

EOLE

*European Programme for
Employee Ownership Learning & Education*

REPORT OF EOLE KICK-OFF MEETING

Brussels, September 24, 2005

*Project coordinated by
the European Federation of Employee Share Ownership*

AGENDA OF EOLE KICK-OFF MEETING SEPTEMBER 24th 2004, BRUSSELS

EOLE PROJECT SUMMARY IN 4 THEMES

- I. **Identify and analyse existing Employee Ownership Learning & Education initiatives** and programmes.
- II. **Propose educational models and best practices, and define European educational frameworks and specifications.**
- III. **Promotion and information dissemination** to develop national and European initiatives: **EOLE & Experts databases; Internet public domain, European conference**, to present the results of the project, the best practices and the proposed frameworks.
- IV. Initiate the creation of **specific networks** in learning and education field to foster co-operation, exchanges and research. **The future of EOLE project: developing EO courses ?**

AGENDA OF THE MEETING

9.30 – 13:00 MORNING SESSION

9:30 – 9:45 INTRODUCTION

Welcome by Marc Mathieu - EFES Secretary General

9:45 – 10:15 EOLE PROJECT'S PRESENTATION

Main Phases, Activities, Intended Results

Presentation by Angelica Luminita Bucur, Project Manager

10:15 – 11:00 PARTICIPANTS' ROUNDTABLE

Participants' presentation, **what do they expect** from the project?

All participants (Facilitator: Janos Lukacs)

11:00 – 11:30 PROJECT'S ORGANIZATION – part 1

Project work-plan, main activities and schedule, management and communication strategy

Presentation by Angelica Luminita Bucur, Project Manager

11:30 – 13:00 WORKING GROUP CREATION – part 1

All participants (Facilitator: Janos Lukacs)

- ▶ **Research and working methodology, in relation with the 4 themes above**

13:00 – 14:00 LUNCH

14:00 – 18:30 AFTERNOON SESSION

14:00 - 15:30 COMPETENCY STANDARDS FOR EO PARTICIPATIVE MANAGEMENT EDUCATION

Presentation by Ryszard Stocki

Questions and debate

15:30 – 15:45 Coffee break

15:45 - 16:00 PROJECT'S ORGANIZATION – part 2

Presentation by Angelica Luminita Bucur, Project Manager

16:00 – 17:30 WORKING GROUP CREATION – part 2

All participants (Facilitator: Janos Lukacs)

- ▶ **Define and agree on the partners' roles and responsibilities (see 4 themes above)**
- ▶ **Evaluation of the results and of the work progress**

17:30- 18:30 PARTICIPANTS' THINK TANK

All participants (Facilitator: Janos Lukacs)

- ▶ **How to use the results of EOLE for promoting ESO, EFES and its members?**
- ▶ **How to use/develop EOLE as source of financial revenues?**
- ▶ **In which directions should project continue to benefit from future EC grants?**

PARTICIPANTS' LIST
EOLE KICK-OFF MEETING,
September 24th, Brussels

N°	Name	Country	Organisation	Sept 24 2004
1	Pierre VANRIJKEL	BELGIUM	ASSOCIATION DES ACTIONNAIRES SALARIES BBL	Yes
2	Marc MATHIEU	BELGIUM	Secretary General EFES	Yes
3	Angelica Luminita BUCUR	BELGIUM	EOLE Project Manager	Yes
4	Myriam BIOT	BELGIUM	Director CULTURES PLURIELLES	Yes
5	Gurli JACOBSEN	DANEMARK	Trainer, LANDS ORGANISATIONEN TRADE UNION	Yes
6	Zdenek Srein	CZECH REPUBLIC	Director CZECH SOCIETY FOR SELF MANAGING ENTERPRISE	Yes
7	Janos LUKACS,	HUNGARY	Director, SHARE PARTICIPATION FOUNDATION	Yes
8	Jean-Claude MOTHIE	FRANCE	President of FAS THALES GROUP	Yes
9	Vincent DUTFOY	FRANCE	Director, CREDIT LYONNAIS, FEDERATION FAS	Yes
10	Gorm WINTHER	DANEMARK	AGIO PARTNERS Former professor to the University of Greenland	Yes
11	Henk KOOL	NETHERLANDS	Director, NEDERLANDS PARTICIPATIE INSTITUUT	Absent
12	Arie De Ruyter	NETHERLANDS	President, NEDERLANDS PARTICIPATIE INSTITUUT	Yes
13	Ryszard STOCKI	POLAND	Professor, Jagiello University	Yes
14	Javier San José Barriocanal	SPAIN	ASLE CONFESAL Director Education & Training	Yes
15	Fred Freundlich	SPAIN	Professor, University of MONDRAGON	Yes
16	David WHEATCROFT,	UNITED KINGDOM	Job Ownership Limited (JOL)	Yes
17	Hugh DONNELLY	UNITED KINGDOM	Director, Employee Ownership SCOTLAND,	Yes
18	Dan BELL	UNITED STATES	COG, International Program Coordinator, Ohio Employee Ownership Center	Yes
19	David Poissonneau	BELGIUM	EFES	Yes
20	Philippe BERNHEIM	FRANCE	FAS, Director France Telecom	Yes
21	Zvone Anton ZUPAN	SLOVENIA	PRESIDENT Slovenian Employee Ownership Association DEZAP	Yes

