

A Work Project presented as part of the requirements for the award of a Master's Degree in
Management from the Nova School of Business and Economics

MEASURING PERFORMANCE WITH A BALANCED SCORECARD
JUNIOR ACHIEVEMENT PORTUGAL

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Abstract

The present Work project aims to develop a measurement tool for Junior Achievement Portugal to grow further. The tool chosen in this project was the Balanced Scorecards, due to its ability to cover the major aspects of the organization efficiently, through five important perspectives: innovation & growth, internal processes, customer, financials and social impact.

This work project demonstrated to be useful for JA Portugal, since it was possible to understand main gaps and errors and discuss it with the organization.

Key words: Balanced Scorecards; Social Impact; Performance Measurement; Non-profit

Organization

Table of Contents

1. Introduction	4
2. Literature Review	5
2.1. Definition and Importance of Non-Profit Organizations	5
2.2. Importance of measuring Performance in Non-Profit Organizations	5
2.3. Definition of Social Impact	7
2.4. Balanced Scorecards	8
2.5. Balanced Scorecards for Non-profit	9
2.6. Conclusion of the Literature Review	10
3. Methodology	10
4. Creating a Balanced Scorecard for Junior Achievement Portugal	11
4.1. Junior Achievement Worldwide	11
4.2. Junior Achievement Portugal	12
4.3. From the Logic Model to the Balanced Scorecards	18
5. Balanced Scorecards – Development	19
6. Limitations and Recommendations	20
7. Conclusion	23
Bibliography	<i>Erro! Marcador não definido.</i>

1. Introduction

The present Work Project consists of a Direct Research aimed to quantify the value a Non-Profit Organization (NPO) is adding to the market and to society, through the application of a performance management tool. The organization analysed in this project is Junior Achievement (JA) Portugal, which is a member of JA Europe and JA worldwide, and it aims to inspire and prepare young people to succeed in a global economy, by transforming the class experience¹.

The economy is evolving and rapidly changing. There is more technology, more interdependence between territories, countries and also between organizations.

The world is converging, at many levels. In the world of organizations there is an increasing concern with the value that each organization brings to the economy and to the society².

Working in a converging world is more challenging than ever. Young people will work with other people from different backgrounds and cultures, toward common objectives. However, the main focus will not only be profit, as sustainability is a new relevant factor.

Schools must work towards the new reality their students will face. Learning the skills of the future is mandatory to succeed. Evermore, Education must consist on the development of creativity, critical thinking, problem solving and decision-making³ rather than blindly learning and repeating concepts. The Portuguese education system was traditionally not designed for such an approach and updating it will take time and effort. JA was brought to Portugal thirteen years ago to ease this process - in order to cooperate with the Portuguese education system and to bring the skills of the future inside classrooms.

Therefore, this project aims to tackle the need for strategic tools to measure the performance of the organization and its social impact. This a very important and relevant challenge as measuring and evaluating performance and impact allows both the assessment the

¹ In JA Portugal website, <http://www.japortugal.org//sobrenos> (accessed 22 Nov 2018)

² In "Fazer mais com menos: O desafio da convergência" (accessed 5 Dec 2018)

³ In Expresso, "As escolas portuguesas ainda não fizeram a transição do século XX para o século XXI" (accessed 28 Nov 2018)

implementation and results of programs and also identify ways to improve the program evaluated⁴.

To understand JA Portugal's potential to generate impact, a Balanced Scorecard will be designed.

2. Literature Review

2.1. Definition and Importance of Non-Profit Organizations

The Non-profit sector, or so called third sector, is very rich in organizations. It is the sum of private, voluntary, non-profit organizations and associations⁵. These organizations are far from homogenous, working in a big number of fields and towards different objectives.

The non-profit sector tries to fulfil many gaps in the society, by joining people together, suggesting innovative and creative alternatives, advocating for change and introducing solutions⁶. However, the non-profit sector has been evolving, it is filled with mission-driven professionals, passionate about the causes in which they are working for.

In Portugal, the non-profit sector includes more than 50,000 entities, more than 200,000 workers, represents 3,8% of country's gross domestic product and 5,5% of employability.⁶ This is a sector with great relevance, with a big impact on society.

It is important to understand the relevance of the third sector in Portugal, in order to understand Junior Achievement's position in Portugal and worldwide.

2.2. Importance of measuring Performance in Non-Profit Organizations

As it has already been explained what a Non-profit organization is or to what extent it works for, it is now time to explain the importance of measuring its performance.

⁴ In Handbook of Practical Program Evaluation "Planning and Designing Useful Evaluation" (accessed 30 Sept 2018)

⁵ In Book "Nonprofit organizations: Theory, management Policy " (accessed 26 Sept 2018)

⁶ In Observador "O que é e o que vale a economia social" (accessed 6 Dec 2018)

This type of organization is always focused on achieving a determined objective, that should generate a positive social impact. As any other organization, it must be able to demonstrate to all its stakeholders what they have already done and what is their direction from then on.

Measuring performance is important to any organization. However, it is often neglected by NPOs, though it is crucial to understand how its initiatives and operations are being integrated in order to achieve its mission. Performance measurement can be used in two strands, both as an evaluation tool and as a management system designed to provide useful feedback on performance.⁷ One of the biggest challenges that NPOs face is to demonstrate its activities based on real measures, which can be understood by its donors and partners and also explains the extent of its impact.

Dealing with different stakeholders obliges NPOs to have concrete evidence of the work done. Not only to demonstrate what the organization does daily, but also to reveal the impact of its mission in the different clients it serves.

Measuring performance of an organization motivates employees and demonstrates that it is a trustworthy organization.

A Logic Model will be used in this work project. The Logic Model explains how an organization achieves its desired outcomes and impact through a series of activities. It has five elements: Inputs, activities, outputs, outcomes and impact.

Using the elements above mentioned above, it is possible to tell the organization's story and also identify the key metrics and data required to measure performance. Moreover, it is possible to understand what the outcome goals are and also which goals were achievable, provoking and impacting.

Briefly, logic models link JA Portugal social problem to the intervention (inputs and outputs) and the impact. Hence, it helps to identify partnerships critical to enhancing performance.⁸

⁷ In "Handbook of practical Program Evaluation" Chapter V: Performance Measurement

⁸ In the article "The Logic Model for Program Planning and Evaluation"

Concluding, a NPO, as any other organization, must measure its performance, according to external and internal conditions. It must also be transparent when demonstrating results and always try to come up with innovative and creative new approaches to new realities.

