next survey should be conducted in 2025.

3/ Ease, stimulate and monitor transversal organisation and common actions based on targets and reportings.

The **governance** was clearly eased by the leadership vision while the settings of business and performance indicators on an annual basis, on market and users insights, have enabled to better align people and actions.

The **Customer Relationship Management (CRM)** tool and the monitoring process implementations have been quicker (than it could have been).

We now follow the targets – global, segments and sector - on a quarterly basis with the marketing, sales and communication. The discussions are more effectiveness on the

"how" rather on "what". Therefore, the projects and process are more concrete. We discuss together and make it happen together.

The essence of the innovation and the transferability of the solutions introduced – lessons learned

This project is not an innovation as such and is more a 'mindset change' that is replicable to other public services. We may share three axes – that could be seen as 'lessons learned' to implement it.

1/ The user-centricity of the project is essential to drive public services to more efficient value propositions and communication

- ⇨ **Know your customer:** size / sector / recruitment needs / barriers / information needs / where they are;
- ⇨ **Listen to your market:** players / technology / barriers;
- ⇨ **Adapt your offer or better promote it:** place / recommendation / time to market.

2/ Setting common targets & tools to encourage transversal action and people commitment
- ⇨ **Setting clear targets**: based on reality of the business, they are easier to explain and to promote;
- ⇨ Clear communication, governance and responsibilities ease the cooperation.

3/ Monitoring the results on a regular basis (quantitative and qualitative)
- ⇨ **Process and tools** (CRM) lead to quarterly & annual report on the 'commercial' targets;
- ⇨ **Getting structured feedback** and implication from the colleagues;
- ⇨ Organise large and ad hoc **surveys** with end-users.

Bosnia and Herzegovina: Standardization of the improvement of local self-government units and assessment of digital readiness. Civil Service Agency BiH (BiH CSA)/ Civil Service Agency of Federation of BiH (FBiH CSA)/ Civil Service Agency Republic of Srpsa (RS CSA) /Public Adminstration Reform Coordinator's Office (PARCO) /UNDP

Introductory information

Title of the good practice: Standardization of the improvement of local self-government units and assessment of digital readiness

Name of the organisation: Civil Service Agency of BiH (BiH CSA)/ Civil Service Agency of the Federation of BiH (FBiH CSA)/ Civil Service Agency of Republic of Srpska (RS CSA) /Public Administration Reform Coordinator's Office (PARCO) /UNDP

City/ country: Bosnia and Herzegovina

Project manager's/contact person's first and last name: Kenan Avdagić

Email, phone number to the project manager's/contact person's: Kenan.avdagic@parco.gov.ba or kenanavdagic@gmail.com

Level of organisation/project: national, regional, local

Sector: administration

How many times the CAF was used? Indicate years please: 2015, 2020, 2023.

ECU label awarded? Indicate years please: 2024.

Main focus: Result orientation: continuous innovation and improvement.

Key words: Public administration, local self-government units, digitalization, innovation, indicator, CAF

Executive summary

Improvement and measurement of the efficiency of local self-government units with the help of the CAF tools. The project involved cooperation of several organizations at different administrative levels in Bosnia and Herzegovina. Two methodologies were

developed: <u>a Support Tool for CAF in local self-government units and a tool for digital readiness in local self-government units/public administration organizations</u>.

About the organisation

This project is an example of good practice that involves cooperation between multiple organizations and represents a result of teamwork. The main processes in this project were led by the following organizations: Public Administration Reform Coordinator's Office (PARCO) – the organization responsible for coordinating public administration reform in BiH, BiH Civil Service Agency, Republic of Srpska Civil Service Agency, and the Agency for Civil Service of the Federation of BiH – all of these organizations are responsible for improving public administration. The project received support from the UN Development Programme (UNDP), specifically Municipal Environmental Governance Project (MEG) and its donors[1]. Additionally, besides the above-mentioned organizations, significant contributions were made by the Ministry of Administration and Local Self-Government of Republic of Srpska, the Ministry of Justice of the Federation of BiH, the Town of Prijedor, and the Municipality of Tešanj.

Quality improvement aspects

According to recent reports, Bosnia and Herzegovina (BiH) is still in the early stages of public administration reform. Citizens expect improvements in service delivery from all levels of government, but above all, simplification and digitalization of these services. One of the key problems in the administration of local self-government units (LGUs) in BiH is that they are not being improved at the same pace and quality, as well as the need for standardization in quantifying and validating the results of their work. The goal of the public administration reform is to improve all LGUs in certain areas that are important for citizens, aiming for as equal a level as possible. Therefore, there is a need to establish a set of indicators to monitor the performance and development of all LGUs in BiH. Another part of the problem is the emerging trend of digitalizing the work of administrations and the delivery of services – digital services to citizens. However, public administration organizations, with a focus on LGUs, simply do not know what the concept of digitalization of work and service delivery entails, i.e., what the scope of the digitalization process is. They lack a roadmap for the digitalization of public administration at the organizational level.

Stakeholders and communication

As mentioned above, this project (case) is the result of teamwork from several organizations at different administrative levels in BiH. The key organizations and their

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[1] https://www.undp.org/bosnia-herzegovina/projects/meg-ii-project

employees were Public Administration Reform Coordinator's Office (PARCO), BiH Civil Service Agency (BiH CSA), Republic of Srpska Civil Service Agency (RS CSA), and the Civil Service Agency of the Federation of BiH (FBiH CSA), with support from UNDP. All of the public administration organizations listed above carried out several cycles of CAF, and PARCO, RS CSA, and FBiH CSA received the CAF Label certificate. Additionally, the project had support from external experts in defining solutions. However, the entire process was driven by the employees of the aforementioned organizations, who also consulted other colleagues from public administration (in a broader context), especially colleagues in local self-government units that had previously implemented CAF.

Implementation process/approach

Two key problems were identified:

1. The need for standardization in quantifying and validating the evidence-based results of work in local self-government units in BiH;
2. The scope of the concept of digitalization of work and service delivery in local self-government units in BiH has not been defined;

Based on the aforementioned problems, the key institutions for quality management in public administration – the BiH Civil Service Agency (BiH CSA), Republic of Srpska Civil Service Agency (RS CSA), the Civil Service Agency of the Federation of BiH (FBiH CSA), and PARCO – in collaboration with the UNDP's MEG Project , decided to take the initiative and address these issues by creating two tools for public administration reform. Since CAF has been implemented in a large number of organizations in BiH for some time now, it was decided to form a support tool for local self-government units (LGUs) that would follow the CAF structure and provide a set of indicators (a total of 43) across different segments. This tool would be used alongside the CAF self-assessment tool. The goal of implementing this tool was to monitor and motivate continued improvements in performance, as well as to standardize the delivery of services from LGUs to citizens.

It is important to highlight that local governments in BiH have begun implementing a results-based performance management system, which includes structures, functions, and processes for development management, with a stronger role for councils/assemblies of LGUs in decision-making and oversight. Despite this positive step forward, the local government system in the country still lacks standardized and systematic measurement of results. Research conducted among nearly 80% of LGUs shows that local governments believe it is essential to introduce financial incentives based on achieved results, from higher levels down to local authorities. They also agree that each local government should regularly conduct self-assessments of achieved results, use the obtained results to improve their work, and share them with citizens.

These findings indicate that there is momentum in the country to introduce a basic standard quality management model in this regard.

The main challenge in creating the additional methodology for CAF (43 indicators) was to ensure that the CAF process itself was not burdened with additional barriers to implementation, and that it remained comprehensible to people in LGUs. This issue was resolved through discussions with LGUs that had already implemented CAF and their feedback on the 43 indicators, which played a crucial role.

The second tool is the Digital Readiness Assessment of organizations/LGUs, aimed at evaluating the digital readiness of organizations, which results in a roadmap that will serve for the further development of implementable projects and their positioning in relevant strategic documents. Digital transformation involves a process that starts with an assessment of the initial state, followed by clear planning of the digital transformation roadmap, with well-defined goals, implementation of planned activities, and final evaluation and continued monitoring of implemented projects. The end result of this tool is the creation of a Digital Transformation Roadmap, which serves as a plan for coordinating and initiating changes within LGU institutions as well as other organizations.

Success Measurement. Main results with regards to the focus area

The Support Tool for CAF in Local Self-Government Units

After developing the Guidelines for the Support Tool for CAF in Local Self-Government Units with the help of UNDP, key institutions for quality management in BiH piloted the tool in 10 local self-government units. All pilot projects were assessed through 43 pre-defined indicators, which, based on years of practice in local self-government units in BiH, best reflect the efficiency and results of their work. These organizations in BiH do not need to define new indicators but are required to establish baseline values, scoring, verification methods, and target values for each proposed indicator. The indicators are designed to evaluate the work of local self-government units, including the establishment of ethical codes, communication channels with citizens, alignment of job positions with development strategies, application of the law on free access to information, establishment of participatory bodies, inclusivity of administrative procedures, etc.

After the pilot phase, a baseline year was created with ratings for each indicator, along with recommendations for improvement through an Improvement Plan for areas with low scores (low indicator ratings). At the end of the pilot phase, concrete improvement plans were developed based on the assessment of indicators from the Support Tool for CAF in Local Self-Government Units. These plans would serve as the basis for donors to provide support to local self-governments in the following period for the implementation

of their Action plans, as well as to group activities from multiple LGUs into projects. In 2025, it is planned to implement this tool in circa 20 new LGUs in BiH.

One of the significant results of applying this tool as a support CAF tool for LGUs in BiH was obtaining the CAF Label for the Town of Bihać, which was one of the first pilot projects. This was, in a way, proof that the methodology is successful. As a long-term decision for the public administration improvement process, this tool, as a support tool for CAF in LGUs, is recommended in all strategic documents for public administration reform. Additionally, for individuals who expressed a desire to become trainers for the CAF process and CAF for LGUs, a trainer training program was organized in collaboration with EIPA.

The Tool for Digital Readiness in Local Self-Government Units/Public Administration Organizations

The foundation for applying this tool is to create a Digital Readiness Roadmap for local self-government units/public administration organizations. This document must describe the initial state, but with a focus on the desired future state in the upcoming period. Like the previous tool, this one was also piloted in several local self-government units/public administration organizations. The piloting of this tool proved to be a key prerequisite for the digitalization process in the upcoming period for public administration organizations.

The essence of this process was the creation of a Digital Transformation Roadmap, which involved preparing a list of measures with brief descriptions of projects arranged by priorities in terms of their implementation. The realization of each measure in the roadmap leads to significant changes within local self-government units/public administration organizations, as well as in the overall environment for delivering public services. In addition to accelerating and facilitating the delivery of public services, it will increase the transparency and efficiency of public administration organizations, help prevent corruption, increase revenue and savings, contribute to greater user satisfaction, and serve as a generator for the development of the digital economy.

This tool has been implemented in five local self-government units, with five digitalization roadmaps developed for towns in BiH.

The essence of the innovation and the transferability of the solutions introduced

Quality management and the CAF tool have been applied at various administrative levels in Bosnia and Herzegovina for over ten years. Before this project, there was no significant use of CAF in local self-government units (LGUs) in BiH, although other methodologies for measuring efficiency had been implemented. However, the

innovative approach of the group of people involved in the realization of this project contributed to making CAF more accessible to employees in LGUs in BiH.

Employees in LGUs where the methodology was piloted highlighted that the creation of a certain number of indicators, which were familiar or recognized by them, was very important because these indicators can improve work processes and services for citizens. They particularly emphasized indicators related to the ethical code, integrity, and ethical behaviour of council members, the number of communication channels with citizens, involving citizens in the development of strategic documents, establishing participatory bodies for two-way communication between citizens and the administration, social inclusion, the implementation of annual and three-year plans, and the involvement of entrepreneurs and other partners, etc.

Furthermore, measuring performance based on these indicators highlighted the possibility of creating objective and credible development plans for LGUs, which could also help potential donors. Donors will be able to direct their resources to pre-prepared plans that align with the policies and objectives of the specific donors.

The methodology developed for the purposes of this project is universal. When looking at the indicators that were added, which align with all nine CAF criteria, they are adaptable and objective for local self-government units (LGUs) in any country. What particularly stood out during the implementation of the project was that all decisions were made by consensus, which indicates that the employees who worked on the development of the methodology had extensive experience in applying CAF, and this is one of the key indicators of success. Additionally, it is important to note that employees from the LGUs in Prijedor and Tešanj (two towns in BiH), who had previously applied the CAF methodology in their organizations, provided significant support during the development of the methodology.

The Digital Readiness Assessment Tool, as the second tool in this case, is also universal and can be applied to all local self-government units in any country. Its innovation lies in the fact that after its implementation, a series of steps are identified that an organization, i.e., a local self-government unit, must take on its path toward digitalization.

From an experiential perspective, the greatest success of all the project participants has been the networking of people that we achieved through collaboration with a large number of individuals from different administrative levels. Moreover, working with such a large group of people highlighted the positive two-way communication and the objective listening to issues from all organizations.

Lessons learnt

When we look back at the project, several factors stand out as key to the success of such a complex initiative, as well as several lessons learned that we would like to share with others:

1. "Listen to each other, whether in the team or not." As mentioned earlier, this project involved people from several organizations and different administrative levels in Bosnia and Herzegovina. Although common problems and project goals were outlined at the beginning, all participants must pay attention to what others are saying about their problems related to the project's theme. Only by establishing two-way communication, both official and unofficial team members can a project succeed. This approach also leads to respect for different perspectives and perceptions of the given problem.
2. "We are the best, we want to see how others are doing." Generally speaking, people by nature enjoy competition. This is most often expressed through sports, but it also applies to public administration, especially at the level of local self-government units in Bosnia and Herzegovina. The competitive spirit is important, and from a fair play perspective, it ensures that everyone has equal conditions. When you recognize that a competitive spirit exists, use it for positive progress toward achieving the goals!
3. *"People are like unpolished diamonds in every organization." It is very important to have people who are willing to work and share their previous experiences with others. Also, always keep in mind that for new knowledge, you may need some external experts. However, within your own organizations, you always have a number of individuals who are the so-called "unpolished diamonds" in a specific field. Take advantage of today's technology, communicate with as many of your colleagues as possible, and someone may come forward with a solution to a problem where you've reached a dead end. It was from these kinds of people that we received the best ideas, which we successfully implemented during our project.*

Bulgaria: chIPA: Digital Communication Revolution.
Institute of Public Administration.

Introductory information

Title of the good practice: "chIPA: Digital Communication Revolution"

Name of the organisation: Institute of Public Administration – IPA (ipa@ipa.government.bg)

City/ country: Sofia, Bulgaria

Project manager's/contact person's first and last name:

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Level of organisation/project: national

Sector: administration, public services

How many times the CAF was used? Indicate years please: IPA implemented CAF model 3 times (in 2016, 2020 and 2024)

Main focus: Digital transformation and innovation.

Key words: Chatbot, AI, Efficiency, digital transformation, communication channel, digital solution

chIPA

Executive summary

The Institute of Public Administration (IPA) in Bulgaria has integrated a chatbot, named "chIPA", to enhance digital communication and support services. This innovation aims to address challenges like frequent phone calls and time-consuming emails. The process involved needs assessment, design, testing, and implementation. ChIPA improves user engagement, supports 24/7 information delivery, and aligns with the country's digital transformation in public administration.

About the organisation

The Institute of Public Administration is the leading training institution of the Bulgarian public administration. It also plays a role of National CAF Resource Center. and supports the work and implementation of the CAF model in the Bulgarian public administration The IPA's key functions include: contributing to the professional development and career promotion of public administration employees; playing a major role in the process of research, development, promotion and transfer of innovations and practices of "good governance" for modernizing the administration; increasing the capabilities of the administration to develop and implement projects in the framework of EU funds; providing assistance in implementing quality management in the Bulgarian administration; others.

In last years, the Institute has paid a special attention to innovation and digitalization processes. As part of its efforts to integrate new technologies, IPA developed an AI-powered chatbot - chIPA. The process involved analyzing needs through focus groups and designing the chatbot's functionalities in a collaboration with IT experts. After internal and external pilot testing, adjustments were made before launching the chatbot on the IPA website. Continuous monitoring and updates ensure its accuracy and reliability.

IPA is one of the first Bulgarian institutions to implement an AI chatbot, encouraging innovation within the state administration.

Quality improvement aspects

The objectives of the chIPA chatbot project focus on improving public administration work through digital innovation and efficient communication. The chatbot enhances communication by providing 24/7 support, addressing FAQs, and assisting with administrative processes, thereby reducing phone calls and email queries. It also strengthens digital competencies within IPA by enhancing civil servants' digital skills, aligning with broader public administration trends. The project supports IPA's digital transformation by streamlining internal processes, improving service delivery, and ensuring better access to information. Following the CAF model for continuous

improvement, regular feedback, testing, and updates ensure the chatbot evolves with technological advancements and users' needs.

The success of these objectives is measured through quantifiable steps. Communication enhancement is tracked by monitoring reductions in phone and email queries and analyzing users' engagement and satisfaction. Digital competency improvements are assessed by training participation rates, post-training evaluations, and the effectiveness of the chatbot in resolving queries. The chatbot's impact on digital transformation is quantified through response time improvements, better access to information, and reduced administrative workload. Continuous improvement is measured by tracking updates, user feedback, and issue resolution, with effectiveness assessed through user satisfaction surveys and performance analytics. These metrics allow IPA to evaluate the project's success in real-time.

Stakeholders and communication

ChIPA project is part of the IPA's new CAF Improvement Plan, based on the CAF self-assessment process in 2024. The project was supported and directed by IPA's Executive Director, aligning with CAF principles for the leader engagement as a key in making all kind of changes, optimizations and improvements in the organization. The initiative was communicated internally via employee briefings and team meetings, and externally through IPA's group communication channels. Employees were actively involved through focus groups, testing phases, and providing feedback during the design and development stages. Civil servants' needs were considered through focus groups and feedback during the pilot testing, ensuring the chatbot addressed common issues and FAQs. The project was carried out with support from IT specialists and experts, who assisted in the design, development, and testing phases. External support was utilized for chIPA technical development in order to ensure the project aligned with best practices in digital transformation and public administration improvement.

Implementation process/approach

The process of implementing chIPA was carefully planned in several phases, each designed to address specific challenges and ensure that the final product meets both internal and external needs. The project aims to improve communication processes, streamline information delivery, and support IPA's broader digital transformation goals.

The **first step** was conducting a **needs assessment**, which identified specific communication challenges faced by IPA. Insights have been gathered from focus groups of IPA staff and external users. They highlighted the high volume of phone calls and emails relating to FAQs, which were time-consuming and inefficient. With these

insights, IPA set a clear objective to design a digital solution to address these communication challenges.

The **second step** involved the **design and development** of chIPA. Working group was assembled to select appropriate technologies and develop a prototype. The design focused on core features such as answering common FAQs, providing information about IPA's courses and events, and guiding users through various administrative procedures.

Once the prototype was developed, **the next phase** was **pilot testing**. Selected group of people tested the chatbot to ensure that it functioned as intended.

Following successful pilot testing and necessary adjustments, IPA moved on to the **implementation** phase. In this phase, chIPA was available to all IPA employees, who were asked to test the chatbot by asking various questions. After the employee gave their initial feedback and first finetuning was made, selected external users from different administration were invited to test and give their feedback.

The final phase was **launching chIPA**. After the internal testing and validation, chIPA was officially launched on the IPA website. In the months following the launch, we focused on **continuous monitoring and improvement**. Regular updates are implemented to enhance the chatbot's functionality, ensuring that it remained relevant and UpToDate.

The successful implementation of chIPA relied on several key methods and tools. The **CAF model** for continuous improvement was used as a guiding framework throughout the project. This model helped IPA focus on ongoing optimization, monitoring, and feedback integration, ensuring that the chatbot evolved with changing user needs and technological advancements.

Focus groups and **pilot testing** were critical tools used to gather feedback from both employees and external users. These methods allowed IPA to fine-tune the chatbot's features and ensure it met the needs of its users.

Internal and external costs:

The internal costs were primarily associated with employee's time and resources. IPA staff participated in the needs assessment, testing, and validation phases, which required significant time commitment.

The **IT specialists** and technical consultants who developed the chatbot's prototype and ensured its smooth integration with IPA's existing systems worked under the project as volunteers.

Main wins (success factors) and challenges include:

- **Improved communication**
- **Enhanced user engagement**

- **IPA's leadership in innovation**: As one of only two Bulgarian institutions to implement an AI chatbot, IPA set a positive example for other public institutions in terms of digital transformation.

Challenges:

- **Technical difficulties**: During the pilot phase, some technical issues were faced. These were resolved by gathering user feedback and working closely with IT specialists to make necessary adjustments.

ChIPA proved that through careful planning and stakeholders' engagement IPA was able to achieve its objectives and set a standard for innovation in Bulgarian public administration.

Success Measurement. Main results with regards to the focus area

The **integration of chIPA** resulted in significant improvements across various focus areas, including communication efficiency, user engagement, and digital transformation. These improvements were systematically measured using both **qualitative** and **quantitative** indicators to evaluate their effectiveness.

1. Improvements in Communication Efficiency:

The primary goal of chIPA is to enhance communication by reducing FAQs via phone calls and emails.

Planned Measured Results:

- **Reduction in phone calls and email correspondence**: The most notable improvement was a significant decrease in the number of phone calls and emails related to **frequently asked questions (FAQs)**. This was measured by tracking the number of queries received via traditional channels before and after the chatbot's implementation.

- **Faster response times**: By offering 24/7 support, the chatbot enabled quicker responses.

- **User engagement**: The chatbot's effectiveness was evaluated through **interaction metrics**, such as the number of users interacting with the chatbot, and the number of queries successfully answered without human intervention. These indicators helped assess how well the chatbot replaced traditional communication methods and how much it improved user satisfaction.

Planned Quantitative Indicators:

- **Reduction of phone and emails**
- **Number of interactions with the chatbot**

- **User satisfaction ratings**

2. Improvement in User Engagement:

ChIPA aims to increase user engagement by providing easy, 24/7 access to information about IPA services, courses, events, and administrative processes.

Planned Measured Results:

- **Increase in user satisfaction**: Feedback from users via post-interaction surveys helped measure satisfaction levels.

- **Ease of use**: Qualitative feedback gathered from users was analyzed to understand how easy the chatbot was to navigate, and how effectively it met their needs.

Planned Quantitative Indicators:

- **User satisfaction**

- **Engagement rate** (users interacting with the chatbot vs. total website visitors)

3. Support for Digital Transformation:

The chatbot contributes to IPA's broader digital transformation efforts by automating administrative processes and improving internal processes for employees.

Planned Measured Results:

- **Internal process optimization**: IPA employees benefited from the chatbot by spending less time answering FAQs.

- **Digital competency**: As part of IPA's goal to enhance digital skills, the chatbot was used to train employees and foster their comfort with new technology. Employee participation in training sessions and the use of digital tools like the chatbot were tracked to measure the growth of digital competencies.

Planned Quantitative Indicators:

- **Time saved by employees** on routine tasks

- **Number of successful administrative queries processed by the chatbot**.

4. Long-term Effects and Measurement:

The long-term effects of the chIPA chatbot's implementation will be measured through continuous monitoring and analysis, as well as regular feedback from users and employees.

The essence of the innovation and the transferability of the solutions introduced

The chIPA chatbot project implemented by IPA represents a significant innovation in the field of public administration. The key innovation is the use of artificial intelligence (AI) and digital tools to enhance communication, public service delivery and to support the broader digital transformation goals of the Bulgarian public sector.

The innovation of chIPA lies in the integration of AI technology into the daily operations of a public administration institution. By automating responses to frequently asked questions and assisting with administrative tasks, the chatbot provides 24/7 user support, improving response times and reducing the administrative burden on IPA employees.

What makes the project particularly innovative is its holistic approach – not just improving communication efficiency but also aligning with broader trends of digitalization and innovation in public administration. IPA's decision to apply the CAF model for continuous improvement has also ensured that the chatbot is a part of an ongoing process of innovation, adapting and evolving in response to feedback and technological advancements.

The chIPA project is highly transferable to other public institutions, both in Bulgaria and internationally. The core elements of the project that are adaptable to other contexts include:

1. **AI chatbots**: The use of AI for answering frequently asked questions and streamlining administrative tasks can be replicated across different organizations, especially within public service delivery systems.
2. **Digital transformation**: The project demonstrates how public administration can successfully integrate digital tools to improve efficiency, enhance communication, and reduce workloads.
3. **Stakeholder engagement**: IPA's approach to gathering insights from both employees and external users through focus groups and pilot testing is a method that can be used by other organizations to ensure that technological solutions meet the needs of users.

Success Factors:

The success of the chIPA project is possible because of several key factors:

- Clear objectives
- Stakeholder involvement
- Continuous feedback and improvement

Lessons for Other Institutions:

For organizations looking to benefit from IPA's experience, the key lessons include:

- Involve stakeholders early: engaging both internal employees and external users in the needs assessment and testing phases helps ensure the solution is aligned with their needs.
- Continuous improvement

Situations for Applying the Experience:

chIPA is particularly relevant in the following scenarios:

- Public sector digitalization: institutions looking to enhance their communication efficiency and automate repetitive administrative tasks can adapt the chatbot model.
- 24/7 public service: the chatbot solution can be applied to any institution where there is a high volume of public inquiries, enabling real-time, on-demand support.
- Employee efficiency: public organizations seeking to free up their employees from answering routine questions can implement this model to improve internal productivity.

In conclusion, chIPA offers a powerful example of how digital innovation can transform public administration. By focusing on automation, AI, and continuous improvement, IPA has set a benchmark for other institutions aiming to modernize their operations, streamline communication, and better engage with users.

Lessons learnt

Lesson 1: Involve stakeholders early and continuously

One of the key lessons from the implementation of **chIPA** at IPA is the importance of involving stakeholders. Before launching the chatbot, IPA conducted **needs assessment analysis** and organized **focus groups** to gather insights into common queries and challenges faced by users and staff.

The **continuous feedback** allowed the project to adapt and evolve. **The feedback from employees** provided valuable data that helped refine the chatbot's functionalities. This process ensured that the final product was user-friendly, relevant, and effective.

For other institutions, this lesson highlights the importance of involving employees and service users from the start and keeping them engaged throughout the whole process. Therefore, institutions should prioritize **stakeholder involvement**, not just during the planning phase, but throughout the implementation and beyond.

Lesson 2: Start small with pilot testing and evolve

Another important lesson is the value of **pilot testing** and the ability to make adjustments before the deployment phase. This allowed the team to test the functionality, identify bugs, and gather direct feedback. Areas for improvement were

identified and the chatbot's answers were verified before it was launched to all employees and external users.

For other institutions, the lesson here is to **start small and test** before full-scale implementation. By using a pilot phase, institutions can identify potential issues early and make necessary adjustments.

Lesson 3: Continuous improvement and adaptation

The third key lesson from the chIPA project is the need for **continuous improvement** and **adaptation**. **ChIPA** is not a static tool. Following the ideas of the integration of CAF, IPA regularly assesses its tools, processes, and technologies to ensure they are aligned with current best practices and meet the growing demands of public service delivery.

Regular **monitoring and updates** are important to maintaining chIPA's relevance and effectiveness. IPA ensures the chatbot evolves alongside changes in **user behavior**, new **technological developments**, and adjustments in public service processes. This proactive approach ensures the chatbot stays relevant, effective, and efficient in meeting its goals. IPA plans also to develop and use chIPA as an useful tool of disseminating knowledge and consultations on the CAF model in Bulgaria.

For other institutions, this lesson emphasizes the importance of **continuous evaluation** and **adaptation** after deployment. Implementing a digital tool like a chatbot is just the beginning. To maintain success and long-term impact, institutions must invest in **ongoing updates** and **improvements** based on user feedback and technological advancements. This ensures the tool remains aligned with its original objectives and adapts to new challenges and opportunities as they arise.

Conclusion

In conclusion, the three key lessons from chIPA project are:

1. **Engage stakeholders early and continuously** to ensure the solution meets real user needs.

2. **Pilot testing** to address issues early and make improvements before official launching.

3. **Continuous improvement** by regularly updating and refining the solution based on feedback and technological progress.

By following these principles, other institutions can ensure the successful implementation of similar digital solutions, improving communication, and enhancing public service delivery.

Bulgaria: Creating a Culture of a Quality Development in the Regional Administration Lovech.
Regional Administration – Lovech.

РЕПУБЛИКА БЪЛГАРИЯ
Областна администрация
Ловеч
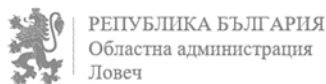
Introductory information

Title of the good practice: "CREATING A CULTURE OF A QUALITY DEVELOPMENT IN THE REGIONAL ADMINISTRATION LOVECH, REPUBLIC OF BULGARIA"

Name of the organisation: REGIONAL ADMINISTRATION LOVECH

City/ country: Lovech, the Republic of Bulgaria

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Level of organisation/project: regional

Sector: administration

How many times the CAF was used? Indicate years please: 2018, 2022

ECU label awarded? Indicate years please: " Effective CAF User" 2018, 2023

Main focus: Social responsibility: attractiveness of the public sector.

Key words: strategic planning, work processes, administrative services, skills enhancement and stimulating employee initiative

Executive summary

The practice has been implemented to improve the activities and results achieved by the organisation from 2021 to 2024. Improvements have been achieved in strategic planning, work processes, administrative services, and employee initiative. The project is innovative because it demonstrates the benefits of the progressive implementation of quality standards in public administration.

About the organisation

Lovech is one of the 28 regions, defined by a Decree of the President of the Republic of Bulgaria in January 1999. The town of Lovech is the administrative centre of the region, which includes 8 municipalities, 112 settlements and 116394 residents. The territory of the region is 4 128 km^2.

The regional administration is a legal entity supported by the budget with its headquarters in the settlement, which is the administrative centre of the region.

The regional administration is a state administrative structure in Bulgaria, which represents the executive power at regional level. It functions as a territorial body of the government and assists the regional governor in exercising their powers, ensures their technical activities and carries out activities related to administrative services for citizens and legal entities.
The regional administration is headed by a regional governor, who is a single-person executive body, appointed by the Council of Ministers (the Government).
The main responsibilities of the regional governor are to implement state policy at local level and to ensure correspondence of national and local interests in the implementation of regional policy. Their obligations include:

- management and protection of state property in the region;
- the legal conformity of the acts issued by the bodies of local self-government and the local administration;
- coordination and control of the activities of the local units of the ministries and of the other administrative structures, which implement administrative services within the territory of the region, regardless of their hierarchical subordination;
- protection of the population, cultural property and physical assets, the environment, in case of disaster.

The total number of staff in Regional Administration (RA) Lovech is 28 employees.

Quality improvement aspects

The "CAF Effective User" certificate (awarded to us in 2018) expired in 2020, and the management of the Regional Administration Lovech started the implementation of the CAF 2020 model in the administration. This decision was driven by the desire to improve the overall performance of the organization. Over the years, changes have taken place in the administration team, with newly recruited employees, who brought fresh ideas for improving the work processes. At the same time, the experience gained from the implementation of the first CAF project in the period 2017-2018, with the guidance of the National CAF Resource Centre of Bulgaria, gave us confidence that we can successfully handle a new project independently with our own resources and human potential. By implementing the improvement project, we set ourselves the goal of improving the work processes and administrative services used by citizens and legal entities, upgrading the qualifications and administrative culture of employees and increasing the efficiency of their work.

It is worth noting that two of our colleagues are associated members of the National CAF Resource Centre of Bulgaria and passed the CAF application training and its external evaluation, which was also an important factor in the process of the project implementation.

The project objectives were not quantified, because the main idea was to involve employees and use the internal potential of the organization in formulating improvements. As a result, all employees became aware of the long-term importance of implementing models for organizational excellence as shared values.

Stakeholders and communication

By order of the Regional Governor, the implementation of CAF 2020 was mandated, as the senior management took responsibility for the process and has provided the necessary resources. The project was supported by the National CAF Resource Centre.

The project was presented initially to the manager staff, and in a separate meeting, to the whole administration personnel. The members of the CAF team were volunteers, appointed on the basis of certain criteria, which contributed significantly to the motivation and good teamwork of the staff. A team chairperson was appointed to manage, organize, and coordinate the activities in conjunction with the management. Throughout the project work, the chairperson showed responsibility, commitment, focus and motivation.

A series of activities were implemented in order to broadcast the project's messages inside and outside the organisation.

In the internal network of the organisation was developed a "CAF 2020" section with materials and documents, such as a "Recommendations from Colleagues" and a sub-menu for feedback and suggestions from all employees. A Communication Plan was drafted, pointing out communicational objectives, target groups, communication channels and activities. A "CAF 2020" section was designed for the administration's website, and it is visible on the homepage, so that any interested person can use the published information *(https://www.lovech.government.bg/section-94-content.html*).

According to the number of downloads the most interesting files in this section are:

- Self-assessment report on the implementation of CAF 2020 in Lovech OA for the period 2018-2020 - 517 times.
- Communication Plan of Lovech RA - 460 times.
- Improvement Plan of Regional Administration Lovech for the period 2022-2024 - 449 times.

A Leaflet was prepared and placed in the Administrative Service Centre, to inform the citizens about the process of CAF implementation in the administration and providing an opportunity for feedback, opinions, suggestions.

Surveys were developed to explore the needs and opinions of citizens before, during and after the change process.

Information about the project was regularly published on the website of the Regional Administration Lovech and sent to local, regional and national media, who covered it. The participation of the Public Relations Officer as a part of the "CAF team" was of significant contribution for the objective and elaborate coverage of the project.

The project was implemented by the Regional Administration Lovech without official partners, but with the cooperation and support of many organisations and institutions and other stakeholders.

Implementation process/approach

The process and the steps taken have been carefully planned. They are as follows:

1. **Planning and organizing the process**

The comprehensive implementation of the Organizational Excellence Tool - CAF 2020 was assigned in August 2021, by an order of the Regional Governor. Throughout the process, senior management has supported the project, the work of the teams and employees, and provided the necessary resources. A self-assessment group called "the CAF team" was formed with set tasks. The CAF team defined the framework and planned follow-up activities in the self-assessment process. The order, issued by the regional governor, instructed all employees of the Regional Administration Lovech to provide the necessary assistance to the self-assessment group in the implementation of the process, thus regulating the involvement of other employees in the work of the team and the successful implementation of the model. An "Instruction for the implementation of the organisational excellence tool CAF 2020 in Regional Administration Lovech" was worked out. It defined the objectives, participants and requirements for the CAF team, tools, approaches and activities in order to provide a clear and systematic framework for the whole process. A timetable was approved to serve as a basis for consistent implementation of the main steps on the way of the application of the model. A mechanism was in place to monitor and oversee the implementation of the roadmap, with progress achieved at key milestones. The steps were regularly reported to the management and shared with the staff and other stakeholders.

The decision to implement CAF 2020 was presented to all management staff at a meeting held by the Regional Governor. Since the process was launched, regular reports on its progress have been made during operational meetings with the Regional Governor. A Communication Plan defines the objectives of the CAF communication, the target groups and the messages to them, the communication channels and tools, the planned communication activities, etc.

A variety of communication channels were used with different media. Registration has been made in the electronic database of the European CAF Resource Centre in Maastricht - for CAF 2020 implementing organisations.

Eighth employees took part in the CAF team, including people in leadership and expert positions from different structural units of Regional Administration Lovech. The group was established on a voluntary basis, and its key objectives were to conduct an analytical self-assessment of Regional Administration Lovech based on the CAF methodology and to prepare a report on the results of the self-assessment.

The roles and specific responsibilities of the team members were further specified in ad-hoc meetings. The compiling of a detailed archive of documents was planned in order to track each step of the process, and the team members to systematize and organize this documentation, were selected.

In September 2021, the members of the Self-Assessment group took part in a training on "Implementation of CAF 2020 in RA Lovech" by an associate member of the national CAF Resource Centre. In February 2022, a second training, related to prioritization of improvement measures and preparation of the Improvement Plan, was held. Information about the training was published on the website of the RA Lovech, as well as through a press release to local and regional media and social networks.

2. Preparation for self-assessment

A portfolio of documents has been created to serve as evidence and justification for the self-assessment. As an additional source of justification for the self-assessment, a satisfaction survey with the employees, has been organised through an anonymous questionnaire.

A large-scale survey of the opinion and suggestions for improvements from key partners of the administration was conducted - letters were sent to stakeholders - a total of 58 addressees, (such as: The Administration of the Council of Ministers, the State Agency for Road Safety, municipalities, territorial structures of the executive power, NGOs, health, cultural, educational institutions and media in Lovech region) with an explanation of the CAF tool and its introduction in the RA Lovech. In response to the request for their opinions on improving the administration's activities, including recommendations, strengths and measures for improvement, were received external assessment letters from 18 organizations, which were analysed in the context of the self-assessment and improvement process of the administration's work.

A series of self-assessment group meetings were held, in which decisions were discussed and adopted on the organization of work and actions related to the self-assessment, the distribution of tasks and the method of their implementation, the roles and responsible persons, the actions and steps in the process, the deadlines and progress of implementation.

3. Carrying out self-assessment

The essence of the self-assessment went through two key phases - individual and consensus assessment. The head of the team prepared a timetable for preparing individual assessments and for holding consensus meetings on them.

The consensus meetings were held in an atmosphere of open dialogue, with each member having the opportunity to present their views and findings. Initially were discussed the ascertainment that had similarities in the individual assessments. The next step was to reach consensus on the conflicting opinions. The adoption of a consensus assessment was based on arguments in the available evidence and to additional information, if necessary.

During these meetings, a table was filled with the results of the team's consensus assessment. Based on the self-assessment work, the team identified 259 strengths, 162

areas/elements for improvement, and proposed 179 ideas for improvement measures/activities in an analytical report. The report was approved by the Regional Governor of Lovech Region and was communicated to all RA Lovech staff through the internal network. A special presentation on the report and the key results of the self-assessment was prepared and presented to staff and other stakeholders. The entire report is published on the administration's website in the CAF section and is publicly available in order to ensure maximum transparency in the work on the implementation of the model and to provide feedback to and from stakeholders.

4. Improvements

Improvement Plan for the Lovech Regional Administration was drafted as a result of the Self-Assessment Report. The Plan identified measures with specific improvement activities (32 measures in total), targets for results/indicators, and responsible persons/units for the respective measures.

The improvement plan had an overall implementation period of 2 years - 2022-2024. The following key areas for improvement were identified: **strategic planning, work processes, administrative services, skills enhancement and stimulating employee initiative**.

RA Lovech employees were invited to share their view on the Plan (during weekly Directorate workshops) as feedback on the Plan. We paid special attention to the fact that there is an opportunity for them to take part more actively in the implementation as there are some measures in the Plan that require the commitment of a wider range of people in the working groups. For this purpose, every employee was encouraged to express their willingness to participate in the formed work groups.

A system for monitoring and controlling the implementation of the Improvement Plan was developed aiming to provide the tools necessary to ensure the effective implementation of the planned objectives, priorities and specific measures, and to prevent problems in the course of the plan's realization (if any).

Seven reviews of the implementation of the plan have been carried out as a result of the team meetings and discussions on the implementation of the measures. By the end of 2024, all measures have been implemented.

The methods and tools for implementing good practice are based on:

- Coherence between strategic and annual plans and projects, activities and daily tasks in the organization.
- Visibility and transparency of the processes, with the opportunity for feedback from external and internal stakeholders.
- Cooperation between the structural units in the administration and the project team, taking into account each contribution to the common tasks and updating plans when necessary.

- Taking advantage of established partner relationships, and bringing in new partners, who will contribute to better execution of planned tasks.
- Interaction in the digital environment in order to be operational and oriented towards intensive exchange and communication at all levels.
- Use of simple, flexible, and inexpensive tools, based on sustainable resource management.