EOLE PROJECT PRESENTATION

Main Phases, Activities, Intended Results
Presentation by Angelica Luminita Bucur, Project Manager

WHAT IS EOLE?

Employee Ownership Learning and Education project is an initiative of EFES **to promote education strategy as key element for further development of European employee financial participation.**

The project EOLE aims to palliate the lack of research and synergies in this field, so that information exchanges, research and education and training initiatives can be put on a permanent footing.

EOLE main themes are :

- 1) Identify and analyse existing Employee Ownership Learning & Education initiatives and programmes.
- 2) Propose educational models and best practices, and define European educational frameworks and specifications.
- 3) Promotion and information dissemination to develop national and European initiatives: EOLE & Experts databases; Internet public domain, European conference, to present the results of the project, the best practices and the proposed frameworks.
- 4) Initiate the creation of specific networks in learning and education field to foster co-operation, exchanges and research.

WHO IS PARTICIPATING?

Working Group Experts are Academics, ESO Directors, Managers, Researchers, International Published Authors, Enterprises, Social Partners, Associations, Education & Training Institutions...

Countries: Belgium, France, Netherlands, UK, Spain, Ireland, Denmark, Finland, Czech Republic, Poland, Hungary, Italy,...most of the EU countries

More details in the future [Who's Who in EOLE](#)

EOLE participants bring together the necessary expertise and resources in different areas, such as:
Extensive experience in ESO and financial participation, at national and international level
Planning and implementing EO education and training programmes
Some of participants are academics and international published authors
European projects and programmes management, ...

HOW TO ACHIEVE EOLE'S AIMS?

The project intends to achieve this aim through the following activities:

RESEARCH activities

SYNTHESIS activities

INFORMATION DISSEMINATION & NETWORKING activities

The project, with a duration of 1 year, is organized in three phases:

Preparation Phase: from September 1st, to September 30 - 2004

Implementation Phase: from October 1, 2004, to May 31st, 2005

Follow-up Phase: from June 1st 2005 to August 31st 2005

Each phase have clear objectives, activities and results.

WHAT ARE THE EXPECTED RESULTS?

1. Identification of existing national and European initiatives and programmes
2. Overview and comparative analysis of existing national and European programmes
3. Analysis of the different education needs of employees, managers, organisations
4. Definition of coherent framework for Employees business literacy, Management training, Masters
5. European Conference to present the results of the project, the best practices and the proposed framework;
6. Creation of an Internet public domain for effective dissemination and exchange of best practices
7. Dissemination and Networking to further mobilise national and European initiatives
8. Creation of specific networks for Employee Share Ownership education and training

EOLE PARTICIPANTS' ROUNDTABLE

Participants' presentation, **what do they expect** from the project?
All participants

► DANEMARK

Gurli JACOBSEN : (Lands Organisation Trade Union Project Manager)

What are the relevant programmes for the ESO employees to participate to the Board of directors of the companies? In DK, such trainings have been provided by trade-unions for a long time. Participation of workers to the Board is a common fact.

What to do and what not to do in education ?

