



Log In

User Name:

Password:

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OEES Website V3.0

User Manual for Consultants

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The OEES website

The OEES Website is build to use the *Organization Effectiveness and Efficiency Scale (OEES)* as a online system, to collect scale data and communicate its results. For an overview of the scale, download “Overview of the Organization Effectiveness & Efficiency Scale” from the OEES website login page.

The system is developed to be used by 2 different type of users. It can be used by persons who consult organizations for OEES evaluation (the “*Consultant*”-user) , and it can be used by organizations who want to use the OEES for strategic planning (the “*Organization*”-user). This manual is intended for the consultants, but also mentions the role of the organizations. For the separate user manual for organizations, download “Website Manual for Organizations” from the OEES website login page.

Two type of accounts

The website has a type of account for each user:

- the consultant account
- the organization account

The difference is necessary because the consultant has a different role in the system, and has access to the data of multiple organizations. Organizations can only access their own data.

CONSULTANT accounts are created by the OEES Webmasters who will give the assigned consultants their login credentials. At this moment the assigned consultants are members of the International Research Consortium on Evidence-based Practices, who operate as OEES consultants/partners, or just as contact persons, for interested organizations.

A consultant account consists of a **username** and **password** which the consultant must use to log into the website.

ORGANIZATION accounts are created by the consultants, who will give the organizations their log-in credentials.

An organization account consists of an **username** and **password** which must be used by the organization to log into the website. For organizations, the organization ID will be used as username, so for organizations the username is always an number.

The conceived scenario is the following sequence of events:

1	Consultants request an OEES webmaster for a consultant account.
2	The OEES webmaster e-mails the consultant login credentials to the consultant.
3	The consultant logs in on the OEES website with the received credentials.
4	The consultant creates an organization for every organization he/she consults / partners or for which he/she acts as a contact person.

5

The consultant sends an e-mail to every organization with the organization login credentials.

NOTE: This scenario shows that an organization account never stands on its own, and is always linked to a consultant account which is owned by a consultant. As mentioned, this consultant may actually consult the organization, but he/she can also act as just a contact person without really visiting/consulting the organization, if this is desired.

To log into the website, fill the textboxes with the username and password and click the “Log In”-button (fig. 1):