The main commitment is to the application of the eight principles of excellence: Results orientation; Citizen/customer focus; Leadership and constancy of purpose; Management of processes and facts; People development and involvement; Continuous learning, innovation and improvement; Partnership development; Social responsibility.

There were some project costs that can be divided into:

A. Internal:

- For the preparation of leaflets, questionnaires and other documents produced by the project.
- For conducting 1 training and 2 team building sessions for all administration staff.
- For implementation of 3 socially responsible initiatives: cleaning and restoration of contaminated sites, and a charity campaign.

B. External:

- For payment of the living expenses and the fee for the 2 team training sessions.

The main advantages in the implementation process are related to:

- The existence of established rules and clarity about the structure, processes and responsibilities within the organisation.
- Clearly defined external and internal customers of the organisation, and their specific needs.
- Availability of a clear communication policy and established channels of interaction with the external environment.
- The professional and personal qualities of the employees in RA Lovech and their motivation to achieve the planned objectives.

A major challenge in the implementation process was the frequent change of the regional governors during the course of the project due to the series of extraordinary parliamentary elections in the Republic of Bulgaria. This challenge was overcome with the help of active communication between the CAF team senior management, by clarifying objectives, planning activities and deadlines for their implementation.

Success Measurement - main results with regards to the focus area

Result area 1: Strategic planning of organisational development

- A Development Strategy for RA Lovech is adopted with its own mission - articulating a vision and values, as well as integrating elements of sustainability, digitalization, innovation and social responsibility.
- Improved communication with the internal and external stakeholders on Lovech RA strategic and planning documents. Stakeholder involvement in the accomplishment of the Lovech RA development strategy is ensured.
- The RA Lovech Risk Management Strategy is up to date.
- Partnership cooperation agreements were contracted with the Burgas RA, Gabrovo RA, Ministry of labour and social policy, Forestry University etc., and a register of partnerships was established.
- A proactive information policy has been conducted on how the organisation works, its structure and processes.

Result Area 2: Human Resource Management

- Training on "Effective Communication" was organised for all employees to improve team communication and team building.
- Team building events were organised with the regional administrations of Burgas and Gabrovo to exchange experiences and good practices.
- A system to encourage employees to implement innovations and good practices in their work and promote initiative was approved by the Regional Governor.
- A system of flexible working conditions was introduced in the administration as one of the factors for achieving work-life balance for employees.
- Voluntary participation of more employees in activities related to social responsibility was encouraged. This came as a result of organized training with the participation of all employees of the organization on social responsibility. Social responsibility causes were identified by employees annually, the participation in socially responsible initiatives was encouraged - cleaning polluted areas, painting benches, the "Talents in the Administration" charity initiative, etc.
- A separate waste collection system has been introduced in the administration,
- A mechanism for learning by sharing what employees have learnt from different types of training in the internal network was created.
- Apprenticeship programmes were implemented as a means of attracting new staff to the administration.

Result Area 3: Technology management in line with the strategic and operational objectives of Lovech Regional Administration

- The RA Lovech Digitalisation Plan with specific objectives, activities and measures was implemented
- By regulating the electronic exchange of documents in the organisation, the internal paper-based workflow was essentially reduced, and employees became technically equipped with the necessary technology for performing their duties. The contact information of the employees on the website of the Lovech RA for communication with the users has been kept up to date. The ways of surveying the users' satisfaction with the provided administrative services of the RA Lovech has been updated.
- The internal rules for the operation of the regional councils and committees were updated with the possibility of online/offline meetings (in view of COVID-19).
- Citizens have been encouraged to give ideas and suggestions. The gathered information was analysed and used to improve the organization's performance.
- The information posted on the internal network has been updated, and unnecessary information has been archived.
- Compliance with the requirements of the Administrative Services Ordinance and the templates of applications for the provision of administrative services, deadlines and fees introduced by the RA Lovech was ensured.
- The internal rules for administrative services have been reviewed regarding the application of the general, and some of the recommended standards for the quality of administrative services, according to the Administrative Services Ordinance, have been applied.
- The quantitative and qualitative indicators used to measure the results are related to the number of documents developed, the number of partnerships, the given feedback, etc. The implemented performance monitoring and control system helps to track their qualitative dimension and effect on the administration's performance.

The essence of the innovation and the transferability of the solutions introduced

The project is innovative and a good example for other institutions because it shows in practice the benefits of persistent application of organisational development tools and quality standards in public administration. The application of the CAF model in the Lovech Regional Administration twice over a period of 6 years has shown that consistent efforts to demonstrate the benefits of its application have not been in vain. Visible results and benefits have been obtained for different stakeholders, which is the motivation that makes employees, partners, and clients trust the process, be motivated and satisfied with the achieved improvement.

Some of the measures in the Improvement Plan were integrated into the organisation's strategic planning/administration objectives and the administration's Annual Plans for 2023, 2024 and 2025, which is a guarantee for the successful implementation of the project.

For the implementation of some of the measures, specific working groups were formed, composed of CAF team members and other administration staff. The working groups were designated by the Governor and were given responsibilities and deadlines for the implementation of the task.

The inclusion of the Public Relations Officer with experience as a journalist in the CAF team itself contributed significantly to the rich and intensive work on communicating the CAF and its implementation process. With her professional expertise, they effectively assisted in the development of the CAF Communication Plan and in providing regular information about the project inside and outside the administration, so that maximum publicity and transparency about the work of the process team to be ensured and all stakeholders regularly informed about the progress of the implementation of the model.

All members of the CAF group contributed significantly to the correct and quality introduction of the model by their devoted and intense work in an excellent team atmosphere and motivation, clearly understanding the meaning of the efforts made in their additional work on CAF. Senior management appreciated the work of the CAF team.

Lessons learnt

Lesson One: Building a balanced and motivated team:

- When forming the project team, it is a good idea to include employees with different backgrounds but with high motivation and willingness to work on new challenging tasks, including young employees who can provide a different and fresh perspective.
- Organize training sessions for the team, to give them confidence in the right direction.
- Giving out praise and recognition of employee contributions and efforts from management is a strong motivating factor.
- The role of the project leader is essential - they need to be an experienced employee with good communication and teamwork skills.

Lesson Two: Communication, communication and more communication:

- The project should not be limited to a certain group of employees, but open to all stakeholders (inside and outside the organization).

- Rely on regular communication and prompt information from the project leader to all members - about planned tasks and team meetings (in terms of timing and content), as well as specific tasks and expectations for each group member.
- The purpose of broad communication is to create commitment and dedication to the project by every member of the working community and other stakeholders. Understanding the significance of the end result and its purpose is of paramount importance for the success of the efforts. A wide range of actions and channels need to be used to make the staff and the stakeholders widely aware of the work of the project.

Lesson Three: Good planning guarantees future success:

- Good planning and a balanced distribution of tasks within the team is essential, e.g. the group leader coordinates, structures, monitors the overall process, prepares timetables, provides all team members with the agenda of the meetings, organizes the minutes of meetings, coordinates the activities of the working groups formed to implement the improvement plan, etc.
- It is important that at every step in the process, team members know what is expected from them, who they can seek advice/assistance from, and work committedly in an atmosphere of openness and sharing.
- Periodic review and monitoring of performance is a guarantee of a positive end result, including if corrective action needs to be taken.
- Documenting the entire process is invaluable material for analysing what happened during the process.

Croatia: Using the power of digitalisation for shared process and quality knowledge management: Croatian digital tool eSUK (https://kvaliteta.gov.hr). Ministry of Justice, Public Administration and Digital Transformation

REPUBLIC OF CROATIA
Ministry of Justice, Public Administration and Digital Transformation

Introductory information

Title of the good practice: Using the power of digitalisation for shared process and quality knowledge management: Croatian digital tool eSUK (*https://kvaliteta.gov.hr*)

Name of the organisation: Ministry of Justice, Public Administration and Digital Transformation

City/ country: Zagreb/Croatia

Project manager's/contact person's first and last name: Dubravka Vukalović

Email, phone number to the project manager's/contact person's:
Dubravka.Vukalovic@mpudt.hr **, 00385 1 3714 101**

Level of organisation/project: national, regional, local

Sector: administration, public services

How many times the CAF was used? Indicate years please: One self-assessment based on CAF 2020 for 20 public administration bodies in 2021-2022

ECU label awarded? Indicate years please: n/a, digital tool eSUK is not intended for use in one public administration body (PAB)

Main focus: implementing quality management (QM) as new concept in Croatian public administration (PA), process mapping/optimisation/standardization, self-assessment based on CAF 2020 for continuous improvement of public (PABs)

Key words: quality management system, public administration, digital repository, business processes, knowledge management, benchlearning

Executive summary

Digital tool (repository) eSUK (*https://kvaliteta.gov.hr*) is a result of ESF project on quality management which combines in innovative way methodology for quality management

based on CAF 2020 with optimization and standardization of business processes. Formalized with Guidelines for Quality Management in Public Administration adopted by Croatian Government, laid the foundations for further implementation of quality management in PA.

About the organisation

In 2018., Ministry of Public Administration started implementation of a quality management based on CAF 2020 in the Croatian Public Administration (PA) within ESF project. In 2020., Croatian ESF project team was recruited in Quality Management Division of Ministry of Justice and Public Administration with aim to ensure sustainability of the project results and coordination on implementing quality management system in Croatian Public Administration Bodies (PABs). Today, Quality Management Division is a part of Directorate for Digital Society Development and Strategic Planning in [Ministry of Justice, Public Administration and Digital Transformation](#) which is, among other, responsible for administrative and professional affairs related to the public administration.

Quality improvement aspects

The general objective of the ESF project "Implementing a quality management system in the Public Administration of the Republic of Croatia" was to introduce quality management in Croatian PA as a unique concept that did not exist before – by defining new methodologies for PA in quality and process management and developing digital tool eSUK to support quality management implementation.

Quality improvement aspects of the ESF project were:

- transfer of already mapped processes in paper format for stakeholders in project in digital repository eSUK with engaged experts for process mapping work
- building knowledge management base of official documents for stakeholders in project with engaged experts for quality management in digital repository eSUK
- training of public servants to implement quality management in their PABs using digital tool eSUK in partnership with National School for Public Administration for professional training. Due to COVID-19 pandemic, training was completely online (Zoom platform, eSUK training environment (*https://kvaliteta-edu.gov.hr/*), which was very challenging and required an innovative approach since project required training of 600 public servants from all parts of country, and National School for Public Administration held training courses until then mostly in-person, in small class groups.

Stakeholders and communication

Ministry formed Steering Committee for implementing ESF project. Members of Committee were: Ministry State Secretary, Croatian ESF project team in Ministry, National School for Public Administration director, Ericsson Nikola Tesla project manager for development of digital tool eSUK (public procurement tender) and authorized representative of the public procurement contract for expertise in the field of quality management and process mapping.

Stakeholders on the project were 137 PABs (17 Ministries, 14 State administrative organizations, 16 counties, 32 cities, 32 municipalities, 26 legal entities with public authorities) and their public servants.

On developing digital tool eSUK were engaged IT developers, together with experts in the field of quality management and process mapping, who were also engaged on training of public servants, all under public procurement contract.

In 2021, Croatian ESF project team translated a published CAF 2020 document and in 2022, Quality Management Division formed Working group of experts for evaluation and trainers on standardization and optimization of business processes and quality management (self-assessment) in partnership with National School for Public Administration.

Implementation process/approach

When it comes to use of digital tool eSUK, main challenge, due to COVID-19 pandemic, was tackling with different levels of public servants digital competencies. Quality Management Division Working group prepared instructions and tutorials for online courses and was in charge for inviting public servants on training. Public servants who have undergone the whole training were competent for managing implementation of quality management and were appointed as Head of Quality Management for their PAB.

Other main challenge in using digital tool eSUK was the fact that, although this digital solution was tested during and after development by IT developers and experts in quality management and process mapping, when launched for training purposes in test environment and used by a larger number of public servants, it became clearer that some setups need to be modified and more tailor-made for PA users, which is in plan (required data for process description

As there was no legal framework for quality management in PA during the period of the project implementation, certain challenge for Heads of Quality Management in PABS and Quality Management Division in Ministry was to ensure further implementation of quality management new methodologies and using of digital tool eSUK.

Main project output is development and implementation of digital tool eSUK for quality management as innovative and representative example of CAF implementation, as well as digitalization and modernization of Croatian PA, which does not require further costs for PABs in knowledge management as important enabler for quality management implementation. For maintenance of this tool, Quality Management Division on regular basis renews contract and implements additional improvements when needed.

Great success is also achieving that quality management and use of digital tool eSUK became mandatory for PABs with adoption of [Guidelines for Quality Management in Public Administration](#) on the government level (in 2023), where monitoring of quality management implementation in PABs is regulated by reporting to the government level on year basis.

Success Measurement. Main results with regards to the focus area

Main results of using digital tool eSUK for shared process and quality knowledge management are:

- digital solution for process documentation, mapping, optimization and standardization in one place – *currently, there are 2700 business processes of PABs.*
- digital repository of information and documentation of PABS in one place enables more efficient knowledge management – *setting-up of statistic generator on number of documents of all PABs in repository in plan.*
- benchlearning and benchmaking tool for PABs – *currently, digital tool eSUK use 164 PABs and about 800 users of PA. Quality Management Division provides support for quality management implementation in PABs (e-mail, telephone, online meetings and workshops on request)*
- continuous improvement of PABs using integrated self-assessment functionality (and also external assessment in the future) based on CAF 2020 – *currently, there are 20 conducted self-assessment of PABs.*
- integrated functionality of conducting surveys in PABS - *provides possibility to PABs for opinion gathering not only when it comes to how public servants use digital tool eSUK and what improvements of tool could be made from their perspective, but also to implement OECD methodology for monitoring the wellbeing of civil servants in public administration, once it is defined (TSI MCP 23LU02-HR - EU survey of central government public servants: Strengthening evidence-based people management policies and reforms, September 2023 - August 2025). From this viewpoint, one could say it provides support to Republic of Croatia in accessing OECD.*
- integrated functionalities of:

- o process mapping/optimization/standardization – *implies also integrated open source platform Camunda for notation and modeling of business processes in .bpmn format*
- o linking with related processes stored in repository
- o linking with PA Service and business catalogue – *standardisation of services and development of guidelines still in progress*.

- option for linking with other government digital solutions in "state cloud" (interoperability) – *i. e. Human Resource Management platform, Public official documents central catalogue of PABs...*

The essence of the innovation and the transferability of the solutions introduced

Digital tool eSUK for quality management and process mapping/optimization/standardization is innovative and representative example of CAF implementation, as well as digitalization and modernization of Croatian PA.

Not only that Croatian PA for the first time developed a solution, and what's more, digital, for process mapping/optimization/standardization and knowledge management in one place, but also for benchlearning and benchmaking, for continuous improvement of PABs offering opportunity for self-assessment based on CAF 2020 (and also external assessment in the future), administrative burden reduction in providing PA services to citizens and business entities and more effective decision-making on investment of PA in further digitalization of public services.

Use of digital tool eSUK presents synergy of business process mapping, knowledge management are knowledge sharing and self-assessment based on CAF 2020 for one institution on the same platform that becomes full-fledged tool for quality management in PA on the whole.

Lessons learnt

In general, public servants showed their interest in QM training and enthusiasm for implementation of quality management in newly developed concept. Nevertheless, it is more challenging when there is no legislative framework form start that explicitly imposes certain obligation. It's not just challenging for those who implement project, but also for those who are willing to undergo training because regular working tasks mainly have priority over new concepts.

Another lesson learned is, when you implement new concept, and especially with a new digital solution as a part of it, to be aware of the fact that not everyone is on the same level of knowledge and digital skills. It's not just about developing a human-centered

solution, but also about ability to bring the knowledge and product closer to users in the most basic possible way. Never assume that something is common knowledge just because you or most people know it, or it seems so basic to you. Otherwise, this can cause unneeded resistance to the matter and take you more time than planned.

- As well, keep in mind:
- value-added impacts on the policies on national level and how this solution fits in and contributes to the "big picture"
- use of digital tools (i. e. One Drive, Zoom, Teams) for building a network of key stakeholders (users of QM, line managers, process owners).
- a bit challenging at start, but later on becomes much easier for users when implementing quality management using digital tool(s).

Georgia: Facilitating the Exchange of Best Practices Among Employees Across Various Branches. LEPL Public Service Hall (Under the Ministry of Justice of Georgia).

Introductory information

Title of the good practice: Facilitating the Exchange of Best Practices Among Employees Across Various Branches

Name of the organisation: LEPL Public Service Hall

City/ country: Tbilisi, Georgia

Project manager's/contact person's first and last name: Natalia Abashmadze; Mariam Tsaguria

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Level of organisation/project (European, national, regional, local)[2]: National

Sector (administration, defence/security, culture/education, justice, healthcare/social care, employment, agriculture, environment, public services, other?)[3] : Administration

How many times the CAF was used? Indicate years please: 2 times (in 2019 and in 2023)

ECU label awarded? Indicate years please: 2025

Main focus: Social responsibility: attractiveness of the public sector.

Key words: Exchange of Best Practices Among Employees.

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[2] Please underline the correct or add the other sector.
[3] Please underline the correct or add the other sector.

Executive summary

In recognition of the existing challenges of Public Service Hall, the self-assessment group has identified a significant area for enhancement within the CAF framework: the facilitation of knowledge exchange and the sharing of best practices among employees across diverse branches. To address this concern, a systematic rotation program was established, enabling specialists from smaller and medium-sized branches to be temporarily assigned to busier branches.

The main results of CAF process have been substantial. There has been a notable enhancement in both the knowledge and skills of our employees, which had a positive impact on reducing transaction time.

Information about the organisation

Public Service Hall (PSH) is a legal entity of public law operating under the Ministry of Justice and creates an innovative space in Georgia that is focused on the development and establishment of strong institutions. It is the largest service delivery institution, not only in Georgia but also within the entire region.

The aforementioned institution represents the ministry's front line, which is constantly communicating with the customer. It significantly simplifies the availability of public services and citizens' engagement with the public or private sector by adopting quick and effective procedures. As the most prominent service provider in Georgia, it is crucial for Public Service Hall to continue to catch up with up-to-date developments and become an innovative agency that leverages modern technology in the digitalization era. The Public Service Hall has the principle of **"One Window"** and the concept **"Everything in One Space"**, which means to provide services for the customers in a comfortable environment with simple procedures, quickly and with high quality.

Public Service Hall offers customers various channels for receiving services:

- Branches
- Mobile Public Service Hall
- Public Service Hall in Penitentiary Institutions
- Digital Public Service Hall
- Call center and Online chat
- Just Cafe
- Social networks

Public Service Hall Brunches - 124 branches are operating throughout Georgia, which allows our citizens and guests, in any part of the country, to receive fast, effective and simple services in a comfortable environment. Due to the specifics of the work and the

increased number of services, the branches are constantly busy. To manage customer flow, PSH has implemented a queue management system, which works successfully throughout the entire agency. Services in branches are available for international customers – frontline operators can communicate in English. Also, machines in the self-service area provide services in Georgian, English, Russian, Armenian and Azerbaijani.

In line with the primary goal of the Public Service Hall, which is to provide fast and efficient services that are equally accessible to all segments of society, the Public Service Halls are designed to be fully accessible to individuals with disabilities. Also, the open-space interiors and comfortable waiting areas combined with qualified, competent and friendly employees highlight the emphasis that has been placed on a customer-friendly environment and service.

It should be mentioned that applications received by the operator are randomly distributed among registrars. The front office employee is separate and has no connection to the employees who are actually reviewing an application, which means that the front office employee cannot see who is reviewing a specific application. Such division minimizes/eliminates the risk of corruption.

Mobile Public Service Hall - This initiative represents a novel endeavor in the relevant area. Within the framework of this initiative, specialized vehicles have been deployed to ensure that rural residents can readily access the services they require without the need to visit branches of Public Service Hall.

In accordance with the principles outlined in Sustainable Development Goal 16 (SDG16), it is recognized that institutions that operate outside the framework of legitimate laws are susceptible to arbitrary conduct and abuse of power, thereby diminishing their ability to effectively deliver public services to all members of society. The Mobile Public Service Hall represents a tangible commitment to realizing the core transformative aspiration of the 2030 Agenda for Sustainable Development and its accompanying SDGs, particularly the overarching aim of leaving no one behind.

This innovative initiative embodies the unwavering dedication of all United Nations member states to mitigate disparities and vulnerabilities that marginalize individuals and impede the collective potential of humanity as a whole. By affording individuals the opportunity to access public services from the comfort of their households, the Mobile Public Service Hall aligns with the ethos of SDG 17 and its objective to provide a comprehensive array of diverse, efficient, and streamlined services under the "one window" principle.

Public Service Hall in Penitentiary Institutions - Brand New International Innovation of the Ministry of Justice – Public Service Halls in Penitentiary Institutions.

In 2023, the Ministry of Justice of Georgia launched a brand-new international innovation for inmates. It means that all penal institutions will be equipped with Public

Service Halls, which are the hub of public and private services. The main idea of this innovation is to further expand the rehabilitation and resocialization opportunities for inmates and create a unique platform for an adequate and simplified service delivery mechanism.

Portal of electronic services - The unified portal of electronic services (MY.GOV.GE) makes the services available online for society. MY.GOV.GE is a unified web portal of electronic services in the public and private sectors, on which more than 500 electronic services are located.

JUST Café - Another unique project of the Public Service Hall is JUST Cafe, which is available at the branches in Tbilisi, Batumi and Kutaisi. Cafe provides its customers with not only a convenient environment but also the entire set of services available at the Public Service Hall. It offers any customer the opportunity to pick up a passport or even register a plot of land in the background of a delicious coffee and meal.

WebSite of Public Service Hall - the Public Service Hall website was redesigned to fully meet contemporary technological standards. As a result of the revitalization, the website has become faster, the visuals have been improved, and the process of searching for services has been simplified for the user. In addition, it includes all the important information and visualizations about the branches and the schedule of the Mobile Public Service Hall. An important issue regarding the website is that it is adapted for people with different disabilities (fonts, sound mode, contrast). (https://psh.gov.ge/)

Call center and Online chat - Public Service Hall has a call center and online chat, which are ways to provide services to society. It is a flexible and fast way to receive service. The call center and online chat are available for customers seven days a week, 24 hours a day (24/7).

Social networks - Public Service Hall has implemented a „Voice of Customers" platform in order to be focused on keeping up with customer expectations and their needs. The aforementioned platform describes a customer's feedback about their experiences with and expectations of our services and thus develops and tailors services to customers' needs.

Public Service Hall has official social networks. Information for society about the news, current and planned projects is distributed continuously by social networks.

All in all, Public Service Hall, as a powerful institution, creates a fully equipped environment for customers to receive qualitative and fast public and private sector services without any additional effort. It creates an innovative space in Georgia that is focused on the development and establishment of strong institutions. In conclusion, it should be emphasized that Public Service Hall aims to expand its knowledge in the international arena while also sharing its experience with other countries.

Quality improvement aspects and objectives

The Public Service Hall of Georgia, a pioneering public agency in the South Caucasus, embarked on a transformative journey to enhance its performance and service quality through the adoption of the Common Assessment Framework (CAF) in January 2018. This framework served as a systematic approach to evaluate and improve the agency's operations, internal processes, and the services provided to the public. By summer 2019, after a comprehensive development phase, the CAF model was fully operational. This initiative actively involved both management and staff, enabling a detailed analysis of operations from various perspectives and ensuring a well-rounded improvement strategy.

By the end of 2023, the Public Service Hall initiated a new and extensive cycle of self-assessment to address key areas in need of improvement. One of the primary objectives was to create a more consistent and equitable experience for both employees and citizens, especially given the stark contrast in workloads and practical experiences across branches.

The Public Service Hall operates 124 branches nationwide, covering urban areas and remote villages alike. While urban branches experience high volumes of applications across the 500 services offered, including high demand for citizenship, business, and residency services, branches in rural or mountainous regions often face minimal application volumes. This disparity in demand led to differences in practical experience among employees. Though employees at smaller branches had strong theoretical knowledge, the lack of real-world application opportunities hindered their ability to fully develop and apply their skills.

To address this challenge, the improvement project implemented a systematic rotation program, which temporarily assigned specialists from smaller and medium-sized branches to busier urban branches. This rotation allowed employees to gain hands-on experience in high-demand environments while offering insights into the operational dynamics of larger, more advanced branches. Each specialist was paired with a mentor, providing guidance and support throughout their time in the busier branches. At the end of each working day, reflection meetings were held to discuss the day's experiences and provide constructive feedback, ensuring continuous learning and improvement.

The objectives of this project were clear: to enhance employee skillsets, reduce operational disparities between branches, and ultimately improve the overall quality of services. These objectives were quantifiable through improved employee satisfaction, increased service efficiency, and a more consistent level of performance across all branches, as evidenced by the outcomes of the self-assessment conducted at the close of 2023.

Stakeholders and communication

The **management of the Public Service Hall** was primarily responsible for organizing and overseeing the entire implementation process of the improvement project. Their leadership ensured that the project was successfully carried out and aligned with the strategic goals of the organization.

During the implementation, the **systematic rotation program** was a key initiative, allowing specialists from smaller and medium-sized branches to temporarily be assigned to busier branches. This rotation enabled employees to gain hands-on experience in high-demand environments, improving their practical knowledge and understanding of diverse operational dynamics. Each employee was paired with a **mentor** who provided continuous guidance throughout the rotation, ensuring a smooth transition and effective learning experience. At the end of each rotation, mentors also evaluated the effectiveness of the program, ensuring that the learning outcomes were achieved.

Beyond the internal rotation program, the Public Service Hall also organized **one-week visits to partner agencies** involved in the application process. This initiative allowed specialists to observe how applications were reviewed, and decisions were made within the Public Service Hall, providing them with a broader perspective on the entire service delivery ecosystem. These visits were essential for expanding employees' knowledge and fostering the exchange of best practices between the Public Service Hall and partner agencies.

The employees were actively involved in the project through their participation in the rotation program and the mentorship system, which facilitated their professional development. This hands-on involvement ensured that the staff was not only gaining new skills but also contributing to the overall success of the project.

The **needs and opinions of citizens** were indirectly considered through the project's focus on improving the skills and capabilities of employees to enhance the quality of service delivery across all branches. The rotation program allowed employees to better understand the operational dynamics and service requirements in different regions, ensuring that citizens received more consistent and efficient services.

The **project was carried out in partnership with other organizations**, particularly during the **one-week visits** to partner agencies, where specialists gained valuable insights into the application process. This external collaboration played a significant role in enriching employees' experiences and improving service delivery.

Implementation process and approach

The objective was to enhance the quality of services provided by the Public Service Hall and improve internal processes through the implementation of the Common Assessment Framework (CAF). The planning involved active participation from both management and staff members to ensure a comprehensive evaluation of operations. The resources required for carrying out the process included a team of management and staff for the self-assessment, facilities for rotating employees, and the organization of mentoring and one-week visits to partner agencies. Financial and human resources were crucial for providing support during the rotation program and for training employees in best practices.

In 2023, the agency initiated a new cycle of self-assessment to address previously identified gaps. A rotation program was introduced where specialists from smaller branches were temporarily assigned to busier branches for hands-on experience. Mentors were assigned to guide and evaluate the specialists during the rotation. Additionally, specialists were sent on one-week visits to partner agencies for deeper insights into service delivery. The process was carried out by the Public Service Hall staff, mentors, and the management team overseeing the evaluations and improvements.

The main methods and tools used in this implementation included the CAF framework for internal performance evaluation, a staff rotation program for knowledge exchange, and mentoring for ongoing support. The rotation program was introduced to address the challenges caused by differing practical experiences among employees in remote and urban branches. By rotating specialists, the agency aimed to equalize knowledge and experience across all branches. The mentoring system was employed to ensure that employees received the necessary guidance and feedback, which helped ensure the effectiveness of the rotation and knowledge-sharing initiatives.

The internal costs of the project included time and effort from management and staff involved in the development of the CAF framework and the self-assessment process. There were costs associated with organizing the rotation program, including travel and accommodation expenses for employees going to busier branches. Furthermore, additional resources were allocated for organizing the one-week visits to partner agencies. External costs likely included the logistical and coordination efforts of partner agencies involved in the visits.

Main wins, challenges and solutions of the implementation process

Main Wins (Success Factors):

- The adoption of the CAF framework allowed the agency to evaluate and improve its performance systematically.
- High participation from both management and staff ensured a well-rounded approach to identifying and solving problems.
- The rotation program helped equalize knowledge and experience across branches, particularly for staff at smaller or more remote locations.
- The one-week visits to partner agencies helped broaden employees' understanding of service delivery processes, fostering collaboration and better communication between agencies.

One of the primary challenges was the process of rotating employees from smaller branches to larger, busier ones. This rotation had to be carefully planned to ensure that it did not disrupt the normal workflow or cause staffing shortages at any branch. Managing the logistics of scheduling without affecting the delivery of services was crucial, as every branch still needed to meet the demands of the public while ensuring that employees gained valuable hands-on experience.

To overcome this challenge, the Public Service Hall implemented a meticulous scheduling system that ensured staff rotation was done at times that would cause minimal disruption. A clear planning process was put in place to ensure that enough staff remained at each branch to handle the regular workload while other employees participated in the rotation. In addition, communication with the staff and management at all levels was key to ensuring that everyone understood the goals of the rotation and how it would be managed without negatively impacting the branch's service delivery.

Success Measurement and Main results

Increased Knowledge and Skill Level of Employees

The primary improvement resulting from the CAF program is the enhanced knowledge and skills of employees. This was measured through both qualitative feedback from employees and quantitative assessments of performance before and after the rotation program. Surveys and interviews with employees revealed that staff felt more confident in their ability to perform a broader range of tasks after participating in the rotation program. 220 employees were trained within the framework of the program. An interview was conducted with all of them.

Reduced Interactions Between Coordinators and Managers

Another significant result of the CAF program was the reduced need for frequent interactions between coordinators and managers, which led to more streamlined communication. The process is ongoing and includes the observation and assessment of trainees by managers and mentors. Employee surveys indicated that staff felt more

empowered and capable of handling tasks independently, reducing reliance on managerial oversight. This allowed managers to focus on higher-level issues rather than being involved in daily operational decisions.

Increased Unity and Collaboration Among Employees

The CAF process also fostered a greater sense of unity among employees, particularly between branches. The rotation program fostered a culture of collaboration across branches. Employees felt more connected, and communication between urban and rural branches became more fluid. As a result, employees were able to share solutions and resources, improving the overall efficiency of the organization. Feedback from employees highlighted increased empathy and understanding among colleagues from different branches. Team-building surveys and employee engagement surveys consistently indicated higher levels of cooperation and job satisfaction post-CAF implementation.

Sustained High Levels of Service Quality

The continuation of CAF processes, particularly in standardizing methodologies and sharing best practices, will help maintain the high standards set by the program. Continuous customer feedback through surveys will track service quality over time, ensuring that improvements made during the CAF initiative are sustained. The goal is to maintain or even improve the 95% customer satisfaction rate that was achieved.

Increased Organizational Efficiency

The CAF process has already led to a more efficient organization, with reduced managerial intervention and a more collaborative workforce. In the long run, this efficiency will be measured through the time taken to process requests, resolve issues, and meet performance targets. Data on service delivery times, error rates, and employee productivity will continue to be tracked. As the rotation process continues to evolve and branch managers also participate, it is expected that efficiency will continue to improve, as decision-making and problem-solving become more decentralized and quicker. For example: reduction of transaction time after retraining by 1 minute on average

In conclusion, the CAF program has already delivered substantial results, improving employee skills, reducing managerial burden, fostering unity, and ensuring consistent service delivery. The long-term success of these improvements will be tracked through both qualitative and quantitative measures, ensuring that the Public Service Hall continues to meet its goals of high-quality service and operational excellence.

The essence of the innovation and the transferability of the solutions introduced

The implementation of the Common Assessment Framework (CAF) within the Public Service Hall of Georgia is a prime example of innovative public sector reform that has significantly elevated service quality, efficiency, and internal collaboration. This project serves as a good example for other institutions due to its well-structured approach to performance evaluation, employee development, and service delivery improvement.

Besides, this project can be a **good example for other institutions**. By systematically evaluating its operations and fostering both vertical and horizontal collaboration, the agency created an environment of continuous improvement, which is relatively rare in government institutions, especially in a region like the South Caucasus.

What makes the project particularly innovative is the combination of performance evaluation with practical solutions such as employee rotations and cross-branch knowledge sharing. These practical initiatives directly addressed the gaps identified in the CAF framework and allowed for real-time skill development, providing employees with both theoretical knowledge and hands-on experience. This not only enhanced the employees' abilities but also helped create a more unified and empathetic work culture. The approach to standardizing processes across branches ensured that citizens received consistent services no matter where they lived, making the agency more reliable and responsive.

During the project implementation, **key elements** were identified that could be transferred to other institutions. Yes, the project is highly transferable to other public institutions or government agencies. Key elements of the project, such as the rotation program for skill development, and the standardization of methodologies, can be adapted to any organization seeking to improve its internal processes and the quality of services delivered to the public.

Other organizations, especially in the public sector, could benefit from adopting the CAF framework as a comprehensive tool for assessing their strengths and weaknesses. The self-assessment process, which involves management and staff alike, ensures that everyone in the organization has a voice in shaping the improvement process. This can foster a greater sense of ownership and accountability among employees.

Several special factors contributed to the success of the project:

1. **Strong Leadership and Commitment**: The project succeeded because of the commitment from senior management and the Ministry of Justice, who recognized the need for improvement and supported the implementation of the CAF framework. Their willingness to embrace a systematic, evidence-based approach ensured that the program had the resources and authority it needed.

2. **Active Participation from Employees**: The active involvement of both management and staff in the self-assessment process was a key success factor. Engaging employees from various levels of the organization helped to build a culture of transparency, accountability, and collaboration, which was essential for the program's success.
3. **Clear Communication and Scheduling**: Careful planning and scheduling of the employee rotation program were critical to its success. Ensuring minimal disruption to regular operations while allowing employees to gain new experiences was a delicate balancing act that was carefully managed.
4. **Continuous Feedback and Adaptation**: The project incorporated regular feedback from employees and customers, which allowed for continuous adjustments and improvements. The combination of formal assessments, surveys, and day-to-day reflection meetings helped the organization stay responsive to the needs of its staff and the public.

Based on this experience, we can share with interested parties the important lessons we have learnt.

1. **Involve Employees in the Process**: The success of the CAF program was due in large part to the active participation of all staff members, from management to frontline employees. Creating a shared sense of responsibility for the process fosters greater engagement and commitment to the improvements being made.
2. **Foster a Collaborative Culture**: Encouraging collaboration across branches or departments can break down silos and create a more cohesive organization. Rotation programs and knowledge-sharing initiatives help create an environment where employees support one another in achieving common goals.
3. **Plan and Coordinate Carefully**: Especially when implementing programs that involve rotations or changes in staffing, careful planning and scheduling are crucial to maintaining operations without compromising service quality.

The experience of this project can be used in various situations, particularly in public sector institutions or large organizations that aim to improve internal processes, employee skills, and service delivery.

Main and important lessons learnt

Engage Employees at All Levels to Ensure Ownership and Success

One of the most important lessons from this project is the value of involving employees at all levels in the process of change. From the very beginning, the Public Service Hall made sure to engage not only senior management but also frontline employees in the self-assessment and improvement process. By actively participating in the CAF

framework evaluation, employees were able to directly contribute to identifying strengths, weaknesses, and areas for improvement in the organization.

Continuous Feedback and Adaptation Are Essential to Long-Term Success

Another critical lesson learned is the importance of continuously collecting feedback and adapting strategies based on real-world results. The CAF process, while structured, is not a one-time evaluation but an ongoing process of improvement. The Public Service Hall recognized that it needed to regularly assess the impact of its initiatives through employee surveys, customer satisfaction evaluations, and performance reviews.

For instance, feedback from employees participating in the rotation program was gathered regularly to identify potential improvements in the scheduling process and ensure that the experience was valuable. Similarly, customer satisfaction surveys were used to track the effects of the new methodologies and processes on service quality.

Create a Supportive Environment for Cross-Branch Collaboration and Knowledge Sharing

A major outcome of the CAF project was the fostering of cross-branch collaboration and knowledge sharing, which became one of the key drivers of success. The rotation program, which saw employees from smaller or less-busy branches assigned to more active branches, allowed for the exchange of best practices and expertise between colleagues who may have previously had limited opportunities to collaborate. This promoted unity, enhanced learning, and ensured a consistent approach to delivering services, regardless of branch size or location.

The standardization of methodologies across branches was another critical element that helped unify the organization's operations. By aligning processes and ensuring that employees had a clear understanding of the expected service standards, the Public Service Hall achieved more consistent service delivery.

Key Recommendations:

Invest in Continuous Employee Development: Organizations should focus on regular training and skill enhancement to ensure their employees remain equipped to handle evolving challenges.

Maintain a Balanced Approach to Centralization and Decentralization: While standardizing processes across all branches, it's important to adapt to local needs and challenges. Flexibility in implementing solutions will lead to better outcomes.

Encourage Cross-Agency Collaboration: The partner agency visits highlighted the value of collaboration. More public institutions could benefit from sharing best practices and learning from each other's experiences.

Conclusion

In recognition of the existing challenges of Public Service Hall, the self-assessment group has identified a significant area for enhancement within the CAF framework: the facilitation of knowledge exchange and the sharing of best practices among employees across diverse branches. To address this concern, a systematic rotation program was established, enabling specialists from smaller and medium-sized branches to be temporarily assigned to busier branches.

The main results of the CAF process have been substantial. There has been a notable enhancement in both the knowledge and skills of our employees, which has had a positive impact on reducing transaction time.

In conclusion, the experience of the Public Service Hall in Georgia has provided valuable insights into how to successfully implement improvement initiatives within a large, complex public institution. The three lessons shared—engaging employees at all levels, establishing continuous feedback mechanisms, and promoting cross-branch collaboration—are essential elements that can guide other institutions in their efforts to improve service delivery, operational efficiency, and employee development.

By prioritizing employee involvement, continuously adapting strategies based on feedback, and fostering collaboration, organizations can create sustainable improvements that lead to better outcomes for both employees and the public they serve. These lessons are not only applicable to public sector institutions but can also be adapted for use in private sector organizations seeking to enhance their performance and service quality.

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Greece: Systemic implementation of the Common Assessment Framework: fostering digital innovation in project management to improve team collaboration, efficiency, and decision-making. Region of Crete.

Introductory information

Title of the good practice: Systemic implementation of the Common Assessment Framework: fostering digital innovation in project management to improve team collaboration, efficiency, and decision-making

Name of the organisation: Region of Crete

City/ country: Greece

Project manager's/contact person's first and last name: Dr. Nikos Raptakis

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Level of organisation/project: Regional

Sector: Administration, Public Services

How many times the CAF was used? Indicate years please: 4 years

Main focus: Leadership and constancy of purpose, values

Key words: systemic approach, leadership, digital innovation, project management, fact-based decision making

Executive summary

The Region of Crete has adopted an innovative approach to implementing CAF, utilizing a two-stage self-assessment process involving all managerial staff. Adding to "performance" assessment of enablers and results, the "importance" assessment provides insights into the organization's maturity level and guides prioritization, leading to the development of an advanced project management solution and enhanced management awareness for effective implementation.

About the organisation

The Region of Crete is one of the 13 administrative regions of Greece, operating as a second-level administrative division. Its administrative structure ensures that national policies are effectively implemented, while also addressing the regional needs and priorities outlined in the regional strategy. At the political level, the Region is led by the Governor and a 45-member Regional Council. Its organizational structure is a matrix model, with seven General Directorates serving as the primary administrative bodies, coordinating 245 organizational entities across the four regional units. The regional authority oversees public services, regional development, infrastructure, environmental policies, and economic planning across the island of Crete.