In DK, the law gives the right to participate to ESO employees if they represent minimum 7% of the total employees.

Mapping all the existing initiatives:

Identify the type of programmes that facilitate the participation of ESO employees to enterprises' management.

Identify the experiences of other countries in this field.

Gorm WINTHER: (AGIO Partners, Professor of economics)

Denmark is a lagging country in this area. 40 to 50 companies based on ESO. Before to create a training program, we have to evaluate the potential demand by a convention on ESO issues. In this way, the project of a national Danish conference shall be updated and revived.

Creation of a Danish ESO Centre.

Translation of UK education courses and programmes for blue-collar employees and development of Danish programmes..

Collaboration and exchange of experiences. **Networking.**

To participate to the creation of European education frameworks and specifications.

► FRANCE

Jean-Claude MOTHIE – President of FAS (Thales Group)

Philippe BERNHEIM – FAS (France Telecom, Coordinator the Education Specifications in France)

Vincent DUTFOY – FAS (Director Crédit Lyonnais, Coordinator of FAS research in education)

The philosophy of FAS concerning ESO in France is that there are three levels that should be taken in account, in education and in all the other aspects concerning the participation of employees. The levels are:

- 1) Financial basis
- 2) Corporate governance (participation)
- 3) Ethics and sustainable development.

Therefore the development of education programmes should address these three levels.

Existing education initiatives:

The FAS framework and specifications address many aspects and target publics, specific to big companies ESO. The French law : the ESO employees participate to the management of the company when represent minimum 3% of total employees. If an employee owner becomes member of the company's supervisory board he has the legal obligation to be trained for this.

FAS accredited six programmes until now.

Education demand in ESO and financial participation:

Not so strong in France. Lack of information of employees. Differences between public and private sector.

The French law imposes 5 days training to learn the Savings funds management.

Jean-Claude Mothie thinks that the EOLE project should focus on a precise model of ESO to collect the information about the existing offer of training in Europe in order to collect a reasonable volume of data.

Expectations:

How to communicate better the existing education initiatives **in France?**

How to promote **'Education & training courses'** as a **PRODUCT**, in France and EU?

► SPAIN

Javier San José BARRIOCANAL – CONFESAL– Director ASLE Education & Training Centre

In Spain specific training ESO programmes are developed for the main three public targets: for employees, for managers and for the future managers (university level master).

This education offer is the result of the high degree of development and of the specific needs of employee-owned companies.

The ASLE Education & Training centre has many years of experience in delivering these programmes for employees and managers. Our trainings on participative management, shares distribution or other topics directly connected with employee ownership have a solid ideological content. We clearly distinguish employee owned companies from capitalist companies.

ASLE, as other employee owned companies regional federation in Spain, also provides trainings on standards skills needed by the companies (accountancy, communication, computing etc.). Those trainings are the same for employee owned companies workers, unemployed people or workers from other companies. Consequently, those programs shall not be included in the EOLE database.

Our public is interested now more in the development of the motivation of employees, of the awareness of the what means to be and ESO, what is the philosophy of employee-owned companies...

Expectations:

To share the CONFESAL Confederation's results in education and training with the other participants.

To offer examples of different types of courses for different publics.

How to transform the existing training courses to apply them to the international subsidiaries of their Spanish companies?

Fred Freundlich : Professor, University of MONDRAGON

Mondragon Corporation developed specific training ESO programmes for 3 public targets: for employees, for managers and for the future managers (university level master).

Some 1000 to 2000 of ESO cooperatives/ co-operators do very interesting things in education.

Expectations:

How to communicate the best experiences to the other thousands of ESO-based companies?

How to explain financial basis to employees to enable them to manage changes?

► UNITED KINGDOM

There is a significant experience all over the United Kingdom in specific education and training for employee share ownership and participation.

Hugh DONNELLY: Director of Employee Ownership SCOTLAND

The activities related directly to ESOP education or preparing for entrepreneurship and active participation to enterprises management are various in Scotland.

An overview of initiatives includes:

Enterprises' oriented education and training courses

Co-operatives specific training

Education for entrepreneurship

Teenagers' cooperatives

Students' oriented education

Children's oriented education

David WHEATCROFT, representing Job Ownership Limited UK

Specialised in Employee Ownership training, author of articles and brochures, he highlights the importance of the culture awareness of employees in EO based companies

Culture education: What is to be an Employee Owner, an ESO ?