2.3. Definition of Social Impact

Before deepening the definition of social impact, it is crucial to define Impact which should a concept wide enough for every organization. Impact is the positive or negative effect an intentional or not intentional action has on someone or something. There are many types of impact: social, environmental, economic and cultural are some of the examples, but in this project, the focus will be on Social Impact.

It is a critical topic in this work project since everything an NPO does converges to it. The ultimate goal of any NPO is to maximize its impact and this work is to effectively measure it.

The Social Impact of any given organization is related to the social value it produces⁹, whether it be a for-profit or non-profit organization. Additionally, Social Impact can generally be defined as the “Significant or lasting changes in people’s lives, brought about by a given action or series of actions”.¹⁰

However, the Social Impact concept is broader than the definition given before, according to the OECD (Organization for Economic Co-operation and Development) and European Union, Social Impact can be defined in reference to four key elements: **“the value created as a consequence of someone’s activity”**; **“the value experienced by beneficiaries and all others affected”**; **“an impact that includes both positive and negative effects”**; **“an impact that is judged against a benchmark of what situation would have been without proposed activity”**¹¹. Social Impact, in the positive case, is frequently a positive result of a new and

⁹ In OECD Employment Policy paper n^o 10, “Social impact measurement for social enterprises” (accessed in 20 Nov 2018)

¹⁰ In Oxfam “Impact Assessment for Developing Agencies: Learning to value Change” (accessed 7 Nov 2018)

¹¹ In Book Balanced Scorecard: Step-by-Step for Government and Nonprofit Agencies

different way of addressing and solving an existing and important social problem, that has been neglected or not successfully solved.

Social impact measurement is important for internal and external purposes. It must be done firstly, to engage stakeholders; secondly, to attract and retain investors; thirdly, to measure outcomes instead of outputs; fourthly, to motivate staff members, while understanding the extent of their work; and finally, to achieve the organization's purpose and mission.

2.4. Balanced Scorecards

In order to better understand the method that will be used with Junior Achievement Portugal, to effectively measure its performance, it is now time to explain it more into detail. In 1990, Robert Kaplan and David Norton developed a study about new methods of performance measurement, as they believed that “the traditional financial performance measures worked well for the industrial era, but they are out of step with the skills and competencies companies are trying to master today”¹².

The BSCD differentiates from other tools since organisations need a system that balances the historical accuracy of financial numbers with the drivers of future performance. It includes the financial perspective and also the operational one: learning and growth perspective, customer perspective and internal processes perspective.

However, the BSCD, like any other measurement tool has its downsides. According to Atkinson et al (1997) if it is perceived as a performance measurement system, it fails in three main aspects: it does not recognize performance measurement as a two-way process, only considering top-down performance measurement; additionally, it does not consider the extended value chain, closing up only to suppliers and employee's contribution¹³; and finally it relies on both formal and informal processes, written and unwritten rules, which must be taken

¹² In Harvard Business Review, “The Balanced Scorecards – Measures that drives Performance” (accessed in 28 Nov 2018)

¹³ In European Management Journal “The Balanced Scorecard: A necessary good or an unnecessary evil?”

into account during the process of implementing this tool. Even though the BSCD is seen as a crucial tool for the companies of this century, it is also necessary to overcome the above-mentioned weaknesses of the tool, bearing in mind that implementing this tool must always have a focus on the two-way process performance measurement.

Concluding, BSC is important to any type of organization due to: 1) the generation of results, as it helps to all people in the organization to be accountable to their own objectives, it leads to results; 2) the creation of a focus on strategy, since it is in the middle of the process, everything is designed taking into account the strategy of the organization; and finally, 3) the effective and efficient execution of the mission of the organization.¹⁴

2.5. Balanced Scorecards for Non-profit

The Balanced Scorecards tool can be applied to Non-Profit Organization, with significant differences that will be explained hereafter. Since the project is about an NPO, the decision of explaining the BSCD adaptation seemed to be crucial.

The major differences when applying the BSCD to NPO are the placement of the mission of the organization and the importance given to the customer. In a mission-driven organization, as an NPO is, this mission must be the priority and purpose of all activities and initiatives.

Secondly, when working within a Non-profit Organization, the customer perspective must be elevated¹⁵. Differently from the organizations working towards the profit, which are worried in maximizing profit, NPOs are focused in serving their customer in the best possible way – in order to maximize the impact on their lives.

Additionally, as the BSCD should translate the strategy of the organization and help working towards its mission, a fifth perspective may be added to the previous ones – learning and growth, internal processes, customer, financial. This fifth one is social impact.

¹⁴ In Book Balanced Scorecards: Step-by-Step for Government and Nonprofits Agencies

¹⁵ In Book Balanced Scorecards: Step-by-Step for Government and Nonprofits Agencies

2.6. Conclusion of the Literature Review

After deepening the key elements for the development of this work project, it is now possible to understand the importance of knowing how to measure organizations' performance and how crucial it is to improve each one of the five perspectives discussed in the literature review on the BSCD: innovation and growth; internal processes, customers, financials and social impact. This fifth perspective was understood as essential to be incorporated in the conventional BSCD, in order to reflect the nature and purpose of NPOs.

There are many measurement tools, such as Social Return on Investment (SROI), Organizational Capacity Assessment Tool (OCAT) and The Performance Initiative (PI) which are considered to be more effective, however they are more expensive and more time consuming. Bearing this in mind, the decision of using BSCD was easy to take. The BSCD captures the performance of an organization across these five perspectives, which are capable of recognizing all the stakeholders associated with the NPO's activity. This tool can also be simple to construct and very effective on measuring performance, although it requires a proper development of indicators.

Concluding, the literature review also revealed the difficulty of measuring social impact, given its intangible components and the multitude of internal and external factors that affect it. It is advised to have a major focus on costumers, since they are the main beneficiaries of the organization's intervention, when developing all indicators.

3. Methodology

After clarifying the key theoretical issues, it is now important to explain the methodology used to construct the BSCD.

Firstly, as a permanent worker of the organization, a diagnosis of each of the five perspectives of BSCD was made. Taking into account the vision a newly member and part of the schools' team.

Secondly, in order to understand different point of views on the reality of the organization, a couple of interviews were developed next to the board, the CEO, coordinators and full-time employees with extended knowledge of Junior Achievement Portugal. Additionally, a collection of best practices and guidelines was made, from different Junior Achievements. This collection was arduous, since every JA has its own type of documents, website organisation and a specific education system.

