



SWOT ANALYSIS 2

REPORT ON THE SECOND SWOT ANALYSIS BY EDUPLAN PARTNERS

- carried out at the last project meeting in Appenzell (CH) on 22 and 23 August 2012-

WP8 QUALITY MANAGEMENT

By

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1) Introduction

The present report deals with the second SWOT analysis of the Eduplan tool done by **the Eduplan project partnership** in August 2012.

The SWOT assessments are part of the Quality Management plan. The aim of the first SWOT analysis was to accompany the development of the Eduplan tool, to identify bottlenecks and problems, and to initiate corrective measures if deemed necessary. The second SWOT analysis intends to take stock at the end of the tool development, identify problems for rolling out the tool and to clarify future actions to be taken.

Methodologies and outcome of the SWOT 2 will be described in Chapter 3 in greater detail. References and comparison will be made with the first SWOT analysis of Eduplan carried out in September-October 2011.

2) Results of SWOT 2 Analysis by Eduplan partners

SWOT analysis is a planning tool used to understand the **Strengths, Weaknesses, Opportunities, and Threats** involved in a project (Eduplan tool). It involves specifying **the objective of the project** and identifying **the internal and external factors which are favourable or unfavourable for attaining the objective**.

The **objective of Eduplan** which was submitted **for assessment** is the following:

EduPlan is designed as a self-assessment tool that should enable the providers of lifelong learning to evaluate their quality management by revealing its strengths and weakness. It is a tool to improve, modify and develop best practices in the field of education/lifelong learning. In a commercial context, it is designed to help businesses to present the quality of their services, improve the results of their employees (trainers), and to satisfy their customers' needs.

The survey contains max 44 questions concerning different measures of quality management in learning. They relate to planning, implementation and evaluation and review of the vocational training and adult education. It is aimed at assessing customer satisfaction, trainers' performance as well as management and organization of a particular institution or company in general. The survey has been divided into 3 areas:

- related to education / lifelong learning providers (44 questions), i.e. providers of further education, chambers of commerce, industrial associations, companies, vocational education institutions,
- related to educators (39 questions), i.e. training managers, academics, course instructors, trainers and administrative authorities
- learners (18 questions) i.e. course participants.

The full SWOT analysis scheme is available in Annex ii.

The information for the SWOT analysis was collected before, during and after the Eduplan meeting in Appenzell in August 2012. The SWOT exercise presented here deals with the Eduplan final version after nearly two years of tool development. **Six** Eduplan partners from Ireland, UK, France, Switzerland and Germany have contributed with their perception of the strengths, weaknesses, opportunities and threats of Eduplan online tool.

The answers collected in the four fields of the SWOT matrix have been grouped into thematic areas and are presented in the order given through the frequency of mentions in the SWOT exercise.

An overview of all answer is given in Annex iv. The results of the grouping and summarising of the answers per SWOT field is presented below.

3.1) Strengths

In total, **29** (28) strenghts of Eduplan have been identified by the partners. These strengths concern the following thematic areas^{1 2}:

- Various ways of using Eduplan
- Market potential
- Process of developing the too l/ expertise of partnership
- Online tool
- EQUARF/ EU compatibility
- Items and questions

Various ways of using Eduplan

Points regarding the use of Eduplan were most often made in relation to strength (12 in all). The variety of possibilities for deploying Eduplan is still seen as key by the partners. The fact that different stakeholders (e.g. VET organisations, course organisers, chambers, enterprises, apprentices, course participant and other users) can use the tool within their own perspective are a main asset. The tool can be used by many different organisations of different size from one-trainer enterprises to huge training providing organisations and big companies, for assessment as well as self-assessment. The many possibilities of comparisons (with previous assessments, other users, across countries) are considered important for the users, as are the user-friendliness and flexibility of the tool. Eduplan is seen as a ‘true’ help for quality assurance of professional training.

Market potential

¹ The colours used for highlighting the areas correspond to the colours used to analyse the statements of the SWOT contributors – see Annex iv below.

² For the sake of making comparisons between SWOT 1 and SWOT 2, we use the same thematic areas for both. Differences in the assessments between SWOT 1 and SWOT 2 will be highlighted in the respective sections under the thematic areas.