Education Newsletters : Diagrams and Feedback based education

Expectations:

To share the UK's results in education and training with the other participants.

To offer examples of different successful types of courses for different publics.

To contribute to the development of education initiatives in other European ESOP organisations

To promote the importance of early financial education in developing the entrepreneurship

To participate to the creation of European education frameworks and specifications.

▶ **NETHERLANDS**

Arie de RUYTER, President of Nederlands Participatie Instituut

Henk KOOL, Director of NPI, had to cancel in the last moment his participation to the meeting due to political crises in his town.

Expectations:

To create education programmes for ESO representatives (Managers , Employees)

To create education programmes **for Work Councils**.

▶ **BELGIUM**

Pierre VANRIJKEL, President EFES, President Association of Employee Share Ownership ING Belgium

Marc MATHIEU, Secretary General EFES, President of Belgian Association of Employee Share Ownership

David POISSONNEAU, Researcher, EFES

Angelica Luminita BUCUR, EFES EOLE Project Manager

Expectations:

To contribute to the development of education initiatives in Europe

Identification of existing national and European initiatives and programmes

Overview and comparative analysis of existing national and European programmes

Needs overview per country, public target (employees, managers, organisations)

To participate to the creation of European education frameworks and specifications.

To create specific education networks (e-learning, etc.)

To create information and education initiatives to **promote ESO in Belgium**.

CENTRAL & EASTERN EUROPE

▶ **CZECH REPUBLIC**

Zdenek SREIN, Director, Czech Society For Self-Management Enterprises

Experience in management and training, provides useful lessons for starting new enterprises. Questions:

How to overcome barriers (barriers that are specific for the majority of the post-communist CEE countries) to ESO and to ESO education?

Learning issues:

How do I owe an company?

How do I teach how ESO makes money for me?

Expectations:

Overview of different countries' **laws/legislations** concerning the creation of ESO systems, and how it worked, in order to get inspiration for a national law in the field.

▶ **SLOVENIA**

Zvone Anton ZUPAN, President DEZAP – Slovenian Employee Ownership Association

How to overcome barriers to ESO and to ESO education?

Expectations:

Overview of different countries' **laws/legislations** concerning the creation of ESO systems, and how it worked, in order to get inspiration for a national law in the field.

To contribute to the development of education initiatives in European organisations.

▶ POLAND

Ryszard STOCKI, Assistant professor, Jagiellonian University

To contribute to the development of MBA in ESO

To promote the role of education initiatives to develop ESO based companies.

To participate to education network on participative management.

Expectations:

To contribute to the development of education initiatives at university level, in Europe.

▶ HUNGARY

Janosz Lukacs, Hungarian Share Participation Foundation

Extensive experience in financial participation, in training programmes and courses for managers and employees. He run a 3-years program of ESOP education for employees in ESO-based companies in Hungary and highlighted different barriers for developing effective courses, related to the transition period in the society.

Culture education: participation and management relationships?

How do I owe an company?

How do I teach how ESO makes money for me?

Expectations:

How to overcome these specific barriers to ESO and to ESO education?

How to develop education & training courses that take in account **the specificity of CEE countries?**

To promote the role of education initiatives to develop ESO based companies.

To participate to education network on participative management.

▶ UNITED STATES

Dan Bell, Kent State University, International Program Co-ordinator, Ohio Employee Ownership Center

Dan thinks that a good way to evaluate the impact of trainings on enterprises could be to compare enterprises that have trainings and those who have not with a predefined analyse. He also mentions that we can get round languages barriers if we create frameworks for trainings destined to trainers.

Expectations:

To share the US's results in education and training with the European participants.

To offer examples of different successful types of courses, including e-learning, for different publics: blue-collars employees, managers, students

To contribute to the development of **e-learning education initiatives**

To promote of training of the trainers

To develop a MBA in ESOP

To participate to the creation of European education frameworks and specifications.