Based on this preliminary work and documents provided, a Logic Model was developed from information about the Social Problem, the respective Transformation Theory and the Solution Proposed. The Logic Model will be used as a way to understand the existent reality and desired future.¹⁶

Furthermore, a strategy map was developed, based on the Logic Model, contemplating the five perspectives of the BSCD for NPOs with the most relevant objectives of the organization. The objectives were deconstructed into more detailed and specific objectives in the BSCD and sub-BSCD. The Sub-BSCD were developed for the two main teams of JA Portugal, Schools' Team and Associates & Partnerships' Team, for them to be accountable of their actions and knowing their mid-term objectives to achieve the organization's mission and strategy.

4. Creating a Balanced Scorecard for Junior Achievement Portugal

4.1. Junior Achievement Worldwide

Junior Achievement was created in the USA, in 1919, by Horace Moss. Moss was a visionary business man, who understood that young people should have hands-on experiences during their times in school, so that they could be more prepared for the future.

JA has been growing and changing for the last 100 years. It is now present in more than 100 countries and it is considered one of the largest youth-serving NGOs.¹⁷ JA prepares and inspires

¹⁶ In the article "Avaliação de desempenho e Medição de Impacto"

¹⁷ JA Worldwide website "<https://www.jaworldwide.org>"

the young generations to succeed in a global economy, through three pillars: work readiness, financial literacy and entrepreneurship.

Junior Achievement offers schools a big number of programs at all education levels, from primary and middle school to universities. As it is an NGO, it is only possible to reach so many students with the partners, companies from all over the world. Which have to fundamental ways of aiding JA: 1) By Paying annual fees and 2) by corporate volunteering.

JAs around the globe can and must adapt to their own reality. Each one offers the programs that are suitable to their community and impacts it the most.

Junior Achievement Portugal reports to JA Europe, who reports to JA worldwide. It is important to share the best practices of each country and continent, knowing that being part of such organization enriches each country.

4.2. Junior Achievement Portugal

Junior Achievement arrived in Portugal in 2005. It starts its activities in 2006, a year of deep difficulties for the Portuguese Society. A major economic crisis, that lead to a big rate of unemployment occurred in Portugal. Entrepreneurship was a blurry concept and young people were focused on memorizing concepts during school time, instead of learning to actually doing something with their knowledge.

It was a difficult time, in which JA could and did make a difference. Schools needed a different mindset, for the students and teachers. JA Portugal's proposal was to make students think creatively and innovatively, to take risks, to think outside the box, to make decision, to look forward and to be positive. ¹⁸ JA Portugal is present in all districts of the country and in the Autonomous Region of Azores.

¹⁸ In JA Portugal Website: Annual Report 2009 ”
http://japortugal.pt/index.php?option=com_attachments&task=download&id=81:Relatorio0809”

Disruptively, JA Portugal entered schools and the Portuguese society. JA knew that Portugal is much more than just Lisbon, and its major challenge would be the interior of the country and zones with ageing population.

JA Portugal begun with one program, only, Economics for success. In that year, it reached 50 schools in Lisbon, with 300 volunteers involved and 300 teachers.¹⁹ Now, JA Portugal has five programs to offer for primary and middle school programmes, one for the secondary school and one for college students. It works along with 40 partners and more than 1000 volunteers. Even though it is already working in so many fronts, it needs the adequate strategic tools that can inform how well it is performing, which expectations are being met and which ones are not, as well as which dimensions must be taken deeply into consideration. This will lead to the next level desired and help each employee to perform better and improving the social impact goals.

Social Problem

In the European report, the commissioner for Education, Youth and Sports, mentions that education for entrepreneurship is not about the promotion of start-ups, it is the promotion of critical thinking, being conscious about risk and also the transformation of ideas into actions²⁰. The Portuguese education system has not changed much in the past years. The formula is the same, students seated and listening to what teachers say. There are courses in different areas, however creativity, innovation and critical thinking have not been the priority for teachers. They are evaluated according to quantitative metrics, most of them colliding to a major importance of grades.

¹⁹ In JA Portugal Website: Annual Report 2008

“http://japortugal.pt/index.php?option=com_attachments&task=download&id=82:Relatorio0708”

²⁰ JA Europe Website:European Annual Report 2018 “<http://www.jaeurope.org//annual-report-2018>”

Andreas Schleicher, OCDE Director of the department of Education and skills, pointed out that the Portuguese students have not made the transition from XX century to XXI, and also stated that if Google knows everything, young people must know how to apply their knowledge.²¹

The Portuguese education system has been this way for the past one hundred years; however, the rest of the society has evolved, and young generations are faced with new challenges and problems. They need to develop important competences, in order to integrate more easily the labour market.

There have been many studies on the skills and competences of the future, the World Economic Forum highlights the following ones: analytical thinking and innovation; active learning and learning strategies; creativity, originality and initiative; Technology design and programming; Critical thinking and analysis; complex problem-solving; Leadership and social influence; Emotional intelligence; Reasoning, problem-solving and ideation; and system analysis and evaluation.

Most of these are not developed in classes. The Portuguese education system have been evolving, however there is still strong focus on grades and memorising concepts, which has to change.

Value Proposition

In order to solve this social problem in an innovative and creative way, Junior Achievement built itself as a network between the corporate world and the educational world and JA is responsible for the coordination of both worlds. Each part involved in the network has its own responsibilities:

Schools are responsible for: registering their classes in each of the programs, as well as preparing it with the volunteer. They must also motivate teachers to participate projects outside of their curricula and to be active during sessions, guaranteeing the success of the programs –

²¹ In Expresso “As escolas Portuguesas ainda não fizeram a transição”

meaning that students will be able to acquire new competences. Whenever, schools are not attributed with corporate volunteers, schools must find themselves volunteers from the community. All schools are accepted in Junior Achievement Portugal, whether they are public or private, bearing in mind that public schools are firstly chosen when deciding where the volunteer will be allocated.

Associates and Partners (Any Portuguese or foreign, singular or collective people can be associated as long as they support the objectives of the organization and fulfil the criteria for admission. Divided into 5 categories, Senior associate; Junior associate, Collaborator associate; Honorarium associate and partners) are responsible for: providing volunteers to schools, motivating and explaining the importance of their partnership with schools. Presently, volunteers are fundamental for the development of programs and for the secondary competitions. Secondly, companies have the ability of stimulating more capacities in students when challenging them, in events, with real problems from their daily routine.

By other entities, it means that JA Portugal's partners are not necessarily companies. It is very meaningful and critical to partner schools with councils, who gives the opportunity to better penetrate a region and its schools.

