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Organization

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Effectiveness

&

Efficiency

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Scale

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International

Research Consortium on Evidence Based Practices

ORGANIZATION EFFECTIVENESS AND EFFICIENCY SCALE MANUAL:

A Systematic Approach to Enhancing Organizational Outcomes

International Research Consortium on Evidence-Based Practices (2013)

(www.ocesonline.org)

Organization Members:

Arduin Foundation-The Netherlands (Jos van Loon and Kees Swart)

Bob Schalock & Associates (Bob Schalock)

Institute on Community Inclusion (INICO)-University of Salamanca, Spain (Miguel Verdugo)

Qui Zhi Vocational Training Center-Taipei, Taiwan
(Chun-Shin Lee and Tim Lee)

University College-Gent University, Belgium (Claudia Claes)



財團法人台灣省私立啓智技藝訓練中心
Qi Zhi Vocational Training Center



Organization Effectiveness and Efficiency Scale

Customer Perspective

Customer Perspective Focus: The Customer Perspective encompasses: (a) aligning services/supports to identified support needs, (b) reporting the number of clients living or working in more independent, productive, and community integrated environments, (c) measuring personal outcomes, (d) reporting and analyzing aggregated personal outcomes, and (e) using technology to enhance personal outcomes.

| <i>Evidence-Based Indicator</i> | <i>Evidence Criteria</i> | <i>Examples of Evidence</i> | <i>Scoring of Evidenced-Based Indicator (Circle)</i> |
|---|---|--|--|
| 1. Aligns services/supports to identified support needs | Develops a standardized approach to the assessment of individual support needs that are important to and for the individual Uses that information to develop an Individual Supports Plan Determines that individualized supports provided are aligned with support needs that are important to and for the individual | Assessed supports needs data; incorporation of support need data into the Individual Supports Plan | 2 1 0 |
| 2. Reports the number of clients living or working in more independent, productive, and community integrated environments | Has a data system that keeps track of client movement into more independent, productive, and community integrated environments Aggregates movement data Analyzes and reports the aggregated data | Data sets within the organization's management information system | 2 1 0 |
| 3. Measures personal outcomes | States/describes desired personal outcomes Implements a standardized approach to the assessment of personal outcomes Analyzes and reports personal outcomes information | Ongoing use of a reliable and valid personal outcomes scale outcomes | 2 1 0 |
| 4. Reports and analyses aggregated personal outcomes | Aggregates assessed personal outcomes Summarizes aggregated personal outcomes in meaningful ways (e.g. by program component or geographical location) Analyzes and reports aggregated personal outcomes | Data sets within the organization's management information system | 2 1 0 |
| 5. Uses technology to enhance personal | Is familiar with current assistive technology devices and strategies | Policy of using IT and AT; demonstrations that they are | |

| | | | |
|----------------------------|---|---|-----------|
| outcomes | Uses individualized assistive technology devices and strategies Evaluates their effectiveness in enhancing personal outcomes | being used; see the use of such devices in practice; evaluations of the impact of their use | 2 1 0 |
| Customer Perspective Score | | | |

Scoring Format:

2 = 3 evidence criteria met

1 = 1 or 2 evidence criteria met

0 = no evidence criteria met

Growth Perspective

Growth Perspective Focus: The Growth Perspective encompasses: (a) articulating the organization’s mission and intended results, (b) entering into partnerships, (c) developing program options, (d) utilizing high performance teams, and (e) monitoring job satisfaction and developing job enrichment programs.