PROJECT'S ORGANIZATION – part 1

Project work-plan, main activities and schedule, management and communication strategy
Presentation by Angelica Luminita Bucur, Project Manager
Discussion about the project's organisation: all participants , Faciliator Janos Lucacs

Following the presentation, the participants agreed on the time schedule, work plan, main phases and activities, as presented bellow:

▶ EOLE WORK PLAN

Preparation Phase: September 1st - September 30, 2004

- *Project management and organization*: continuous
- *Programmes Database creation*: Sept. 2004
- *Kick-Off Meeting* - Sept. 24: Discuss and agree on: Research and working methodology; Partners' role and responsibility , Research region, Communication system, others issues
- *Communication* among the partners of the project: continuous

Implementation Phase: Oct.1- May 31, 2005

- *Research activities* : from Oct.1st 2004 to Jan. 31st 2005
- *Selection e-Meetings* - Jan. 2005: Analyse key results. Selection of best practices and models
- *Synthesis* : Feb. 2005: Common features & selection of possible European levels
- *Framework definition*:March-April 2005.
- *Working Group Workshop*, April 15, 2005: agree on European Framework, programmes specifications
- *On-going* project management and work-in-progress evaluation.

Follow-up Phase: June 1– August 31 2005

- *Internet* public domain creation
- *On-line Databases* of programmes & experts
- *European Conference* in June 2005, Brussels
- *Network creation* in specific ESO education
- *Information Dissemination*
- *On-going project management* and work-in-progress evaluation.
- *Final report* and project evaluation.

▶ MAIN ACTIVITIES

RESEARCH

Research will cover two main aspects:

- 1) Identify **existing** employee share ownership education and training initiatives and programmes from across Europe, in order to present a picture of the current situation and benchmarking for future action.
- 2) Identification and analysis of the education **needs** of employees, managers, different organisations and enterprises.

SYNTHESIS

Overview of existing national and European programmes

Benchmarking: Comparative analysis of these programmes

Selection of best models of programmes: from business literacy training for employees, to programmes for managers of employee share ownership based companies

Define the content and specifications of Education/ Training Programmes on different levels

Based on these results:

Creation of a European framework(s) to provide guidance for developing and implementing employee share ownership education and training programmes

INFORMATION DISSEMINATION & NETWORKING

The project has the ambition to make a contribution to a future steering policy action in Europe in this field.

To assure sustainability and multiplier effect, the information dissemination is planned at several levels:

1. European Conference in June 2005, in Brussels (120 participants from most of the 25 European countries, companies, trade unions, experts, researchers, institutions, employee owners, EU representatives, looking to promote employee ownership and participation in Europe.)
2. Education Database creation (initiatives, institutions, programmes, experts,)

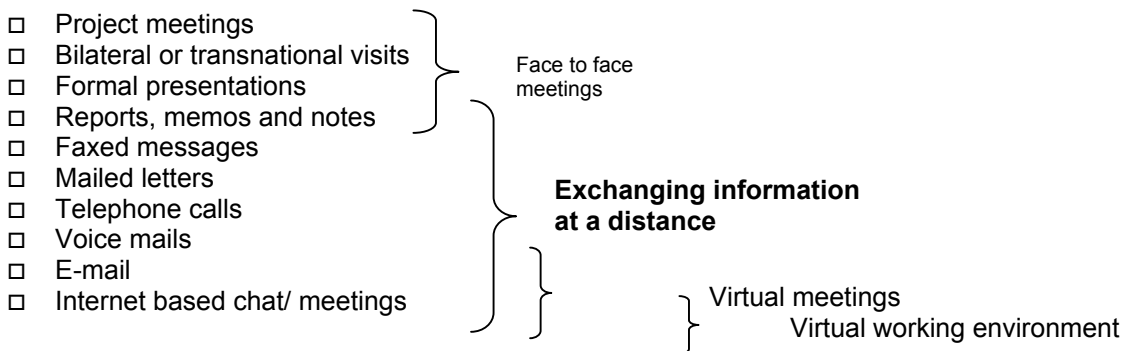
3. Project reports publication
4. Internet public domain creation
5. Exchanges and creation of specific education networks.

▶ MANAGEMENT AND COMMUNICATION STRATEGY

This topic was not presented in detail, the project manager decided to send it for discussion and feedback together with the report of the Kick-off meeting. The reason was that it was preferred to give more time to the Work Group creation and to the discussions related to the research and working methodology.