Finally, **JA Portugal** is responsible for: coordination of the relationship between companies and schools; capacitate volunteers for the work they will be doing; attracting more schools and showing proof of the importance of their programs; expanding the network of partners; monitoring the progress of classes; coordination of each partner closely, to better evaluate their loyalty to the organization; adaptation of programs to the Portuguese reality and creation of new ones; delivery of programs. JA Portugal also takes responsibility to increase the awareness of the importance of teaching students' new competences, through new forms of learning, which is done by reporting the impact programs have on students, so it must assess the impact and translating it into accessible measures.

Theory of Change

The theory of change describes the established strategy by which the initiative or project can achieve the desired change and for that purpose it identifies the pre-existent conditions, the paths and the interventions needed to attain success, which implies explaining how the first immediate changes relate to the intermediate ones and with the long-term ones.²²

Moreover, knowing that most of the students are not being prepared for their future, do not have contact with the reality of work and most of their courses are theoretical and grade-oriented, JA Portugal (a member of JA Worldwide) proposes to join these two realities: schools and organizations. JA Portugal will make this possible by bringing the work reality inside of the classroom. Volunteers from a various range of organizations, capacitated by JA Portugal, will give lectures on the programs made by JA WW and adapted by JA Portugal. While giving the lecture, they will also give them a different perspective on the topics discussed, taking into account their background and their reality. The added-value comes from the communication between these two realities, which tries to give new tools, skills and competences to students, appreciated by many different employers.

Hence, the change logic is that, by providing students with new concepts, skills and competences and putting them in touch with professionals, students will be more prepared for their future and to make more informed choices, leading them to be more successful. Moreover, companies' collaborators will have a better knowledge about the community, the education system and above all, about the characteristics of the future generations. Collaborators will also develop important competences for themselves, such as self-confidence, public speaking and better expressing their ideas. It is r Junior Achievement's responsibility to manage the process and make sure the tunnel occurs the best possible way for both sides, guarantee its functioning.

²² In the article "Avaliação de desempenho e Medição de Impacto"

Solution

As inputs to develop its activities and to stop the previously exposed social problem, Junior Achievement, as any other organization, requires financial resources that come from a network of about forty associates and partners as well as from grants received on European level. On the other hand, it is human and technological capital that develop activities such as the organization of competitions on the secondary and university levels, establishing contact with new possible partners and schools, monitoring and support in-person to all secondary students, coordinating and managing the relation between professor and volunteers, and formation of volunteers. In order to do this, there is fourteen full-time employees, working with more than one hundred volunteers, using a range of technological resources, such as computers, cell phones and printers, on two workspaces, due to the need of being present in the North and South, provided by one of the associates, as their fee.

Hence, by acquiring new partners and expanding the network, there will be room for more schools to have the program done on. More students will have the opportunity to learn about a different reality. Also, there will be more organizations worried with the education system and ready to be an active agent on the matter. Moreover, by developing new services as a revenue, Junior Achievement Portugal will have more in-person contact and will better understand schools' needs.

Nonetheless, it is critical to remember that the human, technological and financial resources must guarantee successful implementations of programs in schools, to better measure impact on students. To consequently raise the awareness on the importance of learning new skills and competences.

Logic Model				
Inputs	Activities	Outputs	Outcomes	Impact
<ul style="list-style-type: none"> • Fourteen full-time employees; • Fourteen computers; • Three printers; • Two work spaces provided by an associate; • Fourteen cell phones and six landline phones; • Fees from associates; • Intellectual resources provided by partners; • Volunteers • Kits with didactic material. 	<ul style="list-style-type: none"> • Adaptation of materials from JA WW • Receive and processing schools and volunteers' registrations; • Ensure follow-up of schools; • Monitor the relation with associates and partners; • Volunteers' training; • Acquisition of new associates and partners; • In-person support to all secondary classes; • Development of new initiatives; • Organization of competitions; • Promote awareness; 	<ul style="list-style-type: none"> • Nr of associates and partners; • Nr of schools registered; • Nr of classes with volunteer; • Nr of students per cycle of education; • Nr of volunteers; • Quantity of material delivered and used; • Nr of applications to competitions; • Nr of new registration per year; 	<ul style="list-style-type: none"> • Increase in the number of experimental courses; • Increase knowledge about education systems; • Increase in the number of active agents in the economy; • Increased awareness on the importance of learning new skills; 	<ul style="list-style-type: none"> • Young generations better prepared for the future; • Companies with more skilled collaborators; • Education system more oriented to hands-on experiences; • Futures generations oriented to solutions, rather than problems. • Professors more motivated.

4.3. From the Logic Model to the Balanced Scorecards

The Balanced Scorecards are composed of four perspectives: Innovation and Growth; Customer; Internal Processes; Financials; and Customers. Nonetheless, in this case, it is essential to add and develop a fifth one: Social Impact.

The Strategy Map

Firstly, to develop the BSCD, the strategy Map needs to be drawn (annex 1) which explains the story of the organization's strategy through a relatively small number of objectives and

measures on each perspective.²³This map is crucial for the development of the BSCD, since it is the groundwork of the project.

The Balanced Scorecards

Moreover, the BSCD (annex 2) will unfold into more specific objectives, than those in the strategy map. Taking into account the complexity of the JA Portugal, the BSCD will also unfold into two sub-Balanced Scorecards (annex 3) specifically designed for the two teams of JA Portugal; it could be for the two realities it works with: Schools and Companies. Hence, this way, it makes them more accountable for their responsibilities. Furthermore, the process of defining the indicators (divided into lag and lead), their respective targets and initiatives that can lead to better results. The process of defining each part of the BSCD was done while working as a full-time at the organization, closely with Junior Achievement Portugal and always according to their feedback.

The construction of BSCD for JA Portugal was a challenging task, due to the complexity of the organization. Thirteen years of existence translated into a big number of events, experiences and opportunities for young people. A big number of information was not efficiently systematized hindering data analysis and the wider perspective of the reality. These were reasons why the diagnosis and evaluation phases were extremely lengthy leaving no time for a pilot.

5. Balanced Scorecards – Development

The process of construction of the Balanced Scorecards was challenging. First of all, it was important to study the work that has been done in Portugal and compare it to the rest of the world. Even though, they are part of the same organization, each country has different set of rules and activities, which are very specific to their realities.

23

To develop targets for each indicator of the BSCD, other JAs (JA Argentina, Canada, USA, Young Enterprise London and JA Spain) were benchmarked, however most of the targets were based on the history of JA Portugal.

Finding targets for the indicators present on the BSCD was not easy. The information about JA Portugal is scattered. Besides that, there is no pattern on the KPIs used year after year.