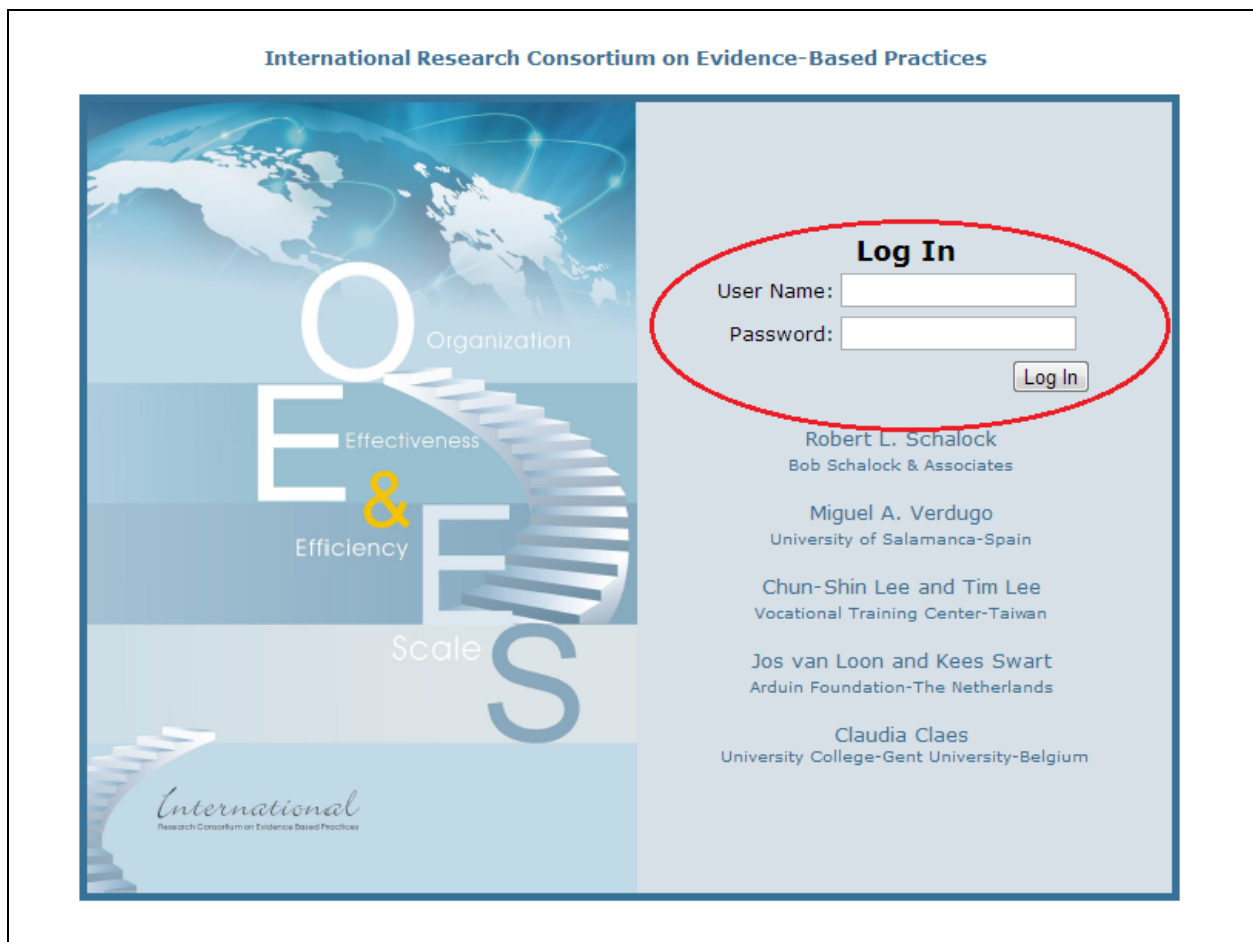


Fig. 1: log into the website

Time out Security

The website has a timeout security of 30 minutes. This means that when there's no user activity for 30 minutes, the site will log you out automatically. When you are logged out, you will jump to the login screen when you try to navigate through the site.

Main Screen

Fig. 2 shows the main screen on which you land after a successful login:



ORGANIZATIONAL EFFECTIVENESS AND EFFICIENCY SCALE

organizations: choose... interview: Delete Selected Interview Create New Interview

Show Survey | Show Results | **Organizations** | **Enable/Disable Delete** | **Log out**

Fig. 2: the main screen

NOTE: The main screen has a little difference for logged in organizations, they do not have a organizations dropdown box, and also no organizations link.

The functionality on this page:

- Drop down boxes for selecting organizations / interviews.
- “Create New Interview” button creates a new interview.
- “Show Survey”; shows the survey for the selected interview. The survey is automatically loaded when a new interview is created.
- “Show Results”; shows the results (scoring from, profile, indices). Results are automatically shown after saving a survey.
- “Organizations”; leads to the organizations section, where to administer the organizations and their demographic data.
- “Enable/Disable Delete” is an “on-off” switch to enable or disable the “Delete Selected Interview”-button. This switch is to prevent interview deletion unintentionally.
- “Delete Selected Interview”; deletes the selected interview from the system.
- “Logout”; meant to close the system.

Create a new Interview

On the main screen click “Create New Interview” (fig. 3). The newly created interview will be added to the drop-down box which is labeled “interview:”. The “CON”-phrase following the date and time of creation indicates that this interview was created by a consultant. On creation of a new interview, the survey panel will immediately open, so the user can administer the questionnaire.

ORGANIZATIONAL EFFECTIVENESS AND EFFICIENCY SCALE

organizations: interview: [Delete Selected Interview](#) [Create New Interview](#)

[Show Survey](#) | [Show Results](#) | [Organizations](#) | [Enable/Disable Delete](#) | [Log out](#)

Customer Perspective			
Evidence-Based Indicator	Evidence Criteria	Examples of Evidence	Scoring
1 Aligns services/supports to identified support needs	<input type="checkbox"/> Develops a standardized approach to the assessment of individual support needs that are important to and for the individual <input type="checkbox"/> Uses that information to develop an Individual Supports Plan <input type="checkbox"/> 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	0
2 Reports the number of clients living or working in more independent, productive, and community integrated environments	<input type="checkbox"/> Has a data system that keeps track of client movement into more independent, productive, and community integrated environments <input type="checkbox"/> Aggregates movement data <input type="checkbox"/> Analyzes and reports the aggregated data	Data sets within the organization’s management information system	0
3 Measures personal outcomes	<input type="checkbox"/> States/describes desired personal outcomes	Ongoing use of a reliable and valid personal outcomes scale outcomes	

Fig. 3: a newly created interview with the open survey panel.