Nevertheless, during the duration of the meeting, the basis of the communication among EOLE participants was agreed upon and is presented is presented bellow.

Communication between EOLE experts and participants normally takes place in several of the following ways:



It was agreed that communication within EOLE will be mainly technological-based as follows:

- ▶ E-mail will be used for regular weekly communication.
- ▶ Establishing an intranet on a project web site might be helpful for working together on a specific task in a virtual working environment.
- ▶ Internet or telephone conferences to intensify the trans-national team work : *proposal of Hugh Donnelly: investigate if EFES's chat room can be improved in terms of speed, in order to use efficiently the participants' time.*

Dan Bell proposes to use the mailing list that had been created for the OEP project initiated by COG. To subscribe the list, just send an e-mail to oep@listserv.kent.edu

The second face-to-face Working Group's meeting is planned in February – March. Its objectives are:

- ▶ to choose educational models and best practices,
- ▶ agree and on levels and public targets,
- ▶ define specifications.

Proposal of Information and reporting system – to be commented upon by the EOLE participants

It is important to develop an effective information, documentation and reporting system within the project.

- Each project member should be kept up to date on the present status of the project, work completed, the next steps, the outcomes of national and trans-national meetings and the allocation of tasks.

This documentation and reporting system is one of the tasks that has to be carried out by the project manager.

It is also the principal tool for running and monitoring the project.

The project Internet can be used for this task very effectively.

The official reports to the Commission need also to be distributed among all the project partners.

EOLE WORKING GROUP CREATION - part 1

GROUP 1 : Gurli, Gorm, Angelica, Hugh , David discussed the theme 1:

How to identify and analyse existing Employee Ownership Learning & Education initiatives and programmes

RESEARCH METHODOLOGY: on two levels

EDUCATION

NEEDS

A. Companies with Employee Ownership (EO, ESO, ESOP)		
IN HOUSE COMPANY TRAINING	TRADE UNION TRAINING	ADVISERS & OTHER TRAINING INSTITUTIONS
WHO ? EMPLOYEES in general MANAGERS at various levels EMPLOYEE DIRECTORS (board members) TRADE UNION OFFICIALS / Work councils (?)		
WHAT? Financial journal of EO (?) Financial understanding Philosophy / Culture of Company Rights and Obligations of an Employee share owner Entrepreneurship training ...others		

B. Development of Sensitivity to EO		
CHILDREN'S SCHOOLS EO PROGRAMMES	BUSINESS SCHOOLS OPTIONAL COURSES FOR STUDENTS	TRADE UNIONS
WHAT? Legal forms from other countries		
Potential new EO's Listed companies ...others		

To be completed

GROUP 2 () discussed the theme II: **CRITERIA for educational models and best practices, and define European educational frameworks and specifications**

What is the meaning of employee ownership?

- Participative management
- Financial participation
- Entrepise feeling
- Social entrepise
- What are the differences between different models of EO ?

What is the philosophy of EO, what is the content ?

- Political
- Economic

Rights and commitments of shareholders:

- as described in national legislations
- as work in particular companies

Definition of the criteria for connecting the training to EO concept: training should be taught in relationship with EO:

- training in industry

- teamwork training
- financial training

Examples of other ESOP-based companies

Synergies among the different companies in a country

Highlights the interests / prospects of different shareholders

General Management Training / or not

(To understand the basics of an enterprise before understanding the ESOP enterprise)

GROUP 3 () discussed the theme III: **Promotion and information dissemination**

Target Publics/ audiences for promoting ESOP

- Company's Management
- Trade unions
- Investors
- Political level representatives
- Education level (schools, universities)

Target publics for the EOLE Conference in 2005

- Companies (large and SMEs)
- Social partners
- Politicians
- Professional organisation

Sources of information

- Resources
- Sponsors (in-kind working time, financial sponsoring)

Presentation of the INFORMATION TRIANGLE

Triangle: ESOP products / How do they work/ How does the market work

What are the available products?	How does it works?	Stock market?
Savings plans Shares others	Which are the ESOP companies (listed / not listed ?	How is it working? How do the banks' advisers work?