| <i>Evidence-Based Indicator</i> | <i>Evidence Criteria</i> | <i>Examples of Evidence</i> | <i>Scoring of Evidenced-Based Indicator (Circle)</i> |
|--|--|---|--|
| 6. Articulates the organization’s mission and intended results | Develops a mission statement that encompasses service delivery philosophy and intended results Operationalizes intended results into evidence based indicators that are objective and measureable Evaluates the evidence based indicators against the intended results | Mission statement with specific goals and objectives | 2 1 0 |
| 7. Enters into partnerships | Identifies potential partners (e.g. advocacy groups, parent organizations, consortia members, community organizations, and businesses) Establishes partnerships Reports and analyzes the impact of the partnerships | List of partners; summaries/reports of partnership-related activities | 2 1 0 |
| 8. Develops program options | Does strategic planning regarding the development of program options Implements the program options consistent with the strategic plan Reports increased program options over time | A listing of program options; policy statements | 2 1 0 |
| 9. Utilizes high performance teams | Relates the concept of high performance teams to the organization Develops specific high performance teams that are relevant to the organization Evaluates the effectiveness and efficiency of the established high performance teams | Protocols regarding meetings, composition and specific tasks of the respective teams, conflict resolution strategies | 2 1 0 |
| 10. Monitors job satisfaction and develops job enrichment programs | Conducts job satisfaction surveys and plans job enrichment programs based on survey results Implements job enrichment programs that includes staff training activities Evaluates and modifies job enrichment programs based on their intended results | Results of job satisfaction surveys, description of job enrichment programs, description of staff training/development activities | 2 1 0 |

Growth Perspective Score

Effectiveness Index

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Scoring Format:

2 = 3 evidence criteria met

1 = 1 or 2 evidence criteria met

0 = no evidence criteria met

Financial Perspective

Financial Perspective Focus: The Financial Perspective encompasses: (a) comparing unit costs across locations and platforms, (b) reporting the percent of budget allocated to client-referenced supports, (c) monitoring the relation between social capital and agency-based capital, (d) using fixed and variable cost data to establish a baseline rate, and (e) analyzing overhead rate to increase efficiency.

| <i>Evidence-Based Indicator</i> | <i>Evidence Criteria</i> | <i>Examples of Evidence</i> | <i>Scoring of Evidenced-Based Indicator (Circle)</i> |
|---|--|---|--|
| 11. Compares unit costs across different locations and platforms | Establishes a standardized approach to calculate unit costs (e.g. hours of service/support) Determines unit costs across different locations and platforms Compares unit costs across different locations and platforms | Budget cost calculations regarding unit costs, costs across locations, and comparative costs across program platforms | 2 1 0 |
| 12. Reports percentage of budget allocated to client referenced supports | Defines operationally components of client-referenced supports (e.g. the components of a system of supports) Determines percent of total budget allocated to client-referenced supports Reports percentage on a regular basis | Budget; financial reports; Annual Report (can be used to calculate operating costs) | 2 1 0 |
| 13. Monitors the relationship between social capital and agency-based capital | Has a policy regarding the contribution of social capital to an organization's budget Develops a data system for capturing the measures (e.g. hours of volunteer service) Computes the ratio of social capital to agency-based capital | Budget; financial estimate of value of social capital | 2 1 0 |
| 14. Uses fixed and variable cost data to establish a baseline rate | Establishes fixed and variable costs Uses ratio to establish a baseline cost rate Monitors cost rate over time (e.g. T 1, T 2 etc.) | Budget; monitoring and evaluation of cost rate over time | 2 1 0 |
| 15. Analyzes overhead rate to increase efficiency | Defines how the organization calculates overhead Monitors overhead rate If necessary, adjusts rate to increase efficiency | Overhead rate calculations; analyses of rate levels over time | 2 1 0 |
| Financial Perspective Score | | | |

Scoring Format:

2 = 3 evidence criteria met

1 = 1 or 2 evidence criteria met

0 = no evidence criteria met

Internal Processes Perspective

Internal Processes Perspective Focus: The Internal Processes Perspective encompasses: (a) horizontally aligning input, throughput, and output program components, (b) vertically aligning an organization’s input, throughput, and output components to the corresponding individual-level input, throughput, and output components, (c) demonstrating the relationship between service/supports provided and the clientele’s assessed support needs, (d) using data related to personal outcomes and organization outputs for multiple purposes, and (e) using evidence-based indicators for continuous quality improvement..