The Region of Crete has consistently applied the Common Assessment Framework, reinforcing the leadership's vision for an innovative, dynamic, and sustainable local government. The scope of CAF implementation has been defined at the level of the seven Directorates-General (DGs), which improved the quality of the evaluation results by focusing on each DG's specific characteristics and priorities.

Quality improvement aspects

CAF implementation in the Region of Crete is guided by two interrelated objectives, each with measurable indicators to monitor progress and success.

Building a Culture of Excellence

The primary objective is to foster a culture of excellence throughout the organization's all management levels. This entails not only raising awareness of core principles but also gaining a thorough comprehension of their practical application within each employee's area of responsibility.

Every phase of the project contributed to this goal. Targeted manager training and the development of a customized self-assessment tool, incorporating the "Importance" dimension, were critical in deepening the understanding of the CAF framework and aligning it with existing management practices within the organization. This was reflected in an overall high significance rate of 88% across all General Directorates (GDs) regarding the principles of excellence. At the same time, managerial staff's active involvement of (95% participation rate) in both prioritizing improvement areas and action planning further strengthened their understanding and ensured their commitment to sustaining a continuous improvement process.

Improving Organisational Performance

A second key objective is to identify strengths and weaknesses through a holistic framework to enhance overall organisational performance. Staff knowledge and

experience have been instrumental in conducting self-assessments and addressing areas for improvement.

Each Directorate General focused on three specific improvement measures, followed by the development of detailed action plans, including timelines and the assignment of responsibilities. The active involvement of staff throughout the process fosters a strong sense of ownership and commitment, ensuring enthusiastic support for the actions and paving the way for successful implementation. At the same time, achieving the first objective—by enhancing understanding—will facilitate a more effective implementation and greater integration with existing initiatives. This will be further demonstrated by presenting the best practices for establishing a project management system.

Stakeholders and communication

The Directorate of Organization, Quality, and Efficiency is responsible for planning and implementing the CAF framework, with guidance from the region's leadership. The project management team is comprised of executives with extensive international experience implementing Total Quality Management (TQM) projects in both the private and public sectors. This knowledge and expertise streamlined the project's design and reinforced the leadership's confidence in the initiative.

The initial CAF implementation plan was first presented to the seven General Directors, ensuring their active participation and support throughout all phases of the project. As a next step, all 245 directors and department heads in the region were given two in-depth training cycles.

During the evaluation process, management considered the findings of citizen and customer satisfaction surveys, which serve as an annual objective in the Region's performance monitoring framework. Employee feedback gathered during the annual staff appraisal process was also incorporated.

For the integration of the digital process management platform, the Region of Crete utilized its existing Management Information System (MIS) and collaborated with the external provider who oversaw its development and support.

Implementation process/approach

The CAF self-assessment approach fosters a culture of continuous improvement and transparency, enabling management to identify strengths and areas for enhancement while effectively executing an action plan. This approach's key distinguishing feature is the assessment of the organization's maturity as well as the identification of potential information or communication gaps—both of which are required for successful implementation of future initiatives. The project bear no external costs. The internal

costs included labor of the personnel involved in the phases of design, development, application and assessment as in every CAF implementation.

The methodological approach adopted by the Region of Crete can be summarized in the following stages.

A. Planning

The first step in CAF implementation is to define its purpose and objectives. The planning phase includes adapting the evaluation tool and questionnaires to meet the specific requirements of organisational units. In this context, project teams establish clear roles and responsibilities, along with a structured timetable. During this initial phase, we also ensure the commitment of the Region's leadership.

The project management team navigated the entire planning process on their own with no external assistance. Relying on their expertise, the same team designed and implemented both the questionnaire and the tool for processing and analyzing the results, ensuring a seamless, efficient, and internally driven approach.

B. Training

Training and raising awareness among all participants in the self-assessment process is a crucial stage towards the Common Assessment Framework's successful implementation. Participants undergo comprehensive training to ensure a common understanding of excellence principles and their significance for the Region of Crete. This training covers the core values of excellence, their alignment with the Region's mission and strategy, and how the CAF framework is structured.

Active engagement from all management staff within the Regional Government is essential for conducting a meaningful and effective evaluation. Their participation not only strengthens the self-assessment process, but it also fosters a culture of continuous improvement and accountability across the organization.

C. Self-Assessment

All managers with leadership responsibilities from each Directorate General participated in the self-assessment process. Each workshop began with an introductory presentation, that emphasized understanding the scoring logic and provided specific examples from the Region's operations to ensure clarity and consistency.

An innovative approach was adopted, structuring the self-assessment process into two stages and dimensions. Initially, all participants evaluate the "Importance" of various issues affecting their organization's effective functioning. Subsequently, the dimension "Performance» assesses each regional organizational unit based on how effectively enabling factors are implemented and results are achieved.

The first dimension adds considerable value to the evaluation, as not all issues are equally important for each organizational unit. Furthermore, it provides valuable insights into the organization's maturity and its level of acceptance of the CAF framework.

D. Action Planning

Comprehensive data analysis and professional visualization of the results—particularly focusing on the importance-performance gap—provide valuable insights into the Region's organizational units' strengths and weaknesses. At the same time, this process highlights information and communication gaps, which are then addressed to improve the effectiveness of each unit.

Each CAF implementation cycle in the Region of Crete concludes with the action planning stage, which ensures that assessment results are translated into concrete steps for progress.

The primary challenge in applying CAF was to raise awareness of the "performance evaluation" approach among the organization's supervisors. The key to successful implementation is their active involvement at all stages of the process, which fosters a sense of ownership and alignment with the results.

Success Measurement. Main results with regards to the focus area

Reflecting the core principles of excellence, a key priority that emerged during the CAF implementation in the Region of Crete was the need to foster fact-based and process-driven decision-making at all management levels. The primary goal was to improve the organization's ability to effectively manage projects by ensuring:

- Clearly defined objectives and project scope
- Stable processes and structured workflows
- Effective task delegation and role clarity
- Optimized time management for increased efficiency
- Robust monitoring mechanisms for tracking progress
- Improved team performance and collaboration

The project team designed and developed a web-based platform aligned with the Region's strategic plan. It incorporated key elements of the European Commission's PM^2 project management methodology to ensure structured, efficient, and transparent project execution. A key reason for prioritizing this issue during CAF implementation is its critical importance to the entire organization, as it affects multiple DGs and has a significant impact on the organization's overall strategy.

The web-based platform is accessible to all five Directorates of Technical Works within the Regional Government. Currently, it supports 190 active users and hosts 2,500

registered projects, each with technical and financial data. There is real-time accurate insight into all projects, whereas data collection and processing used to take a long time and produced low-fidelity information. Projects, studies, reports, supplies, and services from various funding sources (NSRF, National Funds, etc.) and thematic categories (e.g., Sustainable Transportation Infrastructure, Resilient Road and Bridge Infrastructure, Green Building and Urban Planning) are featured.

Project-related procedures and workflows were thoroughly documented and redesigned using a set of process management tools, with active participation from all stakeholders (employees, professional groups, legal advisors, and citizens/clients). For the first time, decision-makers have access to a real-time, accurate, and fully documented dashboard as well as a digital library for each project managed by the Region. To that end, the Governor of the Region, the Regional Committee, and senior management members make systematic decisions about how to implement the Region's strategic plan and operational objectives.

The methodology adopts a holistic approach to a project's entire life cycle, from design to bidding, execution, completion of construction, and operational start-up. The new architecture's interoperability with the internal Document Management System is especially important, because it enables integrated electronic project management by generating a complete digital file for each project with a unified sub-folder structure. Simultaneously, the integration of electronic forms allows the automatic generation of single documents on specific issues for all involved services.

Furthermore, by ensuring interoperability with the Region's geospatial data infrastructure (GIS Crete), the system improves its effectiveness by seamlessy integrated data from multiple domains, including infrastructure, climate change, and civil protection. Integrating Business Intelligence dashboards (Power BI) into the project management platform improves visibility and project oversight, allowing teams to better manage timelines, resources, and budgets more effectively while bringing all stakeholders together around clear, actionable insights.

The new PM system introduces a new design, a user-centred operational approach, and a digital organizational transformation. It addresses critical operational and strategic issues, such us time-consuming processes, delays in public works completion, miscommunication among organizational units within the Directorates, and a lack of transparency in project status.

Furthermore, it preserves institutional memory regarding public infrastructure development and resource allocation. By ensuring a seamless flow of information, it establishes an unbreakable chain of continuity in project management and execution.

The essence of the innovation and the transferability of the solutions introduced

Our experience with the "CAF journey" has reinforced our belief that sustained success depends on the seamless integration of the assessment process with the implementation of improvement measures.

Using the Common Assessment Framework as a diagnostic tool, our methodology produced accurate and widely accepted results, laying the foundation for targeted improvement actions within each organizational unit. The detailed evaluation process, which included in-depth analysis of specific examples as well as the Criteria and Sub-Criteria levels, resulted in clear and actionable conclusions. Additionally, defining the scope at the Directorate-General level contributed to consistent and meaningful results throughout the organization.

At the same time, active participation in the self-assessment process, which included reflecting on both the importance of key issues and the current state of operation—heightened awareness and strengthened the commitment of participants to improving their organization. Moreover, the implementation of improvement actions strengthened the understanding and application of the core principles of excellence.

This integrated approach, which combines evaluation, reflection, and action, has been critical in cultivating a culture of continuous improvement within our organization. Our approach, of course, is adaptable and applicable to any public organization, offering a structured and effective framework for self-evaluation, continuous improvement, and organizational excellence. Finally, the implementation parameters will be determined by the CAF implementation project's core objectives.

- The following measurable outcomes can be obtained from the implementation of the innovative project management system.
- Alignment with the Regional Strategic Plan ensures that project business processes enable timely planning and execution, especially for technical projects.
- Improved stakeholder interface management encourages collaboration and ensures smooth project execution.
- Clearly defined roles, responsibilities, and tasks eliminate data and information silos, ensuring knowledge continuity throughout the Region.
- The multi-tiered project organization is effectively managed and monitored in a structured manner.
- Standardized procedures enable precise tracking of project milestones, improving monitoring and supervision.
- Optimized project performance through timely decision-making and proactive risk management throughout the project lifecycle.

- High-quality infrastructure projects are delivered on time and benefit citizens directly.
- Strengthened accountability, transparency, and public trust in the Region of Crete.

Since project lifecycle management is governed by consistent national and, to a large extent, European legislation, our expertise can be effectively transferred to other organizations. Adopting the core principles of the European PM^2 methodology enhances its transferability. However, before addressing the organizational and technical aspects of the project, it is crucial to secure acceptance of the new way of working through targeted communication efforts and staff consultation processes. Engaging those involved in the project lifecycle and allowing them to contribute their experience and knowledge to the development of the new tool fosters a sense of ownership and strengthens their commitment to the project's success.

In conclusion, the CAF journey in the Region of Crete has resulted in two major benefits: the identification of critical areas for improvement and the more effective implementation of actions, both driven by a transformative cultural shift within the organization.

Lessons learnt

Lesson 1: Empowering Your People

The initial conclusions concern the methodological approach of the CAF implementation. Empowering your people entails creating a culture in which they feel valued, capable, and motivated to contribute to the organization's success. Those who best understand an organization are its own managers, making them the best candidates to evaluate its operations—provided they approach the process honestly and objectively. The most difficult challenge is to embrace and integrate the principles of excellence, at the core of the Common Assessment Framework. This necessitates careful planning, clear communication, staff training, and active staff participation in the assessment process, which fosters a shared commitment to continuous improvement.

The workshop-based assessments, which used customized questionnaires with 180 targeted questions, ensured a high level of accuracy in the evaluation process. At the same time, all participants were required to answer every question, which resulted in a better understanding of the complexity of organizational management and the interrelation of various issues. Ensuring response anonymity and equal participation for all team members significantly strengthened the results' acceptance and credibility.

The evaluation of the "Importance" dimension, which along with "Performance," distinguishes the Region of Crete's approach, has provided valuable insights into the maturity and organizational culture of individual departments. At the same time, analyzing variations in both perceived importance and performance evaluation can provide valuable insights into different perspectives within the organization. Addressing these differences before planning actions is critical for ensuring group's shared focus and alignment. The exceptionally high overall importance attributed to CAF—as assessed by 245 participants—further highlights the necessity of adopting modern management models to enhance efficiency and effectiveness in the public sector.

Lesson 2: Focusing on Constancy of Purpose

Long-term success necessitates thoughtful planning, and the consistent execution of actions derived from the self-assessment process, all while maintaining a commitment to the organization's vision and strategy. Action plans should include detailed measures, timelines, and clearly defined responsibilities and accountability to ensure effective execution and follow-through. While these actions may not always be explicitly mandated by the national legislation—they must be fully and rigorously enforced—which can sometimes lead to misinterpretations. This is where strong leadership is essential, acting as a role model and demonstrating complete commitment from both political and administrative management. Their support is crucial in providing resources required and mobilizing all personnel to ensure successful implementation.

The primary challenge in developing the Project Management system, in accordance with best practices, was securing acceptance and sustained support from all stakeholders. The key to overcoming this was not only a strong management commitment to purpose, but also the provision of appropriate tools tailored to each stakeholder's role within a project's multi-level governance structure. In parallel, engaging with the Common Assessment Framework through the self-evaluation process increased the understanding of its importance resulting in more effective use of the PM system.

Lesson 3: Building a Culture of Recognition

Sharing success is essential for fostering a motivated, engaged, and high-performing organization. Recognizing and celebrating accomplishments—both individual and collective—reinforces positive behaviors, strengthens teamwork, and inspires continued excellence. This was identified as a top priority for improvement through the organization's self-assessment process.

Looking ahead, a key challenge for the Region of Crete could be sharing good practices identified through the implementation of CAF for each General Directorate. The results highlight a lack of information sharing and benchmarking for key initiatives within the organization.

As a first step, this initiative could be implemented at the Directorate-General level, focusing on the services provided by the island's four Regional Units. Subsequently, the communication and knowledge-sharing project could be expanded to a larger regional scale, encouraging the exchange and adoption of best practices across the DGs.

The communication plan could include outreach activities, ensuring that results are disseminated to other public bodies at both national and international levels, fostering collaboration and enabling organizations to learn from one another.

Greece: CAF's implementation in Municipality of Volos. Municipality of Volos

Introductory information

Title of the good practice: CAF's implementation in Municipality of Volos

Name of the organisation: Municipality of Volos

City/ country: Volos / Greece

Project manager's/contact person's first and last name: Triantafyllia Triantafyllidou

Email, phone number to the project manager's/contact person's:
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Level of organisation/project: local

Sector: administration, public services

How many times the CAF was used? 1

Main focus: People involvement: cooperation and co-creation

Key words: CAF, quality, citizen, stakeholder, engagement, participation, consultation, employee, co-working, team, improvement

Executive summary

The Municipality of Volos has implemented the Common Assessment Framework (CAF) in order to evaluate systematically its operational processes, administrative functions, and stakeholder perceptions. The assessment identified significant challenges, notably insufficient employee engagement and limited public participation. In response, the municipality established a dedicated quality team, implemented collaborative tools, and enhanced mechanisms for citizen involvement and employee participation. Moreover, the innovative approach of integrating CAF with ISO 9001 has markedly refined the planning and execution of improvement initiatives, thereby fostering a robust culture of continuous quality enhancement.

About the organisation

The Municipality of Volos is situated midway in the Greek mainland, in the Magnesia regional unit of Thessaly region. With a population of about 140.000 inhabitants, it is the capital and the administrative center of Magnesia. It consists of Volos city and some smaller suburban communities. Volos is a coastal city and one of the largest cities of

Greece. The economy of the municipality is based on trade, services, tourism, agricultural production and manufacturing.

The Municipality of Volos is a local government authority governed by a municipal council and led by a mayor. It is responsible for the environmental and civil protection, commerce and tourism, licensing certain business enterprises, water and waste management, public housing and town planning, urban road system etc.

Urban environment upgrading, preservation of cultural heritage, social empowerment and enhancement of sustainable development are primary strategic goals.

Being a citizen-centered organization, it has early recognized the importance of quality as a key factor in the management of a public organization and in providing quality and efficient services to citizens.

Quality improvement aspects

The Municipality of Volos has prioritized quality management since 2010 by adopting ISO 9001. Recognizing the benefits of total quality management, the organization also implemented CAF in 2018. The purpose was to gain insights into its operations and administrative functions, as well as to understand the general perception of employees, citizens and stakeholders regarding the municipality services. Both frameworks foster a continuous improvement culture by promoting systematic quality management and proactive benchmarking, which helps in the early identification and resolution of issues. The focus on citizen needs, paired with a holistic evaluation of leadership and performance, drives improvements in service quality and stakeholder satisfaction.

One of the major issues regarding the organization's internal environment was the low employee engagement and the totally lack of co-working tools. Another issue to be mentioned was the poor citizens'participation in local affairs and the limited involvement of civil society stakeholders in consultations organized by the municipality. To be more specific, the score in criteria seven "people results", eight "social responsibility results" and in sub-criterion 6.2 "citizen / customer oriented results" was very low (20.09,26.10 and 11.11 respectively). We should note the lack of measurements until the CAF initiative.

Having in mind that a people-centric approach is a key factor for quality management as it is essential to identify people's needs and design in an efficient way to provide maximum satisfaction, the following objectives were proposed:

- to empower the employees
- to improve the communication among the staff of the municipality
- to reinforce the feeling of participation in the decision making of the organization
- to increase community engagement and public participation in local affairs

Stakeholders and communication

Planning, Sustainable Development and New Technologies Directorate was responsible of the first self-assessment evaluation in Volos' Municipality. Moreover, the General Manager Office of Volos Municipality was the project team leader who contributed towards the accomplishment of the initiative. The General Manager Office has always a coordinate role in this kind of projects as it ensures the commitment of the administration and staff and the completion of the projects.

The whole project was supported and managed by the Efficiency and Quality Department that belongs in the Planning Directorate. This administrative unit began to propound the idea of Common Assessment Framework which resulted in several innovative actions for the organization.

The CAF self-assessment tool was conducted in 2018 in six (6) units of Volos' Municipality. An eleven-member team was established with the responsibility for the CAF's implementation in a period of seven months. All the criteria were evaluated by the project's team after it had collected and had checked all the supporting documentation.

Regarding the communication into the organization about CAF's initiative, at the beginning, there was an ongoing formal and informal communication through business letters, reports, e-mails and brief meetings with managers and employees that were getting involved in the project. All these actions contributed to the dissemination of knowledge to all people involved. Consequently, during the implementation of the project, there was a continuously shared information about disseminating expertise, skills and other valuable lessons through training programs and internal digital tools such as our "digital library" for the necessary documentation. In addition, receiving always a feedback of all the implemented steps was a good practice that kept everyone well informed and involved. The realized approach of sharing knowledge and continuous communication between team members was very important in the process of identifying problems and finding possible solutions in connection with the objectives fostering a collaborating environment. Another point worth mentioning is that team members took into consideration some useful information from the questionnaires delivered to municipal employees, citizens and other stakeholders about their opinions and needs.

Finally, it is very important that the project was designed in-house, with no external technical support, as all the activities and processes were carried out by the employees of the organization. This led the organization to gain expertise in designing and implementing CAF's assessment tool based on its own experiences.

Implementation process/approach

Regarding the improvement of **employee empowerment** and the increase of **public participation**, the Common Assessment Framework combined with the Quality Management System were the basic quality tools used in our organization in order to achieve its objectives.

Although, it was the first self-assessment evaluation of our organization, most of the key CAF steps were followed. Initially, the deputy and the general manager committed to implementing the CAF self-assessment, after the proposal of Quality Department that held the main responsibility of the project. Planning the process, a self - assessment team was formed and an implementation plan was developed. For best self-evaluation, the members of the team came from different levels and different units: from the heads of internal units to the employees at the operational level. Most of them were chosen because of their previous knowledge in quality tools and operations management and stood out for their strong communication and critical thinking skills. All involved team members were well trained on the CAF model – it use and benefits, the nature and method of carrying out the self-assessment process, the timelines, etc. Also their particular role in the process of CAF implementation was clarified by the Quality Department and the coordinator - through letters, e-mails and brief workshops. Before conducting the self –assessment, the IT Department acting in cooperation with the Quality Department set up a "**digital library**", a co-working and interactive tool enabling the collection of all the supporting information and documentation gathered by team members at one single point for each criterion. Only project team members could have access into this platform.

During the implementation of the project, the self-assessment was carried out in smaller sub-groups. Each sub-group was assigned to prepare each criterion, collect all the necessary documentation and evaluate each criterion. After that it had to present all the evidence and the rating for each criterion to the other project team members so as to come to a common consensus. The scoring of all criteria was adopted in 4 joint meetings. All the project team members were well informed of the consolidated/supporting documentation of each criterion through the "digital library" and could discuss in plenary no more than five minutes (5') per question/example - for saving time. All members were able to explain or comment. The final assessment on each sub-criteria and the overall final assessment, was reached unanimously by consensus.

Another method that contributed to the project is that project team members conducted a **questionnaire among employees** in terms of determining the organizational climate and culture, values, knowledge of the mission and the strategy. A survey on the satisfaction of **citizens and stakeholders** with the municipality and its services was also conducted. The results contributed to making the score of the corresponding criteria.

After the analysis and assessment of the CAFs' criteria, the project team members recorded the strengths and weaknesses of the organization and made proposals for improvements measures and future actions based on their importance and feasibility.

The actions that have been proposed for the empowerment of our employees were:

- **Quality Team,** of promoting a quality culture and mindset into the organization
- **Improvement Proposal Template,** an immediate and simple way to propose some improvements
- **In-house training programs,** focused mainly on project management and quality issues within the organization for the development and the improvement of employees' skills and knowledge-relevant to their current role and responsibilities
- **Digital co-working platforms and tools,** promoting cooperation and interactive work

Regarding community engagement and public participation, the proposed improvements were:

- **Stakeholder consultation** (online surveys, opinion polls, questionnaires, public meetings)
- **a Digital Consultation Platform** allowing individuals and organizations to contribute to the improvement of the municipality work promoting the participatory decision-making and the feedback by the citizens

All the project and activities were carried out with our own human resources without any external help or cost. The self-assessment implementation was published on the municipality's website and was available to all employees and stakeholders.

Success factors

- The previous experience and knowledge in quality issues and tools of the Quality office
- The well-planned work methodology and the support
- The IT Department within the organization with experience in designing digital tools
- The responsible and motivated self-assessment team members and their soft skills

Challenges

- The first time of self – evaluation in the organization and some difficulties in comprehension of the CAF manual and the evaluation system (some questions were totally out of the box related to our institutional framework)

- The lack of time of the self – assessment team members due to their daily responsibilities and tasks
- The feeling of mistrust of the employees who participated in completing the questionnaire due to the new procedure of self – assessment

Success measurement

Regarding employees' empowerment, all improvements actions made enhanced them of taking more active role. Initially, the **digital project management platform** that vas developed in- house for file and data management was an effective way to structure and organize our files and data, as well as to facilitate and expand communication between employees of different units. Access to this platform is given only to project team members who sign in the platform on an intranet page. To measure the application's efficiency and utility we monitor the average number of users connected to the application on a semi-annual basis. It is worth saying that there was an important increase of users during the first two years, as the employees started to feel more familiar with the platform environment and to acknowledge the benefits of a steady file structure, easy file sharing and safe keeping.

Secondly, the **Improvement Proposal Template** helped us to collect ideas and suggestions for solving some daily problems that the employees are facing. The proposals are collected and managed by the Efficiency and Quality Department. Through this process the employees are given the possibility to improve their work proposing a solution without all the bureaucracy. We monitor the indicator "implemented proposal improvements / submitted proposal improvements" annually. In the last five years 11 improvement proposals have been submitted (regarding mainly organizational issues and training needs) like eight out of them have been implemented until now.

In addition, the function of the **Quality Team** had as a consequence to enhance the feeling of participation in the decision making of the organization as well as to empower the working relationships among staff. Also, people who participate in Quality Team's meetings share their knowledge, expertise, ideas and information. Generally, the Quality Team promotes a culture of continuous quality improvement throughout the organization. At least three Quality Team's meeting take place every year. It also supports the implementation of the quality management system that we apply in the field of managing co-funded projects (ISO 9001:2015).

Furthermore, the **development of a training process** contributed to upgrade employees' required knowledge, abilities and skills. **Training programs focused mainly on project and quality management were organized in-house.** Therefore, through internal learning mechanisms, generation and application of new knowledge and ideas was (and still is) triggered.

At the same time, the Quality Department had another **application developed in – house by the IT Department in order to identify the employees' training needs.** The use of this platform, even by less than half of the municipality' s staff, led to the conduction of specific seminars for targeted groups of the staff in the premises of our organization. Specifically, the organization of ten in-company training programs designed in accordance with our needs during the last five years. Generally, the Human Resources Department monitors the number of employees trained every year and the training hours.

The actions taken to increase community engagement and public participation in local affairs helped our organization to gather statistic metrics and other demographic, environmental, social data that had been used for the documentation of our strategies and policies. **Questionnaires** and **online surveys** were conducted for the composition of the Sustainable Urban Development (SUD) Strategy 2021-2027. What is more, the new **Digital Consultation Platform** is expected to strengthen citizens' and other stakeholders' participation in decision-making on local issues as well as to enhance further the organization's state and reputation on this field.

As for the long term-effects of the implemented improvement measures, we intend to conduct satisfaction surveys for both employees and citizens. Also, we continue to monitor relevant indicators, such as:

- The number of Quality Team meetings
- Implemented proposal improvements / submitted proposal improvements
- The number of employees trained every year
- the training hours
- The Number of in-company training programs
- The Number of stakeholder consultations as well as the number of participants

The essence of the innovation and the transferability of the solutions introduced

The whole project of implementing the CAF model in our organization was an unprecedented procedure on its own, as it was the first time that the employees of the Municipality were asked to evaluate their work in different functional areas. Although we all do our job daily, it was evident from the very beginning of the project that we lack ways of monitoring it. Thus, it was difficult to find the appropriate documentation to measure the results of our work. However, the excellent co-operation among the members of the working group, the share of knowledge and the exchange of experience and opinions led to the successful implementation of the self-assessment process and resulted, in the end, in a detailed and realistic action plan for the improvement of the organization.

The procedures and actions taken targeting to the employees' empowerment and the enhancement of citizens' involvement were new and innovative for our organization and the organizational culture of the majority of the staff.

It is our belief that all of them are easily transferable to other organizations:

Quality Team with responsibilities of promoting a quality culture throughout our organization, consisting of members of different units and representing different function areas. Such a team could (and should) exist in every organization to keep the quality mindset active.

Improvement Proposal Template for collecting employees' needs and ideas. It is a quite simple form, that can be adjusted in every organization. The challenge here is to really take into consideration the improvement proposals submitted.

Project management platform for file sharing and data management in a unified way. We developed ours in-house, however there are various applications and platforms in the market.

In-house Training Programs are an easy way to enhance internal organizational learning and knowledge among the employees. Targeted meetings and workshops help the organization to continuously develop and improve its capabilities and skills. Thus, it can face challenges and exploit opportunities more effectively.

Citizens and Stakeholder consultation including online surveys, opinion polls, questionnaires, public meetings. This is not only of a great importance but it is essential as well to interact with citizens and stakeholders when significant strategic plans and projects are designed by the local authorities. Consultation is a main means for effective management, at the same time it raising awareness among the citizens about the issues of the city in which they live and work.

Digital Consultation Platform for allowing individuals and organizations to participate in the process of solving municipality issues through the participatory decision-making and the feedback by the citizens. The use of new technological tools, social media and chat apps for the expansion, mobilization of a larger number of participating citizens and businesses, as well as the automation of the consultation and collection of ideas process should be a constant goal for local government organizations. Such tools are available in the market and can easily be bargained. Once again, the challenge here is to take into consideration the citizens' opinion.

All in all, we would say that our project was successful, due to the following key factors:

- the Efficiency and Quality Department is composed by a small experienced and well-bonded team that managed the whole project in an excellent way
- the in-house technological support by the IT department

- the simultaneous implementation of Quality Management System in the field of managing co-funded projects
- the commitment and good will of all the team members
- the quality mindset and support of the General Manager and the Planning, Sustainable Development and New Technologies Directorate of the Municipality.

Lessons learnt

The implementation of the CAF alongside with ISO 9001 in our organization has provided a wealth of insights that can serve as a roadmap for other institutions seeking to enhance their quality management and service delivery. From our experience, three key lessons emerged that are crucial for the success of similar projects:

1. The Power of a Dedicated Team:

A fundamental lesson from our project is the irreplaceable value of assembling a dedicated, multidisciplinary team. We formed a CAF implementation team that included members from various levels and departments, selected not only for their familiarity with quality tools but also for their strong communication and collaborative skills. This diverse group was instrumental in performing a comprehensive evaluation of our processes and in identifying areas for improvement. Their commitment and synergy were key to overcoming the initial challenges associated with the self-assessment process. For instance, team members who participated in training sessions and worked together to set up our digital repository contributed significantly to building a culture of continuous improvement. The lesson here is clear: investing in team development, ensuring proper training, and fostering an environment of trust and open communication are essential. Other institutions should prioritize the formation of a dedicated team, as the expertise and cohesiveness of the team directly influence the quality and sustainability of improvement initiatives.

2. Leadership Commitment is Essential:

The second lesson highlights the critical role of strong and committed leadership in driving quality improvement initiatives. Our project was successfully advanced by the active support of senior management, particularly from the General Manager's Office and the Planning, Sustainable Development and New Technologies Directorate. This leadership provided strategic direction, ensured the allocation of necessary resources, and maintained focus on the project's goals, even in the face of initial resistance and time constraints. Leadership engagement was not a passive endorsement; it was a proactive, visible involvement that inspired the entire workforce. By consistently communicating the benefits and progress of the project, our leadership helped to build confidence among employees. This clear demonstration of commitment fostered an organizational culture where quality improvement became a shared goal rather than

a top-down mandate. Institutions looking to implement similar projects should ensure that their leadership is not only supportive but also actively involved in all phases of the project, from planning through execution to follow-up. Strong leadership paves the way for overcoming obstacles and ensures that change is embedded into the organization's culture.

3. Integration of Quality Tools Enhances Results:

The third key lesson from our experience is the significant advantage of integrating multiple quality frameworks. ISO 9001:2015, with its emphasis on standardized procedures, documented processes, and risk-based thinking, provided us with a strong operational foundation. When this was combined with CAF's holistic self-assessment approach, which encompasses strategic leadership, stakeholder engagement, and people-oriented evaluations, the result was a robust, comprehensive framework for improvement. This dual approach allowed us to address not only the technical aspects of process efficiency but also the broader elements of organizational culture and stakeholder satisfaction. The synergy between these two systems led to more effective planning, better measurement of performance, and ultimately, a higher level of service delivery. For instance, while ISO 9001:2015 ensured that our processes were reliable and consistent, CAF pushed us to evaluate and improve our interactions with both employees and the public. This integrated methodology provided a more complete picture of our organization's strengths and weaknesses, allowing for targeted and sustainable improvements. Other institutions are encouraged to consider a similar integrated approach. By leveraging the complementary strengths of different quality management systems, organizations can achieve a more balanced, effective, and innovative pathway to continuous improvement.

Italy: Apulia region as CAF competency center for local municipalities. Apulia Region

Introductory information

Title of the good practice*:* Apulia region as CAF competency center for local municipality

Name of the organisation: Apulia Region

City/ country: Bari, Italy

Project manager's/contact person's first and last name: Roberto Venneri

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Level of organisation/project: regional, local

Sector: labour, education and training (Region), financial management, public services (municipalities)

How many times the CAF was used? Indicate years please:

2012-2013; 2023-2024 (Region)- 2024 (municipalities)

Main focus: People involvement: Cooperation and co-creation

Key words: Attractiveness of public sector, Leadership awareness, Transformative processes, Knowledge management processes, Creation of skills spread across the territory, Development of transversal collaboration

Executive summary

The project involved the Apulia Region on the basis of an experience already underway at its audit structure in 2012-2013, aims to strengthen the previously acquired skills using CAF in the Department of Labour Policies, Education and Training, as well as to support and spread the use of the model in local municipalities in order to build a common language on the issues of supply chain performance on relevant policies.

About the organisation

Apulia is a southern region of 4 million inhabitants. According to the Italian constitution, the regional Administration, a 1.804 emplyeers, is composed by the Legislative Assembly and the Government, formed by 10 Chancellors and headed by the President. Mr Michele Emiliano is the President in charge. The Governing Body, focused on an ambidextrous model, consists of 10 Departments, responsible for the exploitation functions as the exploration functions are delegated to the regional Agencies. In compliance with the principle of subsidiarity, the Apulia Region, plays a fundamental role in identifying tools and procedures to coordinate and consult with local authorities within the scope of their respective competences. In fact, local authorities have become preferential recipients of the community's requests, fully implementing the constitutional principles of autonomy, administrative decentralisation and adaptation of state legislation. In Apulia, there are six provinces divided into 257 municipalities (3.3% of the national total) of which 88 have a population of 5,000 or fewer inhabitants.

Quality improvement aspects

The Public Administration Department, in coordination with Formez (an in-house public agency of the Italian government, and supervised by the Department of Public Administration. It provides technical support, training, and innovation services to help modernize Italy's public administration), proposed to different Regions to use CAF model in the municipalities as well as administrative branches. Apulia Region participated. The project was conducted in order to allow the construction of a Regional Competence Centre for the dissemination of CAF model and practices among local authorities through the supervision of organisational self-assessment processes within the municipalities and shared improvement actions supported in its implementation through the intervention of the Region.

The Apulia Region, together with the national CAF Resource Centre, proposed to carry out an initial test to evaluate the results in order to subsequently extend the good practice to other municipalities in the territory as well as other structures of the Region.

The objectives were to:

- Carry out the self-assessment process at one Regional Department to strengthen skills on the model, self assessment and improvement processes
- Involve 10 municipalities in the use of the model
- Carry out the self-assessment process in at least 5 organisations
- Analyse the results of self-assessments to identify common and specific weakness points

- Define and start the improvement plan in at least three of the organisations involved, giving priority to common themes and encouraging collaboration in the implementation
- Identify actions related to the critical issues emerged from the self-assessment reports where the Region can intervene directly within the scope of its strategic coordination skills
- Evaluate the experience of the model, its strengths and weaknesses, for the purpose of its replicability

Stakeholders and communication

The project manager is Mr. Roberto Venneri, Secretary General of the Presidency of the Apulia Region. The project was supported by Ms. Angela Guerra, Director of the Transparency and Anti-Corruption Service of the Apulia Region.

The Apulia Region participation, with Department of Labour Policies, Education and Training, was formally submitted to the Public Administration Department. To lounch the project in the municipalities, a Public Notice was approved with a Regional act and published on its websites as well as communicated to the Regional level of ANCI (National Association of Italian Municipalities). The Notice, accompanied by the project adhesion form, also identified the participation criteria open to a maximum of 10 municipalities representing all six Apulian provinces where possible.

Dedicated meetings with the organisations involved took place both in person and remotely with a final event to present and share the results. According to the CAF Model, a Self-Assessment Group was formally appointed with a note from the Director of the Department of Labour Policies, Education and Training that conducted the self-evaluation. The employees of the same department were involved in a preliminary analysis through the use of questionnaires. The same process was followed for the participating municipalities (Bari, Bisceglie, Manduria and Trani) where the Self-Assessment Group was appointed and the questionnaires were used to involve the employees.

In the self-assessment activities, the staff was directly involved as internal stakeholders through the questionnaires indicated above, in which an assessment regarding leadership, strategies, people, resources and processes of the organizational were expressed.

The project was carried out with the support of Formez, as well as the CAF National Resource Centre, which made the F@CILE CAF platform available.

Implementation process/approach

Phase One: Involvement

The General Management of the Apulia Region proposed to apply the CAF model to the Department of Labour, Education and Training in January 2023. This department was chosen because it was participating in a project of Public Administration Department and FormezPA on the topic of performance evaluation and on the methods of construction of the IPAO (Integrated Plan of Activities and Organisation - see section 8 of the sheet) and they wanted to test the connection between IPAO and diagnostic checks based on CAF Model.

The general management also decided to open a notice of adhesion to the use of the model to all the municipalities in the territory. The notice was published on the Region's website in August 2023. Four municipalities joined: Bari, Bisceglie, Manduria, and Trani.

A special information meeting on the model, the self-assessment and improvement processess. was held (with the support of FormezPA).

Phase Two: Planning and implementation of the self-assessment process and improvement plan

The F@CILE CAF platform of Public Administration Department provides a self-assessment and improvement planning process structured according to the model guidelines. Therefore, all participating municipalities and the Department itself planned to carry out the self-assessment from 18 September 2023 to the end of February 2024. The Region had access that allowed it to monitor progress and verify if there were any critical issues.

Everyone involved nominated and formalised the self-assessment group which was appropriately formed with slides and documents made available by the CAF National Resource Centre: slides illustrating the model criteria and the methods of conducting the process, tools for collecting evidence, and the questionnaire as tool to pick up evidences about employees perception of their organisations. The questionnaire was provided to the self assessment group of each entity and administered by it.

The results of the questionnaires were included in the Self Assessment Report as an objective evidence for the Enablers Criteria assessment but a first significant result was the large number of people's participation in the survey - in the all entities.

Administration	Personnel units	Completed questionnaires	%
Department of Labour, Education and Training	98	75	76%

Municipality of Bisceglie	152	91	60%
Municipality of Trani	28	22	78%
Municipality ofManduria	87	57	65%
Municipality of Bari (personnel sector)	47	37	79%
Municipality of Bari (financial sector)	40	40	100%
Total		322	

During the process, the National CAF Resource Centre - FormezPA guaranteed a help desk and held a feedback meeting at the end of the Self-assessment Report, and a final one at the end of the improvement planning phase.

The self-assessment group collected all the relevant evidence and and on that basis made its assessment of all CAF Criteria during the individual evaluation and consensus phases. Five of the participating administrations achieved the first self-assessment conclusion result. Two of them planned the improvement.

Phase Three: Support for the resolution of common critical issues

Through the analysis that emerged from the SAVs and the coherence with the improvement actions, some common weakness areas for improvement issues were identified on which the Region intends to intervene with support actions. The Region intends to promote meetings and coordination actions in the planning of improvement measures to overcome the common critical issues identified with the interested organisations, creating a Regional Competence Centre.

There wasn't cost for the activity because all costs for training and for the support of the self-assessment process and improvement planning process were hold up in the Public Administration Department project.

Success Measurement . Main results with regards to the focus area

A general evaluation of the project results was made to verify project effectiveness (participation, completion of self-assessment processand definition/start of improvement plans) and its replicability in other organisational contexts or different Italian territorial areas.

Quantitative measures and qualitative assessments were therefore set:

- How many organisations completed the self-assessment
- How many organisations have started an improvement plan

Furthermore:

- What was the satisfaction from the process taken and how did this create the will to continue the experience
- For each self-assessment process, to what extent common improvement directions identified could become a basis to collaborate for the future.

These are the results to date:

- Of the 10 organisations involved, 5 organisations participated in the training activity held by experts from the CAF National Resource Centre (in total 8 meetings, integrated with additional telephone support and IT contacts)
- 5 organizations completed the self-assessment process, complete with all the elements required by the model. The expert support and the use of the F@cileCAF Platform allowed us to obtain a detailed picture of organisational maturity in relation to the CAF model, also thanks to the use of "Fine Tuning" Score.
    - The analysis of the Self Assessment Reports, allowed the identification of common intervention/improvement area, as well as specific areas in which define shared improvement projects. Some common areas were highlighted: Communication, consultation and collaboration with stakeholders (limited /occasional involvement in the organisations' processes)
    - People skill development and assignment of tasks/objectives (weak links with strategy and operational plans)
    - Citizen/customer satisfaction and internal climate surveys (lack of systematicity and real use of the results)
    - Structured collection and analysis of performance results (dashboard; lack of complete picture, poor practice of benchmarking)

- According to CAF Guidelines, two organisations have formally set up an improvement plan with the common directions identified, now they are continuing their implementation. Although the initial objective was not completely reached (at least three organisations with a formal Improvement Plan), all organisations have declared that they will apply the indications emerged from the self-assessment process in their strategic planning, with the intention of resuming formal application of the model in the future.