Administer the Survey

To administer the scores, just click on the check-boxes or on the evidence criteria text itself, the check-box will be “checked” and the evidence criteria text will be blue and bold, to indicate that this criteria is met (see fig. 4). The scoring column will show the resulting score of the checked criteria:

Growth Perspective			
Evidence-Based Indicator	Evidence Criteria	Examples of Evidence	Scoring
6 Articulates its mission and intended results	<input checked="" type="checkbox"/> Develops a mission statement that encompasses service delivery philosophy and intended results <input type="checkbox"/> Operationalizes intended results into outcome classes/indicators that are objective and measurable <input type="checkbox"/> Publishes a mission statement with intended results via web-site or hard copy	Mission statement with specific goals and objectives	1
7 Allocates available resources to intended results	<input checked="" type="checkbox"/> Articulates intended results (e.g. enhanced personal outcomes and/or organization outputs) <input checked="" type="checkbox"/> Develops a resource allocation formula or approach that is aligned with intended results <input type="checkbox"/> Reports/summarizes actual resources devoted to intended results	Financial reports; breakdowns in percent of budget for overhead and client services	1
8 Develops program options (employment opportunities, community living alternatives, and educational opportunities)	<input checked="" type="checkbox"/> Establishes a baseline of current number/composition of program options (e.g. employment programs, community living alternatives, educational alternatives) <input checked="" type="checkbox"/> Demonstrates strategic planning regarding the development of program options <input checked="" type="checkbox"/> Reports changes over time (T 1, T 2, etc.)	A listing of program options; policy statements	2
9 Develops and uses high	<input type="checkbox"/> Describes current approach to	Protocols regarding meetings, composition and specific	

Fig. 4: evidence criteria will be checked, blue, and bold when met.

Before leaving this panel, the user must save the survey by clicking the “Submit” button (see fig. 5), or all choices will be lost:

quality improvement	<input type="checkbox"/> Uses data for continuous quality improvement <input type="checkbox"/> Uses data for program and system innovation		0
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Fig. 5: click “Submit” to save your choices.

NOTE: Due to the build in **time out security**, it is advisable, when the survey is being administered and the criteria are under debate, to submit the survey within 30 minutes, or choices will be lost. The user can always change an existing survey so, when submitted within the time-out, there's no need to fill out the whole survey at ones.

Show the Results

After submitting, the results panel will be shown. The results contain a scoring form (fig. 6), a radar chart (fig. 7), and 3 gauges (fig. 8) for respectively Effectiveness, Efficiency, and Sustainability Index:

OEES Scoring Form			INDICATOR	SCORE	
Sustainability Index	Effectiveness Index	Customer	1	2	
			2	2	
			3	1	
			4	2	
			5	1	
	Total Score Customer Perspective (Indicators 1 to 5):			8	
	Growth		6	1	
			7	2	
			8	1	
			9	1	
10			1		
Total Score Growth Perspective (Indicators 6 to 10):			6		
Effectiveness Index (Customer and Growth Perspectives):			14		
Efficiency Index	Financial		11	1	
			12	1	
			13	2	
			14	2	
			15	1	
	Total Score Financial Perspective (Indicators 11 to 15):			7	
	Internal Process		16	2	
			17	0	
			18	1	
			19	1	
20			2		
Total Score Internal Process Perspective (Indicators 16 to 20):			6		
Efficiency Index (Financial and Internal Process Perspectives):			13		
Sustainability Index (Effectiveness and Efficiency Indices):			27		

Fig. 6: the OEES scoring form, a clear representation on how the perspectives relay to the indices.