Issues regarding the market potential of Eduplan are gaining importance when assessing the nearly finished tool. Market potential of Eduplan did not play a role in the first SWOT analysis carried out one year before. The innovative aspects of Eduplan were highlighted in several of the strong points identified by the partners. The tool is labelled as “ a good springboard to further develop self - assessment of quality assurance processes”, and the fact that progress can be assessed is highly valued. Previously, the partnership and the institutions linked to them was considered a strong point for the exploitation potential of the tool.

Process of developing the tool/ expertise of the partnership

The way, Eduplan tool was developed and finalised as well as the expertise of the partnership regarding quality management and the different cultural backgrounds of the partners make a strong case for using Eduplan tool all over in Europe.

Tool online

The other strong point about Eduplan is that it is an online tool, i.e. it can be used remotely at any time the user wishes. It is inclusive and accessible for all. Time to complete the compact questionnaire was considerably reduced as compared to earlier versions of the tool, and the questionnaires can be completed in about 30 minutes.

EQUARF/ EU compatibility

Eduplan has been developed aiming at consistency with EQUARF and compatibility with EQUARF criteria. In it's final version, the tool meets international standards and it is related to the “real” world in quality assurance.

3.2) Weaknesses

In total, 20 (20) weaknesses have been identified by the partners during the SWOT exercise. The main points made concern:

- Usability matters
- The market/ competition

- Theoretical aims and reality
- Items and questions

Usability matters

At the end of the Eduplan tool development phase, there are still some points regarding the usability of Eduplan which are considered as weak among the Eduplan partners. There is too little opportunity to customize the tool for specific evaluation criteria, the missing capacity to collect learning lessons and to link results to forward planning were mentioned. Other weak points are that the reporting facility needs further development as well as a better introduction into the tool seems to be needed. However, most of these points were not in the focus of the Eduplan deliverables.

The market/competition

A set of weaknesses concern the potential market of Eduplan and the competition the tool has to face. First of all, there are several tools available on the market with similar facilities, even among the partnerships organisation. Second, while Eduplan tool has quite a good reputation, it will need considerable promotion efforts to sell Eduplan successfully. Competition from other players had already been identified as weak point in the previous SWOT analysis. The identification of Eduplan's USP (unique selling point) would be very helpful and needs to be elaborated for a successful roll-out of the tool, at least in the countries of the partners.

Theoretical aims and reality

According to the partners' perception of the tool, it is a weakness that the questionnaire is not explicitly based on a quality theory. The methodology developed in the tool is not 'evidence-based' but relies rather on personal assessment. Also the questionnaires used in the tool do not always meet the standards in item analysis. There is still some room for ambiguity in the Eduplan exercises.

Items and questions

Another weakness lies in the fact that there are no procedures in place to make corrections in case the tool does not function well. The reporting functions in place are appreciated but they do not clearly monitor and highlight degradations or improvements. The previously identified problem of the **"all-in-one" model** of Eduplan with **too general questions** and in **too few questions** for the **given target** groups, persists. But it is doubtful whether a tool such as Eduplan can and should solve all the problems of quality assurance in professional training.

3.3) Opportunities

18 (15) opportunities have been identified by the partners of Eduplan. These opportunities are focussing on the following themes:

- Variety of options to use Eduplan
- Future of Eduplan
- Legislative/ regulatory environment
- European dimension

Variety of options to use

Most prominent among the opportunities of Eduplan are the variety of options to use it. As it is not explicitly based on a specific quality theory it can be used for different ways of quality management. As stated among the strengths, it can be used by all kinds and types of organisations dealing with professional training. In particular, the benchmarking options of Eduplan and its structure around the quality assurance cycles were mentioned. It can be easily adopted by people familiar with and involved in quality management.

Future of Eduplan

Future opportunities of Eduplan are related above all in the possibility to ability of the partners to roll out the tool successfully in their countries, so that the interest which was shown in the tool on the occasion of the Final Conference in June 2012 in Munich can be turned into subscriptions. Helpful could be the current stress in the funding environment. The future of Eduplan depends also from the ability of the partners to render the tool sustainable in the coming years.