To sustain JA Portugal model, it is necessary to have loyal associates and partners, committed volunteers and interested schools. For this to happen, JA Portugal need to reveal its impact on the society and on its major shareholders.

Bearing this in mind, the organization in partnership with MAZE started a study on Impact, in September 2017. It is supposed to measure the impact of the Company Program on students²⁴, studying seven major dimensions in which students should improve: General efficacy at entrepreneurship and leading an organisation; planning; teamwork; creativity; comfort managing ambiguity; gathering required resources; financial literacy. It is not conclusive yet, because this type of studies are only conclusive in the long-term.

On the other hand, the present work project was conducted in order to collect data to measure performance and design guidelines for the future of the organization.

6. Limitations and Recommendations

Having finalized the construction of the BSCD and the sub-BSCD, it became necessary to present and discuss it with JA Portugal's coordination.

Most of the limitations were related to the fact that the proper processes for measuring certain indicators were not in place and information was not systematized. Even though JA Portugal has 13 years of existence, it does not have the appropriate management tools and complementary analysis which is the reason why this tool can be important for the organization.

²⁴ SPECIAL – Tool used by MAZE to measure the capabilities students should acquire after being part of the Company Program

General BSCD Limitations	
Innovation & Growth Perspective	<ul style="list-style-type: none"> - Programmes cannot be entirely digitalized since the materials are the competitive advantage of JA Portugal; - Portuguese Schools have computers, however the connection to internet is not always the best. It is not guaranteed.
Internal Processes Perspective	<ul style="list-style-type: none"> - Difficult to partner with organizations for staff members' training; - Difficult to give new and different options to volunteers year after year, since there are only seven programmes.
Customer perspective	<ul style="list-style-type: none"> - Students' satisfaction is dependent on the volunteer, who is a human being and whose capacity to be in class is difficult to evaluate. Meaning that there are variables out of JA Portugal's control. - It is not possible to measure the success rate of a volunteer, it is dependent on perceptions.
Social Impact perspective	<ul style="list-style-type: none"> - True impact is only measurable once a student reaches their adult years; - It is possible to understand the impact of the programs right after they are finalized, however the true impact is only measurable many years after; - There is no

Sub-Balanced Scorecard Limitations

- Small number of people working when compared to the amount of work. Employees overloaded with work, which makes difficult to implement and explain the BSCD;
- Lack of knowledge of Microsoft tools;
- Teams focused on daily operation, lack of time to analyse and point out objectives;
- Lack of KPIs to guide them.

Recommendations

Recommendation 1: Develop a culture of analysing in order to know which the major challenges are each manager encounters. It is necessary to implement KPIs for each team to guide themselves. There should be a map with the KPIs in JA Portugal's office, so that everybody could be in the same point and working towards the same objective

Recommendation 2: Train JA Portugal's employees. It is fundamental to motivate them, enhance their satisfaction and increase productivity. Since the employees work with two important realities (schools and companies) it is important to learn how to do their work more efficiently.

Recommendation 3: Develop a platform to train volunteers. As the one existing for JA Canada. In this platform, volunteers must be able to learn about the programmes, learn from other volunteers, share experiences and become inspired. This would decrease financial costs and would be less time consuming for the A&P Team.

Recommendation 4: It is necessary to distinguish stakeholders. Segment stakeholders: Schools, professors and teachers; Companies and volunteers and then give importance to them. It is important to enhance their loyalty to JA Portugal.

Recommendation 5: The Alumni network must be involved in JA Portugal major events and also be mentors in the communities which are more in need. JA Portugal network of alumni should share their experience to demonstrate its impact.

7. Conclusion

This work project for Junior Achievement, was very challenging and also very interesting, since I was obliged to more deeply understand the organization's reality.

Having finalized the work project and discussed it with JA Portugal's members it was possible to understand the extreme utility a BSCD can have for an NPO. It can reveal important information about JA Portugal's activity in a simple but effective way.

Also, it makes clear important gaps and errors in the JA Portugal's operational processes and in data registering processes. The BSCD comes as an important management tool, to be used as a guidance to the organization as whole and also for the two main teams: Schools & Programs; Associates & Partners. Knowing this, the BSCD was unfolded into two more specific to each one of the teams. Even though, the organization is working towards the same objectives it is important to outline which priorities each one should have.

Hence, the structure of the BSCD was adequate for JA Portugal, unveiling the complexity of the organization into indicators and initiatives separated in five perspectives made it very simple to analyse and take important conclusions.

Having discussed the BSCD with the coordinators, the acceptance was good and it revealed the interest of the organization in using the balanced scorecards as guidance to the future.

Concluding, this work project was an opportunity to look into the past, analyse the present and project a future, to an organization that have been working for the citizens of tomorrow and their future jobs. An organization that with fifteen people is capable of reaching the country from south to north and from the outside to inside.