Beyond these direct results, it was important to know the level of satisfaction for the journey made together by the organisations with the support of the Region and the National CAF Resource Center. This is essential to understanding if it can be replicated in different geographical areas or sectors and which points need to be improved in the future.

Here is the summary of the evaluation obtained from a brief questionnaire sent to the organisations at the end of the project.The answers are summarized below in qualitative terms:

- Overall satisfaction with the path taken: very high
- Satisfaction with the guidance/support received: very high
- Usefulness of the joint path: very high
- Added value received from the application of the model (in decreasing order):
    - organisational analysis
    - guidance for improvement
    - TQM Culture
- Critical issues that emerged in the application: in decreasing order
    - low participation of top management
    - time availability
    - low priority
- Intention to complete and/or to repeat the experience in the future: all the organizations;

These results, joined with the people participation level during the self assessment process (for example very high percent of answer to the questionnaire administered) show a high level of people engagement in the project both within the region and externally in the municipalities, and the opportunity to cooperate for improvement implementation.

There are also some other aspects to take into consideration for the success:

- The importance of involvement of top management from the beginning and along the process. Where this involvement was higher, the best results were obtained in terms of quality of the self-assessment/improvement process and continuity in the process
- Foster further collaboration between organisations in all phases of the process, and in particular in improvement phase(such as exchange of experiences and sharing of approaches)
- Increase support from experts (regional or from the CAF Resource Center) in training
- Enhance support and guidance to organisations throughout the whole training and improvement process

The essence of the innovation and the transferability of the solutions introduced

The idea of building a Regional Competence Centre dedicated to the dissemination of CAF arises from the role that the Region has towards the local authorities of the territory,

with particular reference to certain policies such as federalism, public transport, environment, and labour. Dialogue on these policies is continuous and the Region has deemed it necessary to build a common base of skills, based on the knowledge of the principles of excellence and TQM, useful in promoting this dialogue.

The innovative nature of the project lies in the role that the Region assumes with regard to the model that strengthens the importance of programming in an integrate way and governing the organization as a whole, especially since the national reform, that introduced the IPAO, urges administrations to think in terms of supply chain and no longer in a stand-alone logic. Moreover, through the F@CILE CAF platform, a further innovative element is represented by the possibility to conduct self assessment process with the same times and the same "rules" and to identify Common Areas of improvement with the regional level support. The experience is transferable to all other Regions and also to the Provinces. Formez is developing a project in this direction. There are no results in this sense yet but the basic idea is in transferability. The Regions are facilitated in this because they have a coordinating body, represented by the Conference of the Regions and Autonomous Provinces, which promotes constant and periodic discussions.

An element of success was participating in the FormezPA project on the topic of performance evaluations and seizing the opportunity to learn about the model and use it as a tool to strengthen common skills. The sensitivity and interest of the administration's top management to support the initiative was another important element. The possibility of using the F@CILE CAF platform of the Department of Public Function favoured the implementation of the self-evaluation process in the institutions and gave the Region the opportunity to monitor the progress.

For those who want to use our experience, we suggest immediately setting up a coordination group to oversee the activities of the municipalities; a group that must be appropriately trained on the model's underlying themes and on its connections with all reform policies at a national level. It is similarly important, in order to fully understand the model that the same regional body that assumes the role of coordination carries out a process of self-assessment and improvement with the CAF.

The experience can be replicated in all administrations that, by role, perform a programming, coordination and financing function towards other public administrations in the territory. Its added value would also be considerable in the dissemination of the model. If the 20 Italian regions performed this role towards the local authorities in their territory, the CAF could reach a significantly greater number of administrations (potentially the 8,000 Italian municipalities).

Lessons learnt

Based on our experience, we suggest 3 lessons learnt for those who want to set up a local/territorial competence centre dedicated to the entities in their territory:

1. Set up a reference guide committee within the administration, possibly with diversified skills, in particular project management and performance evaluation and knowledge of local entities in the territory

2. Develop the skills of the committee members both by involving them in the self-assessment and improvement process with the CAF within their administration and by training them on the model's underlying principles and the good practices it represents. The training must also concern the main national reform processes underway in order to connect them to the CAF and stimulate interest in its use. The training and experience acquired would allow the members of the Committee to respond promptly to the questions posed by local entities during the self-assessment and improvement process.

3. Monitor the progress of the self-assessment and improvement process in local authorities by maintaining constant, even informal, contact with the self-assessment group referents in order to more easily identify common critical issues that emerge from the self-assessment reports and direct common improvement actions.

If collaborate and involve people and other administration in the same route toward the excellence, speaking the same language, the first result is empowerment, engagement and motivation to changing!

Poland: Development and implementation of a stakeholder engagement management project. Social Insurance Institution (branch in Bydgoszcz)

Introductory information

Title of Good Practice: Development and Implementation of Stakeholder Engagement Management Project.

Organization Name: Social Insurance Institution, Branch in Bydgoszcz

City/Country: Bydgoszcz/Poland

Project Manager: Anna Świekatowska

Email, Phone Number of Project Manager:

Anna.Swiekatowska@zus.pl, tel. +48 523418130

Level of Organization/Project: Organization level: ZUS Branch in Bydgoszcz and local project

Sector: Administration

How many times has CAF been used? Please indicate the years:

The ZUS Branch in Bydgoszcz carried out 1 self-assessment of management control using the CAF evaluation method in 2019 (developing improvement projects in 2020).

Main area of interest: Engagement of people: collaboration and co-creation

Keywords: stakeholders, planning, cooperation, relationships, actions, management, feedback, trust, verification, strategy

Summary

The analysis of the CAF matrix in terms of the external environment revealed gaps in the perception results in stakeholder relations. The goal of the project is to improve this area by identifying entities and their needs. During its implementation, the organization focuses on multifaceted collaboration with stakeholders and collecting feedback.

Stakeholder engagement management supports the implementation of strategic projects for the Institution and clients, making initiatives more effective and organized.

About the Organization

The Social Insurance Institution (ZUS) is one of the largest and most important public institutions in Poland.

ZUS operates based on statutes and other generally applicable legal acts. Its activities impact millions of Polish citizens. The key responsibilities of ZUS include granting and paying pensions, disability benefits, and allowances, collecting social security contributions and other public funds, and directing individuals to medical rehabilitation as part of disability prevention programs. Additionally, it implements a range of social programs, such as the support benefit (świadczenie wspierające), Mama 4+, Active Parent (Aktywny Rodzic) and Family 800+ (Rodzina 800+).

As part of its current strategy, one of the institution's goals is modern communication and education by striving to build and maintain harmonious relationships with clients and local communities while respecting environmental sustainability. Effective organizational management is achieved through the use of modern governance methods, such as the balanced scorecard (Zrównoważona Karta Wyników), internal control, process management, and project management.

ZUS has over 300 field units cooperating with approximately 500 institutions and organizations. The institution serves 3 million payers, 17 million insured individuals, and 8.4 million beneficiaries. The ZUS Branch in Bydgoszcz is one of 43 branches in Poland, employing a total of 1100 staff and carrying out tasks across 11 locations.

Aspects of Quality Improvement

The reason for implementing the improvement project was to define the issue of lack of stakeholder analysis and their real needs and expectations. Before the project's implementation, the organization focused on current tasks without systematically collecting feedback on how stakeholders perceive its activities.

The branch undertook initiatives and engaged with stakeholders based on assumed benefits without directly confronting their expectations.

The goals defined in the project card are:

- Active management of stakeholder engagement based on dialogue and collecting feedback;
- Improving relationships, ensuring their high quality, providing appropriate value to stakeholders, and meeting their expectations;

- Recognizing stakeholders;
- Systematically gathering and analyzing information about stakeholders, their needs, expectations, and satisfaction levels;
- Transforming mission and vision into strategic objectives and actions;
- Assessing the need for improvement in strategy and planning methods with stakeholder involvement;
- Entering into partnership agreements and managing them with consideration for social responsibility aspects;
- Ensuring a proactive information policy;
- Encouraging clients/citizens and their representatives to engage in the consultation process and actively participate in decision-making processes in the organization;
- Defining the framework for actively searching for ideas, suggestions and complaints from clients/citizens, as well as collecting and analyzing them using appropriate mechanisms;
- Raising public awareness about the institution's impact on the quality of citizens' and clients' lives.

The expected result is to build lasting relationships and flexible/modern forms of cooperation with our partners. Effectiveness is measured by the quality and quantity of feedback, continuously monitoring cooperation in accordance with the PDCA cycle.

Stakeholders and Communication

The project was initiated by the Branch Director as one of the solutions to improve branch management and operations. The project manager is Anna Świekatowska, an employee of the ZUS branch in Bydgoszcz and a member of the team conducting the self-assessment of management control using the CAF method. From the beginning, Director not only managed the project but was also responsible for its concept and development.

During the project implementation, the organization's emplyees were regularly informed about its subsequent stages. Additionally, updates on the actions implemented as part of improvement projects were systematically communicated. A special email address "Bydgoszcz-CAF," common communication tools used in the Branch, information shared during meetings, and promotional posters were used for this purpose.

Currently, employees continuously participate in the project through their ongoing tasks and engagement in academic and educational activities. The Press Spokesperson collaborates with media and institutions, while the social communication and education coordinator, together with the heads of local units, ensures relationships in the educational field: including primary, secondary, vocational, and higher education institutions. At the managerial level, the Branch Directorate meets with stakeholders

both when initiating new initiatives and during ongoing project implementation and execution of routine tasks.

The opinions of citizens/clients were taken into account during the project by collecting feedback. Stakeholders were eager to define their expectations and identify areas for improvement. The obtained information pointed to directions for further development.

No external consultants were engaged in the implementation of the improvement project. All undertaken activities were executed using the organization's internal resources.

Citizens' and clients' opinions were incorporated into the project through feedback collection. Stakeholders actively defined their expectations and needs and assisted in identifying areas for improvement. The obtained information provided direction for further development.

Implementation Process/Approach

The first stage of the improvement action was the development and implementation of a stakeholder engagement management program.

The detailed action plan included:

- Identifying stakeholders and field organizational units. As a result of this process, a stakeholder database was created. Detailed information about them, including contact details, expectations, needs, preferred forms of cooperation, as well as ongoing projects and initiatives, was uploaded to the database and monitored;
- Developing a "Stakeholder Engagement Handbook" outlining a nine-step approach to continuous stakeholder engagement;
- Conducting stakeholder meetings, maintaining relationships, sharing information, participating in joint events (trainings, conferences, anniversaries, etc.), and gathering feedback;
- Searching for new stakeholders;
- Verifying and improving ongoing activities.

The stakeholder management tool was developed by a ZUS Bydgoszcz Branch employee using available IT resources and existing knowledge. No financial investments were required for external expert support or employee training. The tool for stakeholder engagement was designed in Excel and functioned as a database for partners and stakeholders with whom the Branch most frequently collaborated at no additional cost.

Currently, the ZUS Headquarters is working on enhancing the tool's functionalities, an initiative executed solely with internal organizational resources. The tool for managing stakeholders was developed by an employee of the ZUS Branch in Bydgoszcz at no cost.

Currently, work is ongoing (led by the Central ZUS Office) to improve the tool and expand its functionality. This initiative is also being carried out at no cost.

The main successes of the project include stakeholder reactions:

"(…) we carefully and kindly support the actions of the ZUS Branch in Bydgoszcz. The last few months have brought a new quality to our mutual relationships here in Bydgoszcz. We greatly value this. We maintain regular contact. The information we receive from you is coherent and understandable, as confirmed by our members…" "Thank you for the first-hand information. I am forwarding it," "Great material. I am sending it to our companies. Thank you very much."

ZUS is implementing further projects: support for entrepreneurs during the pandemic, family benefits, and implementing regulations supporting entrepreneurs (contribution holidays) or helping seniors (widow's pension, supplementary benefits).

Stakeholder engagement management supports the implementation of further projects and the introduction of new regulations. The verification of the project's usefulness took place during the pandemic, when stakeholders regularly received up-to-date information about the government assistance program for entrepreneurs and citizens, and distributed it according to needs. The institution kept interested parties informed about available support for entrepreneurs and insured individuals, with detailed terms. This form of cooperation proved beneficial for both sides. The program also included informing stakeholders about the most common errors in documents, enabling payers to submit correct applications. As a result, the institution could serve clients more efficiently and process benefit payments more quickly. ZUS in Bydgoszcz conducts targeted training, all thanks to staying in contact with stakeholders, which makes the actions taken not one-sided.

In the first phase of the project, the project author and the branch director personally engaged with stakeholders. During face-to-face meetings, they built relationships and then jointly agreed on the future directions of cooperation and the expectations of each party. The pandemic led to changes in the cooperation and communication principles. During this time, the institution focused on improving and developing cooperation and engagement in a way that would support stakeholders in their business activities.

The implemented practice follows a standard "how-to" tool approach. It provides guidance on how to conduct the stakeholder engagement process, including in the form of dialogue. It offers numerous practical tips that facilitate planning and executing stakeholder dialogue.

Success Measurement. Main Results in Relation to the Focus Area

The success measurement of the stakeholder engagement management project yielded both measurable and immeasurable results:

Maintaining good relationships with key partners:

The project allowed for the identification of new key partners and the enhancement of previously established contacts by building relationships that are helpful for long-term cooperation and fostering trust in the institution. Currently, the organization regularly builds long-lasting collaboration and trust. The institution consistently provides social partners with important information, and they regularly communicate their needs. Since January 2020, dozens of contacts have been established with each key stakeholder, excluding phone contacts and intermediary meetings in public spaces. The institution also took care to engage niche associations and organizations. In return, ZUS can count on the support and involvement of stakeholders. In situations where management (director or leadership) changes occur, contact is immediately established to maintain the relationships that have been developed.

One example of joint initiatives is the involvement of many communities, including the Bydgoszcz branch of ZUS, in gathering materials and preparing a Guide for Foreigners. This initiative is a response to the expectations of foreigners who, for various reasons, plan to relocate their lives to Poland. Currently, discussions are underway regarding its publication.

Effective communication:

The stakeholder engagement management tool ensures control and helps manage the information and messages passed to our partners. The tool supports the organization in informing stakeholders about changes in regulations. It facilitates monitoring and coordinating communication. Through systematic and comprehensive cataloging of activities, the organization eliminates the duplication of information sharing and minimizes the risk of sending unnecessary messages to stakeholders who are not interested in them. The tool is used in all key projects. Measurable outcomes include the number of stakeholders, events, information shared, initiatives, and feedback.

Optimization of project outcomes:

Maintaining a steady relationship with stakeholders enabled the successful completion of key projects for the Social Insurance Institution, such as the Anti-Crisis Shield and the Polish Deal. We used our connections with Social Partners to reach potential beneficiaries of the projects. This is particularly important when accessing a service involves meeting additional conditions. Comprehensive information about requirements eliminates the need for repeated contact with the institution, reduces the need to supplement documentation, and shortens the decision-making process. The benefit for

the organization is the complete submission of documentation by the client and a faster resolution of the case.

Better identification of risks and opportunities, as well as reduced conflicts:

During the implementation of one of the projects, a stakeholder asked the Institute to prepare a presentation on the mistakes made by entrepreneurs submitting applications for ZUS support. The branch fulfilled the partner's request, and the materials prepared for them were used to educate other clients of the Institute. The benefits were significant, as communicating information to payers about mistakes to avoid in documents resulted in a decrease in the number of incorrect applications. Additionally, the information sent about the possibility of creating electronic profiles (PUE) led to an increase in the number of new profiles and helped with subsequent projects in which applications could only be submitted electronically.

Increased transparency:

Regular communication with stakeholders ensured that they knew what to expect in the subsequent stages of the projects. For example, during the subsequent anti-crisis shields, stakeholders were continuously informed about which sectors would be covered, who could submit an application, etc. Early communication about changes or upcoming projects allows stakeholders to prepare for those changes.

Better understanding of stakeholder needs:

ZUS collects feedback and adapts its actions to specific stakeholders by using targeted training. This approach was applied during the implementation of the competition for funding to improve workplace safety and hygiene for entrepreneurs.

Better resource allocation:

Regular feedback from stakeholders helps better plan and allocate resources. ZUS knows who is interested in a specific training and who already has the necessary knowledge in that area. Social partners communicate the information they need, which topics are important to them, and what challenges they face.

Increased project acceptance:

Involving stakeholders in the decision-making process increases their engagement and acceptance. During the implementation of the program supporting entrepreneurs (Polish Deal), the need for joint training with tax offices was identified.

Information and messages are communicated by stakeholders to ZUS clients, beneficiaries, and insured individuals via their organization's social media. Stakeholders contact ZUS when they need specific information, which allows the project to be considered a success. The stakeholder management project enhances the image of the ZUS Branch in Bydgoszcz and the entire Social Insurance Institution.

The Essence of Innovation and the Possibilities for Transferring Implemented Solutions

The organization's relationship with the local community and business influences the outcomes of its work as well as its response time to changes, as demonstrated above. The stakeholder engagement management project supports the organization in communication and task execution, regardless of the area or field in which the organization conducts its core activities. The example of the Bydgoszcz branch of ZUS shows that the project can be implemented by any institution or company without additional financial burdens. A very important task was to outline a precise communication plan. Information about the project was communicated to all interested parties, as mutual communication is the core of any change management initiatives. As part of the dissemination of project information, we reached all key stakeholders to provide details on the project's implementation and present the action plan.

Collecting key information about stakeholders in one place, such as contact details, events, initiatives, or documents, including agreements, also ensures project succession. The operation of any institution or company is dynamic, but regardless of the changes occurring at the managerial or operational levels, the project can continue in a continuous mode.

For example, the Bydgoszcz branch of ZUS, by providing information to the local accounting association, ensures that information reaches the association's members and the communities they operate in. Stakeholders use social media and have dedicated websites, which provides us—project owners—with wide reach, saves time, and minimizes costs.

Stakeholders play a key role in project management processes carried out by a given company/institution. The engagement and cooperation of stakeholders directly affect the outcome and success of the project, while the lack of management may lead to project failure. Managing relationships with stakeholders in a project-based manner facilitates communication and monitoring of activities within the organization.

The institution recognizes that cooperation with stakeholders requires work, regularity, consistency, and predictability in communication. Stakeholders must be certain that they will receive necessary information at the right time, allowing them to familiarize themselves with changes in the project or regulations, and later, seamlessly adapt. Managing relationships in this way strengthens trust in the institution and enhances its credibility in the eyes of stakeholders.

For the full success of the project, it is also necessary to encourage stakeholders to share feedback, based on which actions can be adjusted. The institution can use the stakeholder management project to communicate and implement new regulations,

launch new projects, or encourage the use of applications it has introduced. A business, in turn, can carry out its tasks using effective communication with stakeholders.

A training company offering managerial training, by establishing contacts with employer associations and public institutions, ensures free advertising. When introducing regulations affecting several institutions, public offices do not seek contacts when the immediate need arises but use the collaboration developed during the project and organize joint events for citizens. Customers appreciate them because they can find all the information in one place and attend a single training, during which representatives of several institutions speak.

Thanks to close cooperation with stakeholders, the Bydgoszcz branch of ZUS collected and developed materials that serve as the starting point for writing a guide for foreigners about possible support and tasks performed by public institutions in the context of foreigners' operations in Poland.

At this point, it is worth emphasizing another important aspect of project implementation for the organization. During stakeholder identification, many employees of the organization were involved, who defined their expectations and engagement areas for the organization in detail. This was valuable experience because it allowed for a multifaceted view of the external environment and stakeholders. This comprehensive analysis showed that even with stakeholders with whom we have maintained relationships for many years, there are new areas for further development and improvement.

Conclusions

To support the implementation of the stakeholder engagement management project, a Stakeholder Management Guide was developed in nine simple steps, describing the actions that the institution should implement to make its operations effective and strengthen long-term relationships with stakeholders. The actions described in the guide can be divided into the following stages:

Step 1: Identify stakeholders:

Base your efforts on the experiences of people within your organization. Collect data about stakeholders who influence the activities of the organization and those with whom your team collaborates.

Look for stakeholder data online, especially if you have not yet established cooperation with them. It could be a new employers' association, a business cluster, or perhaps your company has not yet connected with them, even though they have existed on the market for years.

Step 2: Conduct a stakeholder analysis:

Define the relationships between stakeholders and your organization. The strength of influence and the level of interest in ZUS's activities should align with the type of activity you are planning. A stakeholder map can be used. Create a map that will be most useful for your organization.

Step 3: Create your own stakeholder database:

You do not need a special program. A simple Excel spreadsheet will suffice. Each sheet can be dedicated to one stakeholder. Record their contact information and any initiatives related to them. Save the database on a shared drive so that it is accessible to all interested parties.

Step 4: Develop a relationship management strategy:

Plan your actions based on the analysis from Step 2. Assign responsibilities for conducting activities, handling specific communication forms, overseeing the entire project, and determining contact channels. Indicate the tools that will be used during the collaboration.

Step 5: Build and manage relationships:

Where possible, meet stakeholders in person. Emphasize that you aim to establish a long-term, open, and active dialogue and that you want to understand their actual expectations and needs. Execute your strategy and document activities in your database, performing regular reviews.

Step 6: Collect feedback:

The most important task is to regularly ask stakeholders for their expectations, needs, collaboration directions, or opinions. This allows you to incorporate stakeholders' expectations into decision-making processes and translate those needs into products and processes. Feedback helps verify the actions of your company: we do not act for ourselves, but for our clients, and we want our products to meet their expectations.

Step 7: Respond to stakeholder expectations:

Always respond to your stakeholders. Present your capabilities to meet their expectations and satisfy their needs. Look for a compromise. Never ignore feedback, as doing so can erode trust and damage positive relationships.

Step 8: Incorporate stakeholder expectations into processes, tasks, strategies, and decisions:

Enhance your strategy by considering stakeholders' expectations and apply the feedback to products and processes. By doing so, you will create value for all

stakeholders and build positive relationships. This might even become a catalyst for innovation.

Step 9: Conduct a verification of your actions:

Evaluate how stakeholder management is being implemented. Assess whether all elements are yielding the expected outcomes and adjust your strategy if necessary.

And finally, three lessons:

Lesson 1: Every institution operates in its environment, interacts, provides or receives services, and should manage relationships instead of simply following the course of daily activities.

Lesson 2: Relationships must be nurtured consistently. Management, points of contact, and personnel change over time, but the institution continues to function. Therefore, the project should be designed in a way that allows new individuals to easily carry it forward.

Lesson 3: Introduce a habit of systematic planning, action, verification, and solidifying changes at every organizational level. The simplest structure for such systematic action is proposed by the American statistician William Edwards Deming, known as the PDCA cycle, which consists of the following sequence:

P – plan

D – do

C – check

A – act

Poland: Implementation of robotic process automation technology in the Polish Financial Supervision Authority. Polish Financial Supervision Authority.

Introductory information

Title of the good practice: Management Practices: The Example of RPA implementation at the Polish Financial Supervision Authority

Name of the organisation: Urząd Komisji Nadzoru Finansowego (UKNF) - Polish Financial Supervison Authority

City/ country: Warsaw / Poland

Project manager's/contact person's first and last name: Mikołaj Burkacki

Email, phone number to the project manager's/contact person's: +48 697 042 885

Level of organisation/project: national

Sector: administration

How many times the CAF was used? Indicate years please: 0

Main focus: Digital transformation and innovation

Key words: RPA, transformation, digital, process, automation, efficiency

Logo of the organisation: added in a separate file to the email

Executive summary

The case concerns the implementation of Robotic Process Automation (RPA) technology, aimed at increasing efficiency, reducing manual workload, and improving the accuracy of repetitive tasks. In this case, the goal was to automate routine administrative processes. The key challenges identified were long processing times and inefficiencies caused by the manual handling of repetitive tasks.

About the organisation

The KNF Board and UKNF operate under the Act on financial market supervision. The Chair of the KNF Board manages both entities. The KNF Board oversees banking, capital market, insurance, pension, payment institutions, electronic money institutions, credit unions sectors, and non-bank lenders. The UKNF supports the KNF Board and Chair. The KNF Board also promotes market development and competitiveness, offers financial education initiatives, participates in drafting relevant legislation, and facilitates dispute resolution between supervised entities and their clients. Furthermore, it performs other statutory tasks, such as ensuring the proper functioning, stability, security, transparency of, and confidence in, the financial market, while protecting the interests of financial market participants.

Quality improvement aspects

What were the objectives?

The RPA implementation aimed to boost operational efficiency by automating repetitive, high-volume tasks, thereby reducing processing times and operational costs. The key objective was to minimise human error and improve accuracy, leading to enhanced compliance. Freeing employees from routine work was intended to increase job satisfaction, while simultaneously improving service delivery speed and efficiency.

Have these objectives been quantified?

Reduced processing times: a measurable decrease in the time it takes to complete these tasks from 5 minutes to 1 minute per process instance.

High Full-Time Equivalent (FTE) release rate: the decision to narrow the scope of automation to electronic correspondence handling was driven by the potential to achieve a high FTE release rate. This means they aimed to free up a significant number of full-time employees from these routine tasks, allowing them to be redeployed elsewhere.

Handle higher workloads: having a reserve for an additional volume of process instances

Stakeholders and communication

The people involved in the project can be introduced by answering the following questions:

Who was responsible for the project? **Mikołaj Burkacki**

Who supported the project? **UKNF Director General**

How to CAF initiative are communicated internally and externally before, during the implementation and maintenance? **Conducted interviews across the organisation to assess automation needs. Focused communication on support departments.**

How were employees involved in the project? **I was asked to assemble a team, so I proposed this task to several individuals, who agreed to participate. Without unnecessary formalities, the organisation was informed that these individuals would be assigned to work on this task. Additionally, resources were secured in other departments as well, including IT, legal, information security, cybersecurity, public procurement, and most importantly, the organisational unit that was the first to utilise this technology.**

How were the needs and opinions of citizens/clients taken into account before, during and after the change process? **The need for automation stemmed from business requirements gathered during workshops with the organisational unit. At every stage of implementation, the selected business unit was actively involved, ensuring the final product was tailored to its needs. When a need for change arises, the business unit reports it for evaluation to assess its feasibility.**

Was the project carried out in partnership with another organisation? If yes, give a brief description. **No**

Was support from outside the organisation used? **Yes**

Were consultants employed? **No**

Implementation process/approach

What Was Done?

The implementation of RPA technology, including the deployment of an automation bot.

When?

The project was carried out between June and November 2023, with the RPA bot officially launched on 22 November 2023.

How?

The implementation followed a structured approach, including:

- Self-assessment and planning (BSC, MBO)
- Process analysis and optimisation (CAF, LEAN, KAIZEN, BPM)
- RPA implementation and testing (WATERFALL, AGILE)
- Deployment and monitoring (CAF, CI, MBO)

The strategic objectives (UKNF Strategy for 2021–2025) encompassed the development of a 'digital office' and the implementation of automation and robotic process automation to enhance operational efficiency, streamline administrative processes, and improve service delivery.

By whom?

The project was coordinated by a dedicated implementation team, supported by key stakeholders across the organisation, including:

- Business unit representatives, responsible for process expertise and operational alignment.
- Cybersecurity unit, ensuring compliance with security standards.
- IT department, overseeing technical integration and infrastructure.
- Procurement unit, managing vendor relations and licensing.
- Legal department, addressing contractual and regulatory aspects.

This cross-functional collaboration ensured a comprehensive and secure implementation of RPA technology, effectively meeting organisational needs.

A presentation of the methods and tools used to implement of this good practice: why they were chosen?

Elements of various methodologies and tools were strategically employed to ensure a structured, efficient, and adaptable implementation process. Rather than applying each approach in its entirety, specific components were selected based on their relevance and effectiveness in addressing organisational challenges:

- CAF (Common Assessment Framework) – Its key principles played a crucial role in ensuring a successful automation implementation.
- BSC (Balanced Scorecard) – Ensured that automation efforts were aligned with key performance indicators and long-term strategic goals.
- KAIZEN & LEAN – Focused on continuous improvement and waste reduction, optimising processes before automation to maximise efficiency gains.
- BPM - Providing a framework for analysing, designing, implementing, and managing the automated workflows.
- AGILE – Allowed for an iterative approach, enabling rapid testing, feedback integration, and flexibility in implementation.
- WATERFALL – Used for well-defined stages where a sequential approach ensured thorough planning, development, and deployment.
- CI (Continuous Improvement) – Ensured ongoing monitoring and refinement of automated processes to enhance performance over time.

The combination of these methodologies enabled a balanced approach, integrating strategic vision, process optimisation, flexibility, and continuous improvement to drive a successful and scalable implementation.

What were the internal and external costs of the project?

- Internal – not included in the financial analysis
- External – PLN 130 000

Main wins (success factors) and challenges of the implementation process (and how were they resolved).

Success Factors:

- High-Quality Deliverable – The solution was delivered with exceptional quality, with no errors caused by the robot's code or the software itself.
- Rapid Deployment – The implementation was completed at a significantly accelerated pace, reducing delivery time by one-third compared to the average procurement process for public contracts up to PLN 130 000 at the UKNF.
- Strong Business Adoption – The business unit for which the solution was developed not only actively used the automation but also requested its further expansion, demonstrating high engagement and trust in the technology.
- Strategic Process Selection – Choosing the right process for automation as a proof of concept ensured measurable success and scalability potential.
- Continuous Monitoring and Optimisation – Ongoing oversight and refinement of the RPA solution allowed for sustained improvements and maximum operational benefits.

Challenges:

- Redefining Confidentiality Clauses – As this was the first case involving an RPA solution, legal teams had to be engaged to re-assess confidentiality provisions. By explaining the robot's functionality and objectives, stakeholders were able to re-evaluate the issue and establish appropriate safeguards to protect organisational interests.
- Overcoming Resistance to Change – Initial scepticism from the business unit was addressed through active engagement, technology demonstrations, and continuous involvement throughout the implementation process, ensuring smooth adoption and user confidence.

Success Measurement. Main results with regards to the focus area

Improvements made and how to measure them: measured results, indicators used (qualitative/quantitative) to measure the results

Quantitative indicators

- Reduced processing times: a measurable decrease in the time it takes to complete these tasks from 5 minutes to 1 minute per process instance.
- High Full-Time Equivalent (FTE) release rate: At the start of automation in the electronic correspondence handling process, the estimated FTE was 0.5. Currently, this level is increasing, exceeding 0.6 FTE due to a higher volume of cases.

Qualitative indicators

- Handle higher workloads: having a reserve for an additional volume of process instances and, consequently, reducing the operational risk in terms of delays
- Increased job satisfaction: reduction of repetitive tasks was a breath of fresh air, leading to higher job satisfaction and opportunities to develop new skills.

How are (or will be) the long-term effects of the improvement implemented measured?

Current data analytics

Summary

The implementation of Robotic Process Automation (RPA) in public administration ushered in transformative benefits for both the organisation and its stakeholders. RPA reduced processing times for routine tasks like data entry, allowing departments to handle higher workloads more efficiently. Operational costs decreased due to automation, freeing up staff for more strategic tasks and reducing errors. Moreover, automation ensured pinpoint accuracy, minimising human error and bolstering compliance, which, in turn, fostered greater public trust and transparency. For employees, the reduction in repetitive tasks was a breath of fresh air, leading to higher job satisfaction and opportunities to develop new skills. On the public front, services were delivered faster and more efficiently. Thanks to the scalability of the RPA system, automating additional processes across departments was a piece of cake, ensuring that the organisation could keep up with rising demands. The RPA implementation proved to be a game-changer, delivering more accurate, cost-effective, and reliable services while setting the stage for long-term operational excellence.

The essence of the innovation and the transferability of the solutions introduced

Why is the project innovative or a good example for other institutions?

The implementation of Robotic Process Automation (RPA) is an innovative step as it enhances efficiency, reduces human error, and allows employees to focus on higher-value tasks. By automating repetitive processes, institutions can achieve significant cost savings and improve service quality. This transformation serves as a strong example for other organisations looking to modernise operations without major system overhauls. Additionally, RPA ensures scalability and adaptability, making it a future-proof solution for evolving business needs.

Is the project transferable to others? If so, which elements? Have the other organisations already adapted the whole project or elements of it?

Yes, it's transferable. The whole thing. The whole thing or parts of it have already been adopted by four organisations: Chancellery of Prime Minister, Ministry of National Education, IT Centre for National Education, Mazovia Voivodeship Office

Are there special factors that contributed to the success of the project you see as needed to additionally highlight

The most important ones are:

- Properly defining project goals and deliverables,
- Strong support from the project sponsor,
- Clear division of responsibilities within the team,
- The project leader's ability to build motivation and address challenges,
- A well-structured project plan and timeline,
- Maintaining relationships with project stakeholders throughout the entire implementation period.

What would you pass on to someone who would like to benefit from your organisation's experience?

I would advise approaching the implementation with a well-structured, step-by-step strategy rather than attempting overly ambitious goals from the outset. A gradual, incremental approach allows for better risk management, continuous learning, and necessary adjustments along the way. By focusing on small but steady achievements, an organisation can build a solid foundation for long-term success while ensuring that each stage of the process is optimised and aligned with strategic objectives.

In what situations can the experience of the project be used

The experience gained from this project can be particularly valuable in two key scenarios: before the implementation of RPA within an organisation and when facing challenges during its deployment. Prior to implementation, the lessons learnt can help in strategic planning, defining clear objectives, and ensuring stakeholder alignment to create a solid foundation for automation. During the implementation phase, insights from the project can serve as a guide for overcoming common obstacles, such as process optimisation, change management, and technical integration. By leveraging this experience, organisations can mitigate risks, streamline adoption, and maximise the benefits of RPA.

Lessons learnt

CAF or BSC provides guidance for the UKNF on the areas where organisational change should be implemented. In our case, we obtained this information based on the Balanced Scorecard (BSC), which provided a general direction for strategic initiatives. However, this insight was broad and required further refinement after being formally adopted by the organisation. This approach contrasts with the Common Assessment Framework (CAF), which offers a data-driven and measurable assessment of the organisation's specific needs and specific areas requiring improvement. However, leveraging CAF effectively necessitates a commitment of resources for conducting a thorough self-assessment, which must be acknowledged and accepted by the organisation. Rather than searching for a foundation and deliberating on the best approach, it is often more effective to leverage well-established models. In this regard, CAF proved to be highly beneficial, as it allowed us to focus on proven and well-documented principles, ensuring a structured and reliable framework for our actions.

At the outset of the project, the UKNF adopted the common organisational approach of high optimism and ambitious resource allocation. However, experience shows that unforeseen challenges frequently arise along the way, leading to schedule erosion and necessitating adjustments. While the final product was delivered on time, this was achieved only through a significant intensification of efforts during critical phases, requiring more working hours than initially planned. This highlights the importance of maintaining flexibility and contingency planning throughout the project lifecycle. It is essential to take a realistic approach from the very beginning and allow for buffer time in project timelines rather than setting overly ambitious deadlines. Planning with a margin for unforeseen challenges ensures greater flexibility and reduces the risk of delays, ultimately leading to a smoother and more effective implementation.

A lack of expertise in a given technology can be particularly challenging when drafting a public procurement tender. Without the budget to engage external consultants, the UKNF had to develop the procurement description and contract internally. This resulted in numerous inquiries from potential contractors, requiring multiple contract

modifications. Each change necessitated approval from various departments, significantly complicating the process. It is crucial to acquire the necessary knowledge at the very beginning. I was able to establish contact with representatives from the Republic of Ireland, which provided valuable insights. However, due to differences in the technologies used, not all of their solutions were directly applicable to our context. Today, the UKNF have transitioned from seeking support to providing it—offering guidance to other public administration units, ensuring they have a reliable partner from the very start of their journey.

Portugal: Conciliar + Project - Implementation of Portuguese Standard 4552:2022 – Reconciliation of Professional, Personal and Family Life. Unidade Local de Saúde da Região de Aveiro, EPE.

Introductory information

Title of Good Practice: CONCILIAR+ Project – Implementation of Portuguese Standard 4552-2022: Conciliation of Professional, Personal and Family Life

Organization Name: Unidade Local de Saúde da Região de Aveiro, EPE (ULSRA)

City/Country: Portugal

Project Manager:

Margarida França

Maria Jose Oliveira

Email, Phone Number of Project Manager:

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Maria.Oliveira.72323@ulsra.min-saude.pt

Level of organisation/project: regional

Sector: healthcare

How many times the CAF was used? 2020 and 2021

ECU label awarded? EFFETIVE CAF USER

Main focus: Organisational culture: wellbeing & WLB

Key words: Professional, Personal and Family Life; Certification; NP 4542:2022; good labour practices; quality improvement.

Executive summary

Effective CAF User recognition was the impetus for the development of 3 main organizational areas:

- Management and Monitoring,
- Provision of Services to Users and
- Community Involvement and Communication.

Considering the staff feedback and identification of a generation gap on expectations and life style of younger professionals, the Board of Directors decided to launch the CONCILIAR+, a project in order to get an organizational diagnosis and identify measures to improve staff satisfaction and weelbeing.

The ULSRA was the 2nd healthcare organization to achieve this certification in Portugal.

About the organisation

The CAF project was primarily developed on the Centro Hospitalar do Baixo Vouga, EPE, a general hospital centre with 3 hospitals in the Region of Aveiro. The organization till the 31st December 2023 delivers care to a population of 315.000 citizens with 2.100 staff members and 33 medical specialities.

On the 1st of January 2024 primary care and public health of the Aveiro Region were integrated with hospital care to serve a population of 340.000 citizens supported by 3.100 staff members and the integration of 46 functional primary care units and public health services.

This integration was a result of a national health reform of the National Health Service (NHS) led by Government.

Quality improvement aspects

Main objectives of the CONCILIAR+ Project:

- To create an internal quality improvement culture,
- To empower support services on hospital settings (initiated with CAF project),
- To get a diagnosis of staff expectations and answers to promote professional satisfaction,
- To improve conciliation of professional life and quality of life,
- To promote interaction between professionals,
- To reduce absenteeism.
- Not all objectives were quantified however was possible to achieve results on these broad areas:

- Disease absenteeism level with a reduction of 15% from 2022 to 2023 year.
- Interaction of professionals within 5 workshops (ex: make-up, cooking and financial literacy).
- Healthy Workplaces Award (May 2024) – Portuguese Psychologist College.

Stakeholders and communication

The Board of Administration, mainly the Chair of the Board, launched the idea of the project and supported participating and monitoring its steps.

The internal Quality Service mas responsible for managing both processes, CAF and CONCILIAR+, with the support of a multidisciplinary team. It was also facilitated external consultancy.

The communication of the process was accomplished thru the weekly newsletter, leaflets, and messages in the organization intranet as well several information sessions.

The way to seek staff participation and involvement was thru questionnaires, workshops, free participation and free suggestions. The project team was always open to suggestions from colleagues and several suggestions were collected and added to the project measures.

It was also possible to seek opinions from users and staff families thru patient satisfaction questionnaires and thru workshops with main stakeholders.

It was provided external consultancy to support the CAF process and in the implementation of NP 4552 certification.

Implementation process/approach

The project was implemented based on the following steps:

1. Development, diagnosis and assessment of psychosocial risks for all employees of the institution
2. Implementation of Standard NP4552;
3. Preparation of the Conciliation Program.

The process was based on these steps, which were initiated by the Team appointed by the Board of Administration, from March 2022 to the present date, as it is a dynamic and continuous improvement process.