Legislative/ regulatory environment

Opportunities for Eduplan are coming from the regulatory and legislative environment in which it will be used. In France, for example, the Eduplan evaluation process matches with the new French VET standard X50-769. Other partners mentioned the possibility that Eduplan could develop into a 'standardised' approach for evaluation and self-evaluation

European dimension

Core themes of Eduplan are in line with the key priorities established in the EU Life Long Learning Programme and the stated aim to develop a culture of quality control in VET.

3. 4) Threats

Overall, 21 (21) threats for Eduplan have been mentioned by the partners who participated in the second SWOT exercise. These concern diverse issues and the order of the following presentation of the issues follows the frequency of mentions:

- Sustainability and funding
- Uni-dimensional use
- Acceptance of tool
- Ergonomics

Sustainability/funding

Most of the threats Eduplan is facing concern the sustainability of Eduplan and funding issues more specifically. 17 out of the 21 threats identified by the partners concerns these issues. In order to continue with Eduplan it will be necessary that partners find clients in their countries and are able to co-finance in the initial roll-out phase. A way needs to be found to keep the tool working. Some issues are still not resolved. It remains an open question how the commercial follow-up and monitoring will be defined. The costs for maintenance, hosting and development are unknown. Finding funds is the most important challenge set for the partnership at the end of the Eduplan project.

Other threats

Other threats perceived by individual partners concern the uni-dimensional use, the acceptance of the tool and its ergonomics. The uni-dimensional use was already an issue in the previous SWOT where it was stated that Eduplan could be used in a top-down approach only which would turn it into a control instrument but which is not the initial aim of using Eduplan. Acceptance of the tool is a challenge as there are many similar tools making similar promises as Eduplan. Another threat comes from the technical capacity of the tool to accommodate a large number of users at the same time. As the site has never been stress-tested, it is unknown how the system would react in case of large numbers of simultaneous users.

4) Conclusions

The conclusions to be drawn here are derived from the SWOT 2 exercise with references made to SWOT 1. The SWOT analysis carried out in August 2012 is a snapshot of appreciation by the Eduplan partners at a given point in time, i.e. after the development of the tool has been nearly finished and the project has come to its end. A previous SWOT analysis had been carried out after the end of the pilot 2 user tests and it will be interesting to observe the evolution in appreciation between both SWOTs.

Please note: In the following, the number in brackets refer to the results of SWOT 1

The overall picture of the SWOT 2 results reveals that the perceived **Strengths** of the tool prevail with **29 statements (28)** made. **Weaknesses** and **Threats** were expressed through **20 (20)** and **21 (21)** statements, respectively. **18 (15)** statements were related to **Opportunities** of Eduplan.

The following table gives an overview on the quantitative outcomes of the SWOT analysis (the numbers in brackets are the results from SWOT 1).

	Helpful to achieving objectives	Harmful to achieving objectives
Internal origins attributes of the organisation	STRENGTHS 29 (28)	WEAKNESSES 20 (20)
External origins attributes of the environment	OPPORTUNITIES 18 (15)	THREATS 21 (21)

Table 1: Quantitative results of the SWOT analysis

It is interesting to note that at the time when the SWOT 2 assessment was carried out the Eduplan partners identified definitely more factors considered to be **helpful for achieving the objective of Eduplan tool than considered to be harmful**. In total, **47 helpful** factors and **41 harmful** factors were mentioned. In the first SWOT exercise, these figures were 43 and 41 respectively. In particular, the number of opportunities seen for Eduplan has increased from 15 to 18. Opportunities identified in a SWOT analysis can be turned into good marketing arguments for the product

Regarding the **internal and external origins** for attaining the objectives, facts stated by the partners and related to the attributes of the organisation (i.e. Eduplan) outnumber stated facts which are attributed to it's environment, with 49 (48) mentions of internal origins versus 39 (36) mentions of external origins. For the second SWOT analysis internal project and organisation related attributes still prevail in the partners' assessment of Eduplan, with more mentions of strong items than of weak items. Regarding the external facts to be considered for a successful completion of Eduplan, a considerable number of statements relate to threats. As a matter of fact the threats still outnumber the opportunities. In the coming months, it will be important to address these threats which were singled out by the partners (see above Section 2.4), and which mainly concern matters of sustainability and funding.