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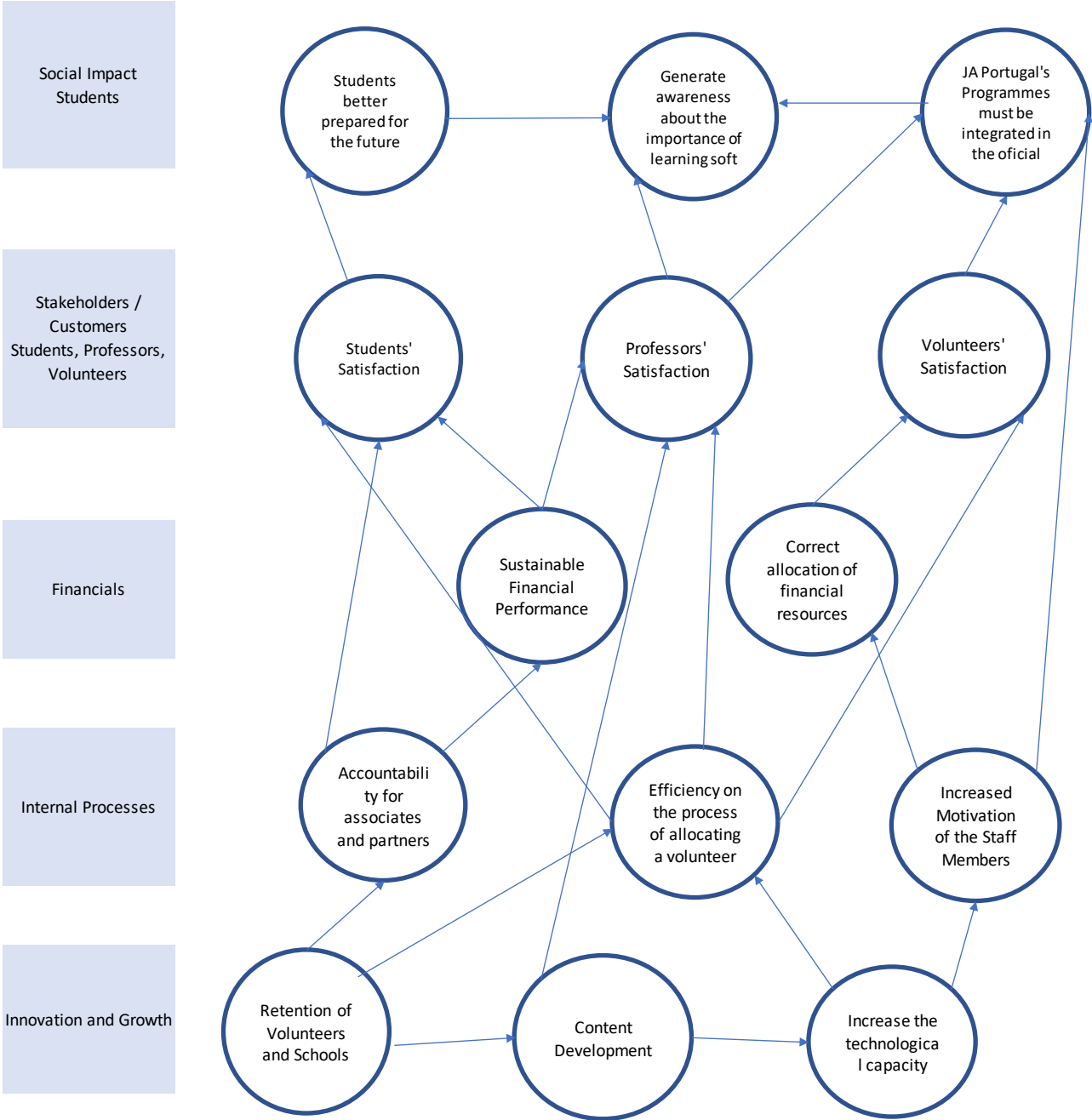
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Annexes

Annex 1 – Strategy Map



Annex 2- BSCD

Innovation & Growth					
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Target	Initiative
Content Development	1.a. - Percentage of classes registered for new programs	1.b. Nr of classes registered	1.b. - (Nr of classes registered on new programs)/(total of classes registered) x 100	> 80%	As a member of JA Europe, JA Portugal must mapp which programmess other members (with a similar reality) are implmenting. Secondly, join a multidisciplinary team to understand what would be a value added for portuguese schools
			1.a. - Quantification of registrations	>45000	
	2.a. - Percentage of New schools registered		2.a. - (Nr of schools only registered in new programs)/(Total nr of schools registered)	>10%	
	3.a.- Percentage of school groups JAP reach per year	3.b.- Nr of School Groups per district	3.a.- Nr of School groups registered in N/ Total Nr of existing School Groups x 100		
			3.b.- Quantification based on DGEST		
	4.a.- Nr of schools registered in JA Portugal capable of supporting digital Material	4.b.-Percentage of the material that can be digitalized	4.a.- Annual quantification of schools in which a digital program can be presented	>10%	Digitalization of It's My Business and Economics for success
		4.b.- Nr of pieces possible to digitalize without loosing the experience/ Total pieces x100	>60%		
Retention of volunteers	1.a.- Annual Retention rate (%)	1.b.Nr of volunteers per associate and partner	1.a. - Annual Quantification and comparison to the years before		Each collaborator must receive, in the end of the academic year, the impact report of that year with testimonials from students and professors and the objectives set.
			1.a.- (1-Nr of volunteers not registered in the beggining of year N-1 /nr of volunteers registered in the beggining of year N) x 100	>10%	
	2.a.- Growth Rate		2.a.- (Nr of volunteers in year N - Nr of volunteers in year N-1) / Nr of volunteers in year N-1	> 0	
	3.a. - Percentage of volunteers per program		3.a.- (Nr of volunteers registered in program AF/ Total nr of volunteers)	There is no need to have a target, this is an informative measure	
Increase the Technological Capacity	1.a.- Associates, partners and schools capable of using the platform provided by Accenture (%)	1.b. - Nr of new software or other type of technological resources implemented	1.b. - Annual quantification		Investigate which partner or associate could be na important alliance to implement more developed technologies tools. As JAP is already doing with Accenture
			1.a.- Nr of entities capable of using the platform/ Total nr of entities x 100	90%	
	2.a. - Total success rate of the implmentation of new technologies	2.b.-Nr of new technologies	2.b.- Annual quantification of technological tools		
			2.a.- Nr of new technologies with successful implementation/ Nr of technologies implemented x 100	100%	

Internal Processes					
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Target	Initiative
Accountability for Partners and Associates	1.a.- Annual Retention rate (%)	1.b.- Nr of associates	1.a.- (1-Nr of entities that left the organization at the end of the academic year/nr of entities at the beginning of the year) x 100	95%	Close follow-up with each associate and partner, a meeting per semester to understand major difficulties on both parties
			1.b.- Annual quantification of the nr of entities (associates and partners)	≥ 35	
	2.a.- Annual percentage of upgrades		2.a.- (Nr of associates that move from category B to category A) / Total nr of associates x 100		
	3.a.- Percentage of Associate 1 collaborators that volunteer for JA Portugal	3.b.- Nr of volunteers per partner	3.a.- Nr of volunteers of Partner A / Total Nr of collaborators of Partner A x 100	> 6%	
			3.b.- Nr of collaborators that volunteer for JA Portugal		
Increased Motivation of the Staff Members	1.a.- Annual Retention rate (%)		1.a.- (1-Nr of staff members that left the organization at the end of the year/nr of staff	> 85%	Training staff members
Efficiency on the process of allocating a volunteer to a class	1.a.- Time span between receiving a registration and the start of sessions		1.a.-Quantify the days between receiving the volunteers registration and receiving the school where they will be volunteering	< 1 Month	Automatization processes, from sending e-mails for schools and volunteers to the actual allocation.
		2.b.- Percentage of withdrawals during the process of allocation per partner	2.b.- Nr of withdrawals of partner A/ Total nr of volunteers of Partner A x 100	< 10%	
		3.b.- Percentage of total withdrawals during the process of allocation	3.b.- Total Nr of withdrawals / Total nr of volunteers x 100	< 10%	
Financials					
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Target	Initiative
Sustainable Financial Performance	1.a.- Revenue diversification		1.a.- (Percentage of Financial donator contribution1)^2+(Percentage of financial donator contribution2)^2...	< 3000	Find out new sources of revenue
	2.a.- Increase the network of associates and partners		2.a.- Quantification of nr of events attended in each associate or in partnership with	> 2	Participate in more events around the country
	3.a.- Surplus Margin Ration		3.a.- (Revenue - Expenses) / Revenue	> 0	Respect the budget agreed
Correct allocation of financial resources		1.b.- Administrative cost ratio	1.b.- Administrative costs/Total revenue	< 60%	Reduce administrative costs - Renegotiate telecommunications contract
		2.b.- Program Efficiency Ratio	2.b.- Total program expenses / Total expenses	< 27%	Reduce production costs - Using digitalized materials
		3.b.- Wage Ratio	3.b.- Annual wage / Total Revenue	< 55%	Avoid spending above the budget
		4.b.- Ratio of fixed costs over variable costs	4.b.- Fixed costs / Variable costs	> 0,80	Avoid spending above the budget stipulated