The activities developed in the 3 phases were as follows:

1. **Development, diagnosis and assessment of psychosocial risks for all employees of the institution:**

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- Development and application of a validated questionnaire to all employees to diagnose psychosocial risks, integrating the assessment of fatigue at work and the reconciliation of professional, personal and family life;
- Conducting interview panels with representative groups (6 panels) (Service/Department Directors, Hospital Administrators, Support Services Directors, Chief Nurses, etc)
- Preparation of the Final Report with a summary of the results obtained, identification of the measures to implement and dissemination to professionals.

2. **Implementation of Standard NP4552**

- Project development in accordance with the requirements of NP 4552:2016/NP 4552:2022;
- A Context Analysis was carried out to identify relevant internal and external factors;
- Stakeholders were identified;
- The Principles and Values that guide the Institution in terms of Conciliation were identified/reviewed;
- The Institution's Conciliation Policy was defined;
- Actions for addressing the Risks and Opportunities from the SWOT analysis, associated with the Conciliation Management System, were identified;
- The Implementation Plan was drawn up, which was operationalized and is monitored over time;
- Internal and external audits were carried out by independent elements of the implementation process;
- Improvement and/or corrective actions were identified and implemented.

3. **Preparation of the Conciliation Program**

The Program was developed based on suggestions from professionals at the institutional level, and the opinions of families were considered and integrated.

The activities focused on the three aspects of the Standard:

- Good Labor Practices;
- Professional Support and Personal Development;
- Services and Benefits (in this area, partnerships were established with external entities).

Several strategies were used, namely: *Focus group*; *Brainstorming*; Questionnaires and Clarification Sessions, were the way to get better results on staff participation.

In the initial phase, the project has got support from an External Consulting Company, in order to know and facilitate compliance with the legal requirements of the NP 4552.

Members of staff constituted the local project team.

The costs of the Consulting Company as well as the Certifying Company were supported by a European funding - "Compete 2020" and SAMA.

The gains obtained were reflected mainly in the well-being of professionals and their families, with more advantageous prices in some areas, promotion of a good working environment, contribution to the reduction of absenteeism with proactive measures from the Occupational Medicine and Occupational Health Service.

The main challenge is the project enlargement to all primary care units, mainly due to its geographic dispersion.

To overcome these difficulties, we held project presentation sessions in the different Units, listening to professionals and incorporating their feedback into the Conciliation Program Measures, actions that aimed to meet the expectations and needs of these professionals.

Success Measurement. Main results with regards to the focus area

Some of the project outputs to be considered and with impact on the staff wellbeing:

- N.º of outpatients consultations after risk identification of burnout (96 in 2023 and 2024)
- N.º of external partnerships:
    - **Insurance company** – 65 simulation requests and 12 formalized.
    - **Activities for children**: Wise man's hat; living Science; Sun Tribe; Pedagogical Farm;
    - **Gymnasiums.**
- N.º of workshops: 5 (Make up; Cooking and Financial Literacy.
- N.º of art expositions from authorship of professionals - 11

Staff satisfaction level

- 4.4% very satisfied;
- 41,5% satisfied;
- 26,9% indifferent;

- 21% dissatisfied;
- 6.2% very dissatisfied.

Level of Absenteeism – Decreased 15% from 2022 year to 2023.

The CONCLIAR+ foresees continuous monitoring of measures like staff satisfaction and absenteeism and developing new partnerships and other social and leisure facilities for professionals.

The replication of the psychosocial risk questionnaire will give new information on the impact of measures.

The essence of the innovation and the transferability of the solutions introduced

The project CONCILIAR+ ended with an award of certification that is a good practice to all kind and size of organizations.

The organization acknowledges that the highlight on the personal and family life needs to be promoted specially to younger members of staff.

 Covid-19 pandemic has left burnout, moral distress and Long Covid on many members of staff facing fatigue and lack of enthusiasm. Junior doctors didn´t have preparation and experience to face the pandemic and we are facing an intergenerational shift about life perspectives. Nurses and other health care professionals also feel work loaded.

The process reinforced the importance of the wellbeing of professionals and motivation. The pandemic also stressed all environment revealing existing fractures not yet addressed. Mental health support was reinforced during and after the pandemic with a direct access to consultations and psychological support.

We acknowledge that in healthcare we share the same problems and challenges, and the workforce is one of the most challenging situations nowadays, namely in the way to retain professionals and to create and sustain a positive work environment.

We are happy to say that standard certification by NP 4552-2022 – Conciliation Management between professional, personal and familiar life is a good practice and a continuous improvement process that can be used after a stressful situation as Covid19 or as a regular tool to improve quality of human resources management in healthcare organizations focusing on their wellbeing and satisfaction.

Lessons learnt

As lessons that we have learned from the CONCILIAR+ implementation and management we choose to refer these ones:

- To look and understand that these certification processes are a continuous improvement tool and not a single process ending with the award.
- Staff participation is crucial; the process has been a way to reinforce participation and trust, setting professional´s wellbeing as a priority in the institutional agenda,
- Top and explicit management support is also essential to achieve success.

Portugal: Staff development and involvement. National Institute for Agrarian and Veterinary Research.

Introductory information

Title of Good Practice: Staff development and involvement

Organization Name: National Institute for Agrarian and Veterinary Research

City/Country: Portugal

Project Manager:

Patrícia Inácio

Carla Brito

Email, Phone Number of Project Manager:

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Level of organisation/project: regional

Sector: agriculture

Main focus: Organisational culture: wellbeing & WLB

Key words: Teambuilding, organizational culture, performance, positive reinforcement, organizational communication, wellbeing, leadership and communicative processes.

Executive summary

In the end of 2018, we saw the opportunity to implement CAF model through financing under the Support System for the Modernization and Training of Public Administration (SAMA2020), of the Portugal 2020 Program.

Given the complexity of INIAV's assignments, it was decided to apply CAF in phases. The first phase was only said to consider the support areas. The methodology to be adopted was based on the PDCA model (Plan, Do, Check and Adjust) and in the guidelines defined by the CAF Model, the process took place between 2019 and 2021 by the CAF

work group and the leaders of the institution. Information sessions were held for those involved and training.

About the organisation

INIAV is a Research Institute, with State Laboratory status, which, within the scope of its mission and attributions, develops activities in the areas of animal and plant production, environment and natural resources, forestry, agro-industries, genetic resources and improvement, food and animal health and, also in food safety, in line with public policies defined for the respective sectors, with at the moment 554 employees, with 7 poles, 5 strategic Investigation units deconcentrated around the country.

Stakeholders and communication

To seek for the success of CAF implementation model started to involve middle and senior managers and later through communication by e-mail and dissemination on the intranet.

The focal point was designated in each organic unit for the development of the self-assessment and contributions were requested from key collaborators of the different processes under evaluation.

Implementation process/approach

The scoring system used in this CAF implementation process, for the means and results criteria, was the classic one because it is simple to use in a first application of CAF model. The self-assessment team included members from different support areas with distinct technical skills and a deep and integrated vision of the Institute. Document analysis was carried out, satisfaction questionnaires were administered and interviews were conducted with those responsible for the processes.

After having the main areas that needs intervention, we listed and scored it, that way we were able to know the areas that needs a rapid intervention.

Afterward, we were able to began to implement some of the rapid implementation improvement actions (Quikwins) listed, as well as the actions that was a priority.

So, through the assessment tools used throughout the different management cycles, the need to improve internal communication was perceived. Through the CAF self-assessment, we confirmed the need to invest in internal communication and in strengthening the organizational culture if we want to increase performance and employee involvement. It became aware of the identification of anomalies in the organizational culture and communicative processes during the self-assessment

process of CAF application revealed the need to develop: collaborative practices, agile communication, leadership processes.

Subsequently the self-evaluation was able to understand the main points to improve. We intend that all employees identify with a unique culture and the same processes, improve the communicational interaction of different units and improve the leadership practices, contributing to the good performance of the institution. So, the strategic objectives were: Obj. 1 - Clarify responsibilities and roles (Clarify); Obj. 2 - Redesign communication processes and mechanisms (Simplify); Obj. 3 - Reinforce the spirit of the INIAV Tribe (Align and Pride); Obj. 4 - Create a common collaborative culture (Empower and Integrate); Obj. 5 - Fit the plan into the management system (Articular).

As part of its development strategy, it was decided to invest effort improving internal communication: beginning with the elaboration and implementation of an Internal Communication Plan; involve and commit the internal stakeholders in the elaboration and implementation of the communication plan.

The main lines of action to begin this implementation involve and commit the internal stakeholders was triggered by a diagnosis, consisting of 3 phases:
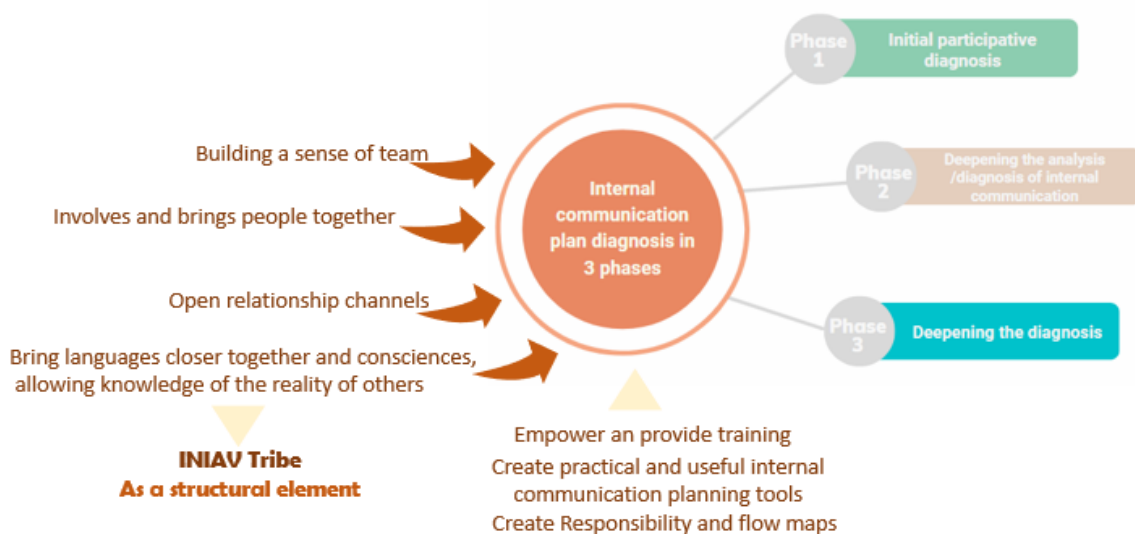
The Internal Communication Plan defines priorities and structures its intervention into 2 major axes of an integrated process organizational development:

1.srt axe program - Development of the cultural organization:

- INIAV Day

- Teambuilding events (harvesting grapes, apples and figs in different poles to get to know the pole activities and colleagues,

- WebINIAV internal seminars, to know colleagues, technical and investigation activities and projects in each unit),

- Artistic creation contests, to promote teambuilder activities and interaction between teams, INIAV Academy of development and innovation, to develop communication leader skills. (it is expected to advance in 2025).

2.nd axe program - Increment and participate, improvement of communication flows: (began in 2025)

- Reflection and analysis of communication blocks and difficulties,

- Work around of the flow questionnaire,

- Improve "Document Management".

Because it was the first time that we would implement this model and we didn´t have all the resources we need, we started the implementation by phases. So, we decided to start by the 1st axe and after that we started to monitored the impact of implementation as well as if these impacts our needs.

Success Measurement. Main results with regards to the focus area

During monitoring it was possible to measure the following results:

- Regarding the activities promoted 100% of the participants respondents consider that these activities help foster deeper Knowledge about the activities in the poles and Units and their teams. 77.8% of the participants respondents consider these activities important to improve the motivation level and interest of the employees. 77.8% rate the activities as very important and 22.2% as important.

- When asked if they consider that these activities have the potential to aggregate and reinforce the institution's organizational culture, 100% of the participants respondents answer yes. And Why? They referred that: it as an opportunity to learn more about the activity of each center as well as their colleagues, help to understand better the INIAV mission and assignments, enables the dissemination of inter-knowledge, better understand the contribution and role each one have in the institution, because creating shared values that provide opportunities for participation and being able to experience them is an excellent basis for a good corporate culture; encourage a good environment and bring better results to the organization, because it promote communication and empathy between colleagues; these activities are therefore very important, as they involve challenges that require everyone's collaboration to be successfully overcome and everyone feels motivated to achieve common goals.

- Help foster deeper Knowledge about the activities in the poles and Units and their teams employees: To the monitoring of internal seminars were assessed through a questionnaire. In reference to the usefulness of keeping this event internally, 98.1%

of employees responded yes, and only 1.9% responded no, believing that opening up should be considered of these events externally. Regarding how they classify the WebINIAV event overall, 51.9% of collaborators considered it very interesting, 37% found it interesting and 11.1% acceptable.

- Improve internal communication: In the annual satisfaction questionnaire sent to employees in 2024, they rated (scale from 0-5) the level of importance of actions to improve the internal communication plan as 4.1, (4.2 – 2023; 4.1 – 2022; 3.8 - 2021). Regarding the Level of Importance of the improvement actions developed within the scope of the Working Group of the Internal Communication Plan 2021-2023, the responding employees mentioned that the dynamization of activities at the hubs had an importance level of 3.9 in 2024, 4 in 2023, 3.9 in 2022 and 2021. In 2024 considered the Dynamization of internal seminars 4.1 – very important, 4.2 – 2023, 4.1 - 2022 and 4.2 – 2023. Also, in 2024, 2023, 2022 e 2021 considered the preparation of the implementation of Document Management 4.3 – Very important. In 2024, they consider the development of annual breeding competitions 3.2, important and 3.3 in the previous 3 years under analysis.

The essence of the innovation and the transferability of the solutions introduced

The implementation of CAF model brought new challenges and procedures, it open ways to started to use the PDCA model, monitoring all activities resulting from the project and the internal communication plan.

If you intent to start a self-assessment and improvement actions to have an impact on the organization, it is necessary to have:

- Leaders and workers involved,

- Use the PDCA cycle in the process,

- Use monitoring tools to adjust the strategy and facilitate the decision,

- Prepare the monitoring tools to respond to the next self-assessment,

- Flexibility in action - to adjust when is necessary,

- Have a strategy to communicate the process.

Lessons learnt

The first self-assessment allowed us to learn the following lessons:

- Leaders must be committed to the project and must have time to dedicate to it;

- The team working on the project must be motivated and committed;

- Be resilient, as it is a process that affects the entire organization and is not always a process recognized and appreciated by everyone.

- The impact of the action takes time to achieve, to take place and give results, so be patient and don't give up.

Serbia: CAF Efficiency platform – CAFficiency. Human Resource Management Service.

GOVERNMENT
OF THE REPUBLIC OF SERBIA

Introductory information

Title of the good practice: CAFficiency (www.cafficiency.suk.gov.rs)

Name of the organisation: The Human Resources Management Service

City/ country: Belgrade, Serbia

Project manager's/contact person's first and last name: Jovana Stojadinović

Email, phone number to the project manager's/contact person's:
jovana.stojadinovic@suk.gov.rs

Level of organisation/project: national

Sector: employment

How many times the CAF was used? Indicate years please: 1

Main focus: Result orientation: continuous innovation and improvement.

Key words: CAF, task management, transparency, gamification, automation, coordination, real-time monitoring, accountability, engagement, innovation

Executive summary

CAFficiency is a user-friendly platform designed to streamline the implementation of CAF Action Plans by automating task management, improving coordination, and providing real-time progress monitoring. It enhances transparency, reduces administrative burdens, and fosters employee engagement through gamification. Currently in use across multiple public bodies, it offers scalable, innovative solutions for more efficient and accountable public service management.

About the organisation

The Human Resources Management Service of the Government of Serbia oversees public administration HR, ensuring transparent hiring and efficient administration. We focus on employment policies, performance evaluation, job analysis, and workforce planning. Our work supports career development, civil servant mobility, and key government bodies like the High Civil Service Council and the Appeals Commission. Committed to innovation, we follow the latest HR trends and develop digital tools to streamline staffing solutions. By modernizing HR practices, we enhance efficiency and transparency in public administration, contributing to a more effective and well-managed civil service in Serbia.

Quality improvement aspects

The implementation of CAFficiency was driven by the need to enhance the efficiency, transparency, and accountability of public sector organizations during the execution of Common Assessment Framework (CAF) Action Plans. The primary objectives were to streamline task management, improve coordination and communication, ensure timely completion of activities, and promote inclusivity and engagement among all employees involved in the process.

Objectives:

- *Efficient task management:* Automate deadline reminders and centralize task tracking to reduce delays and missed deadlines.
- *Improved coordination and communication:* Clearly identify activity coordinators to enhance team collaboration and ensure responsibilities are well-distributed and understood.
- *Real-time monitoring and transparency:* Provide up-to-date insights into the progress of activities, enabling swift corrective actions when necessary.
- *Reducing administrative burden:* Minimize the need for constant emails and manual follow-ups, freeing coordinators to focus on more strategic tasks.

- **Enhanced engagement and inclusivity:** Foster a more proactive and motivated work environment by allowing all employees to see progress and actively participate in the implementation process.

Quantification of Objectives:

- **Timeliness**: The number of tasks completed on time increased by 40% compared to the previous manual tracking system.
- **Reduction in administrative effort:** Coordinators reported a 50% reduction in time spent on administrative follow-ups and manual progress tracking.
- **Proof of task completion**: Over 50 pieces of evidence (documents, photos, videos) have been uploaded to verify completed tasks, enhancing transparency and accountability.
- **Adoption rates:** The platform is currently in use by three major public administration bodies in Serbia, with additional interest from other organizations, both nationally and internationally.

Stakeholders and communication

The CAFficiency project was initiated and led by the Human Resource Management Service (HRMS) of the Government of Serbia, with a dedicated team responsible for its development and implementation. The project was supported by HRMS leadership and CAF experts, who provided strategic guidance and ensured alignment with the Common Assessment Framework (CAF) principles.

Internal communication was key to the project's success. Before implementation, employees were introduced to CAFficiency through workshops, training sessions, and internal newsletters. During the development phase, continuous testing and feedback loops ensured user-friendly functionality. Externally, the platform gained visibility through presentation at international conference, participation in the EIPA online conversation, and discussions with other public sector organizations interested in adopting the system.

CAFficiency was developed in collaboration with other public administration bodies, including the Accreditation Body of Serbia and the Office for Combating Drugs, which adopted the platform and provided valuable insights for further improvements. The project also benefited from expert feedback from CAF professionals at the international level.

While no external consultants were employed, the project leveraged in-house expertise and CAF expert guidance, ensuring that the platform remained aligned with best practices. The success of CAFficiency is a result of strong stakeholder engagement, transparent communication, and a collaborative approach to improving public administration efficiency.

Implementation process/approach

CAFficiency was created to streamline the coordination and tracking of the CAF Action Plan within the Human Resource Management Service (HRMS) of the Government of Serbia. The initiative came from the CAF Action Plan coordinator, who struggled with manually tracking tasks, following up with colleagues, and ensuring deadlines were met. To address these challenges, the coordinator collaborated with a colleague from the IT sector to develop a digital solution that would automate and simplify the process. The project was developed internally without additional budget allocation, relying on existing IT resources and employee participation.

The implementation process was structured into three main phases. The first phase focused on identifying inefficiencies and conceptualizing the solution. The coordinator and IT colleague analyzed the challenges of managing the CAF Action Plan and designed an initial prototype to centralize task tracking and automate reminders. No external consultants were hired, and there were no additional software expenses. The main investment was employee time spent on development, testing, and training. After a small test phase, HRMS employees were introduced to the system, providing valuable feedback that shaped the development of additional features. One of the first key improvements was enabling employees to submit proof of completed tasks, such as documents, photos, or videos, ensuring greater transparency and accountability. Automated email notifications were also integrated to reduce the need for manual follow-ups.

The second phase involved the full rollout of CAFficiency within HRMS, where employees actively used the platform in their daily work. Training sessions and workshops were held to ensure that all users understood the platform's functionalities. Throughout this phase, employees continued to suggest improvements, refining the system based on real-time use. The platform's ability to provide a clear, real-time overview of task progress significantly improved internal coordination and efficiency.

The third phase began when the Accreditation Body of Serbia and the Office for Combating Drugs adopted the platform. Their feedback led to further refinements, including the introduction of a calendar feature that allowed users to visualize activity timelines and track key deadlines more effectively. Additionally, an import function was introduced, enabling organizations to upload their CAF Action Plan (70+ pages) with a single click, significantly reducing manual data entry. An export function was also implemented, allowing users to generate quick reports with one click, making it easier to present progress updates in meetings or respond to urgent information requests. Once it proved effective, CAFficiency was presented at an international conference in April 2024. and later at the EIPA online conversation, generating interest from other public administration bodies.

The key success factors of CAFficiency's implementation were strong employee participation, continuous improvement based on real-time feedback, and the platform's ability to simplify complex administrative processes. The main challenges included initial hesitation in transitioning from manual tracking to a digital system and the need to ensure long-term engagement. These were overcome through training, workshops, and feature enhancements that made the platform both user-friendly and indispensable.

CAFficiency has transformed the management of CAF Action Plans by increasing efficiency, transparency, and accountability in public administration. Its adaptability and scalability make it a valuable tool for other PA institutions, proving its potential as a sustainable and innovative solution for modernizing public sector processes. As more organizations express interest in its adoption, CAFficiency continues to evolve, demonstrating its long-term relevance and impact.

Success Measurement. Main results with regards to the focus area

CAFficiency has significantly improved the efficiency, transparency, and accountability of CAF Action Plan implementation within public administration. The platform was developed to address key challenges, including tracking numerous activities, ensuring deadlines are met, and maintaining clear communication between coordinators and employees. The success of the platform has been measured through both qualitative and quantitative indicators, demonstrating its impact on improving internal processes and long-term sustainability.

Improvements made and how they were measured

One of the key quantitative indicators of success was the ***increase in timely task completion***. Before the introduction of CAFficiency, tracking deadlines relied on manual follow-ups and spreadsheets, leading to delays and inconsistent execution. After implementation, the percentage of tasks completed on time increased by 40%, as employees had clearer visibility into their responsibilities and received automated reminders. Another major improvement was in ***reducing administrative workload for coordinators***. Previously, task tracking required frequent emails and direct follow-ups to ensure progress. With the introduction of automated notifications and a centralized dashboard, the time spent on administrative follow-ups decreased by 50%, allowing coordinators to focus on more strategic aspects of CAF implementation. The platform also resulted in a ***higher level of employee engagement***. The ability to see real-time progress, understand the overall direction of the organization, and actively contribute to updates made employees feel more accountable and motivated. The proof submission feature, which allows employees to upload supporting documents, photos, or videos of completed activities, has also contributed ***to greater transparency and inclusivity***.

Additionally, CAFficiency improved reporting and decision-making by enabling **quick access** to real-time data. The export feature, which allows users to generate one-click reports on completed activities, has proven to be an essential tool for leadership when preparing for meetings or responding to urgent status requests. The **adoption** of CAFficiency by the Accreditation Body of Serbia and the Office for Combating Drugs further demonstrated its effectiveness beyond HRMS. Their feedback led to the addition of a calendar feature, enabling better visualization of upcoming deadlines, and an import function that allows organizations to upload their entire CAF Action Plan with a single click, significantly reducing manual data entry and ensuring consistency across all activities.

Measuring long-term effects

One of the key long-term indicators is the **consistent rate of on-time task completion over multiple CAF cycles**. Since organizations update their CAF Action Plans periodically based on their strategic needs, CAFficiency supports the continuous improvement process by ensuring that each completed action plan serves as a foundation for the next one. Encouraging organizations to develop a new action plan after implementing the previous one enables timely quality management and ensures that progress is sustained rather than stagnating. By tracking task completion rates, engagement levels, and efficiency metrics across different planning periods, organizations can assess whether their improvements remain stable over time and identify areas that require further development.

User feedback continues to play a crucial role in assessing the platform's effectiveness. **Annual employee surveys** are conducted to measure satisfaction, engagement, and perceived ease of use. This data is used to make further refinements and address any emerging needs.

Additionally, the **scalability** of CAFficiency is a long-term measure of success. The growing number of public administration bodies expressing interest in adopting the platform indicates its broad applicability. Expanding the platform to new organizations while maintaining its core efficiency improvements demonstrates its ability to be a sustainable and transferable solution for modernizing public administration. Lastly, long-term success is measured through **external recognition and benchmarking**. CAFficiency has already been presented at international conferences and has gained interest from organizations across Europe. Future participation in international best practice exchanges, workshops, and collaborations with CAF experts will ensure that the platform continues to evolve in line with modern public sector management trends.

The essence of the innovation and the transferability of the solutions introduced

Before CAFficiency, tracking CAF Action Plan implementation relied on manual spreadsheets, frequent emails, and time-consuming follow-ups, leading to inefficiencies and delays. The platform eliminates these bottlenecks by automating reminders, providing real-time tracking, and allowing for proof submission of completed tasks (documents, photos, videos). The addition of a calendar function helps visualize deadlines, while the import feature allows an entire 70+ page CAF Action Plan to be uploaded in one click, eliminating the need for manual data entry. The export feature provides quick reports on completed activities, making it easier for leadership to assess progress on demand. CAFficiency is **highly transferable** because its core functionalities—automated reminders, task tracking, proof submission, and reporting—are universally applicable to any public sector organization implementing structured improvement plans. It can be customized to different organizational needs without major modifications, allowing other institutions to adopt it immediately rather than investing in building their own solution.

The user-centered approach was crucial in ensuring CAFficiency's success. The platform was developed based on real user needs, with continuous feedback loops ensuring practical, easy-to-use functionalities. Employees actively participated in testing and improving the platform, which fostered strong engagement and adoption. Additionally, cost-effectiveness played a key role. Unlike many digital transformation projects that require external consultants or significant investment, CAFficiency was built using internal expertise. This proves that innovation does not require a large budget—practical, well-designed solutions can be developed using existing resources. Leadership support and collaboration with CAF experts also contributed to its success, ensuring that CAFficiency remained aligned with CAF principles and public administration best practices.

Lessons for Other Institutions

One of the biggest challenges in public administration is ensuring that CAF Action Plans don't become forgotten documents. Without an efficient system, deadlines get overlooked, and progress stalls. CAFficiency ensures plans remain active, tasks are visible, and follow-ups are automated. Rather than spending time and resources developing their own solution, **organizations can adopt CAFficiency immediately**, benefiting from its proven features without unnecessary investment. The platform improves transparency, reduces administrative burden, and ensures accountability. For institutions looking to implement digital transformation, the key takeaway is that technology should be practical and user-driven. CAFficiency was designed to solve a real problem—not to add complexity. Public institutions don't need to reinvent the wheel—CAFficiency is available to all interested organizations, allowing them to focus

on service improvement rather than system development. CAFficiency is particularly useful for public administration bodies managing structured improvement plans. **Beyond CAF**, the platform can be adapted for strategic project management, performance tracking, and public sector reforms. Any institution struggling with task coordination, transparency, and deadline management can benefit from adopting a ready-made, field-tested solution rather than building a system from scratch.

CAFficiency is an example of how digital transformation in the public sector can be achieved efficiently, sustainably, and with real impact. As more institutions express interest in using the platform, its potential for modernizing public administration continues to grow.

Lessons learnt

CAFficiency's development and implementation provided several key insights that can benefit other institutions looking to improve their administrative processes. The project demonstrated how digital tools can streamline public sector workflows, reduce administrative burdens, and enhance transparency. Based on this experience, three major lessons emerged:

1. Digital transformation should be driven by practical needs, not technology for technology's sake

One of the main reasons CAFficiency was successfully implemented was that it was developed to **solve a specific operational challenge** rather than simply introduce new technology. The CAF Action Plan coordinator identified a clear inefficiency in manually tracking tasks, following up with employees, and ensuring deadlines were met. The solution was not to adopt an existing, costly software but to design a system that directly addressed these pain points in a simple and user-friendly way. This lesson is crucial for other institutions considering digital transformation. Instead of starting with technology and looking for a way to implement it, organizations should first analyse their challenges and define what improvements are truly needed. By keeping the end users in mind, CAFficiency ensured that the platform was intuitive, easy to use, and met real needs without adding unnecessary complexity. For other organizations, this means taking a bottom-up approach—involving employees in the early stages of solution development and ensuring that the tool genuinely makes their work easier. A digital transformation project should never become an additional burden; instead, it should integrate seamlessly into existing workflows and improve efficiency from day one.

2. Employee engagement is key to adoption and long-term sustainability

The second major lesson is that digital solutions in the public sector will only succeed **if employees understand, trust, and actively engage with them**. A well-designed platform is useless if people do not use it. CAFficiency overcame this challenge by

involving employees throughout the development process. Initial testing, feedback loops, and continuous improvements based on user suggestions made employees feel like co-creators of the system, not just passive users. When HRMS first introduced CAFficiency, some employees were resistant to shifting from manual tracking methods. To address this, workshops and training sessions were held to explain the platform's benefits and show how it could make daily work easier. Additionally, the gamification features and real-time dashboards helped employees stay engaged and see tangible results of their work. For institutions looking to implement similar projects, the key takeaway is that communication and education are essential. Employees should not just be informed about new tools—they should be part of the conversation from the start. Providing structured training, clear guidance, and opportunities for feedback ensures greater acceptance, faster adoption, and long-term sustainability of the project.

3. Cost-effective digital transformation is possible without external funding

Many public administration bodies hesitate to initiate digital transformation due to concerns over budget constraints and the need for external consultants. CAFficiency proved that meaningful digital transformation can be achieved using internal resources. The project was entirely developed in-house by an HRMS IT colleague and the CAF Action Plan coordinator, without requiring external consultants or a dedicated budget. Instead of purchasing an expensive off-the-shelf solution, HRMS used existing IT infrastructure and internal expertise to create a system tailored to its needs. This made the project highly cost-effective, adaptable, and sustainable. For other institutions, the lesson is that digital transformation does not have to be expensive. Often, the most effective solutions come from within an organization, using people who truly understand its processes. Before seeking external funding or consultants, organizations should first evaluate their internal capabilities and consider whether a practical, internally developed solution could be just as effective—if not more so.

Slovenia: CAF as a Change Engine: Driving Towards Continuous Improvements. Ministry of Higher Education, Science and Innovation (MHESI).

REPUBLIC OF SLOVENIA
MINISTRY OF HIGHER EDUCATION, SCIENCE AND INNOVATION

Introductory information

Title of the good practice: CAF as a Change Engine: Driving Towards Continuous Improvements

Name of the organisation: Republic of Slovenia Ministry of Higher Education, Science and Innovation (MHESI)

City/ country: Ljubljana, Slovenia

Project manager's/contact person's first and last name: Ksenja Hauptman

Email, phone number to the project manager's/contact person's: ksenja.hauptman@gov.si, 00 386 31 617 412

Level of organisation/project: national / federal

Sector: Higher Education, Science and Innovation

How many times the CAF was used? 3 self-assessments (2017-ongoing)

ECU label awarded? Indicate years please: 2021

Main focus: Organisational culture: wellbeing & WLB

Key words:

Strategic Themes

MS Teams Collaborative Tools

Employee Recognition

Internal Communication

EMPLOYEES' EYE

https://www.gov.si/assets/ministrstva/MVZI/Fotografije/Pasice/slike/logotipi/Logo-MVZI-ang.pdf

2024 - MHESI

Third CAF Self-Assessment Report (11. 9. 2024)

CAF Action Plan (14. 10. 2024)

2021 - MESS

CAF External Feedback Procedure

Effective CAF User - ECU Label

2020 - MESS

Second CAF Self-Assessment Report (24. 2. 2020)

CAF Action Plan (6. 7. 2020)

2017 - MESS

First CAF Self-Assessment Report (15. 11. 2017)

CAF Action Plan (30. 11. 2017)

Executive summary

Since 2017, MEHSI has implemented quality management based on the CAF model, introducing key organizational changes. This document highlights four employee-centered actions: Creating the "Mission, Vision, and Values," Recognition of Outstanding Employees, Enhancing Internal Communication, and Assessing Workplace Satisfaction and Organisational Climate, demonstrating MEHSI's commitment to a motivated, high-performing, and resilient workforce.

About the organisation

In April 2023, following the separation of Higher Education, Science and Innovation from the Ministry of Education, Science and Sport (MESS), MHESI started operating as a legally independent entity.

MHESI focuses on the quality development of higher education, the transfer of knowledge into practice for the development of society, and the creation of a stimulating environment for research and innovation. Our goal is for Slovenia to become a country of knowledge, science and innovation and to be recognised as such around the world.

Quality improvement aspects

MESS conducted its first self-assessment using the CAF method in 2017, followed by a second self-assessment in late 2019, with full implementation of the resulting action plan. In 2021, an external evaluation recognized MESS as the first ministry in Slovenia to earn the "Effective CAF User - ECU Label."

The self-assessment was supported by the ministry's leadership, guided by three strategic themes as foundational priorities for the action plan:

1. Operational Excellence and Employee Goal Orientation.
2. Continuous Improvement of Ministry Performance Quality.
3. Intersectoral Cooperation.

Despite our limited resources as a new ministry, our self-assessment resulted in higher scores than in previous evaluations.

As a basis for overall quality improvement within the organization, the ministry used the CAF self-assessment report as well as an in-depth analysis of the results of the employee EYE survey of working environment. Both inputs provide a solid foundation for evidence-based management and, consequently, the implementation of concrete measures, of which we present in this document:

1. Creating the "Mission, Vision, and Values".
2. Recognition of Outstanding Employees.
3. Enhancing Internal Communication.
4. Assessing Workplace Satisfaction and Organisational Climate.

Stakeholders and communication

At the ministry, a dedicated working group was formally established to implement the CAF process. This team was carefully and strategically selected to ensure a diverse range of interdisciplinary expertise, fostering a highly effective and well-structured execution of the process. The group operated in a systematic and coordinated manner, placing strong emphasis on a holistic approach that combined internal and external training, regular joint meetings, and continuous collaboration via Microsoft Teams - each member had a dedicated space within the digital environment, including individual channels for the assessment of subcriteria and documentation of notes.

From the outset, the CAF process was strongly supported by the ministry's leadership, with both the Secretary-General and the Minister actively engaged in its implementation, offering strategic direction and oversight.

Beyond the working group, all employees of the ministry were actively engaged and informed about the CAF process. The Minister launched the CAF self-assessment by

sending an official email to all employees, emphasizing the importance of participation. The newly established quality section on the ministry's intranet provided key information about CAF and gave space for the publication of the self-assessment report and the Action Plan. Additional communication channels included the ministry's internal publications, such as the Connector and Linkages, ensuring continuous awareness and engagement. Lastly, a short video was prepared to showcase the results of the CAF team's work, providing a visual and engaging summary of the process and its impact.

Implementation process/approach

1.   **Creating the "Mission, Vision, and Values" Document**: Developed collaboratively by top management and all employees.

The development and acceptance of the "Mission, Vision, and Values" document was a collaborative process that actively engaged employees at all levels. To ensure broad participation and meaningful contributions, all employees were invited to take part in two workshops.

Both workshops were led by the Minister and structured around Edward de Bono's Six Thinking Hats methodology, which facilitated a creative and systematic exploration of different perspectives.

Ultimately, the final "Mission, Vision, and Values" document was adopted by consensus, ensuring that it reflects the collective input and commitment of all participants. Through this process, we have established an ambitious vision, aiming to position Slovenia among the leading research and development countries in Europe by 2035.

2.   **Recognition of Outstanding Employees:** Celebrating the contributions of dedicated employees.

To enhance motivation and acknowledge the contributions of employees, the ministry implemented a structured process for recognizing deserving individuals and teams. The process of formalizing employee recognition has evolved over the years (in 2017 the first formal recognition was awarded), demonstrating a commitment to acknowledging outstanding contributions and achievements.

The Rules on Recognitions are introducing formal recognition categories, including:

- Best employee of the year;
- Outstanding achievements within the ministry;
- Successful completion of the most demanding project(s);
- Lifetime achievement award;
- Successful completion of the most demanding team project.

The recognition ceremony has been held regularly since 2022.

The process of submitting nominations for recognition at the ministry follows a structured and transparent approach, ensuring fairness and broad employee participation. The process consists of two main phases:

1) The initial submission of proposals: all employees are invited to submit nominations for colleagues who have demonstrated exceptional contribution. The submissions should outline the nominee's key achievements, their impact on the organization.
2) An anonymous employee survey to determine employee of the year: employees are asked to vote for the colleague they value the most based on criteria such as professionalism, quality of work, responsibility, cooperation, willingness to help, creativity, and contributions to improving procedures for both citizens and the ministry. This approach ensures that the recognition reflects the collective appreciation of peers.

3.   **Enhancing Internal Communication:** Launching newsletters poVeZovalnIk (Connector) and VeZI (Linkages) to strengthen communication channels.

Effective internal communication is essential for fostering transparency, engagement, and information sharing within the ministry. As part of this effort, two newsletters have been introduced, both named based on the acronym VZI, which represents the ministry's areas of work.

To ensure comprehensive coverage of all ministry activities, an Editorial Board has been appointed, consisting of one representative from each internal organizational unit.

"poVeZovalnIk" – The Ministry's Biweekly Internal Newsletter

"poVeZovalnIk" is designed to keep employees of the ministry informed about key developments, achievements, and future activities. It provides concise and relevant information, with additional details accessible through embedded links.

The newsletter is structured into several key sections:

MVZI News – A brief overview of the most significant events, achievements, and activities within the ministry over the past 14 days.

From the Perspective of the Media – A summary of the most relevant media coverage related to the ministry.

Looking Ahead – An announcement of major upcoming activities and initiatives.

Personnel Corner – Updates on new hires, retirements, and staff departures.

Citizen-Friendly Initiatives – A highlight of recent activities especially aimed at benefiting citizens and improving public services.

"VeZI" – The Ministry's Quarterly Magazine

The "VeZI" quarterly magazine offers a diverse and engaging selection of content, providing in-depth insights into the ministry's work while also incorporating lighter, engaging topics for employees. The magazine is structured into several key sections:

Editorial – A message from the editorial team or ministry leadership, providing an overview of key themes and developments.

Highlights of the Trimester – A summary of the most important events, projects, and milestones achieved over the past three months.

Walk Among Internal Units of the Ministry – A detailed introduction to different internal units, featuring interviews with unit heads to offer insight into their work, challenges, and successes.

Let's Get Acquainted – A personal portrait of an interesting colleague, fostering a sense of connection and recognition within the ministry.

Savor the Flavor – A seasonal cooking segment featuring recipes contributed by employees, adding a personal and community-oriented touch.

Hidden Corners of Slovenia – Travel tips and recommendations for excursions to explore Slovenia's lesser-known but beautiful locations.

This blend of professional and informal content ensures that "VeZI" remains informative, engaging, and relevant to all employees.

4.   **Assessing Working Environment:** Regular surveys to measure satisfaction and organisational climate with the work environment.

As part of our commitment to enhancing organizational climate, employee satisfaction, and motivation, we initiated a collaborative effort with the Ministry of Public Administration to co-create a methodology for measuring key workplace factors. In response to this initiative, eight (8) public authorities participated in the joint effort to develop a comprehensive and standardized approach. This initiative was based on voluntary cooperation, leveraging the knowledge and experience of the participating organizations.

The primary objective of the initiative is to support strategic decision-making by gathering valuable insights into workplace environment. By developing a uniform methodology, the initiative ensures that organizations can conduct meaningful comparisons. Additionally, the initiative aims to identify opportunities for improvement by leveraging targeted feedback and data-driven analysis. This structured approach enables organizations to make informed decisions.

The questionnaire framework is designed with a modular structure, allowing organizations to implement stand-alone modules or combine multiple components to best suit their needs. This flexibility ensures adaptability while maintaining consistency in data collection and interpretation.