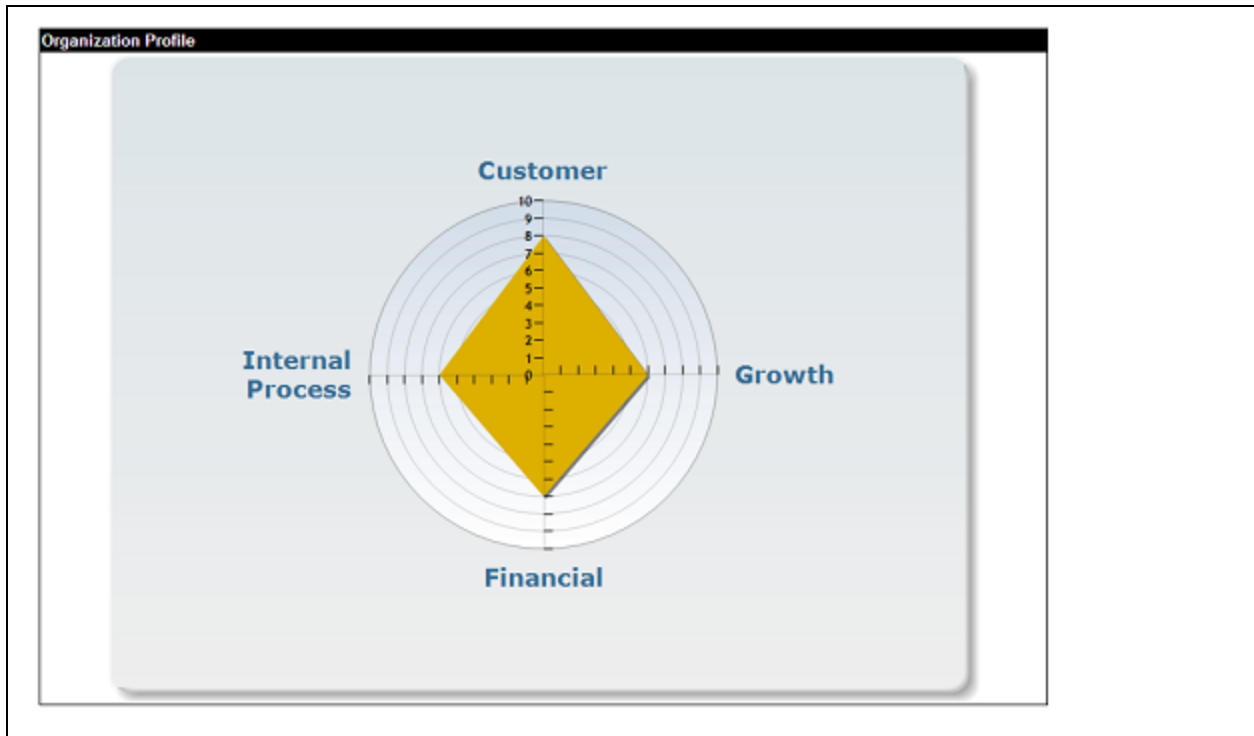


Fig. 7: the radar chart presentation of the OEES scores is meant to communicate the organization's profile.

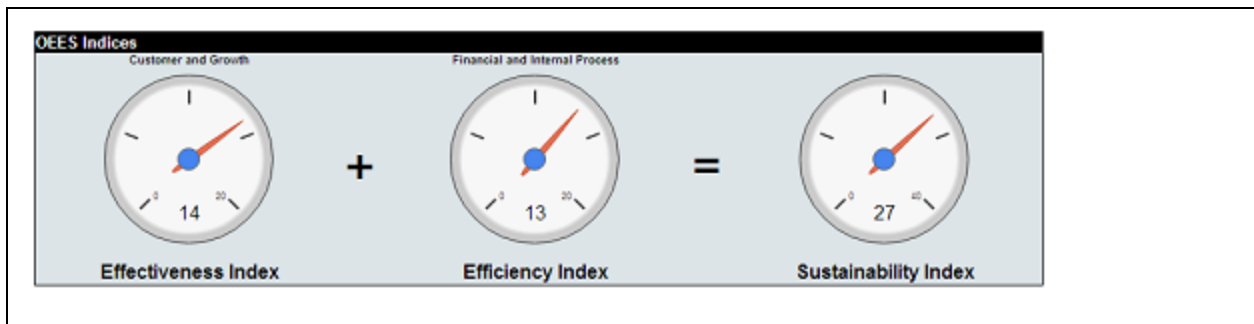


Fig. 8: the OEES indices presented as gauges, showing how an organization's sustainability is build up on it's effectiveness and efficiency.