Annex

i. SWOT analysis scheme



SWOT ANALYSIS NR 1 – SEPTEMBER 2011

At the recent meeting of the Eduplan partnership in Tours (April 2011), it was agreed that a first SWOT analysis of the Eduplan tool should be carried out in June 2011, at the point in time when the first piloting takes place. All Partners and the persons participating in the first piloting should carry out a SWOT analysis of the tool.

To remind, SWOT analysis is a planning tool used to understand the **Strengths, Weaknesses, Opportunities, and Threats** involved in a project (Eduplan tool). It involves specifying **the objective of the project** and identifying **the internal and external factors which are favourable or unfavourable for attaining the objective**. More information about the SWOT analysis can be found in the Eduplan Quality Management Plan.

Below on page 2 is a graphical representation of the SWOT matrix and the **definition of the of the EDUPLAN tool objective**. On **page 3**, you will find the **four boxes** where you can insert **your comments regarding the Strengths, the Weaknesses, Opportunities and Threats of the EDUPLAN tool** after having participated in the first piloting of Eduplan in June and July 2011. Finally, on page 4 **a listing** gives some **keywords which subjects could be of interest** when carrying out a **SWOT assessment of Eduplan tool**. Please feel free to mention any topic in **your SWOT analysis** and do not limit yourself to the items listed in the table.

Please fill in these boxes on page 3 below with your assessment comments and send the sheet back to helga.treiber@icons.fr.

The external evaluator – Prof Thomas Eckert – and the EDUPLAN quality manager – Helga Treiber – will analyse your answers and compile a summary of the analysis.



OBJECTIVE OF EDUPLAN TOOL

EduPlan is designed as a self-assessment tool that should enable the providers of lifelong learning to evaluate their quality management by revealing its strengths and weakness. It is a tool to improve, modify and develop best practices in the field of education/lifelong learning.

In a commercial context, it is designed to help businesses to present the quality of their services, improve the results of their employees (trainers), and to satisfy their customers' needs. The survey contains max 44 questions concerning different measures of quality management in learning. They relate to planning, implementation and evaluation and review of the vocational training and adult education. It is aimed at assessing customer satisfaction, trainers' performance as well as management and organization of a particular institution or company in general. The survey has been divided into 3 areas:

- related to education / lifelong learning providers (44 questions), i.e. providers of further education, chambers of commerce, industrial associations, companies, vocational education institutions,

- related to educators (39 questions), i.e. training managers, academics, course instructors, trainers and administrative authorities

- learners (18 questions) i.e. course participants.

Having read the objective of Eduplan tool above and having worked with the tool, you can now carry out



YOUR SWOT ANALYSIS OF THE EDUPLAN TOOL

PLEASE MENTION ALL ITEMS THAT COME TO YOUR MIND

STRENGTHS <small>please fill in</small>	WEAKNESSES <small>please fill in</small>
OPPORTUNITIES <small>please fill in</small>	THREATS <small>please fill in</small>

Listing with keywords for S, W, O T for Eduplan tool

	Helpful to achieve objectives	Harmful to achieve objectives
Internal origins	<p>STRENGTHS</p> <ul style="list-style-type: none"> • Advantages of Eduplan • Competitive advantages of the tool • Resources, assets, people • Experience, knowledge, data • Marketing - reach, distribution, awareness • Innovative aspects • Localisation issues • Price, value, quality • Accreditations, qualifications, certifications • Management cover, succession 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> • Disadvantages of Eduplan • Lack of competitive strength • Reputation, presence and reach • Known vulnerabilities • Timescales, deadlines and pressures • Commitment, leadership • Accreditations, etc • Management cover, succession
External origins	<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • Market developments • Competitors' vulnerabilities • Trends in professional training world • Technology development and innovation? • New markets, vertical, horizontal • Niche target markets • Geographical, export, import • Business and product development • Information and research • Partnerships, agencies, distribution 	<p>THREATS</p> <ul style="list-style-type: none"> • Political effects • Legislative effects • Environmental effects • Competitors' intentions • Market demand • New technology, service • Vital contracts and partners • Sustaining internal capabilities • Obstacles faced • Insurmountable weaknesses • Loss of key staff? • Economy - home, abroad