To ensure continuous relevance and refinement, additional issues and questions were incorporated into the original questionnaire in 2022 and 2024. These updates reflect the evolving priorities of public administration and further enhance the tool's effectiveness in capturing employee perspectives.
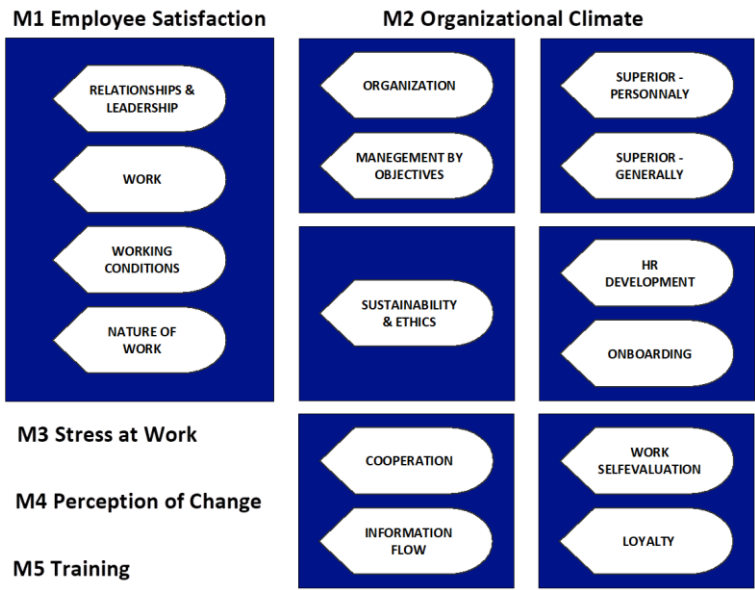

Figure2: Modules of the Employee EYE Questionnaire

This collaborative approach fosters evidence-based decision-making and promotes a culture of continuous improvement.

Success Measurement. Main results with regards to the focus area

The ministry identified areas for improvement, which were prepared based on analytical inputs and served as the foundation for implementing specific actions. It emphasizes the importance of setting clear objectives by defining and communicating the ministry's vision, mission, and goals while encouraging employee involvement in achieving them.

A significant focus is placed on optimizing work processes through IT support, e-procedures, and a system for submitting proposals and ideas. Practical improvements, such as shared parking spaces were implemented. Internal communication is highlighted as a critical factor in workplace efficiency, with an emphasis on timely information flow, improved vertical and horizontal communication, and effective information transmission across departments and hierarchical levels.

Employee well-being is also a priority, with initiatives aimed at promoting a balance between personal and professional life, enhancing employee satisfaction, and providing opportunities for professional growth, education, and training.

The effectiveness of implemented practices on the level of ministry is best represented through the results of our "Working Environment Questionnaire – EMPLOYEES' EYE," conducted in 2020, 2022, and 2024.

Individual measures are also subject to individual assessment. Here are two examples:

1 "Mission, Vision, and Values" Document

Employee satisfaction with the document preparation process and its content was assessed following the second workshop. Participants reported high levels of satisfaction, particularly regarding the event's organization, professional execution, achievement of workshop objectives, and the final outcome.

Overall, the workshop received strong satisfaction ratings on a 5-point scale, with most categories scoring 4,6 or higher (5 scale), reinforcing its effectiveness and well-structured delivery.

2 Newsletters poVeZovalnIk (Connector) and VeZI (Linkages)

In the survey dedicated to our internal cannels, we aimed to assess employees' attitudes towards two new internal communication channels: the newsletters poVeZoValnIk and VeZI, as well as our new intranet.

The survey was conducted to determine the level of employee satisfaction with the newly introduced communication channels and to identify opportunities for improvement. At the end of the survey, employees were invited to provide suggestions for enhancements.

The biweekly newsletter *poVeZoValnIk* and the quarterly newsletter *VeZI* were rated as appropriate information channels by 80 % of employees who responded to the survey.

The results indicate that nearly half of the employees regularly read the quarterly newsletters VeZI and poVeZoValnIk. The publication frequency of poVeZoValnIk is considered appropriate by 71 % of respondents, whereas this percentage is even higher for VeZI, reaching 87 %.

Furthermore, employees who read both newsletters largely or strongly agreed that the content is engaging (90 %), informative (90 %), and visually appealing (81 %). Additionally, 76 % of employees find the existing content in both newsletters to be sufficient.

The essence of the innovation and the transferability of the solutions introduced

MEHSI highly values the exchange of best practices, recognizing it as a key driver of added value in any project. Our ministry actively engages in this exchange from both perspectives—adopting proven best practices from others while also contributing our own with commitment and enthusiasm. We firmly believe that only through collaborative efforts can we shape a modern, agile, and high-performing public sector— one that is responsive to contemporary challenges and tailored to the evolving needs of our key stakeholders.

In line with this commitment, we initiated a collaborative effort to develop a methodology for measuring key workplace factors. As a result, in 2024, four ministries participated in the survey, fostering further exchange of best practices. Additionally, the Employees' EYE methodology was shared at an international level, extending its impact beyond national boundaries.

We are fully committed to sharing all presented processes with interested stakeholders. However, it is crucial to acknowledge that each organization must evaluate its readiness to implement specific concepts and determine which best practices can be seamlessly integrated into its existing organizational culture to maximize their effectiveness.

Lessons learnt

Strong Management Support is Crucial – The active engagement of top management is essential to ensure that the project aligns with the organization's strategic priorities and that the necessary resources are allocated effectively. A committed leadership fosters a culture of accountability and drives the successful implementation of key measures.

Clear Commitment to Implementation – Beyond approving the action plan, management must demonstrate unwavering commitment to its execution. This includes ensuring that planned measures are systematically implemented, monitored, and adapted as necessary to achieve the intended outcomes. Strong leadership involvement enhances institutional credibility and reinforces the importance of continuous improvement.

Defined Responsibilities and Accountability – Establishing clear roles and responsibilities for each measure is critical to maintaining structure and efficiency in the implementation process. The appointment of a dedicated custodian for the action plan ensures continuous oversight, facilitates communication with responsible parties, and enables systematic reporting to management. This structured approach strengthens transparency, enhances coordination, and mitigates the risk of delays.

Inclusive Employee Engagement Across All Levels – The active involvement of employees at all levels is a key success factor for sustainable project implementation. Encouraging participation in decision-making, fostering a culture of collaboration, and ensuring that employees are well-informed and engaged in the process lead to higher levels of commitment and ownership. Inclusion not only enhances the effectiveness of measures but also strengthens organizational cohesion and long-term adaptability.

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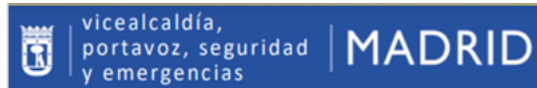
Introductory information

Title of the good practice: Línea Madrid: Preferential Attention for People Over 65

Name of the organisation: Citizen Services of Madrid City Council

City/ country: Madrid. Spain

Project manager's/contact person's first and last name:

Fernando Carrión Morales / Mar Núñez Suárez

Email, phone number to the project manager's/contact person's:
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Level of organisation/project: local

Sector: public services

How many times the CAF was used? 6

Main focus: Social responsibility: attractiveness of the public sector.

Key words: Local Government, Inclusion, Accessibility, Citizen Service, Elderly, Senior Citizens

Executive summary

The Preferential Care Project improves access to municipal services for people aged 65 and over by simplifying procedures and reducing waiting times. It offers a free 24/7 telephone line and improved face-to-face services.

The project combines traditional face-to-face services with digital inclusion measures to ensure that seniors are not left behind in the digital transformation, making public administration more inclusive and responsive to older adults' unique needs.

About the organisation

Línea Madrid is Madrid City Council's citizen service, designed to provide people with information and accessible municipal services.

It is offered through multi-channel assistance, which includes face-to-face assistance in 23 main Citizen Service Offices and several auxiliary offices, telephone assistance (010) and telematic assistance on social networks (FB, X, online chat) in addition to the web www.madrid.es.

Línea Madrid facilitates administrative processes and provides information on public services.

It also coordinates the management of the appointment system for the entire Madrid City Council.

In 2023 it provided more than 10.5 million services, and in 2024 more than 10.8 million services were carried out by LM.

Link to Video Línea Madrid (1).mp4

Quality improvement aspects

As a result of the 2020 pandemic, there is both saturation of the 010-telephone line and difficulty in obtaining appointments at the Citizen Service Offices, which causes a certain unease among the elderly, who express a difficulty in accessing the local administration, as they do not have sufficient means to process transactions in the electronic administration.

The measures developed to make up for these shortcomings are:

- to create a new **preferential attention number for the over 65s**, free of charge and without rejection of calls, without prompting (no need to choose any option), with direct access to agents covering all profiles to deal with requests
- in-person attention: the service would be provided without prior appointment for seniors.

The main objective of the Preferential Attention Project for the Over 65s in Línea Madrid was to guarantee equal access to municipal services for the elderly population, a group that faces technological and mobility barriers.

The specific objectives were:

- To offer an accessible service adapted to the needs of the elderly, providing personalised assistance through face-to-face and telephone channels.
- To increase their satisfaction and trust in the public administration.

The number of people attended and their satisfaction have been measured, and since 2024 a special ticket for the elderly has been included in order to be able to evaluate waiting and service times in a more refined way.

Stakeholders and communication

- Project manager: General Director for Citizen Services, Fernando Carrión.

- The project was led by the Subdirectorate for Citizen Services.

- Communication of the CAF initiative:

Internal Communication: through e-mails and meetings with the staff of the presential and telephonic channels.

Staff were involved in the project through specific training on inclusive preferential care and empathy in dealing with the elderly.

External Communication:

Citizens were informed through the City Council website, radio, press and social networks.

link to publication in www.madrid.es: [The City Council creates a free telephone number to assist the over 65s - Madrid City Council](#)

900 111 065 is the new free telephone number, operational as of today and created by Madrid City Council to provide 24-hour service, seven days a week, to people over the age of 65.

This announcement was made by the Councillor for Territorial Coordination, Transparency and Citizen Participation, Silvia Saavedra, at the Cerro Bermejo Senior Citizens' Centre in the Latina district.

"Thanks to this number, we seek to ensure that our elderly have easy access to all the services of Línea Madrid without having to move from home or go to the citizen service offices", explained Saavedra during the presentation, at which she was accompanied by the Delegate for Families, Equality and Social Welfare, José Aniorte; the Councillor for Latina, Alberto Serrano; representatives of the municipal groups and members of various associations for the elderly in the district.

Calls to this telephone number with preferential attention for people over 65 years of age will be answered by 010 agents with more experience in providing the service. "At 900 111 065, people over 65 will continue to be able to obtain general and personalised information and will also be able to carry out a wide range of procedures and formalities that Línea Madrid has taken on".

Link to Video: https://www.youtube.com/watch?v=qw-c8badVrU

- The needs and opinions of service users are taken into account before, during and after the process of change, through the SyR (suggestions and complaints system) and by means of an annual LM satisfaction survey with disaggregated data for the elderly. In addition, at the end of each face-to-face and telephone service, an evaluation of the service is offered.

- The project did not require the participation of external entities or private consultants.

Implementation process/approach

During the previous CAF process, we had already detected the need for improvement in relation to seniors, and it was exacerbated by the consequences of the COVID pandemic, as the capacity of the offices was reduced, and in order to maintain it, it was made compulsory to make appointments for all formalities.

Implementation Phases

Phase 1 (April 2022):

Enabling walk-in service in the Offices.

Creation of priority shifts at times of peak demand.

Phase 2 (May 2022):

Launch of the 900 111 065-telephone line with priority attention.

Improvements in the technological infrastructure to facilitate access.

Priority telephone number for the elderly

Link to listen **Escuchar**

900 111 065 is the Madrid City Council's **free** telephone number for people over 65 years of age. It operates **24 hours a day, 7 days a week.**

On 900 111 065, the over 65s can obtain **general and personalised information** and carry out a wide range of procedures and formalities.

Methods and tools used

CRM system was adapted to prioritize calls from the elderly, so that when a person dials 900 111 065, the system gives priority to that call over the others and it is immediately attended by an agent.

Specialised training was also organised for the staff, including content on how to serve the seniors and the adaptation of the CRM shift system.

Project costs: no extra financial cost.

The only additional cost would be the implementation of the 900 line by Telefonica España, but as it has already contracted a comprehensive package of services with the council, this line was included in the package.

Main successes and challenges of the implementation process

Successes: Increased satisfaction and reduced waiting times for elderly people.

Challenges: Adapting the system to the growing demand for care by the group of senior users.

Success Measurement. Main results with regards to the focus area

The Preferential Attention Project for individuals over 65 in Línea Madrid has delivered measurable results, enhancing user satisfaction and organization's service effectiveness. Key metrics from 2022 to 2024 underscore the initiative's tangible impact, demonstrating its success in addressing the needs of older citizens.

- Older adults remain a significant segment of **users** at the **Citizen Service Offices,** accounting 91.859 seniors in 2022, 105.016 in 2023, and 168.087 in 2024. This demographic's sustained reliance on face-to-face services highlights their critical role in service demand.
- Senior satisfaction scores (out of 10) for the **annual survey of the 010 line** are as follows: 8.74 (in 2022) 9.20 (in 2023) 9,28 (in 2024)

Key Enhancements for Seniors in Offices:

- **No Appointment Required:** Walk-in access eliminates the complexity of scheduling in advance.
- **No Waiting in Queues**: Seniors bypass waiting room lines, ensuring prompt service.

Preferential Telephone Line (900 111 065)

Number of Telephone line senior users: 39.742 persons in 2022, 65.750 in 2023, 97.072 in 2024

Satisfaction scores (out of 10) of senior users along these years have been as follows: 8.46 (in 2022) 8.69 (in 2023) 8,62 (in 2024)

This demonstrates effective demand management while continuing to meet the target demographic's needs.

Key Enhancements for Seniors in telephone channel:

- Priority Handling: 100% of calls from seniors are answered, compared to up to 35% unanswered during peak demand for general 010 calls.
- Minimal Waiting Times: Seniors wait an average of 10 seconds to connect with an agent, compared to 200 seconds (3.4 minutes) for standard calls.
- Extended Support: Senior calls receive 20% more handling time to ensure comprehensive assistance, with an average call duration of 350 seconds (5.8 minutes).

- The preferential line eliminates technological barriers by connecting seniors directly to agents without requiring keypad navigation. Free calls ensure accessibility for all users, regardless of location or technological proficiency.

	Number of elderly ASSISTED			Number of SERVICES provided to seniors		
	face to face	telephone	Total	face to face	telephone	Total
2022	91.859	39.742	131.601	141.847	55.458	197.305
2023	105.016	65.750	170.766	210.081	108.803	318.884
2024	168.087	97.072	265.159	349.907	189.504	539.411

This graphic shows a comparison of the **number of seniors served** over three years in the two channels.

It can also be seen that the number of services is higher because **each person can request several procedures**.

Over the years, it is clear that **the number** of elderly people served **is increasing**.

The MY ticket for seniors without appointment has been introduced in the Citizen Attencion Offices. It started on October 31, 2024 in tests and the first day that services were correctly registered was November 4, 2024.
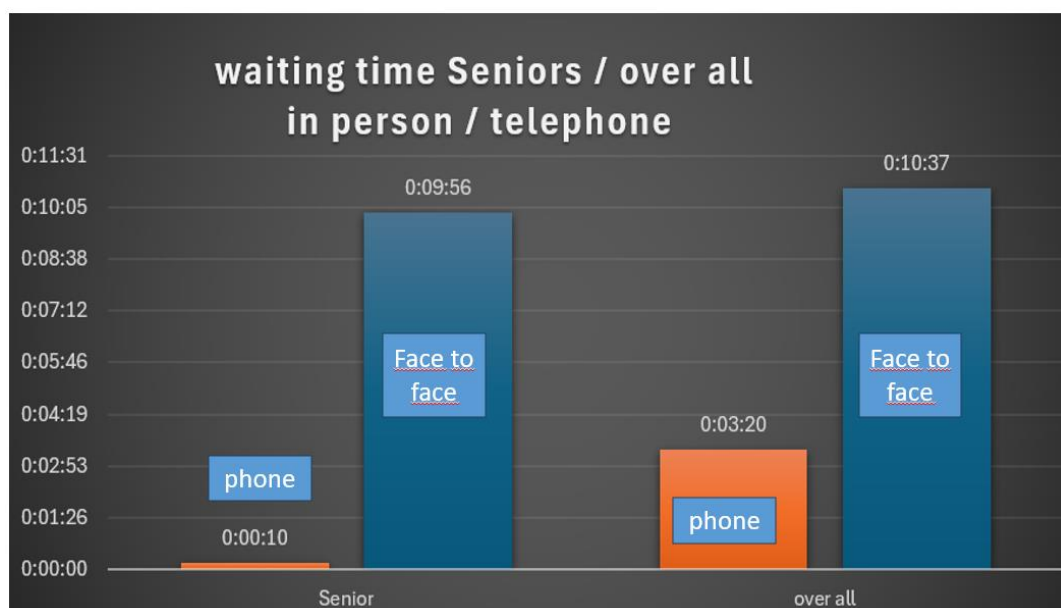
This graph compares the **waiting times between seniors and the rest** in both channels.

As we can see, older people wait less to be attended to:

- In the offices, the waiting time is about **9 minutes for the elderly** versus over 10 minutes for the rest
- On the phone, the general waiting time is about 3 minutes whereas **for the elderly it is about 10 seconds.**

Senior satisfaction scores out of 10		years		
		2022	2023	2024
LM channels	telephone	8,46	8,69	8,62
	in person	8,74	9,20	9,28

This diagram shows the satisfaction of seniors comparing channels and years, in scores out of 10.

Face-to-face service is increasingly valued, while the evaluation of telephone service seems to have reached a ceiling.

Ratio of complaints, suggestions and compliments submitted by persons up to 64 years of age to those submitted by persons 65 years of age or older in 010 and OAC in 2024							
	attended by telephone				attended face-to-face		
age	Up to 64 years		65 years or older		Up to 64 years		65 years or older	
Total SyR	673		44		1208		174	
complaints	567	95%	30	5%	680	94%	46	6%
compliments	86	89%	11	11%	506	80%	125	20%
suggestions	20	87%	3	13%	22	88%	3	12%

citizens' opinions	attended face-to-face				total	
	Up to 64 years		65 years or older			
complaints	680	56%	46	26%	726	
compliments	506	42%	125	72%	631	
suggestions	22	2%	3	2%	25	
	1208	100%	174	100%	1382	

citizens' opinions	attended by phone				total	
	Up to 64 years		65 years or older			
complaints	567	84%	30	68%	597	
compliments	86	13%	11	25%	97	
suggestions	20	3%	3	7%	23	
	673	100%	44	100%	717	

Here we show the claims and compliments posted in 2024 by seniors compared to the rest.

The elder served in the offices submitted about 25% of complaints and 70% of compliments (out of their own global feedback)

Among those attended by phone, older people made around 60% of claims (out of their total number of opinions), while for younger people this rises to more than 80% of their own feedback.

In other words, seniors give higher percentages of compliments and lower ratio of complaints than the under 65 group.

The essence of the innovation and the transferability of the solutions introduced

The project **is innovative** and a good example for other institutions because:

- Incorporates a multi-channel approach adapted to digitalisation without excluding the elderly.
- It prioritises care for a vulnerable group, with an inclusive design.

Transferability to Other Organisations

Any public administration with a citizen care service can replicate the model.

Elements such as priority attention and staff training can be adapted.

In fact, the municipal Tax Agency is already making similar adaptations to serve the elderly.

These factors have contributed to the success of the project:

- Staff awareness-raising.
- Use of accessible technology.
- Continuous evaluation of impact.

Recommendations for Other Agencies

- Involve citizens in the design of the service.
- Conduct pilot tests before full implementation.

Lessons learnt to be shared with other institutions in relation to the implemented project

Lesson 1: Inclusive care improves service quality

It has been shown that designing services adapted to the needs of seniors not only increases their satisfaction but also optimises the distribution of the workload across channels.

Understanding specific needs: It is essential to conduct studies and surveys to understand the needs and preferences of the elderly. This includes aspects such as accessibility, ease of use and relevance of the services offered.

Service customization: Tailoring services to make them more accessible and user-friendly for seniors can include simplifying processes, removing physical barriers and providing personalized assistance.

Staff training: It is essential that staff are trained to deal with seniors in a respectful manner. This not only improves the customer experience but can also increase staff job satisfaction by seeing the positive impact of their work.

Use of assistive technology: Implement technologies that help seniors access services more easily and safely. This may include assistive listening devices, voice recognition software, and simplified user interfaces.

Workload optimization: By designing services that are more efficient and accessible, the distribution of workload among different service channels can be optimized. For example, if seniors find it easier to use certain services online, this can help to optimize the distribution of workload between different service channels.

Lesson 2: Technological adaptation must be progressive

Tackling the digital divide means balancing the transition to digital services without eliminating traditional options.

Addressing the digital divide:

Assessing the current situation: It is important to start with a thorough assessment of the current situation in terms of technology adoption. This includes identifying which segments of the population have limited access to technology and what barriers they face.

Education and training: Provide training programmes to help people become familiar with new technologies. These programmes should be accessible and tailored to different skill levels.

Gradual implementation: Introduce new technologies gradually, allowing people to adapt at their own pace. This may include the co-existence of digital and traditional options during a transition period.

Continuous feedback: Establish feedback mechanisms to collect opinions and suggestions from users.

Balance between digital and traditional services:

Maintain traditional options: It is crucial not to eliminate traditional options outright. Many people may be more comfortable with traditional methods and need time to adapt to new technologies.

Promoting the benefits: Clearly communicating the benefits of digital services, such as convenience and efficiency, can help motivate people to try them.

Personalised support: Offer personalised support for those struggling with the transition. This can include telephone assistance, live chat or in-person help.

Benefits of progressive technology adaptation:

Social inclusion: Ensure that no one is left behind in the transition to a more digital society.

Increased adoption: A gradual and well-supported transition can result in increased adoption of new technologies.

Improved satisfaction: Users feel more comfortable and satisfied when they have the time and support to adapt to changes.

Lesson 3: Impact measurement must be continuous

To ensure the long-term success of the project, it is key to establish feedback mechanisms and make adjustments based on the results obtained.

Establish feedback mechanisms:

Surveys and questionnaires: Implement regular surveys and questionnaires to collect user feedback on services offered.

Conduct periodic reviews of data collected to identify areas for improvement and adjust strategies accordingly. This ensures that services remain relevant and effective.

Benefits of continuous impact measurement:

<u>Continuous improvement:</u> Constant feedback allows for continuous improvement of services, ensuring that they adapt to the changing needs of users.

<u>Increased customer satisfaction:</u> Users feel valued when their opinions are listened to, and changes are made based on their feedback.

<u>Long-term success</u>: The ability to adapt and continuously improve is key to the long-term success of any project or service.

Implementing continuous impact measurement not only helps maintain the quality and relevance of services but also fosters a culture of continuous improvement and adaptation.

PART III

CAF CASES

Destriptions of the managerial practices, implemented through the use of CAF, and preselected at the national level by the CAF National Correspondents.

POLAND25.EU

PART III – other CAF cases

Description of the additional cases, submitted to the 10th European CAF Users' Event "Smart Governance : People-Centred, Efficiency-Driven":

1. Belgium: Human Resources Landscape. College of the Public Prosecutor Support Service

2. Georgia: Workflow automation and digital transformation through information sharing and engagement of the employers. Pension Agency of Georgia.

3. Greece: Implementation of CAF in three units (ICU, Coronary Unit, Transplantation Unit) of LAIKO General Hospital of Athens

4. Hungary: Effective use of QM system; using internal power (an example). Government Office of Capital City Budapest / Labour Department.

5. Poland: Comprehensive knowledge-building system. Social Insurance Institution (II branch in Warsaw)

6. Portugal: Sharing and involvement: the importance of the CAF Education Model. Institute of Social and Political Sciences.

7. Portugal: Sharing and involvement: the importance of the CAF Education Model. Institute of Social and Political Sciences.

Belgium: Human Resources Landscape. College of the Public Prosecutor Support Service

Introductory information

Title of the good practice: Human Resources Landscape

Name of the organisation: Support Service of the Public Prosecutor's Office

City/ country: Belgium

Project manager's/contact person's first and last name: Aline Huin

Email, phone number to the project manager's/contact person's: Aline.Huin@just.fgov.be, +3225574280

Level of organisation/project: national

Sector: justice

How many times the CAF was used?: 2013

ECU label awarded? Indicate years please: 2015

Key words: Process, Management, Human resources, BPM, Digitalisation, GDPR

Executive summary

The careers of members of the judiciary (Courts and tribunals, public prosecution and Court of Cassation) need to meet certain standards. The main aim of this project is to simplify access to information about human resources and career opportunities, but also to centralise the information in a practical tool.

About the organisation

The Support Service of the Public Prosecutor's Office is a high-quality centre of expertise that provides full support, in terms of both management and criminal policy, to the Colleges, Councils and networks of expertise, on the one hand, and to the Public Prosecution office's, on the other. The Support Service can be contacted to examine legal and criminological issues and to answer questions relating to the budget, personnel, IT, etc. Its staff are also active in the field, supporting pilot projects and change processes in criminal policy and management.

Quality improvement aspects

The objectives were to simplify access to career information for judicial staff and the judiciary.

We also wanted greater transparency in human resources processes, which can sometimes seem rather obscure and slow to people outside the profession.

Moreover, we wanted to have an authentic, regularly updated single source of career data available in one place.

Subsequently, we were also asked to write up the complex processes so that the stakeholders knew exactly what was going on and what they had to do.

In the second part of the project, we're also going to include the RGPD so that we can have all the points of attention where personal data is processed.

In the third phase of the project, we're going to focus on job and role descriptions to help with recruitment advertisements, but also to help with the drafting of objectives for staff appraisals.

Stakeholders and communication

The main person responsible for the project is the Support Service of the Public Prosecutor's Office, as it is responsible for its conception and design. However, after reflection and various meetings, it became clear that it would be worth extending the project to the entire judicial system, as the careers are the same for the courts and tribunals and the courts of cassation. The Federal public service of Justice will also be involved, as they also manage part of the processes. As a result, the Courts and Tribunals Support Service, Support Service of the Court of Cassation and FPS Justicehave been included in the project.

The project should be supported by the Human Resources management team common to the judiciary and will also have a sponsor in the College of the Public Prosecution. The project is currently being led by a business analyst from the Support Service Public Prosecutor's Office.

At present, the initiative has been communicated internally (at the level of the support service) via a Kick-off meeting and also a presentation meeting at the level of the HR management team. When the project will be more advanced, it will be communicated to the field via the various channels available to us.

Employees will be involved in the project, because we don't just need HR specialists, but also people on the ground, so that we can better target their demands and expectations. The teams for the working groups will therefore be cross-functional and bilingual.

As part of this project, we have the support of a BOSA expert from the FPS BOSA (strategy and support), and we will be using consultancy (IMendos) for the technical side of the software that is currently being used.

Implementation process/approach

To begin the project, an outline presentation was first given internally to management and then to the national human resources department.

Once the latter had agreed to continue with the project, a vision note was drawn up, setting out the main stages, objectives and expectations. It will now be presented to the various colleges for approval, as well as to the various departments.

Following this, a steering group will be set up, including representatives of the various stakeholders, which will be responsible for defining the various strategic and political objectives, validating the processes and to whom the various working groups will report.

Once the working group has been set up, a national communication campaign will be launched via various channels to inform people about the project and issue a call for applications for representatives from all levels and both national languages, as well as experts on the subject.

With the various participants, we will set up working groups on the different subjects to be tackled and thus map out the processes. A schedule with objectives and deadlines will be put in place, with regular tollgate meetings to check that everything is going in the right direction and to see if any adjustments need to be made.

After each cycle, the processes will be validated at national level and made available to staff members. The various communication departments will be involved in this process.

The tool currently being considered is 'OMPilot', which is the Public Prosecutions tool for process management. This tool is under a justice contract and the courts and tribunals are also considering its use. OMPilot is built on ARIS software, with which we have been working for a number of years and in which we have a certain amount of expertise. The processes are modelled using BPMN 2.0.

The Public Prosecutor's Office has been working on process management and process modelling for the past ten years. Our entry point is the quality model for the Public Prosecution, which is the entry point of our OMPilot site.

Quality model

Starting from there, we have created a general architecture covering the criminal and civil proceedings, which are our core business. Several hundred processes have already been described in these areas.
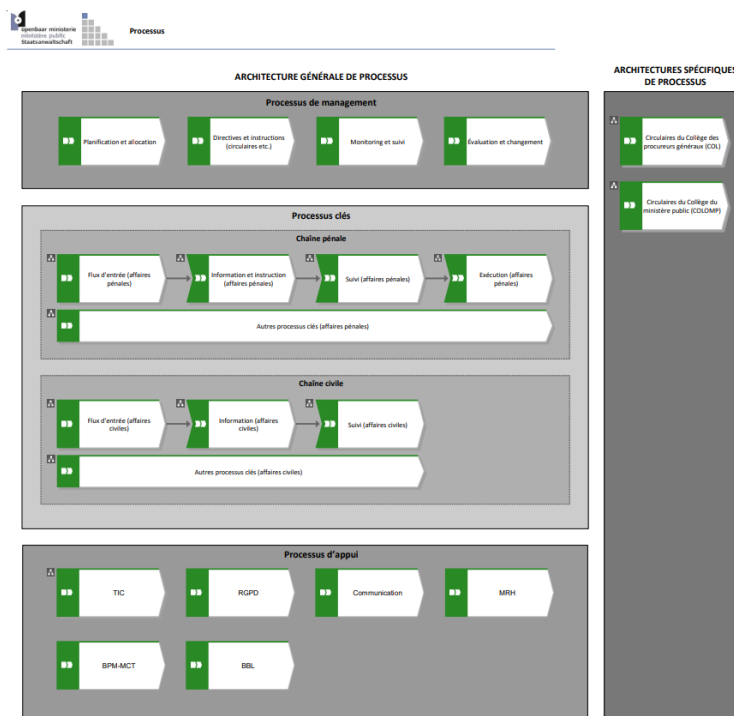

General architecture

To carry out this work, we usually work with bilingual national groups, depending on the subject, under the supervision of a steering group and the College of the Public Prosecution.
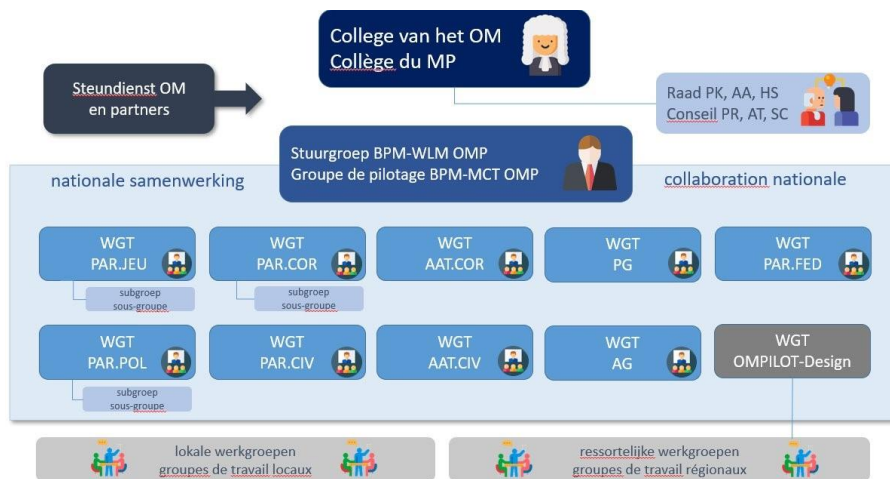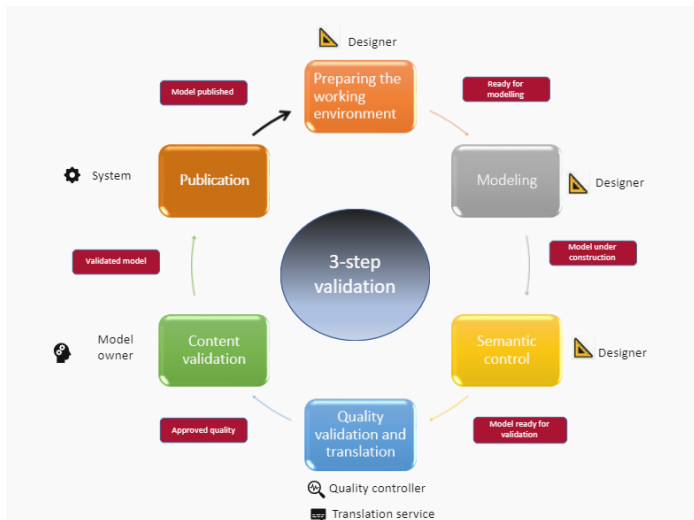
Organization workgroups

We have implemented a process lifecycle to ensure greater transparency and a better understanding on the part of the field and participants on our work.
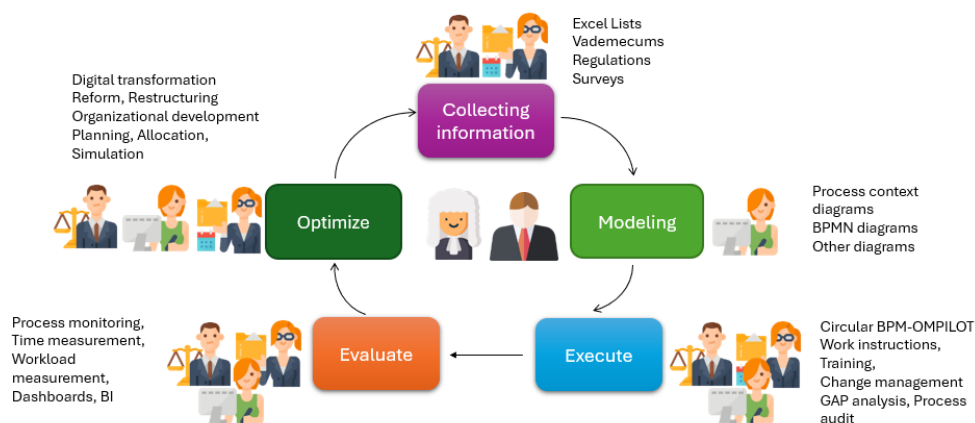
Life cycle

We have also set up a validation cycle to ensure that all stages are clear and respected, and that everyone understands their role.
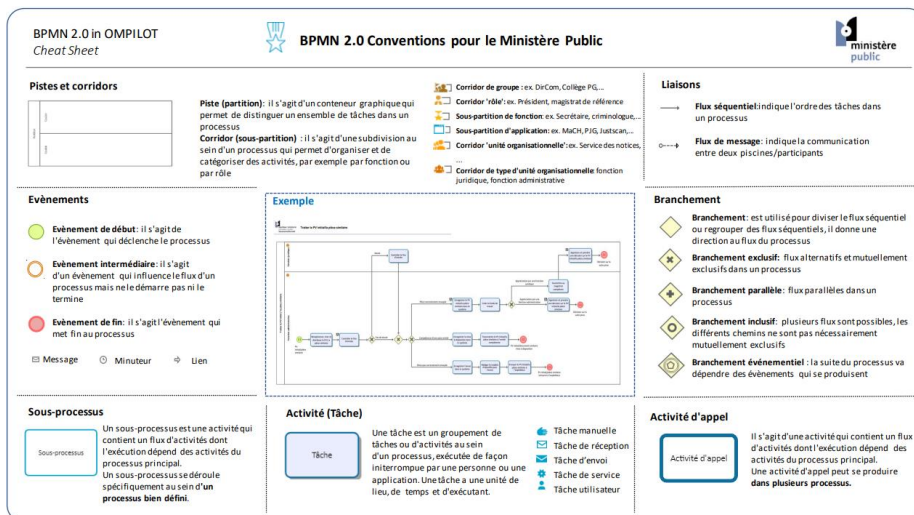
3-step validation

In addition to the process, we have a process context, which serves as an identity card for the process.
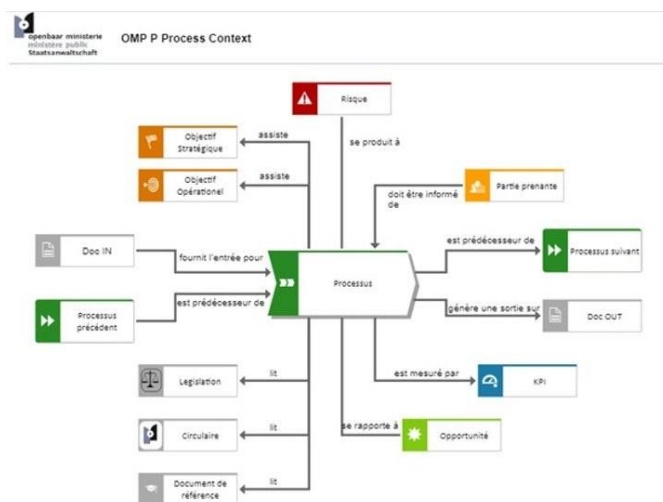
Process context

To help our employees, we've created explanatory posters (cheat sheets) with our conventions regarding the different objects used in each type of model during modeling.

Cheat Sheet

We've also created a glossary, a user guide, and an abbreviations guide. All of this is available on a SharePoint platform.

To keep staff members informed, lists of all processes, along with their status, validity, and other information, such as a link to the published version in OMPilot, are available on the national intranet.

The processes already designed serve as the basis for several projects, such as workload measurement, risk analysis, and the implementation of control measures.

The human resources landscape is a multi-year project, and we are not yet sufficiently advanced in our planning to foresee the additional costs that this could entail.

One of the main challenges has been the approval and launch of the project, as we've had to get a lot of people on board before we could go ahead. The bilingual nature of the project, even though it's commonplace in our country, doesn't make things any easier either, and we have to manage to maintain a balance at meetings where, to make things easier, everyone speaks their own language.
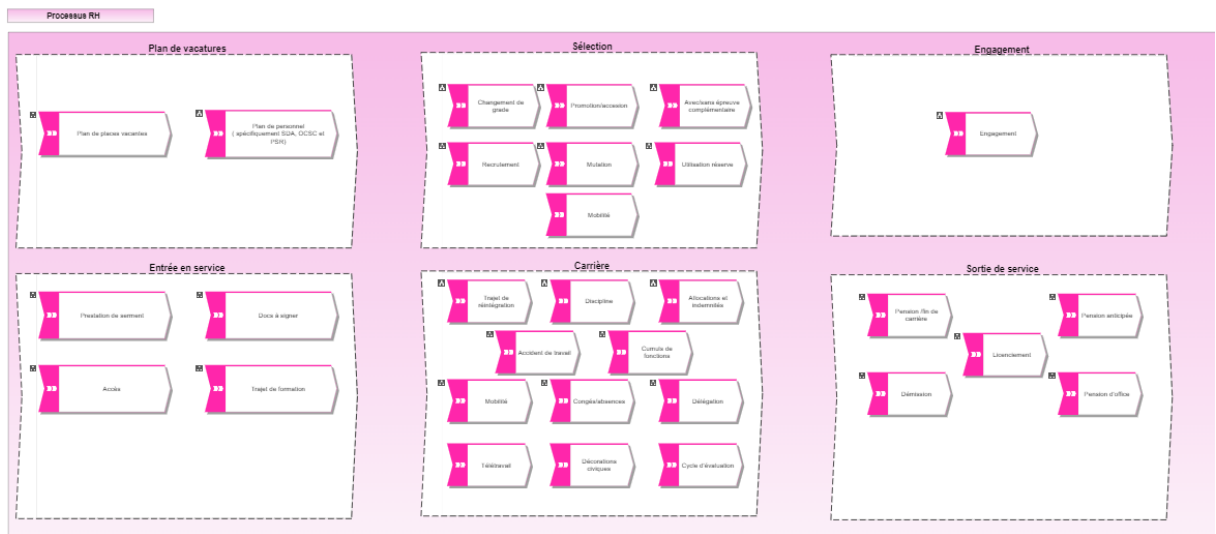
Level 1 of the Human resources landscape
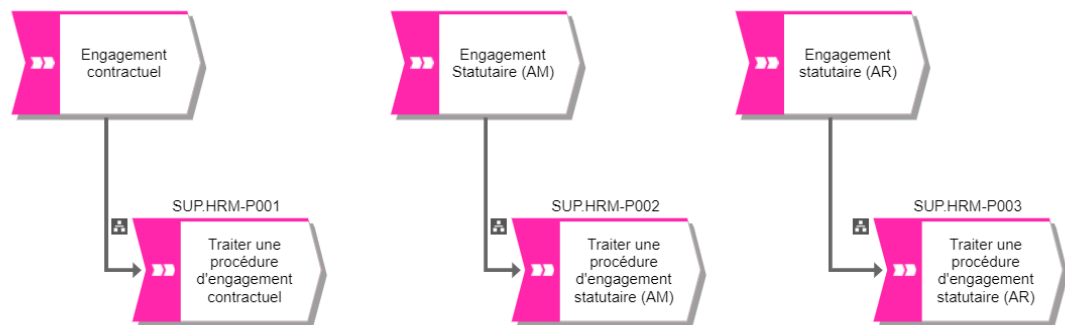
Example of level 2

Success Measurement . Main results with regards to the focus area

The main improvement will be the centralisation and accessibility of career and human resources information's. The level of employee satisfaction can be measured via a national survey; it will also be possible to use dashboarding to see what consultations are taking place and which processes are most in demand. There should also be a reduction in the number of requests and questions addressed to the human resources departments.