In the centre: ESOP's investors NEEDS , resulting in SPECIFICATIONS for education and training.

GROUP 4 () discussed the theme IV: **Specific Networks Creation**

Type of networking , national and international:

- Youth education networks
- Networks of teachers, schools
- Networks of Managers
- Network of trainers
- Network of ESOP companies

Specific subjects networks:

- **Employee training courses** :Adapting to national needs existing training courses for employees (participants from Denmark, United Kingdom, Spain, United States)
- **Managers oriented courses** - (Belgium, Netherlands, United Kingdom, France?, US)
- **MBA level programme creation** (Poland, Netherlands, Belgium, Spain)
- **E-learning and Open Distance Learning** (US, Belgium, Denmark?, Netherlands?, Spain?)

AFTERNOON SESSION

COMPETENCY STANDARDS FOR EO PARTICIPATIVE MANAGEMENT EDUCATION

Presentation by Ryszard Stocki
Questions and debate

Standards of what?

- Employee ownership
- Open book management
- Participative management
- Cooperation...

Specificity

- Person & community orientation versus Result & cost orientation
- Long-term perspective Versus Short term perspective
- Person anthropology / Human resources anthropology
- Creation of standards / MBA standard

Question: Should we follow the existing educational standards or to create new ones?

What do we need the standards for ?

- Course and curriculum design
- Certification of professors, schools, institutions,
- Assure the same high quality
- Ownership culture search
- Handbook development
- Professional exams
- Recruitment & development criteria
- Promotion of the Employee Ownership

Standard 1 – GENERAL MANAGEMENT

Values: Trust, Responsibility, Personal dignity

General: Business literacy

People related: Personal development, Communication skills, Give / receive feedback, etc...

Standards SPECIFIC PARTICIPATIVE MANAGEMENT

Values: Community, Subsidiarity, Solidarity

General Competencies: Anthropology foundation of the economic systems; History & development of social systems;

People related competencies: facilitating other individuals' development

Model (EFQM?)

LEVELS:

Employee Share Ownership companies
Employee Ownership companies
Employee Owned & Managed companies

PROJECT'S ORGANISATION – Part 2

All participants – facilitator: Angelica Luminita Bucur & Janosz

EOLE PROJECT ORGANIZATION AGREEMENT

The ***Kick-off Meeting's objectives were to discuss, change or/and agree on:***

- Work plan phases and activities
- Research and working methodology
- Partners' role and responsibility
- Research region

Work plan phases & activities

The project manager, Angelica L. Bucur continued the presentation of the project. Following the presentation and the discussions among the participants, several actions and activities were planned.

- ▶ After two months of research, an e-meeting should be organized to discuss further research and research for the countries that are not covered by the present experts.
- ▶ Depending on the country situation and development of ESOP, this information will cover one or more from the research outputs as planned in the project presented to the European Commission:
- ▶ Agreed on communication strategy but not on the frequency.
- ▶ The discussion / agreement of the Draft of the Questionnaire for collection of data was postponed until a first questionnaire is proposed by the participants.

Research and working methodology:

Angelica L. Bucur asked the participants, one-by-one, to present the modalities of their participation and their possibility to respect the first information research deadline.

All the participants committed themselves to search and send the information to EFES between October to November 2004.

The research would include the planned aspects:

Key aspects per country:

- Existing programmes
- Experts and consultants and institutions
- Existing Initiatives

Key needs per country and per level

- Training the employee / Business Literacy programmes
- Training the managers and promoters of Employee Share Ownership initiatives
- MBA/ Master Programmes for the future managers of ESO-based companies

E-learning initiatives.

Partners' roles and responsibilities and research region:

- ▶ Each participant / expert agreed to undertake the research for one country.
- ▶ The information will be sent mainly in the original language.
- ▶ Translations could be made when further collaboration and exchanges are planned.
- ▶ They agreed to use the structure of information as proposed in the preliminary database example (see the details in the Belgian example ICHEC).
- ▶ They agreed to send the information about the existing initiatives for their country until November 30 the latest.

EOLE & SPONSORHIP

All participants – facilitator: Janos Lukacs

The EOLE project has to finance by itself 20% of the general budget.

This matching found represents 40. 000 €. If the project's promoter and participants cannot finance this part of the budget, the European Commission will proportionally reduces its funding.