Stakeholders					
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Target	Initiative
Students' Satisfaction: Satisfied with the experience: Received the skills and learned new competences		1.b.- Percentage of students capable of speaking in public	1.b.- (Nr of students capable of speaking in public / Nr of total students) x 100	>50%	Give awards to the most promising students
		2.b.- Percentage of students capable of making critical choices	2.b.- (Nr of students capable of making critical choices / Nr of total students) x 100	>50%	
		3.b.- Percentage of students capable of contributing with creative and innovative solutions	3.b.- (Nr of students capable of contributing with creative and innovative solutions/ Nr of total students) x 100	>50%	
Professors' Satisfaction: Motivated to prepare different classes, to and to be in contact with companies whenever it is necessary	1.a.- Annual Retention rate of professors (%)		1.a.- (1-Nr of professors not registered at the end of the academic year/nr of professors at the beginning of the year) x 100	> 70%	Chose 5 professors, annually, to be on the International Summit for Education
	2.a.- Nr of classes registered by the professor		2.a.- Quantification of the total number of classes registered per year by the professor		
Volunteers' Satisfaction: Motivated at work with a different attitude towards colleagues and external people	1.a.- Annual Retention rate of professors (%)		1.a.- (1-Nr of volunteer not registered at the end of the academic year/nr of total volunteers at the beginning of the year) x 100	>40%	Giving Stamps for linkedin: JA Volunteer
	2.a.- Percentage of volunteers who referred had acquired new skills and a different perspective	2.b.- Percentage of responses to the final questionnaires	2.a.- (nr of volunteers who referred acquiring skills)/(total nr of volunteers)x 100	> 40%	
			2.b.- (Nr of returned questionnaires)/(Nr of sent questionnaires) x 100	> 80%	

Social Impact					
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Target	Initiative
Students better prepared for their future and with higher probability of success		1.b.- Percentage of interested students in the beginning of the program	1.b.- Nr of positive responses in the beginning/total nr of responses X 100	> 35%	Follow students' path. Questionnaires to volunteers must ask if they had one of the JA Portugal's programs.
		2.b.- Percentage of students that became interested in the end of the program	2.b.- Nr of positive responses in the end of a program- Nr of positive responses in the beginning x 100	> 55%	
		3.b.- Percentage of students that chose the path they wanted	3.b.- Nr of students that chose the path they desired/ Total nr of students that had done JA Portugal programmes x 100	> 10%	
Generate awareness about the importance of learning soft skills in classes and to have hands-on experiences		1.b.-Nr of alumnis per class	1.b.- Quantification of classes which volunteer is an alumni	> 10	Bring alumni together and part of JA Portugal as active agents/volunteers, mentors and judges for competitions. Sponsors of specific schools, as their responsibility.
		2.b.-Percentage of schools sponsored by alumnis	2.b.- Nr of schools registered for more than 5 years/ Total Nr of schools registered x 100	> 40%	
		3.b.- Nr of mentorships made by alumnis	3.b.- Annual Quantification of the nr of students mentored by na alumni	> 5	
	4.a.-Rate of the quality of the electronic materials in promoting awareness	4.b.- Nr of visualizations from electronic material made available	4.a.- Surveys to verify how the electronic materials provided changed their awareness about the importance new methods inside of classrooms, as well as learning fundamental skills: People that had their awareness increased/People that answered x 100	> 10%	Communication plan to raise awareness about the topic of skills of the future and the work done by JA Portugal
			4.b.- Check the visualizations according to the online platform, or social media, used.	> 300	
JA Portugal's Programmes must be integrated in the oficial curriculum for schools		1.b.- Nr of school groups teaching entrepreneurship at the secondary level	1.b.- Annual quantification of the nr of school groups	> 50%	JA Portugal must give their impact reports to the education ministry in the end of the academic year. Discuss possible partnerships
		2.b.- Nr of schools registered on JA Portugal for more than 5 years	2.b.- Quantification of the nr of schools registered in JA Portugal for five years	> 100	

Annex 3 – Sub- BSCD

Annex 3.1 -Sub- BSCD for Schools & Programs Team

Innovation & Growth SP				
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Initiative
Content Development	1.a. - Percentage of classes registered for new programs	1.b. Nr of existent programs	1.b. - (Nr of classes registered on new programs)/(total of classes registered) x 100	Choice of professors and coordinators to be part of the multidisciplinary team.
			1.a. - Quantify the number of programs developed	
	2.a. - Percentage of New schools registered		2.a. - (Nr of schools only registered in new programs)/ (Total nr of schools registered)	
		3.b.- Nr of professors per region and type of school	3.b.- (Nr of professors from North/Total professors) x 100	
	3.a.- Nr of schools capable of supporting digital Material	3.b.-Percentage of programs digitalized	3.a.- Annual quantification of schools in which a digital program can be presented	Each manager must accompany one session from each program, to understand to what extent tangible materials are important for the experience
			3.b.- Nr of pieces possible to digitalize without losing the experience/ Total pieces x100	
Internal Processes				
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Initiative
Efficiency on the process of allocating a volunteer to a class	1.a.- Time span between receiving a registration and beginning the sessions	1.b.- Nr of volunteers with restrictions	1.a.-Quantify the days between receiving the volunteers registration and receiving the school where they will be volunteering	Each manager must be sure that all schools from past years are enrolled. Data analysis before schools' registration
			1.b.- Quantification	
		2.b.- Nr of classes registered	2.b.- Annual quantification of the nr of entities that pay a fee to JA Portugal	
Increase Motivation of Staff Members	1.a.- Annual Retention rate (%)		1.a.- (1-Nr of staff members that left the organization at the end of the year/nr of staff members at the beginning of the year) x 100	Training on Education Courses. Conferences and webinars.
Financials				
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Initiative
	2.a.- Increase the network of partners		2.a.- Quantification of nr of events attended	Find out major education events where JAP could present itself.
	3.a.- Surplus Margin Ration		3.a.- (Revenue - Expenses) / Revenue	Respect the budget agreed