It will also be easier to adapt to changes in legislation, as we will be using copies of 'legislation' objects in the models, which will enable us to find all the processes concerned in a single search.

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The essence of the innovation and the transferability of the solutions introduced

This project will help to clarify the different stages of a career, from the creation of job vacancy until retirement, and all the related possibilities. It also provides greater transparency in human resources management.

What may be innovative here is the type of representation that has been chosen, with modelling processes in BPMN 2.0.

The project is entirely transferable to other institutions, as the high-level stages of a career are often the same, but the level of granularity required and the specific characteristics of each institution need to be taken into account.

Lessons learnt

The importance of management support in project launch. It is vital that the hierarchy accompanies the development of the project and advocates it in front of the different stakeholders as well as during the presentation of the project to the staff.

The support of field staff and their participation are really very important if the objectives are to be achieved. Without their input, the development of the tool will not correspond to the reality in the field and their needs.

You have to have a lot of patience and courage to develop this type of project, especially at the beginning. You have to take your time and go step by step, even if it means reducing the scope first so that you can develop it better later on.

Georgia: Workflow automation and digital transformation through information sharing and engagement of the employers. Pension Agency of Georgia.

Introductory information

Title of the good practice: Workflow automation and digital transformation through information sharing and engagement of the employers

Name of the organisation: Pension Agency of Georgia

City/country: Tbilisi / Georgia

Project manager's/contact person's first and last name: Ana Kekelidze

Email, phone number to the project manager's/contact person's:
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Level of organisation/project: national

Sector: administration, employment, economy and finances

How many times the CAF was used? Indicate years please: 1

ECU label awarded? Indicate years please: 1

Key words: Digital transformation, involvement of employers, automated process, refinement of existing processes

Executive summary

For the purposes of self-assessment and quality improvement, Common Assessment Framework (CAF) was introduced in Pension Agency of Georgia. Self-assessment process clarified the need for further simplification/optimisation of operating procedures/instruments for employers throughout Georgia submitting pension declarations. Therefore, holistic approach led to workflow automation and digital transformation in accordance with the best interests of the Pension Agency beneficiaries.

About the organization

In 2018, on the basis of the [Law of Georgia on Funded Pension](#) (hereinafter referred to as the "Law"), Georgia laid ground for the pension reform by establishing the defined contribution mandatory funded pension scheme (the "Pension Scheme"). Under the Law, the Pension Scheme is administered and managed by the independent legal entity of public law – the Pension Agency (hereinafter - the "Agency"). The Agency manages and invests the pension assets within the Pension Scheme, in accordance with the best interests of the participants of the Pension Scheme, in full compliance with the requirements and limitations envisaged by the Law and the Investment Policy Document.

The Pension Scheme represents the Pillar 2 of the pension system and participation is mandatory with some voluntary components. Every participant of the Pension Scheme contributes 2% of gross income and the employer and the state are obliged to make matching contributions, except for the exceptions envisaged by the Law in terms of the pension contributions of the state. Pension assets are being invested in three different investment portfolios for the purposes of maximizing real return over the investment horizon.

Quality improvement aspects

Before implementing the project, employers were making contributions in favour of the employees through submission of pension declarations not later than 5 business days after payment of salary or any compensation defined as a salary income by the Tax Code of Georgia, in accordance with the procedure defined by the Pension Agency.

However, the process of submission of pension declarations by the employers often led to difficulties with regard to violation of terms envisaged thereof, and inaccuracies in submitted data, which in turn, had a negative impact on the pension assets of the beneficiaries. Furthermore, employers considered the process related to submission of pension declarations slightly complicated, which in turn, caused dissimilarities compared to data presented to various tax authorities.

In order to further streamline the processes, the Agency recognized the critical importance of simplification of declaration submission process for the employers, which would follow the new trends and cover innovative elements. For this reason and taking into consideration the Action Plan prescribed by the self-assessment group, the representatives of the Pension Agency conducted various surveys within the target audience, held working meetings, online workshops and awareness raising campaigns for the employers throughout the territory of Georgia, shared information and received feedback on how to better simplify the overall workflow.

Through the active involvement of the employers throughout the country within the co-creation process, innovative approach was developed. In particular, the amendments

were made to the Law of Georgia on Funded Pensions (which shall be enacted from 1 May 2025), which implies automatic calculation of pension contributions, based on the income declaration submitted by the employer to the tax authorities operating on the territory of Georgia, i.e., the employer shall no longer be entitled to submit additional pension declaration and only transfers the sum of a pension contribution to the related account of the Pension Fund in the amount of 2% of gross income of the employee.

Stakeholders and communication

Innovative solutions and projects quite often bring together different stakeholders with similar thematic and functional elements, creating opportunities for mobilising joint efforts. Cooperation that is structured and emerging synergies in this regard, lead to fruitful outcomes. It should be mentioned, that within the framework of the self-assessment group, one of the priorities out of 10 long-term activities, envisaged identification of the target audience of the Pension Agency, i.e. the employers, and sharing information and raising awareness thereof. This approach was strengthened by the Action Plan prescribed by the members of the self-assessment group, within the various meeting formats. Based on the proper communication with different stakeholders and target audience, enhancement of interagency cooperation and smooth exchange of relevant information, modern and user-friendly solutions were designed.

Implementation process/approach

Pension Agency constantly strives to assess processes and identify the need for further refinement and development of existing mechanisms. In addition, one of the priorities is to ensure compliance of such processes with best practices and international standards. Taking into consideration the abovementioned, Pension Agency was one of the first public agencies in Georgia to express its readiness to introduce Common Assessment Framework. Therefore, the Agency demonstrated its willingness once again to design services tailored to the needs of beneficiaries of the Pension Scheme as well as increase accessibility and quality in this regard.

Since the Agency had deep understanding regarding the significance of introducing the CAF model, the decision was made to compose CAF self-assessment group with the employees from every-level to leadership positions. Self-assessment group was composed of representatives from every structural unit of the Agency, including top-level management facilitating the co-decision-making process.

Performance analysis conducted by the CAF self-assessment group further clarified that there were still challenges to overcome. Therefore, priorities were identified and activities related to improvement of existing processes were envisaged in the form of the Action Plan. Overall, 5 Quick Wins and 10 long-terms activities have been highlighted and implemented.

Prior to commencing the work, self-assessment group was delivered exhaustive information through appropriate communication channels and afterwords, views and positions were reconciled within the framework of consensus meetings.

Under the assessment, one of the long-term activities implied raising the awareness of employers, engaged in the Pension Scheme. The scope of the activity covered the issues related to open discussions regarding simplification of the services, as well as sharing of information regarding the change in the process/regulation to be delivered in advance.

Self-assessment group identified the need for simplification of process of submission of pension declarations by the employers, making contributions in favour of employees; thus, it would also minimize the risks related to inaccurate and / or late submission of data related to contributions, which would itself translate into one of the key deliverables of the activity.

Taking into consideration the activities prescribed by the self-assessment group, representatives, including the high-level managers from the Pension Agency, organized various meetings with the target audience, i.e. the employers throughout the country. Such direct engagement of the employers in the working process, led to development of services tailored to their needs. Furthermore, transparency and exchange of information set the stage for further enhancement of active cooperation and joint actions with the counterpart authorities.

Success Measurement

Pension Agency recognizes the key importance of CAF and believes that this is the holistic mechanism, which along with the quality assurance, implies employee as well as customer satisfaction, which is the backbone of organizational effectiveness.

It should be highlighted that self-assessment led to tangible effects, which was reflected in following directions: a) strengthening and digitalization of the internal operating procedures and instruments at organizational level; b) automated exchange of information and enhancing cooperation/communication with the counterpart agencies and stakeholders; c) active communication and exchange of information with the beneficiaries of the Pension Scheme.

At the organizational level, it should be emphasized that the activities identified by the self-assessment group were further reflected in the Institutional Development Strategy of the Pension Agency.

Indeed, through the active involvement of the employers throughout the country within the co-creation process, innovative solutions were developed., i.e., exchange of information and active engagement of the employers formed a basis for digital transformation and workflow automation.

In terms of legal instruments, amendments were made to the Law of Georgia on Funded Pensions (relevant paragraphs shall be enacted from 1 May 2025) and applicable regulations. Such legal framework covers the overall workflow, as well as refers to the process of monitoring and supervision of the accuracy and completeness of each action. Moreover, for the purposes of full automation of the process related to making contributions by the employers, special software was developed by the Pension Agency team. Such software tracks all the progress, activities, as well as monitors and measures all the results thereof. Furthermore, via individual electronic platform, all the employers are having the possibility to submit online applications regarding the issues of their interest remotely, and/or receive alerts, notifications, messages or other significant work-related information on their individual platform.

It should be highlighted that the proper and strong monitoring mechanism forms the solid ground for continuous cycle of improvement and development.

The essence of the innovation and the transferability of the solutions introduced

The project, with its nature, can be considered as a valuable example when it clarifies the innovative approach driving the real change. Processes that were deemed to be standardized, were refined due to proper self-assessment and interaction with beneficiaries leading to simple technological solutions. It can be envisaged as a solution with the replicable elements delivering meaningful insights, which can be translated into diverse possibilities striving for excellence. Self-assessment, identification of priorities bearing in mind the long-term vision, engagement of beneficiaries, co-creation of technical solutions, enhancement of cooperation, adjustability, etc, can be regarded as the key reasons for various institutions to take into consideration.

Any organisation focused on improvement and organizational effectiveness may benefit from the experience that is gained within the framework of the implementation of the above-mentioned project. Full-scale PDCA cycle can be offered as a method for designing and managing relevant services which relies on better performance and service delivery.

First of all, it should be highlighted that within the context of introduction of accurate self-assessment, which is offered by CAF model and covers comprehensive assessment process, the elements of the project can be transferred to various institutions dedicated to meeting individual requirements and needs: in particular, the overall planning process, which implies assessment of the institution from various prospectives, identification of emerging challenges, comprehensive analysis of the opportunities to maximize the application of digital solutions to all relevant and appropriate actions/processes and moreover, issues related to data management and integration can be considered as one of the factors that may be transferred as well. Ultimately, any valuable element related to the change management can be shared to interested

institution, which in turn shall save its resources, time, and contribute to the success of their project.

It should be emphasized, that one of the factors having core and most valuable effect was the quality assessment technique which is offered by CAF model. Alignment with the main structure of this model, which covers 9 criteria, and 28 sub-criteria enables proper performance analysis and presenting a situation with a wide projection, from various angles, which itself ensures organizational effectiveness. Such simple, but holistic approach at the same time, leads to proper planning and development of further organizational strategy, covering all the processes and resources.

Furthermore, gained experience clarifies, that almost all the elements, both tangible as well as intangible may be shared with institution striving for better change; this may include, clear and concise communication with stakeholders, mobilisation of joint resources, risk evaluation and management, creativity while using modern technology, building support across parties engaged in the project and lots of other elements.

Therefore, the experience of the project may be used in wide range of situations in various contexts. Such experience may be useful for further project planning process, while refining project management methodologies. Knowledge related to technologies and software solutions may lead to further optimization of workflows. Insights related to proper communication, information sharing, and decision-making process may be valuable in terms of smooth introduction of further innovative approaches. Therefore, projects under efficient self-assessment, management and organizational strategies shall serve as a source driving the permanent improvement.

Lessons learnt

First and foremost, it should be highlighted that for the Pension Agency, CAF represents a tool that, as a result of an in-depth and complex self-assessment of the existing situation, helped the Agency evaluate effectively the activities and improve the quality management system, increase the efficiency of current processes, and deliver existing services with even higher quality, which ultimately represents the necessary foundation for increasing the level of trustworthiness and continuous development of the Agency.

CAF, by its very nature, was new to the Agency, and therefore, during the initial phase of the implementation process, there was slight concern regarding the proper execution of the process. Nevertheless, with the active involvement of the self-assessment group and the joint efforts and dedication of the employees, the expected and effective result was achieved. Through the self-assessment group, which was composed with the representatives from various structural units, the existing situation in various directions of the Agency was assessed with a broad perspective. A clear vision on the overall situation, in turn, contributed to the optimization of processes and resources. In addition to improving the quality of activities and entire performance, CAF as a tool

helps ensure the direct involvement of each employee in the process of making decisions of strategic importance. Furthermore, it also increases motivation and strengthens a sense of unity, which encourages joint pursuit of common objectives. Therefore, CAF is the universal mechanism that, along with increasing the quality of processes, takes care of meeting the needs and expectations of both employees and beneficiaries, which is a guarantee for organizational effectiveness.

It should be emphasized that one of the significant components that needs to be underlined is the clear and straightforward communication and sharing of information with all stakeholders engaged in the process. Engagement of representatives from almost all the structural units of the institution represents a perfect platform for identification of strength and challenges throughout organization, thus making is simpler to define priorities under the common strategic mission and vision. Furthermore, the representatives within the self-assessment group, serve as the "ambassadors" of their relevant structural units who gather feedback and contribute to proper dissemination of information. Therefore, within the process of the assessment every structural unit of the institution can voice their priorities, and within the framework of consensus meetings, agreements are made on those projects/activities, that bring significant benefits to the organization. Moreover, as a result of the assessment of activities with a common projection, such approach eliminates overlapping or duplication of activities within the organization, saves resources and increases effectiveness through optimization.

Similarly, constant assessment and measurement of results based on pre-defined indicators contribute to long-term effects of the improvement. Data-driven evaluation with regards to progress measurement and elimination of hindrances, promotes more efficient performance and delivers valuable insights in terms of launching further projects.

And finally, the significance of creativity and adaptability in the overall implementation process should be underlined as well. Each decision and the way of their execution requires creative thinking, since in the fast-changing world, where everything is constantly changing, creativity leads to further improvements and represents a driving force in terms of innovation and development. It offers indefinite choices that open-up new horizons where we embrace changes for the better.

Greece: Implementation of CAF in three units (ICU, Coronary Unit, Transplantation Unit) of LAIKO General Hospital of Athens

Introductory information

Title of the good practice: The implementation of CAF in 3 specialized units of General Hospital of Athens Laiko.

Name of the organisation: General Hospital of Athens Laiko

City/ country: Athens, Greece

Project manager's/contact person's first and last name: Maria Kourti

Email, phone number to the project manager's/contact person's: nursmak@yahoo.gr,

Level of organisation/project: local

Sector: healthcare/social care

How many times the CAF was used? Indicate years please: 2019

Key words: quality improvement, intensive care unit, coronary unit, transplantation unit

Project Manager: Dr Maria Kourti

Members of the Self-Assessment Team:

-Zougou Theoni, Efstathia Christofilou

-Kidney Transplantation and Nephrology Unit: Artemis

Anagnostopoulou, Dr. Chrysaida Karouni, Maria Darema

-Intensive Care Unit: Dimitra Petraki, Sofia Zagavierou

-Coronary Unit: Georgios Anastasiadis, Dr. Maria Hatzopoulou,

Dimitra Synkouna

Executive summary

The implementation of CAF in the Hospital (Intensive Care, Transplantation and Coronary Unit) was a first attempt to use Quality tools to achieve the implementation of a Total Quality Management System in the organization. The response rate for employees was 31.3% and for patients 100%. The three units documented their operation and published regulations and protocols for daily clinical practice.

About the organisation

The General Hospital "Laiko" is a tertiary hospital. In the hospital, several University Clinics and Laboratories (Medical School of the National and Kapodistrian University of Athens - NKUA) as well as Clinics and Laboratories of the National Health System (NHS) are included.

The Mission of the Hospital is:

• to provide hospital care to every person who comes in need

• to provide care equally (in the sense of severity, which requires that only cases of the same severity are treated equally) and regardless of economic, social, racial, religious or other discrimination.

The objectives of the hospital are:

• to provide primary, secondary and tertiary health care to the population of the 1st Regional Health Directorate of Attica, as well as the patients referred from other Health Regions regardless of their economic, social and professional status, in accordance with the rules of the NHS.

• to provide specialized, continuous education and training of doctors, nurses and other health professionals through the development and implementation of relevant educational programs and the clinical training of students of health care departments.

• to develop and promote research in the health sector.

• to cooperate with hospitals and other health care organizations of the 1st Regional Health Directorate of Attica for the development and upgrading of the provided health care.

• to implement new methods and types of care in order to effectively enhance the health status of citizens.

• to develop procedures that facilitate the strategic goals set by the Ministry of Health, the 1st Regional Health Directorate of Attica and the Board of Directors of the Hospital

The Vision of the hospital is to provide high quality health services to all incoming people, through innovation and the cooperation of its specialized human resources, so that it is recognized by patients, the community and staff for its optimal operation and immediate service.

The Values of the hospital

Ethics: The behavior of each employee is sought to be manifested through ethical practices, such as selflessness, justice, respect for people, etc.

Information: The full and thorough information of patients about their problem is supported.

Support: The support of patients and their families is sought.

Professionalism: The professionalism of employees is promoted and recognized, which stems from the cooperative spirit, organizational logic, trust and mutual respect.

Continuous improvement: to encourage creativity, initiative, innovation, monitoring and continuous self-evaluation of the Hospital's processes and results.

The Management Objectives

The Hospital Management Objectives have 3 dimensions:

A) Universal and equal access to all without discrimination.

B) Provision of quality health services - Design of new services, innovative procedures to enhance the sense of security, safety and reliability of patients and employees.

C) Continuous monitoring of conditions, developments and data with a view to immediate and effective intervention.

To achieve the objectives, basic prerequisites:

A) Supervision and monitoring of financial resources.

B) Continuous monitoring of effective service provision - Documentation of proper adherence to procedures

C) Focus on research and continuing education - key pillars of development and promotion of the Hospital's work

D) Measurement of patient satisfaction

The Hospital has 580 organic beds, of which 542 are developed. The beds are distributed as follows:

-Pathological Department: 200 beds

-A' Surgical Department: 170 beds

-B' Surgical Department: 180 beds

-Intersectional Departments: 30 beds

The **Intensive Care Unit** of the GHA "Laiko" is the first multi-purpose Intensive Care Unit created in Greece. It belongs to the Medical Pathology sector and the 3rd Nursing Sector and consists of 17 hospital beds. Since its establishment, the ICU has operated on the basis of internal regulations that are based on the guidelines of Greek and international scientific bodies. The duties of ICU stuff are described in detail in the internal regulation

and in their job description. In recent years, 12 to 14 of 17 hospital beds are operating, one bed at least is available for liver transplants. The number of beds in the ICU is directly dependent on the number of doctors and nurses who are employed in the ICU. Over the last 10 years, the ICU of GHA "Laiko" has treated an average of 300 patients and 12 liver transplants per year with an average length of stay of 6 to 10 days. The main cases hospitalized in the Intensive Care Unit are acute respiratory failure, acute heart failure cardiac arrest and resuscitation, coma of any kind, shock of any origin, postoperative complications, sepsis, acute renal failure, severe electrolyte and acid-base balance disorders, acute poisoning and pathological or surgical conditions that pose a threat to the patient's life. In recent years, the reduction of airborne infections and the control of infections by multi-resistant microorganisms in a hospital environment has been a challenge, that has led to apply isolation practices, the strict use of personal protective equipment and to the intensification of cleaning protocols for the maximum possible disinfection of the hospital areas and the medical equipment to optimize the results. These measures require an interdisciplinary approach that includes the cooperation of the medical and nursing staff, the auxiliary and the cleaning crew.

The **Renal Transplant Unit** is one of the leading transplant centers in Greece. The Unit has 30 beds, including 26 in the clinic and 4 in the High Dependency Unit (HDU), specially designed for high-risk patients. Its clinical work includes:
• Performing kidney transplants from both living (two kidney transplants from a living donor are performed per week) and deceased donors
• Postoperative monitoring of kidney and liver transplant patients, detecting potential complications and managing graft rejection
• Treatment of transplanted patients for infections and other medical reasons

• Evaluation and preparation of transplant candidates with thorough clinical and laboratory assessments

• Donor management and transplant coordination in collaboration with the Hellenic Transplant Organization (HTO)

• Surgical procedures for renal patients, including vascular access creation for hemodialysis or general surgical interventions

The Unit accepts emergency cases through the Emergency Department (ED), while scheduled admissions involve diagnostic tests, therapeutic interventions, and routine follow-ups for transplant patients.

The Renal Transplantation Unit at "LAIKO" is the leading center for kidney transplantation in Greece, making significant contributions by:

• Improving the quality of life for renal patients through transplantation

• Increasing the number of transplants, addressing the growing needs of patients

• Developing protocols and therapeutic approaches for managing transplant patients

• Raising public awareness about organ donation and enhancing transplant activity in the country

The **Coronary Unit** consists of 7 hospital beds. There is a significant collaboration of medical, nursing, dietitian, and administrative staff and they provide high quality health care to patients. At the specific unit, there are about 350 patients' admissions per year. The main goal of the unit is to provide care to patients with heart failure and in need for vital support in order to recover from the main disorder independently the primary disease and improve their quality of life in the future. The main cases hospitalized in this unit are patients suffered from various cardiac diseases such as acute coronary syndrome, acute pulmonary edema, heart failure, pulmonary embolism, disorder of cardiac rhythm, inflammatory hearth diseases, cardiac valve disorder, toxic dactylitis, pulmonary infections and cardiac diseases or patients after a successful resuscitation. The provided care, also, refers to patients after invasive interventions such as **pacemaker implantation** (permanent or temporary), cardiac c**atheterization**, angioplasty or stenting, pericardiocentesis, with intraaortic balloon pump.

Implementation process/approach

The principles of self-assessment through the CAF were implemented, following a relevant decision by the Hospital Administration, which responded positively to the relevant request of the Intensive Care, the Coronary and the Kidney Transplantation Unit of the hospital. For the implementation of the CAF in the specific Units, the procedure from CAF implementation "Guide" was followed. The first step was the formulation of a Project Team - Self-Assessment Team, with representation from the three units. The team comprised from a Project Manager, Dr. Maria Kourti and 9 Members who was Efstathia Christofilou (RN, MSc, Head of Nursing Sector), Artemis Anagnostopoulou (Head Nurse), Dr. Chrysaida Karouni (RN), Maria Darema (MD) from Kidney Transplantation Unit, Dimitra Petraki (Head Nurse, MSc), Sofia Zagavierou (RN, MSc) from Intensive Care Unit and Georgios Anastasiadis (MD), Dr. Maria Chatzopoulou (Head Nurse), Dimitra Sygkouna (RN, MSc) from Coranary Unit.

Then, the Project Team scheduled a meeting at 16/10/2019 with the Deputy Director of the Hospital, Ms. Adamantia Englezopoulou, who had previous experience in the implementation of the CAF in 2 other Hospitals, in order to be a counselor and facilitator during the implementation process. In this meeting, all the issues and the subsequent steps were discussed and also the adaptation of the questionnaire to the language of the Hospital was implemented. In this meeting, the required actions and the timetable for their implementation were determined. They agreed that health professionals working (medical and nursing staff) in the Units, the patients or significant others and

social organizations, related to the Hospital. will participate in the self-assessment process.

On 31/10/2019, a second meeting of the project team was held at the Hospital Administration Office. In this meeting, the executives of the Quality and Standards Department from the Ministry of Interior, who are responsible for the implementation of the CAF in Greece, were also participated in the presence of the Deputy Administrator. A detailed presentation of the quality "tool" was made to the project team and more specifically, the new method of distributing and collecting questionnaires was presented, via the Ministry's electronic platform, which replaced the old method of distributing them in printed form.

Then, a formal document (15853/04-11-2019) was communicated to the Directors and Head Nurses of the three participating units of the Hospital. The document referred to the Scope of Application (Coronary Unit, Intensive Care Unit, Kidney Transplantation Unit), the aim and purpose, the basic principles governing the Common Assessment Framework and the structure of the nine (9) evaluation criteria and their 28 sub-criteria. It was clarified that the first four (4) criteria (Prerequisites) and the fifth (Procedures) concerned the way the Hospital is organized and operated and the next four (4) (Results) were related to the measurement of the effectiveness of the Organization.

It was determined that criteria 1 to 5 (and all sub-criteria), criterion 6 (only sub-criterion 6.2), and criteria 7 and 9 will be completed by Hospital employees (employees within the Units and employees in support services), sub-criterion 6.1. will be completed by patients or significant others and criterion 8 will be completed by social agencies that collaborate with the Hospital (Police Department, Fire Station, Academic departments, Local Government Social Services). The questionnaires were sent to the participating employees and social organizations, only through the electronic platform of the Ministry of Administrative Reconstruction. The questionnaires with subcriterion 6.1 were distributed to the patients/relatives/relatives/accompanists, by the Head Nurses of the involved Units. The time period for completing the questionnaires was set as 11-30/11/2019.

The response/participation rate was:

A) for employees at 31.3% (46/147 employees).

B) for patients/family/companions/relatives at 100% (44/44)

C) for social institutions 0% (0/4)

The Project Team requested an extension of the time for submitting the self-assessment report, for technical reasons, and the Hospital Administration, approved an extension of one (1) month, in order to complete the implementation of the CPA and to prepare the relevant evaluation and improvement report (19143/27-12-2019).

There was no external economic cost of the project. All the involved employees participated during their working hours. Only the questionnaires for the patients/SO were printed. The statistical analysis was done through the platform of CAF and the final review was written by the project manager, the facilitator and the team.

The implementation of CAF was difficult, mostly due to the completion of questionnaires. The personnel are aged and some of them had major difficulties to complete them. So, the head researchers had to help them with this process. The patients had the same problem, so the questionnaire was printed and was completed by hand writing. The major problem was the generality of the questions' context which made difficult to the employees to understand their meaning and answer them.

The self-evaluation process showed that the Hospital is in planning and implementation phase of the administrative procedures. The results, obtained from the evaluation of the procedures, that they are already implemented, show the success in some of the goals that have been set and the undertaking of improvement actions in some of them.

The implementation of CAF in our Hospital was a first attempt to use Quality tools to achieve the implementation of a Total Quality Management System in the organization. We hope that this effort will be the first step of self-evaluation and improvement of our Hospital, with the ultimate goal of improving the provision of health services to our citizens/customers.

The COVID pandemic was a reluctant factor for the implementation of CAF during 2020-2024, but now we are looking forward to apply the CAF again.

Success Measurement . Main results with regards to the focus area

The project team used the SWOT ANALYSIS to describe the present situation.

STRENGTHS

Hospital Size: Allows easy navigation of information, changes according to needs, to grow when opportunities arise and to maintain a sense of community (family environment in the staff-patient relationship).

Location: The Hospital is located almost in the Center of Athens and is near to many other large and small Hospitals.

Reputation: It is one of the largest Hospitals in the country not so much for the size in beds, but for the science and specialization it has national and international recognition due to the cooperation with Medical department of University of Athens.

Management/Leadership: It has a clear vision for the future and is committed to achieving new goals, responding to modern challenges.

Human Resources: High-level executives and staff, friendly, cooperative, with team spirit, Capabilities, Skills-Commitment to goals for development and improvement of the services provided.

Personnel Health and Safety: staff locker rooms are available, good climatic conditions, staff areas are separate from patient wards, readiness exercises are conducted on a regular basis (every month), fire extinguishing/fire safety equipment is available, Personal Protective Equipment is available.

Structures and Facilities: Modern facilities (renovation of all facilities), Signage (overall and per floor), Regular Maintenance of E/M and building facilities.

Research: Most of the research activity in the health sector is carried out in the country.

Education: Educates future doctors and future nurses. Has a Continuing Education program

Pilot Hospital: in new programs that are to be implemented in all Health Units of the country (GR DRGs, PRINCE, etc.)

Distinctive approach to care: Has thirteen (13) recognized National Centers of Expertise for Rare and Complex Diseases, manages a large portion of hematological/oncological patients, is a Kidney and Liver Transplant Center, performs surgeries unique in Greece (perhaps in Europe), specialized pathological specialties, specialized diagnostic services.

Quality of care: Provides excellent care to patients.

Access to care: Wide range of services, Participates in the on-call program of the Hospitals of the Attica Basin

Equality in service provision: Emphasis on inequalities in the health sector, staff has skills to communicate with foreign-speaking patients.

Patient-centered approach: Support for the views of patient associations, direct communication and cooperation with patients, participation in public health assurance programs.

Sound Financial Management: cost containment policy, monitoring budget codes-Performing internal audits.

WEAKNESSES

- Insufficient Staffing: staff reinforcement is required in all specialties
- Evaluation: Insufficient methods for monitoring the achievement of targets.
- Communication: Insufficient communication between staff of different Services.
- Resources: Need to recruit staff, insufficient funding

- Information and Communication Technologies: Insufficient use of the New Information System
- Equipment: inability to replace outdated equipment (medical technology, hotel)
- Patient service: Delays due to the joint operation in the morning hours of emergencies and regular cases.
- Hospital Duty: Not on duty with a Hospital that has several pathological beds, resulting in pathological cases piling up in the Emergency Department and developing auxiliary beds
- Staff car parking: no space is available for all staff vehicles - from 01/09/2019, approximately 200 spaces allocated by the Medical School were abolished.

OPPORTUNITIES

Sources of funding: from European programs, from donations, from the Public Investment Program

Scientific Achievements: Application of new technologies, patient access to new drugs

- Collaborations: with academic departments, with European organizations
- Promotion of extroversion: highlighting and informing/notifying Hospital achievements - dissemination of good practices

THREATS-RISKS-CHALLENGES

- Financial Resources: Reduced state subsidy-Economic Recession-Economic pressures
- Personnel: Lack of mainly Nursing Staff – reinforcement only of auxiliary staff (retires in a specific period of time)
- Professional fatigue: mainly due to the "aging" of staff
- Uninsured: high number of uninsured-Loss of income

Also, the project team analyzed the data from the completed questionnaires and below the main results are presented. The sub-criteria of each criterion are scored on a scale from 0 to 5, depending on the maturity level. That is:

0 = no evidence or only symptomatic evidence of an Action Plan

1 = Action Plan is planned

2 = Action Plan is planned and implemented

3 = Action Plan is planned, implemented and reviewed

4 = Action Plan is planned, implemented and reviewed based on benchmark data and oriented accordingly

5 = Action Plan is planned, implemented, reviewed based on benchmark data, adapted and fully integrated into the organization.

At the criterion 9, which concerned the main performance results of the organization, the participants answered to questions about what the public organization had achieved, related to its institutionalized mandate and its predetermined objectives as well as in satisfying the needs and expectations of those who have a financial interest in it or others participating in the public organization.

SUB-CRITERION 9.1: Assessment of the results achieved by the Organization in relation to external performance: outputs and results in objectives

The score was 2.17. The Hospital Administration   has communicated to the Directors of the three Services (Medical, Nursing and Administrative) the Organization's objectives for the years 2019-2020, which are harmonized with the objectives of the Ministry of Health. The Directorates of the services were also requested to submit relevant suggestions regarding the available resources, the implemented and ongoing actions of their Service, as well as the general planning in their area of responsibility/competence. The LAIKO General Hospital has succeeded in realizing its mission and vision as well as in implementing its objectives to a large extent, since it has achieved the uninterrupted provision of hospital care to every person who needs it, without discrimination and despite the difficult conditions under which all staff work (small number of employees, increased number of admissions, increased volume of hospitalized patients, limited financial resources, etc.). The Hospital always tries to improve its services provided, through feedback of the information it receives from citizens, as well as through satisfaction surveys. To this end, the implementation of innovations is also carried out, at the level that is feasible (e.g. creation of Expertise Centers,) as well as the extensive use of ICT with upgrading of information equipment.

The Organization operation is based on the annual approved financial budget, within specific credit limits. Due to the economic crisis, the budgets of all Hospitals have been limited and the requirement is to cover their basic needs. Based on the respective objectives, appropriate priority is given. In cases where necessary, amendments may be made to the initial budget. The Hospital is subject to internal and external audits. Regular and extraordinary management audits are carried out by the Internal Auditor of a private company, by certified accountants (for closing the balance sheets) and by the Health and Welfare Services Inspectorate (intervenes in the event of administrative omissions or errors). Their findings are evaluated, confirming the good or bad functioning of the Organization. The Hospital is required to submit monthly operational and financial data through electronic databases (B.I). Also, annually the closing of the balance sheets (by certified accountants) is published in the "Diavgeia" system and is sent to the 1st Ministry of Health, the Ministry of Health and the General Accounting Office of the State. Finally, no comparative measurement results with other bodies were found.

CRITERION 9.2: Assessment of the results achieved by the Organization in relation to internal performance: level of efficiency

The sub-criterion score was 2.8. The Management bodies of the Organization are the Director and the Deputy Director. Decisions on important issues of its operation are taken in the Board of Directors, which meets once a week. The Board of Directors has seven members and two employees of the Hospital participate in it, through their elected representatives, who actively participate in the decision-making process. Three representatives of the Ministry of Health, which is the governing authority of the Hospital, also participate. In this way, democracy and transparency are ensured during the decision-making process. The satisfaction of the bodies involved in the operation of the Organization is not evaluated, as there are no relevant measurement indicators. An attempt was made through the CAF process, by distributing questionnaires, but the bodies involved did not respond. The organization collaborates with other public organizations, private individuals and social organizations, with the exchange of knowledge being considered productive on both sides. However, the procedures of its administrative functions are not recorded, as a result of which controls and improvement actions are impossible. Despite this, the Hospital is governed by satisfactory functions that ensure its smooth operation. The technological applications of information technology and communications contribute to the efficiency and effectiveness of the Organization, through the improvement of the control and monitoring capabilities of its daily operation. However, there is room for improvement, with the universal participation of all procedures in the Hospital's NPS (e.g. creation of an electronic protocol). The annual approved budget is executed by the Organization, however, due to emergency needs and expenses that arise, it often needs amendments. In addition to the state budget, an additional source of income for the Hospital are the revenues from its morning and all-day operation. The costing of the services provided by the Organization is based on published Official Gazettes, which apply to all public hospitals. The participation of the insured is zero for prescribed examination referrals, while some services of the Hospital are not covered by public insurance agency or other insurance funds. The operation of the Hospital, as well as the coverage of the financial requirements of its involved entities (e.g. staff salaries, suppliers' - partners' salaries, etc.) is based on the state budget, as well as on the income generated by its morning and all-day operation. The Hospital tries to maintain a balance between the available resources and the needs that it must satisfy. In this process, the internal, financial audits that are carried out are also useful, which assess possible financial risks and propose improvement measures. Of course, a main obstacle to the Hospital's income are the debts from the insurance funds and, according to the public insurance agency.

The essence of the innovation and the transferability of the solutions introduced

The implementation of CAF had as result to propose main actions that the Hospital must take, in order to improve its performance, considering the basic principles of Total Quality Management.

The main actions for improvement are:

CRITERION 1: LEADERSHIP

- Review mission, visions, values goals and communicate them to all employees
- Identify and define priorities for the necessary changes in the structure, performance and administration of the Hospital, for which all staff of the institution will be informed
- Encourage staff to submit proposals for improving the operation of the Hospital

CRITERION 2: STRATEGY AND PLANNING

- Systematic collection of information on the performance of the Hospital
- Development of job descriptions where the tasks will be adequately and clearly defined, so that they can be correlated with the results produced.

CRITERION 3: HUMAN RESOURCES

- Regular analysis of current and future human resources needs, taking into account the needs and expectations of the parties involved and the Hospital's strategy.
- Development and promotion of employee training in their workplace and/or online education, taking into account the cost-benefit ratio.
- Conducting staff satisfaction surveys with working conditions and the administrative operation of the Hospital.

CRITERION 4: COLLABORATION AND RESOURCES

- Systematic recording and monitoring of documentation data regarding the results of the Hospital's collaborations with its partners.
- Protocols for cooperation with Hospitals of the 1st Ministry of Health to cover clinical and laboratory examinations of the Hospital's patients, assessment of patients by other specialties (e.g. neurosurgeon, thoracic surgeon, etc.), as well as periodic movement of employees for the exchange of good practices. citizen participation in the decision-making process concerning its operation
- Expanding the electronic ordering system for all examinations, both for inpatients and outpatients (e.g. patients of the Hospital's Department of Special Infections), with a security protocol based on the new EU Regulation on the Protection of Personal Data (GDPR) that has come into force

- Electronic movement of documents within the Hospital, via an electronic protocol.
- Implementation of a digital signature for service executives
- Saving parking spaces
- Renovation of other clinics and areas (e.g. Heart Attack Unit, Administrative Service Offices)

CRITERION 5: PROCEDURES

- Detailed recording of all procedures that concerned the scope of the Hospital's responsibilities, especially those related to the provision of services to citizens.
- Drafting of Internal Operating Regulations for all Departments of the Hospital and recording of the basic responsibilities/procedures that must be followed initially at the level of the service unit and later per job position.
- Completely updated electronic patient medical record

CRITERION 6: CITIZEN/CUSTOMER-ORIENTED RESULTS

- More systematic distribution and collection of citizen satisfaction measurement questionnaires and use of tools to capture it (e.g. satisfaction index per department and its notification).
- Definition and systematic measurement of indicators that concern the image of the Hospital to the public, the utilization of proposals and the exploitation of new technologies.
- Adoption of general and specific indicators for measuring effectiveness and efficiency based on the Organization's respective target setting.

CRITERION 7: HUMAN RESOURCE RESULTS

- Establishment of the Organization's self-assessment through the C.P.A. at the scheduled intervals.
- Modernization of administrative procedures
- Identification of internal human resource measurement indicators in order to evaluate its effectiveness.

CRITERION 8: RESULTS RELATED TO SOCIETY

- Design and implementation of an organized Hospital Marketing policy to promote and strengthen its image.
- Expansion of social responsibility actions.

CRITERION 9: MAIN ORGANIZATIONAL PERFORMANCE RESULTS

- Planning and implementation of the Hospital's target setting systematically on an annual basis.
- Comparative evaluation of the Hospital's performance in outputs and results with other similar organizations.

- Rational management of financial resources

The above improvement measures can be adopted from any general hospital in Greece.