ii. Raw results of SWOT 2 analysis

ALL – SWOT ANALYSIS OF THE EDUPLAN TOOL

PLEASE MENTION ALL ITEMS THAT COME TO YOUR MIND

STRENGTHS *please fill in*

- Various ways of using Eduplan
 - EQUARE/ EU compatibility
 - Process of developing the tool/ expertise of partnership
 - Items and questions
 - Online tool/useability
 - Market potential
-
- The project meets international standards
 - The project is open for many kinds of quality management and does not force companies to hire a special organization
 - The member of the projects are experts for evaluation and quality management in their countries and specialists in the field of adult education
-
- Tool developed by partners from structures with different and complementary aims, missions and publics.
 - Tool experienced before and during conception by potential users.
 - Tool revised and corrected according to the feedback collected following the experimental phases (pilots).
 - Toll adapted as well for structures of varying sizes than for single-member companies.
-
- Big strength is related to the speed at which tool can be completed. Does not take up a large amount of organisation's or managers' time.
 - Good visibility in terms of being able to see results – and to compare progress in one quality field against another
 - Allows for contributions of different stakeholders, with different expectations re education content and purpose; and these can be compared
 - Based on a common and shared terminology and set of definitions means that organisations can be assisted information about progress and results with their peers – even in different sectors and countries.
 - Comprehensive in scope re the outputs to be measured (taking in the learning cycle from design to delivery and review; as well as some reference to the operational or policy environment.

- Website and tool are very use-friendly and can be offered to any kind of providers, trainers and users.
 - The questionnaire is compact and can be used in approximately 30 minutes which means time needed for filling-in is not an obstacle for using.
 - The evaluation of the answers can be compared with other users in the own country and with other country-summaries.
 - The tool can be used as self-evaluation instrument and to suit individual organisations as well.
 - The tool is flexible enough to suit the quality assurance needs of all kinds of institutions
 - The tool is innovative and can be flexibly expanded.
-
- Tool is web-based and available on line so is inclusive and accessible for all users.
 - Learner evaluation can be developed to suit individual organisations.
 - Tool is user friendly & flexible to suit the quality assurance needs of organisations
 - The tool has innovative aspects
 - Good springboard to further develop self assessment of quality assurance processes
-
- The tool is innovative
 - The tool is valuable for Providers and Trainers as a self-assessment.
 - It is possible to see the progress and to compare it to a reference group (In my opinion that the most effective sale-point
 - It is a good start to get acquainted with self-assessment.
 - It's easy to handle
 - It's related to the "real" world in quality assurance.

WEAKNESSES - please fill in

- Usability matters
 - Theoretical aims and reality
 - Items and questions
 - The market/ competition
-
- The questionnaire does not always meet standards in item analysis
 - The questionnaire is not explicitly based on a quality theory
-
- Tool fixed, without the possibility for the user to customize specific evaluation criteria.
 - Reports are only observations that do not clearly highlight points of degradation or improvement to monitor.
 - There are no simple and rapid procedure and means to make any corrections if an anomaly is detected in the tool.
-
- Not an 'evidence-based' approach – results are based on personal assessment rather than on any structured information collection to support conclusions.
 - There is still a problem with language and communicating exactly what is meant to specific audiences. Terminology used can make sense in one context, but can cause confusion in others.
 - No capacity to collect 'learning and lessons' – it can be as important for an organisation to say why something as happened, in addition to just noting that it has happened.
 - No capacity to link results to forward planning – what do these assessments mean for future
 - Absence of reporting function that gives easily produced comparisons between different stakeholder rankings, as well as comparisons over time
-
- Marketing – there are many tools existing and therefore the marketing per country has to be necessarily done
 - Reputation of the tool including sell-ability in all partner-countries; it will be necessary to do quite a lot of promotion
-
- Despite of individual changes resp. expansions the basic questionnaire has to remain as it is – and it will be necessary to control this in the next 2 years by the subcontractor LRD (responsible for the content).