The better way to get this extra funding is sponsoring from private companies and institutions. Some participants mention that it is also possible to apply financial support from national and regional authorities.

The potential private investors can be attracted by :

- the visibility for their company the project can offer,
- the press coverage of the project,
- for companies who already practice ESO, new ideas and resources to ameliorate the ESO, programs in their company,
- a privileged access to information about ESO in Europe
- the opportunities to create networks with other companies trough the project.

Products that the project can propose to attract investors are essentially :

- Companies logos added to all EOLE communications
- Explicit advertisement
- Sponsored dinners for participants...

After this overview of the topics, participants were invited to list, in smalls groups, the entities likely to be interested in sponsoring the EOLE project.

Here is a non-exhaustive list of participants ideas :

John Lewis partnership

FEPI

FEPC

The Beyer Institute (c/o David Binns)

XSANSA

CERA Foundation

Fortis Group

Herend

Hengel

Rovtre Foundation

SAIC

JOC companies

IAFP

PARTICIPANTS THINK TANK

All participants – facilitator: Janos Lukacs

The participants were divided in four groups to brainstorm on the following subjects:

1. **How to use the results of EOLE for promoting ESO, EFES and its members?**
2. **How to use/develop EOLE as source of financial revenues?**
3. **In which directions should project continue to benefit from future EC grants?**

RESULTS:

1. Due to the lack of time, the discussion of using the results of EOLE for promoting ESO, EFES and its members was postponed.

2. There were four main directions that seemed of interest for the EOLE participants willing to develop new projects with the support of the European Commission.

- **Collaboration on Employee training courses** :Adapting to national needs existing training courses for employees (participants from Denmark, United Kingdom, Spain, United States)
- **Development of Managers oriented courses** - (Belgium, Netherlands, United Kingdom, France?, US)
- **Creation of a MBA level programme** (Poland, Netherlands, Belgium, Spain)
- **E-learning and Open Distance Learning** (US, Belgium, Denmark?, Netherlands?, Spain?)

These future projects will be developed by EFES or EFES members on the foundation created by EOLE.

Where ? The future projects could apply for European financing by participating calls for proposal or call for projects not only at the **DG Employment and Social Affairs** but also at **DG Education & Culture** (for projects with a duration of 3 years), **DG Enterprise** or **DG Enlargement**.

EOLE KICK-OFF MEETING OUTCOMES

We can summarize the **main outputs of the Kick-off meeting** as follows:

1. Agreement on the work plan phases and main activities as presented in the project.

- ▶ One change was suggested at this moment:
to organise the second face-to-face meeting earlier , in February or March 2005, than on April 15th as planned. This will allow more time for the framework(s) and specifications development.
- ▶ The date for the EOLE Conference was discussed and agreed upon: June 16-17 , 2005 in Brussels.

2. Agreement on a research and working methodology for the first two months of the Research phase

Key aspects per country:

- Existing programmes
- Experts and consultants and institutions
- Existing Initiatives

Key needs per country and per level

- Training the employee / Business Literacy programmes
- Training the managers and promoters of Employee Share Ownership initiatives
- MBA/ Master Programmes for the future managers of ESO-based companies
- E-learning initiatives.

3. Agreement on partners' roles and responsibilities for the research phase

4. Agreement on the research region.

- ▶ Each participant / expert agreed to undertake the research for one country.
- ▶ The information will be sent mainly in the original language.
- ▶ Translations could be made when further collaboration and exchanges are planned.
- ▶ They agreed to use the structure of information as proposed in the preliminary database example (see the details in the Belgian example ICHEC).
- ▶ They agreed to send the information about the existing initiatives for their country until November 30 the latest.

5. Plan of the future activities and the communication principles:

- ▶ After two months of research, an e-meeting should be organized to discuss the results and further research and research for the countries that are not covered by the present experts.
- ▶ Depending on the country situation and development of ESOP, this information will cover one or more from the research outputs as planned in the project presented to the European Commission:
- ▶ Agreed on communication strategy but not on the frequency.
- ▶ The discussion / agreement of the Draft of the Questionnaire for collection of data was postponed until a first questionnaire is proposed by the participants.