Lessons learnt

The application of the CAF in the Intensive Care, Coronary and Kidney Transplant Units, aimed at reviewing the operation of Units, which take into account many factors, such as health improvement and quality of life improvement, patient satisfaction measurement, effectiveness and efficiency, by providing the best quality health services at the lowest possible cost. The review of the operation of "open" Departments is more difficult. It constitutes a future challenge, recording good practice that can be disseminated and not avoiding the difficulty. The goal, after all, is the future implementation of Total Quality Management throughout the Hospital.

The implementation of CAF was lead to measure and improve the satisfaction of patients and employees. Additionally, the training needs of personnel, specifically in quality improvement issues, identified, they were empowered to propose improvement ideas and they became familiar to setting goals. The three units documented their operation and they published regulations and protocols for their daily clinical practice.

The self-evaluation process showed that the Hospital is in planning and implementation phase of the administrative procedures. The results, obtained from the evaluation of the procedures, that they are already implemented, show the success in some of the goals that have been set and the undertaking of improvement actions in some of them.

The implementation of CAF in our Hospital was a first attempt to use Quality tools to achieve the implementation of a Total Quality Management System in the organization. We hope that this effort will be the first step of self-evaluation and improvement of our Hospital, with the ultimate goal of improving the provision of health services to our citizens/customers.

The COVID pandemic was a reluctant factor for the implementation of CAF during 2020-2024, but now we are looking forward to apply the CAF again.

Hungary: Effective use of QM system; using internal power (an example). Government Office of Capital City Budapest / Labour Department.

Introductory information

Title of the good practice: Effective use of QM system; using internal power

Name of the organisation: Government Office of Capital City Budapest

City/ country: Budapest / Hungary

Project manager's/contact person's first and last name: Zsolt Pál DEMECZKY

Email, phone number to the project manager's/contact person's: demeczky.zsolt@ffo.bfkh.gov.hu; +3614775743

Level of organisation/project: regional

Sector: administration

How many times the CAF was used? Indicate years please: *2013 – 2024*.

Key words: *Quality Management, integrated system, TQM, ISO, CAF, partner-centered, Partner-centered Quality Management Model (PcQMM), data collection, internal power*

Executive summary

The aim of the project was to integrate the mandatory quality management systems and the CAF in the Employment Department of the Government Office of the Capital City Budapest. All this had to be implemented in a short time, cost-effectively, while preserving the benefits inherent in them.

The most important result was not only the implementation of the integrated system, but also the experience gained during the project, through teamwork, and the development activity resulting from joint work.

It has been proven to us that CAF as a self-assessment tool can be used excellently either independently or as an integral part of a quality system, supporting its effective operation.

About the organisation

The National Employment Service in Hungary includes the central labour departments of government offices and the local employment departments of district/county offices, such as the Central Labour Department (CLD) of the Government Office of Capital City Budapest (GOCCB) and the employment departments of the Budapest district offices.

From a professional point of view, the employment departments in the capital report to the CLD, including data of quality measurements.

From quality point of view, the CLD supports the data collection and data handling.

Quality improvement aspects

Regarding quality, the TQM-based Partner-centered Quality Management Model (PcQMM) has been introduced and used at National Employment Service (NES) since 2006, and CAF has been applied since 2013. In the department - within the framework of an EU project - the ISO 9001 quality management sytem was introduced in 2010 and has been continuously used/developed since then.

Thus, 3 mandatory Quality Management tools were available forCLD (as the successor of the independent Labour Centre and as the part of the National Employment Service): thePartner-centred Quality Management Model (PcQMM), CAF and the ISO 9001:2008 (from 2017: ISO 9001:2015) system.

It would have been unnecessary to use 3 tools in parallel, independently of each other, so the obvious objective was: to create 1 integrated system, i.e. to harmonize the 2 quality systems and the CAF, thus taking advantage of the available synergies.

Stakeholders and communication

The main responsible person for the integration project was the chief quality management officer, who was the common point of management, colleagues and interested parties having the support of the department head and the appointed person responsible for quality management.

The involvement of employees was a fundamental condition for successful implementation, which was solved formally through internal training and the creation of quality circles, and informally through regular discussions with colleagues.

Given the rather unique nature of the problem, it was not possible to involve similar organizations.It could berelied on quality literature, own quality expertise, experiment and external quality specialists' network.

Implementation process/approach

The basic data for the process'planning were available:

- both ISO and PcQMM and CAF process maps,

- the knowledge and experience of the colleagues involved in their implementation and operation.

The selected/designated employees carried out the following process steps in teamwork:

- analysis of the ISO, PcQMM and CAF (inputs, process, outputs);
- identification of the similar and/or same processes; The overmapping technique provided a very good opportunity to review the processes, filter out parallelisms and identify differences. Integration of the PcQMM into the ISO system, additionally using its specific elements (e.g. Quality Circles, Employees' satisfaction).
- furthermore, using the whole system's measuring results to CAF for self-evaluation.
- Every QM system needs a feed-back via a good self-evaluation tool. In our case CAF needs data from the processes and gives important information back to the organisation.
- Building up a yearly flow-control plan to fix the steps for the QM system.

Each step took about 2 weeks.

The process began in the first half of the fiscal year, and the operation was tested during the quality activities during the year (data collection, processing, etc.).

The project basically did not rely on financial resources, moreover, could be based on the hard work of the colleagues and the commitment of the management. This fact strengthened the team spirit of the department, which positively affected the process indexes.

The final feedback on compliance was provided by the external audit at the end of the year. According to the external auditor's report: the system works properly.

Success Measurement. Main results with regards to the focus area

The project achieved the elimination of duplication in the quality system.The "measure", the '1' system was fulfilled including CAF (synergy effect).

Additionally:

- well-controlled activities during the year: all of the partners, departments, colleagues concerned can plan their tasks (planning resource and its distribution);
- moreover, the time-based data collection ensures the availability of data processing in time, e.g. the CAF evaluation can be carried out according to the data in November, thus the Management review (ISO) can also use them before the external audit;
- (N.B.: although it seems to be a strict system, it also contains flexibility as QM systems generally does.);
- stronger relationship with our partners (jobseekers, firms, other authorities, etc.), via the data collection and feed-back to them.

Paradoxically, a problem emerged as a success factor during the examination of the self-assessment process:

Although the data collection of co-workers' and partners' satisfaction was solved via an external collection system, additionally the measurement of the satisfaction of the local employment departments relating to the CLD was also required. The changing of the external system seemed to be costly, required permissions and lots of time. Possibility of paper-based data collection had been rejected. The question was given: how to solve data collection?

The answer was:

- organized team focussing on the problem (using CAF 4.4, 4.5);
- fixing the task;
- finding the suitable internal website that was available to the parties concerned;
- find a colleague of us who created an "easy-to-use" surface;
- test and use of the software;
- training colleagues at the local employment departments.

In the long term, the indicators measuring the feedback of external and internal partners on the quality management system provide feedback.As already described above, the appropriate rating given by the external auditor provided the first positive feedback, which was also confirmed by the feedback from the local departments.

The essence of the innovation and the transferability of the solutions introduced

A public administration institution needs a QM tool that supports proper operation and development.

Several options are available: various, usually TQM-based quality management systems, CAF, etc. In many cases, the question is: if we already have a QM system, why use CAF, or vice versa: if we use CAF, is a QM system unnecessary? In fact, any of them can be used on their own, but with proper planning and implementation, they can be integrated into a well-functioning system.The question is not 'which one', but how tightly integrated system we want, using its advantages.

Any institution can utilize these experiences, whether it has a CAF or a QM system or not.Not only in terms of the steps of the integration work, but also in terms of organization and teamwork.

The success of the project was fundamentally contributed by the support of the management, the committed, problem-finding and problem-solving attitude of the employees. Therefore, it can be seen that - in the case of an existing system - the quality project is primarily not a financial issue, but an attitude issue.

As I described, the experiences of the project can be utilized primarily where a mature system has not yet been developed or where the operation of the QM system needs to be renewed.

Lessons learnt

The example described a case where three systems had to be operated together (and not side by side).With sufficient expertise, an integrated system can be created that takes advantage ofsynergistic effects.It is very important to prepare an annual quality plan, which includes measurement times and methods.This provides data for the QM system and the CAF, ensuring appropriate evaluation and feedback.

In most cases, the key to success is not primarily financial issue, but the coordinated, committed work of management and employees.Experience shows that this is the only way to achieve successful results in the long term.

Teamwork can also highlight a problem during the system review that no longer appears as a problem, but as a task to be solved.In our example, a problem that started out as financial and time-consuming could be solved by non-financial, internal resources.

Poland: Comprehensive knowledge-building system. Social Insurance Institution (II branch in Warsaw)

Introductory information

Title of the good practice: The Comprehensive Knowledge Building System

Name of the organization: Zakład Ubezpieczeń Społecznych II Oddział w Warszawie (Social Insurance Institution, 2nd Branch in Warstw)

City/Country: Warsaw, Poland

Project manager's/contact person's first and last name:

Beata Pawlińska-Wiak - Branch Director

Email, phone number to the project manager's/contact person's:
justyna.wojdala@zus.pl +48225902304

Level of organization/project: regional

Sector: administration

How many times the CAF was used? Indicate years please: Since 2022

Key words: The Comprehensive Knowledge Building System serves to facilitate the friendly adaptation of a new employee in the organization.

Executive summary

The Comprehensive Knowledge Building System serves to facilitate the friendly adaptation of a new employee in the organization. It assumes thorough training, mentoring and support in the first months of work to minimize stress related to new tasks and provide better understanding of the role that the employee plays in the organization. The comprehensive system consists of 4 stages: initial, "Incubator", evaluation of the implementation process and summary. In the long term, the project contributes to lower employee turnover rates, supporting staff stability and reducing recruitment costs.

About the organization

ZUS is an institution that collects social and health insurance contributions for citizens and pays benefits in the form of pensions, annuities, maternity and sickness benefits on the principles established in the relevant regulations. Branch II is one of three branches

of the Social Insurance Institution that operate in the capital city of Warsaw and the surrounding counties. There are 43 ZUS branches throughout the country. And the Warsaw metropolitan area, due to the specifics of the labor market, struggles with the problems of high turnover of new employees and difficulties in recruiting them. In such conditions, the goal of Branch II is to employ employees who are aware of the tasks that await them in their new job. It is also important to gradually introduce the employee to new tasks and provide them with the necessary support, both substantive and friendly, so important especially in the initial period of employment.

Quality improvement aspects

The aim of the project is to introduce a newly hired employee to the specific functioning of the **Social Insurance Institution.**

The program consists of 4 stages:

I – introductory – first day in the organization

II – "Incubator" - "(from 2 to 6 days depending on the department in which the employee is employed) - employees gain knowledge about the functioning of the Plant as an organization, organizational structure, subordination and characteristics of cells when dealing with various types of matters. They receive substantive information, thanks to which they will be able to perform their tasks more effectively:

- general induction - serves to familiarize a new employee with issues relating to the functioning of each organizational unit of the Plant;
- substantive implementation - employees are divided into groups according to the department they are employed in. They undergo thematic training implemented within the areas in which they will work.

III - evaluation of the implementation process - the newly employed person has further substantive implementation planned and evaluation in this regard;

IV - summary – the employee completes a survey summarizing the implementation cycle and a knowledge test.

Thanks to these activities:

- we strengthen the commitment of newly hired employees,
- we introduce them (effectively) to the implementation of future tasks,
- we will retain newly employed people in the Branch structure.

Stakeholders and communication

During the implementation stage, the project was coordinated by the Organization and Analysis Department (in agreement with the Branch Director). The HR and Payroll Department is responsible for implementing the program and is responsible for

recruitment and training organization. However, during the implementation process, the participation and involvement of all departments is necessary. Each delegates a representative who familiarizes the participants with the tasks and specifics of their department's work.

The Head of the Organization and Analysis Department, who was also the Team Coordinator during the self-assessment in the Branch, coordinated the implementation of the program. The Branch Management, Organization and Analysis Department, HR and Payroll Department, and managers of individual units participated in developing the concept of the Comprehensive Knowledge Building System.

The II Branch uses various communication channels both inside and outside the organization. Due to the number of employees (approximately 1,000 people) and their dispersion (in six locations), the fastest communication channel is e-mail. From the beginning of the CAF project, the most important information was transmitted via e-mail and in the form of infographics in the Branch Information Bulletin.

The idea of the Comprehensive Knowledge Building System was born during a discussion of employees regarding working conditions. After conducting a self-assessment in this area, we began talks on improvement activities. The concept of the entire new employee induction system is the result of the work of the self-assessment team participants. We established its final form during meetings of the management staff with the Branch management.

The Comprehensive Knowledge Building System takes into account the needs and expectations of interested parties. Therefore, during the program, newly employed people fill out a survey twice, in which they can provide their comments and observations. Additionally, we conduct an annual Employee Opinion Survey among employees,
in which questions about the adaptation process and the needs of newly employed people appear. The opinions received in this way become an important element in the process of improving the System.

We carried out the project independently and we did not use any support from outside the organization.

In the process of conducting the CAF self-assessment, we used the help of external consultants. We implemented the Comprehensive Knowledge Building System independently – without the support of institutions/people from outside the organization.

Implementation process/approach

Steps taken to achieve the objective:

1. Formulation of goals and basic assumptions for the Comprehensive System.

2. Determining the scope of the project, people involved in the project, risk assessment.
3. Formulation of procedures, creation of presentation templates, checklists, document templates – Organization and Analysis Department, Personnel and Payroll Department, all departments.
4. Project introduction – Organization and Analysis Department, Human Resources and Payroll Department (organization), other departments (participants).
5. Collecting and analyzing opinions about the project (survey at the end of implementation, annual Employee Opinion Survey) and adapting it to changing needs – Organization and Analysis Department, Personnel and Payroll Department.

When implementing the Comprehensive Knowledge Building System we used the classic Waterfall method. This method corresponds to the specifics of our organization (division of management competences between the Headquarters and the Branch). We divided the project into two stages: analysis and implementation. The analysis phase was also a time of consultation and exchange of opinions with the Headquarters.
After a thorough analysis and risk assessment, the project was implemented by the Second Branch.

Successes:

- Changing the way of thinking about a new employee – the time and attention invested in him will bring benefits to the organization.
- Improving the image of ZUS as an employer.
- An opportunity to "fish out" experienced employees with the potential to teach others – new leaders in departments.
- A fresh look at the work they have done so far – new hires see areas where changes can be made (sometimes minor), but they will make the work of others easier.

Challenges: Overload of tasks and time pressure for mentors (the need to complete current tasks and at the same time support the new employee).

Success Measurement. Main results with regards to the focus area

The "Incubator" project for inducting new employees at ZUS has undoubtedly contributed to a more effective introduction of new employees to the organization.

Thanks to systematic training and support in the first months of work, new employees gain self-confidence and a better understanding of the organization, including procedures, which reduces errors and improves the atmosphere in the team. In the long term, the project also contributes to lower employee turnover rates, which in turn affects staff stability and reduces recruitment costs.

The program also undoubtedly brings benefits in the area of communication. New employees get to know each other, employees of other units (and/or managers of other internal units) and the rules regarding the flow of information throughout the organization. This makes it easier for them to "enter" their target teams.

The effects of implementing the "Incubator" are visible in the form of higher efficiency, better quality of services and greater satisfaction of both ZUS employees and customers.

At the Social Insurance Institution (ZUS), the implementation of improvements within the CAF (Common Assessment Framework) is aimed at improving organizational efficiency, the quality of customer services and increasing employee satisfaction.

The long-term effects of the implemented improvement in ZUS are monitored multidimensionally – through performance indicators, customer and employee opinions, audits. The actions taken allow for continuous improvement of processes, which translates into better quality of services and more effective management of the institution.

The essence of the innovation and the transferability of the solutions introduced

The Social Insurance Institution is an institution of public trust, which is why financial discipline is extremely important here. It can be a challenge in the face of the need to compete on the capital's labor market with large private entities. That is why we are looking for solutions that will allow us to be a competitive employer, and at the same time will not cause excessive financial burdens. The Comprehensive Knowledge Management System project, which we implemented in Branch II, can be used by other institutions, not only from the public sector.

What can be transferred to other institutions is the focus on the individual – the newly hired employee – and their needs. The implementation process is gradual and proceeds according to the formula from the general (mission, vision of the organization, structure, tasks) to the specific (tasks at the job position) with the participation of a substantive supervisor – an experienced employee who supports the newly hired employee and provides assistance on a daily basis.

The success of the Incubator project at ZUS (or similar initiatives related to improving the organization within CAF) depended on several key factors. Here are the most important ones:

1. Management commitment

- Support from the ZUS management staff was crucial to the success of the project.

2. Culture of innovation and openness to change

- Readiness of employees and management to introduce new solutions.
- Creating an environment conducive to testing innovations and sharing ideas (e.g. through workshops, hackathons, brainstorming).

3. Cooperation between departments

- Good coordination of the activities of various ZUS departments enabled effective implementation of improvements.
- The involvement of operational employees allowed for better adaptation of new solutions to the actual needs of the organization.

4. Effective communication

- Regularly informing employees about the goals and benefits of the project increased their engagement.
- Clear instructions on how to implement changes helped avoid misunderstandings.

5. Monitoring and evaluating the effects

- Continuous tracking of project results via employee surveys.
- Possibility to modify actions based on current results and feedback.

To someone who would like to benefit from ZUS's experience in implementing the Incubator project, a few key tips would be provided:

1. Clearly define the project goals

- The success of the Incubator resulted from well-defined goals: streamlining processes, improving customer service, and developing employee competences.
- Before you begin, it's important to define exactly what problems you want to solve and what success metrics you'll use.

2. Ensure management support

- Innovation initiatives require the commitment of organizational leaders.
- Active support from management staff makes it easier to overcome resistance to change and provides the necessary resources.

3. Monitor the effects and respond to feedback

- Tracking performance indicators and regular evaluation of activities is crucial.
- It is worth collecting opinions from both employees and customers to continuously adjust the strategy.

4. Support a culture of innovation and openness to change

- At ZUS, promoting a proactive attitude among employees was of great importance.
- Creating a space to submit ideas and test them helps the organization develop continuously.

To sum up: clear goals, leadership support, data analysis and a culture of collaboration and learning – these are the key elements of success.

The Incubator project at ZUS, which focuses on streamlining processes, innovations and improving organizational efficiency, can be used in many different organizations, especially those operating in the public and administrative sectors.

The ZUS Incubator project can be useful wherever:

- There are complex administrative processes that require a longer adaptation process.
- Change and innovation management plays a key role in organizational development.

Lessons learnt

Convince decision-makers that a new employee is an investment.

1. Set measurable goals and define the level that will determine project success.
2. Analyze feedback from all stakeholders.

New Employee as an Investment – Key to Organizational Effectiveness

The decision to hire a new employee is often treated as a cost, not an investment. Meanwhile, a properly planned recruitment and implementation process of a new team member can bring measurable organizational benefits, such as: increased efficiency, better quality of customer service, reduction of errors or increased innovation. In order to convince decision-makers to this strategy, it is necessary to set measurable goals and determine the level of their implementation, which will indicate the success of the project.

1. New employee as an investment – key arguments:

A. Increased team productivity

Every organization has key operational processes that require adequate human resources. A shortage of employees leads to:

- extending the time of task execution,
- overloading current team members,
- increased risk of making mistakes,
- decline in the quality of customer service work.

A new employee not only reduces the workload for the team, but also potentially develops new competencies and enables more efficient implementation of processes.

B. Long-term savings

Hiring a new employee generates recruitment and implementation costs, but in the long term it leads to savings thanks to process optimization and increased efficiency.

Failure to invest in new employees can lead to hidden costs such as:

- increased sickness absence among overworked employees,
- staff turnover due to burnout,
- decline in the quality of work resulting in complaints and customer dissatisfaction.

2. Setting measurable goals

To prove the value of investing in a new employee, it is essential to set specific, measurable goals. These can be divided into three key categories:

A. Operational Objectives

1. Shortening the implementation time

2. Reducing the number of errors in documentation

3. Increase in the number of cases handled –

B. Financial Goals

1. Reducing overtime costs

2. Reducing turnover costs – reducing the number of employee departures

3. Improvement of cost efficiency indicators – reduction of the cost of handling one case.

3. Increasing employee engagement – increasing the team satisfaction index (measured by internal surveys).

3. Analysis of feedback from all stakeholders

To realistically assess the success of hiring a new employee, it is necessary to collect feedback from various perspectives:

A. Team members

- How did the new employee affect the workload?
- Has the introduction of a new person improved work dynamics and cooperation?
- Was the implementation process effective enough?

Data collection method: internal surveys, employee interviews, overtime analysis.

B. Management Staff

- Has the new employee contributed to achieving the planned indicators?
- What does its adaptation look like in the organization?
- Is the investment returning at the expected rate?

Data collection method: performance reports, evaluation interviews.

4. Summary and recommendations

A new employee is not a cost, but an investment whose return can be measured through increased efficiency, reduced errors and improved quality of service.

It is worth emphasizing that simply hiring an employee is not enough – effective implementation, monitoring of results and responding to feedback are key. Analysis of results should be cyclical (e.g. quarterly), which will allow for ongoing adjustment of the strategy and maximization of benefits resulting from hiring a new person.

Can we afford not to invest in this? In the long term, not hiring new employees can cost the organization more than hiring them and getting them up and running.

Portugal: Sharing and involvement: the importance of the CAF Education Model. Institute of Social and Political Sciences.

Introductory information

Title of the good practice: Sharing and involvement: the importance of the CAF Education Model

Name of the organisation: Instituto Superior de Ciências Sociais e Políticas (ISCSP) – Universidade de Lisboa

City/ country: Lisbon, Portugal

Project manager's/contact person's first and last name: Isabel Soares

Email, phone number to the project manager's/contact person's: isoares@iscsp.ulisboa.pt, +351919123653

Level of organisation/project: national

Sector: education

How many times the CAF was used? Indicate years please: 2017, 2019, 2021, 2022, 2024.

Key words: Higher education, students, quality management.

Executive summary

Quality Meetings Between Students' Representatives and the Administration is an innovative practice in Portuguese Academe. The objective of this practice is to listen to students directly, beyond the gathering of information from bi-annual quality surveys. It brings students' representatives in close contact with the school's administration so they can be heard directly and problems identified and tackled in a quick manner.

About the organisation

ISCSP is a public higher education institution founded in 1906 and one of the eighteen colleges of Universidade de Lisboa (University of Lisbon), the major Portuguese university. Its academic scope is in the areas of social and political sciences and it offers Bachelor's Master's and PhD degrees as well as life-long-learning courses at post-graduate levels and engages in consultancy projects at national and international levels.

The Institute has several research centres in the domains of public administration and policies, gender studies, Oriental and African studies. With over 4.000 students, it is one of the major colleges of the University of Lisbon.

Quality improvement aspects

Since responding to the quality surveys is not mandatory at the ISCSP, meaning that not all students reply to the questionnaires, and because the administration is invested in listening to the students, their collective problems, anxieties, wishes for the institution, this project was devised. There are three regular meetings (onset of the school year, end of the first semester, end of the school year) between the students's representatives (Students' Union and representatives of all courses), the Presidency (vice-president for quality management) and the Executive Director. From these meetings, it has been possible to quickly identify improvement measures and students feel they are heard at the highest level. These meetings were particularly helpful during the Covid period and were held more than the regular three times a year. This way, the students were a decisive part in helping the administration navigate the challenges imposed by the pandemic. The objectives of this project are to create in students a sense that their opinions matter to the administration and to allow for a better communication between the decision-making bodies and the students. This is a qualitative method approach to enhance communication and problem-solving and experience has shown a decrease in the problems brought by students to these meetings.

Stakeholders and communication

This project is located in the Quality Management Unit of the Institute and is a part of the Strategic Plan of its President under the direct supervision of the Vice-President for Quality Management. It came about as an improvement measure after the first times the CAF survey was implemented at the ISCSP. The administration wanted to reach out to students in a closer and more direct way and so a plan was devised to create a forum where students could be heard. This forum was, on a first moment, composed of the students' representatives from the different student bodies of the Institute (Students' Union and nine other groups each representing a course), the vice-president for quality management and the coordinator of the Quality Management Unit. At a later stage the Executive Director was also included in this forum. Communication of this project was made by contacting all formal students' associations of the ISCSP so they could choose a representative to be present at these meetings. The outcomes and decisions of these meetings are communicated to all students by their representatives, to the President by the vice-president and to the non-teaching staff by the Executive Director.

Implementation process/approach

This project was built on the idea of using few resources for maximum results. The project was planned as an improvement measure to be implemented with permanent status. It is called the Informal Forum because it is non-statutory and one of the

principles underlying its creation was to make it as free from bureaucracy as possible. It materializes as three annual meetings between the students' representatives and the administration of the Institute although it is possible to hold extraordinary meetings as was the case during the Covid-19 pandemic period. These meetings have a defined meeting agenda with three topics: 1) Information; 2) Report from students; 3) AOB (any other business).

The first topic is aimed at improving communication between the institute's admnistration and the students and is usually headed by the vice-president for quality, who informs students of all new developments taking place at the institute. Such information may include the creation of an office for psychology appointments available to students, faculty and staff, changes in the catering company providing for the bar and cafeteria, why prices in certain services have been highered or lowered, etc. That is, this point has the objective of letting students know what is going on at the institute at the management level and therefore bring more transparency to communication. If any other of the stakeholders present at the meeting has other information to share, this is the moment when that is done.

The second topic allows the representatives of all students' bodies, including the Students' Union to make a report of the moments of the school year pertaining to the meeting (the first meeting is usually in early October so students can report on how the process of the beginning of the academic year went, how were new students welcomed, how classes started, what logistics should be improved, what went well and is worthy of mention, etc; the second meeting is usually held in early February and focuses on how the first semester went and how is the secont semester being prepared; and the third meeting, occuring in July, makes a balance of the school year). At this stage both the vice-presidente and the executive director also give feedback regarding what the students say.

In the AOB part of the meeting, any stakeholder can talk about emerging matters or new business.

Throughout the meeting, minutes are made focusing mainly on improvement measures suggested by students. Because the administration is present at the highest level with the presence of the vice-president and the executive director, pressing matters are swiftly tackled and improvements therefore happen quickly. These meetings also aim at understanding what is working well so that grey areas are lit and both administration and students get a broader image of the institution: what can be improved, what needs to be done, what is going well and should be maintained.

The immediate cost of this project is measured in terms of time. However, this is a positive cost as it is time spent in a collaborative effort to improve the institution and the mechanisms that allow its overall operation. There are no financial costs of holding these meetings and an indicator of success is that in a non-statutory, non-mandatory

forem, attendance of students' representatives is at the 100% level. A qualitative indicator of success is that since the first meetings in 2018, the number of improvement suggestions has been declining because issues can be dealt with and solved rather quickly. Students understand that their common needs are met at the soonest as possible moment and this creates trust in the admnistration. Similarly, the administration can have constant, regular feedback from students and act in order to perform better. Consequently, these meetings help the administration have a broader angle of vision to enhance decisions at management level.

Success Measurement . Main results with regards to the focus area

From these meetings, a series of improvements that impact the daily activities and life of the community at ISCSP have been made. Examples include:

- No more use of single-use plastics at the bar/cafeteria, namely cups, straws, cuttlery, food containers;
- Creation of a psychology office offering free appointments to all: students, staff and faculty;
- Reduction in the fees for registration in grade improvement exams;
- Extension of the students services office hours to better accommodate the needs of working-students attending evening classes;
- Diversification of the cafeteria menus to include more vegetarian options;
- Increased distribution of waste bins for recycling paper, plastic, and general waste across different areas of the institute;
- Extension of the opening and closing hours of the bar/cafeteria, particularly in the evening period;
- Creation of more study areas throughout the institute by equipping them with chairs and tables;
- Improvement in the periods of application of the questionnaires to evaluate the educational offer so that they do not coincide with exam seasons.

Results of the implementation of these measures can only be measured qualitatively, and this implied an immediate two-fold consequence. Firstly, there has been a decrease in the comments area in the bi-annual surveys to students. Secondly, there has also been a decrease in the improvement suggestions given by students in these meetings. There are also other qualitative consequences with impact on:

- *students*: through their representatives, participation and commitment to the continuous improvement process has been reinforced;
- *management bodies*: strengthening in fact-based decision/management processes;
- *increase in transparency*: at each meeting there is information on the follow-up of the improvement actions identified at the previous meeting;

- *the relationship of trust between the Presidency and students*: improvement in this relationship because the subjects addressed in these meetings are the target of analysis and action that lead to accountability.

In turn, this collaborative project has also been instrumental in leading to and developing other actions with positive impacts at the teaching-learning level, namely:

a) Greater offer of continuous evaluation modality in curricular units, which has meantime become the by-default assessment modality at all first cycle courses;
b) Implementation of the four-day week for students of first cycle;
c) Implementation of schedules that are either morning or afternoon for first cycle students enrolled as day students;
d) Examination schedules developed in collaboration with the representatives of student groups by means of meetings with the vice-president for academic matters.

In all, these measures contribute to improvements in the well-being of the community at ISCSP as a whole.

The essence of the innovation and the transferability of the solutions introduced

This project is innovative due to its singularity in Portuguese higher education institutions. Usually, processes of assessing user satisfaction rely solely and exclusively on surveys. At ISCSP we have created another layer, a forum, for listening to students, who represent the largest group within higher education institutions and are therefore their main stakeholders. By inviting them closer to the administrative body, the ISCSP has also created a safe space where students feel heard and where they feel that their opinions matter and their needs are met.

This is an easily transferable project to not only other higher education institutions but also to institutions at secondary-school level, where students' voice can likewise play an informed role. Furthermore, this is a project that can be transferred irrespective of either the legal nature of the education institution whether private or public or of its size.

However, for the successful implementation of a CAF-Education-derived project such as this, there are some crucial aspects to bear in mind, namely:

a) commitment to quality processes by the top management level;
b) involvement of all institutional stakeholders by means of raising awareness to the importance of quality processes, active participation in surveys, and periodic communication of process outcomes;
c) knowledge of the CAF-Education model by the self-assessment team and the Quality Management Unit.

A project like this can only lead to positive outcomes, not to mention it can only be implemented, when there is a strong institutional commitment to quality management

and its centrality at an institution's day-to-day performance. Without financial implementation costs, and no bureaucratic weight, this is a straightforward, easy project to implement that does not consume human resources and one in which time is used to solve problems. Particularly, this is a project paradigmatic in placing students at the centre of decision-making at education institutions and thus mitigate the paradox of students being often let out of such processes. This project has proved another catalyst in the involvement of the institutional community in a culture of quality and continuous improvement. As it promotes a strategic management based on facts and evidence, it has proven to be a value-added project for improvement in the everyday activities of an institution.

Lessons learnt

Lessons to be had from the implementation of this project follow in line with its simplicity. Terefore:

Lesson 1: Students do not enter these meetings to merely complain, they are able to discern well the problems that are of crucial importance to them as a collective and do not personalise or individualise their problems;

Lesson 2: Students are keen on helping find solutions to improve life at their institutions and understand that these meetings are not a forum for pedagogical and/or scientific matters but rather a forum for quality management pertaining to everyday life at the institution;

Lesson 3: The project can be easily transferred to other groups of stakeholders partaking the life of the institution, in particular faculty and non-teaching staff.

Appendix

Agenda of the 10th European CAF Users' Event

9 April 2025	**Official welcome at the Chancellery of the Prime Minister**
	Al. Ujazdowskie 1/3, 00-583 Warsaw
18:00 – 20:00	**Opening of the 10th European CAF Users' Event Welcome and cocktail party**
10 April 2025	**10th European CAF Users' Event**
	Conference Centre at the national stadium "PGE Narodowy", Al. Ks. J. Poniatowskiego 1, Warsaw
08:30 – 09:30	**Registration/Coffee**
09:30 – 09:50	**Welcome words**
	Anita Noskowska-Piątkowska, Head of the Civil Service in Poland
	Marco Ongaro, EIPA Director General
09:50 – 10:20	**In days of uncertainty: the need of shaping a resilient and future-proof civil sector in Europe – keynote speech**
	Cecilia Wikström, Chair of EIPA's Board of Governors
10:20 – 10:35	**The CAF Network and its European Resource Centre: Navigating challenges and driving change successfully**
	Gracia Vara Arribas, Head of the European CAF Resource Centre, EIPA
	Tihana Puzic, Deputy Head of the European CAF Resource Centre, EIPA
10:35 – 10:45	**How to best explore the 18 Golden CAF best practices? Introduction to the break-out sessions**
	Katarzyna Dudzik, Polish CAF National Correspondent
10:45 – 11:15	**Family photo and coffee break**

Session 1: Leadership and constancy of purpose, values.

Facilitators: Katarzyna Dudzik, Polish CAF National Correspondent & Loredana Leon, Slovenian CAF National Correspondent

1. Application of the CAF in a Directorate General of a Federal Ministry. Federal Ministry Arts, Culture, Civil Service and Sport.[4]

Presenter: Michael Kallinger, Deputy Director and Head of Unit III/9/a – Public Management und Governance, Austria / CAF National Correspondent

2. Strategic approach of employers to increase public services relevancy and employment rate in the Brussels Region. ACTIRIS.

Presenter: Sébastien Rochedy, Marketing Expert, ACTIRIS (Public Employment Service) Brussels, Belgium

3. Systemic implementation of the Common Assessment Framework: fostering digital innovation in project management to improve team collaboration, efficiency, and decision-making. Region of Crete.

Presenters: Dr. Nikos Raptakis, Executive Secretary, Region of Crete, Greece & Giulia Bartolozzi, Head of Department, Road Construction, Region of Crete, Greece

Session 2: People involvement: cooperation and co-creation.

Facilitators: Mimi Yotova, Bulgarian CAF National Correspondent & Kenan Avdagić, Correspondent from Bosnia and Herzegovina

1. CAF's implementation in Municipality of Volos.

Presenters: Triantafyllia Triantafyllidou, Director, Directorate of Planning, Sustainable Development and New Technologies; Angeliki Stathelo & Eleftheria Givropoulou, Municipality of Volos, Greece

2. Apulia region as CAF competency center for local municipalities.

Presenters: Roberto Venneri, Apulia Regional Government – Secretary General, Italy & Angela Guerra, Apulia Regional Government – Secretary General, Italy

3. Development and implementation of a stakeholder engagement management project.

Presenter: Marta Czarkowska, Social Insurance Institution Bydgoszcz Branch, Poland

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[4] Due to organizational changes, in the extended description, the title of the practice was changed to: "The Strategic Implementation of the CAF in Austria's Directorate General III of the Federal Chancellery: A Transformative Case of Public Sector Innovation".

Session 3: Organizational culture: wellbeing & Work-Life Balance.

Facilitators: Isabelle Verschueren, Belgian CAF National Correspondent & Hrachik Yarmaloyan, Member of Management Team of GIZ Country Office in Armenia

1. Conciliar + Project - Implementation of Portuguese Standard 4552:2022 – Reconciliation of Professional, Personal and Family Life. Unidade Local de Saúde da Região de Aveiro, EPE.

Presenter: Margarida França, Unidade Local de Saúde da Região de Aveiro, EPE, Portugal

2. CAF as a Change Engine: Driving Towards Continuous Improvements. Ministry of Higher Education, Science and Innovation (MHESI).

Presenter: mag. Ksenja Hauptman, Secretary, Representative for Quality Management, Head of CAF project, Ministry of Higher Education, Science and Innovation (MHESI), Slovenia

3. Staff development and involvement. National Institute for Agrarian and Veterinary Research.

Presenters: Patricia Inácio, National Institute for Agrarian and Veterinary Research, Portugal & Carla Almeida e Brito, National Institute for Agrarian and Veterinary Research, Portugal

12:35 – 12:45	**Finding the way to plenary session & small refreshment**

12:45 – 13:30	**Panel discussion: Shaping the Future: Quality as the Cornerstone of Public Sector Succes**

- *Gregor Virant, Head of the SIGMA Programme*
- *Małgorzata Bywanis-Jodlińska, Director of the National School of Public Administration, Poland*
- *Maja Handjiska Trendafilova, ReSPA Director*

Moderator: Gracia Vara Arribas, Head of the European CAF Resource Centre, EIPA

13:30 – 14:30	**Lunch**

14:30 – 15:50	**Breakout session no 2: Transformative processes**

Session 4: Public Sector Excellence - A Vision for digital transformation and innovation

Facilitators: Greta Hrehova, Slovak CAF National Correspondent & Witold Stelmaski, chief expert, Civil Service Department, Chancellery of the Pime Minister, Poland

1. Leertrac. GITO Overijse.

Presenters: Dr. Marc Rabaey, GITO Overijse, Belgium & Ingeborg Maes, Insightful, Belgium

2. *chIPA: Digital Communication Revolution, powered by IPA. Institute of Public Administration.*

Presenter: Pavel Ivanov, Executive Director, Institute of Public Administration, Bulgaria

3. Implementation of robotic process automation technology in the Polish Financial Supervision Authority. Polish Financial Supervision Authority.

Presenter: Mikołaj Burkacki, Polish Financial Supervision Authority, Poland

Session 5: Result orientation: continuous innovation and improvement.

Facilitators: Slaven Bukarica, Programme Assistant at Regional School of Public Administration (ReSPA) & Michael Kallinger, Austrian CAF National Correspondent

1. Standardization of the improvement of local self-government units and assessment of digital readiness. Civil Service Agency BiH (BiH CSA)/ Civil Service Agency of Federation of BiH (FBiH CSA)/ Civil Service Agency Republic of Srpsa (RS CSA)/Public Administration Reform Coordinator's Office (PARCO) /UNDP.

Presenters: Kenan Avdagić, Public Adminstration Reform Coordinator's Office, Bosnia and Herzegovina & Goran Stefatić, United Nations Development Programme

2. Using the power of digitalisation for shared process and quality knowledge management: Croatian digital tool eSUK (https://kvaliteta.gov.hr). Ministry of Justice, Public Administration and Digital Transformation.

Presenter: Dubravka Vukalović, Ministry of Justice, Public Administration and Digital Transformation, Croatia

3. CAF Efficiency platform – CAFficiency. Human Resource Management Service.

Presenters: Jovana Stojadinović, Human Resource Management Service, Serbia & Danilo Rončević, Phd, Human Resource Management Service, Serbia

Session 6: Social responsibility: attractiveness of the public sector.

Facilitators: Barbara Zupanc, Head of Quality Unit, EIPA & Begoña Lázaro Álvarez, Spanish CAF National Correspondent

1. Creating a culture of a quality development in the regional administration Lovech, Republic of Bulgaria. Regional Administration – Lovech.

Presenters: Neli Miteva, Director of Directorate and a Leader of the Self-Assessment Group in the Regional Administration Lovech & Vanya Ivanova, Chief Legal Advisor and a Member of the Improvement Plan Implementation Group, Bulgaria

2. Facilitating the Exchange of Best Practices Among Employees Across Various Branches. LEPL Public Service Hall (Under the Ministry of Justice of Georgia).

Presenters: Mariam Tsaguria, Head of Analytical Service in Administration Department, Public Service Hall, Georgia & Natalia Abashmadze, Public Service Hall, Georgia

3. Línea Madrid: Preferential Attention for People Over 65. Ayuntamiento de Madrid (Madrid City Council).

Presenter: Mar Núñez Suárez, Citizen Services of Madrid City Council, Spain

15:50 – 16.00	**Getting back to plenary & small refreshment**

16:00 – 16:45	**Reflections and reporting back for the future**

- *Nick Thijs, Senior Advisor, Team leader Service Delivery and Digital Government, OECD/SIGMA*
- *Tihana Puzić, Deputy Head of the European CAF Resource Centre, EIPA*
- *Gracia Vara, Head of the European CAF Resource Centre, EIPA*

16.45 – 17:00	**Closing remarks**

Marta Kuzawińska, Director of the Civil Service Department Chancellery of the Prime Minister, Warsaw Poland

Marco Ongaro, EIPA Director General

17.00	**End of the 10th European CAF Users' Event**

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