Stakeholders				
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Initiative
Students: Satisfied with the experience: Received the skills and learned new competences		1.b.- Percentage of students capable of speaking in public	1.b.- (Nr of students capable of speaking in public / Nr of total students) x 100	Give awards to the most promising student. As this indicators depend on the volunteers' sensibility, managers must always be part of the choice and ask professors for feedback.
		2.b.- Percentage of students capable of making critical choices	2.b.- (Nr of students capable of making critical choices / Nr of total students) x 100	
		3.b.- Percentage of students capable of contributing with creative and innovative solutions	3.b.- (Nr of students capable of contributing with creative and innovative solutions/ Nr of total students) x 100	
Professors' Satisfaction: Motivated to prepare different classes and to be in contact with companies whenever it is necessary	1.a.- Annual Retention rate of professors (%)	1.b.-	1.a.- (1-Nr of professors not registered at the end of the academic year/nr of professors at the beginning of the year) x 100	Recognitions to committed professors.
	2.a.- Nr of classes registered by the professor		2.a.- Quantification of the total number of classes registered per year by the professor	
Social Impact				
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Initiative
Students better prepared for their future and with higher probability of success		1.b.- Percentage of interested students in the beginning of the program	1.b.- Nr of positive responses in the beginning/total nr of responses X 100	Feedback conversations, in the end of the year, with coordinator of the schools for the primary and middle school. Close contact with professors from secondary school, even though it is supposed to do two visits, whenever necessary make another visit.
		2.b.- Percentage of students that became interested in the end of the program	2.b.- Nr of positive responses in the end of a program- Nr of positive responses in the beginning x 100	
		3.b.- Percentage of students that chose the path they wanted	3.b.- Nr of students that chose the path they desired/ Total nr of students that had done JA Portugal programmes x 100	

Annex 3.2- Sub-BSCD for Associates & Partners Team

Innovation & Growth				
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Initiative
Content Development	1.a. - Percentage of classes registered for new programs	1.b. Nr of existent programs	1.b. - (Nr of classes registered on new programs)/(total of classes registered) x 100	Choose volunteers to be part of the multidisciplinary team.
			1.a. - Quantify the number of programs developed	
	2.a. - Percentage of New schools registered		2.a. - (Nr of schools only registered in new programs)/(Total nr of schools registered)	
Retention of volunteers	1.a.- Annual Retention rate (%)	1.b. Total number of volunteers	1.a. - Annual Quantification	Waiver: Immediate follow-up
	2.a. - Percentage of volunteers per program		1.a.- (1-Nr of volunteers not registered in the beginning of year N-1 /nr of volunteers registered in the beginning of year N) x 100	
			2.a.- (Nr of volunteers registered in program AF/ Total nr of volunteers)	
Increase the Technological Capacity	1.a.- Associates, partners and schools capable of using the platform provided by Accenture (%)	1.b. - Nr of new software or other type of technological resources implemented	1.b. - Annual quantification	Investigate which partner or associate could be a important alliance to develop volunteer's platform
	2.a. - Total success rate of the implementation of new technologies		1.a.- Nr of entities capable of using the platform/ Total nr of entities x 100	
			2.a.- Nr of new technologies with successful implementation/ Nr of technologies implemented x 100	

Internal Processes				
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Initiative
Accountability for Partners and Associates	1.a.- Annual Retention rate (%)	1.b.- Nr of associates	1.a.- (1-Nr of entities that left the organization at the end of the academic year/nr of entities at the beginning of the year) x 100	Kick-off Session: Specific measures to each associate, according to the years as associate and the number of collaborators. Design specific targets to be reached.
			1.b.- Annual quantification of the nr of entities (associates and partners)	
	2.a.- Annual percentage of upgrades	2.b.- Nr of Associates	2.a.- (Nr of partners	
			2.b.- Annual quantification of the nr of entities that pay a fee to JA Portugal	
Increased Motivation of the Staff Members	1.a.- Annual Retention rate (%)		1.a.- (1-Nr of staff members that left the organization at the end of the year/nr of staff members at the beginning of the year) x 100	Training staff members: Management courses, webinars and conferences
Efficiency on the process of allocating a volunteer to a class	1.a.- Time span between receiving a registration and beginning the sessions	1.b.- Nr of volunteers with restrictions	1.a.- Quantify the days between receiving the volunteers registration and receiving the school where they will be volunteering	Automatization processes, such as Accenture's platform
			1.b.- Quantification	
		2.b.- Nr of classes registered	2.b.- Annual quantification of the nr of entities that pay a fee to JA Portugal	
Financials				
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Initiative
Sustainable Financial Performance	1.a.- Revenue diversification		1.a.- (Percentage of Financial donator contribution1)^2+(Percentage of financial donator contribution2)^2	Find out new sources of revenue
	2.a.- Increase the network of partners		2.a.- Quantification of nr of events attended	Participate in the associate events
	3.a.- Surplus Margin Ration		3.a.- (Revenue - Expenses) / Revenue	Respect the budget agreed

Stakeholders				
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Initiative
Volunteers' Satisfaction:	1.a.- Annual Retention rate of professors (%)		1.a.- (1-Nr of volunteer not registered at the end of the academic year/nr of total volunteers at the beginning of the year) x 100	Recognition to volunteers that did more than they were supposed and brought added value to class
	2.a.- Percentage of volunteers who referred had acquired new skills and a different perspective	2.b.- Percentage of responses to the final questionnaires		
Social Impact				
Objectives	Lag Indicator	Lead Indicator	Measurement Method	Initiative
Generate awareness about the importance of learning soft skills in classes and to have hands-on experiences		1.b.-Nr of alumnis per class	1.b.- Quantification of classes which volunteer is an alumni	The portuguese alumni network must be a partner of JA Portugal: Being part of the events
		2.b.- Percentage of schools sponsored by alumnis	2.b.- Nr of schools registered for more than 5 years/ Total Nr of schools registered x 100	
		3.b.- Nr of mentorships made by alumnis	3.b.- Annual Quantification of the nr of students mentored by na alumni	