- Reporting facility needs further development
 - Reputation of the tool including self-ability particularly in the UK
 - Does not accommodate variation in needs between partner countries as there is a lack of control over content of questionnaire.
-
- It needs a better introduction
 - There are similar other tools
 - Adaption of the tool will provide additional costs
 - in our quality assurance system (eduQua) there is already a self-evaluation-tool which is part of the audit

OPPORTUNITIES - please fill in

- Variety of options to use Eduplan
 - Legislative/ regulatory environment
 - European dimension
 - Future of Eduplan
-
- The project is not explicitly based on a quality theory and is so open to several ways of quality management
 - The questionnaire is easy to use and will so be helpful for many organizations – if the use it
 - There are many companies interested in a tool like eduplan, but it is still not shure whether the project can manage them to hire the tool and the conditions to do that are different in each country
-
- Tool structured around the stages of quality assurance (PDCA/PIER) and therefore easily appropriable by people already involved in quality management.
 - The main topics of the evaluation process match with the French VET new standard X50-769 (diagram of a training device completion chain).
 - The relevance of the tool relative to the quality assurance process in VET in France has been identified by experts of QA involved in the final conference (Munich).
-
- Current funding environment (and focus on 'austerity') is a threat to organisations and institutes. But it can be opportunity for assessment systems. More pressure than ever now on institutes to demonstrate their results and standards. Eduplan can commit to help with this without taking up a lot of time.
 - Core themes in Eduplan are in accordance with key priorities established for EU LLL programme – especially the stated aspiration to develop a 'culture of quality control'. Also with regard to sharing instances of good practice (although Eduplan would need to develop the capacity to share results across projects (as well as between stakeholder groupings within projects) of it is to exploit this opportunity
 - Learning (and ensuring quality standards in learning) can be positively promoted as being essential in efforts to stimulate sustainable economic growth. Especially important selling point is the capacity to be flexible as circumstances change.
-
- The tool can be used by all parties of any kind of organisations and companies to assess the quality assurance process
 - Could become the 'standardised' approach to self-evaluation and evaluation of any organisation
 - If many providers and trainers can be attracted to use this tool the opportunity for benchmarking is very high - either against other organisations or other countries
-
- Can be used as an integral part of an organisation's self assessment of quality assurance process
 - Could become the 'standardised' approach to self evaluation in post 16 learning.
 - An opportunity to benchmark against other organisations is available.

- benchmark against other organisations is available.
- Could may be used as a “teasing”-tool for providers, who are interested to be eduQua-certified.
- Could be a bit further developed and become a self-evaluation-tool only for Trainers in AE

THREATS **please fill in**

- Acceptance of tool
- Ergonomics
- Uni-dimensional use
- Sustainability and funding

- The partners in each country must find clients to establish the tool and to get money for continuing the activities of the project
- The partners must be able to finance continuing projects (meaning 25% co-financing)
- The partners must find a way to keep the tool working with or without Thorsten Koch.

- The administrative, technical and commercial follow-up and monitoring are not yet defined at this step of the project.
- There is no precise and detailed study of the expected costs for maintenance, hosting and development.
- The actual capacity and technical limitations of the application are not known (no stress test).

- Real possibility that education providers can mistake eduplan for an evaluation system. Evaluation should compare inputs with outputs, as well as recoding lessons re factors blocking or facilitating progress. Eduplan is a set of scales that allow people to ‘score’ outputs, but may be first seen as something more than this.
- As a self-assessment tool, eduplan could be used to justify existence and activities rather than to give an accurate picture. (People can succumb to growing pressure to justify their outputs because of financial cutbacks (results may not be ‘falsified’, but the danger is they could be exaggerated. Results can therefore be open to question.

- There are so many similar tools 'out there' making similar promises

- Funding – funding – funding!!!
- Convincing – convincing- convincing!!!
- Funding the ongoing development and updates to Eduplan that will be required.
- Funding maintenance of the website
- Current Economic Climate for providers when aiming to 'sell' the tool.

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- Funding maintenance of the website
- Current Economic Climate for providers when aiming to 'sell' the tool.

- The Project ends, no further money.
- No sales – no money – no further development
- No website anymore
- The current economy is not spending-friendly