| <i>Evidence-Based Indicator</i> | <i>Evidence Criteria</i> | <i>Examples of Evidence</i> | <i>Scoring of Evidenced-Based Indicator (Circle)</i> |
|---|---|--|--|
| 16. Horizontally aligns input, throughput, and output program components | Identifies and describes the organization’s service delivery components Uses a logic model to show how the service delivery components can be aligned horizontally into input, throughput, and output components Analyzes the horizontal alignment among input, throughput, and output components | Availability of program logic models that graphically portray the organization’s input, throughput, and outcome/output components; evidence of horizontal alignment | 2 1 0 |
| 17. Vertically aligns an organization’s input, throughput, and output components to the corresponding individual-level input, throughput, and output components | Identifies and describes the input throughput, and output components at the individual and organizational levels Uses a mapping system (e.g. logic model, concept map, or a strategic activities system map) to show how the components can be vertically aligned between the individual and organizational levels Analyzes the vertical alignment of the input, throughput, and output components between individual and organizational levels | Evidence of or examples of horizontal alignment; evidence of or examples of vertical alignment | 2 1 0 |
| 18. Demonstrates relationship between units of service/support provided and the clientele’s assessed support needs | Establishes a standardized approach to defining units of service and the assessment of support needs Determines the relationship between units of services/supports provided and the person’s assessed support needs Analyzes the relationship between units of service/supports provided and the person’s assessed support needs | Description of a standardized approach to defining units of service; description of the organization’s standardized approach to the assessment of individual support needs; research/evaluation studies determining the relationship between units of service provided and consumer’s assessed support needs | 2 1 0 |
| 19. Uses data related to personal and organizational outcomes for multiple purposes | Has a policy regarding data sets and data use Implements a data collection system Uses data for multiple purposes (e.g. reporting, monitoring, evaluation, and continuous quality | Descriptions of data sets; examples of how personal outcomes data are used; examples of how organization output data are used | 2 1 0 |

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| | improvement) | | |
| 20. Uses evidence-based indicators for continuous quality improvement | Employs evidence-based indicators in strategic planning Aligns quality improvement strategies to specific evidence-based indicators Evaluates the impact of the strategies | Examples of evidence-based indicators/practices; examples of performance-based measures; performance-based perspectives; balanced scorecard; radar charts; specific quality improvement plans | 2 1 0 |

Internal Processes Score

Efficiency Index

SUSTAINABILITY INDEX:
Effectiveness Index + Efficiency Index:
[_____]

Scoring Format:

2 = 3 evidence criteria met

1 = 1 or 2 evidence criteria met

0 = no evidence criteria met

Figure 3. OEE Scoring Form

| OEE Scoring Form | | | | | |
|---|---|---|-----------|-------|--|
| Sustainability Index | Effectiveness Index | PERSPECTIVE | INDICATOR | SCORE | |
| | | Customer | 1 | | |
| | | | 2 | | |
| | | | 3 | | |
| | | | 4 | | |
| | | | 5 | | |
| | | Total Score Customer Perspective (Indicators 1 to 5): | | | |
| | | PERSPECTIVE | INDICATOR | SCORE | |
| | | Growth | 6 | | |
| | | | 7 | | |
| | 8 | | | | |
| | 9 | | | | |
| | 10 | | | | |
| | Total Score Growth Perspective (Indicators 6 to 10): | | | | |
| | Effectiveness Index (Customer and Growth Perspectives): | | | | |
| | Efficiency Index | PERSPECTIVE | INDICATOR | SCORE | |
| | | Financial | 11 | | |
| | | | 12 | | |
| | | | 13 | | |
| | | | 14 | | |
| 15 | | | | | |
| Total Score Financial Perspective (Indicators 11 to 15): | | | | | |
| PERSPECTIVE | | INDICATOR | SCORE | | |
| Internal Process | | 16 | | | |
| | | 17 | | | |
| | 18 | | | | |
| | 19 | | | | |
| | 20 | | | | |
| Total Score Internal Process Perspective (Indicators 16 to 20): | | | | | |
| Efficiency Index (Financial and Internal Process Perspectives): | | | | | |
| Sustainability Index (Effectiveness and Efficiency Indices): | | | | | |

www.OEESOnLine.org



財團法人台灣省私立啓智技藝訓練中心
Qi Zhi Vocational Training Center



BOB SCHALOCK
AND ASSOCIATES



ARDUIN
voor mensen door mensen