Delete an Interview

To delete an interview (fig. 9), select the organization (1), select the interview (2), and click on the link “Enable/Disable Delete” (3):

ORGANIZATIONAL EFFECTIVENESS AND EFFICIENCY SCALE

organizations: TESTorgKees interview: 8/13/2013 1:53:57 PM CON **Delete Selected Interview** Create New Interview

[Show Survey](#) | [Show Results](#) | [Organizations](#) | [Enable/Disable Delete](#) | [Log out](#)

Customer Perspective			
Evidence-Based Indicator	Evidence Criteria	Examples of Evidence	Scoring
1 Aligns services/supports to identified support needs	<input type="checkbox"/> Develops a standardized approach to the assessment of individual support needs that are important to and for the individual <input type="checkbox"/> Uses that information to develop an Individual Supports Plan <input type="checkbox"/> 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	0
2 Reports the number of clients living or working in more independent, productive, and community integrated environments	<input type="checkbox"/> Has a data system that keeps track of client movement into more independent, productive, and community integrated environments <input type="checkbox"/> Aggregates movement data <input type="checkbox"/> Analyzes and reports the aggregated data	Data sets within the organization's management information system	0
3 Measures personal outcomes	<input type="checkbox"/> States/describes desired personal outcomes	Ongoing use of a reliable and valid personal outcomes scale outcomes	

Fig. 9: Select an Interview for deletion.

By this you prepare the system for delete and this extra user action will prevent interview deletion unintentionally. The delete button will highlight red (fig. 10):

ORGANIZATIONAL EFFECTIVENESS AND EFFICIENCY SCALE

organizations: TESTorgKees interview: 8/13/2013 1:53:57 PM CON **Delete Selected Interview** Create New Interview

[Show Survey](#) | [Show Results](#) | [Organizations](#) | [Enable/Disable Delete](#) | [Log out](#)

Customer Perspective			
Evidence-Based Indicator	Evidence Criteria	Examples of Evidence	Scoring
1 Aligns services/supports to identified support needs	<input type="checkbox"/> Develops a standardized approach to the assessment of individual support needs that are important to and for the individual	Assessed supports needs data; incorporation of support need data into the Individual Supports Plan	

fig. 10: the system is brought into delete state.

Click on the highlighted “Delete Selected Interview”-button to delete and the selected interview will be deleted and the system will return to its normal state. To cancel before clicking the delete button, click the “Enable/Disable Delete” link again.

Organizations

NOTE: For consultants only.

The link “Organizations” on the main screen navigates the consultant to the organizations panel (fig. 11):

ORGANIZATIONAL EFFECTIVENESS AND EFFICIENCY SCALE

[back to scale](#)

	Name	Password	
1	Stichting Arduin	arduin2012	delete
7	Quality of Life Foundation	QOLF2013	delete
8	Care For U Organization	CFUO2222	delete
9	Establishment on Live Empowerment	EOLE1111	delete

New Organization: Password:

Fig. 11: the organizations panel.

It is here where the consultant adds the new organization(s). An organization can also be deleted (data will not be lost, only not visible anymore). While creating, a password must be inserted. The number in the first column is the organization ID and together with the given password they form the login credentials for the organization. As mentioned above, inform the organization with their login credentials, so they can access the system.

Demographic Info

In the organization table, a click on the organizations name will open the demographic info form (fig.12):

Organization Demographic Information

Choose year of record first: 2013

Name of Organization: Stichting Arduin

Country: Netherlands

Contact person: Jos van Loon e-mail: JLoon@arduin.nl

Setting: Urban Rural Mix of Urban and Rural Number of Clients Served: 700

Number of FTE Staff: 770

Population Served (Check all that apply):

ID/DD Elderly Mental/Behavioral Health Special Education

Other (please specify):

Population Age (Percent):

10 Children (<12) 10 Adolescents (13-18) 70 Adults (19-65)

10 Elderly (65+)

Service Type (Check all that apply):

Residential Employment Education (school/pre-school)

Day Activity Sheltered Workshop Community living options

Other (please specify):

Annual budget (total, in your own currency): 55000000

cancel save

Fig. 12: the demographic data.

The demographic data is bound to a specific year, which gives all data a historic perspective (useful for research over the years with build up data). There's no need to fill out this form every year, just when significant changes have taken place. The demographic data can be filled in by a consultant or by the organization self.

Log out

To log out of the system, use the log out link on the main page (fig. 13):

ORGANIZATIONAL EFFECTIVENESS AND EFFICIENCY SCALE

organizations: TESTorgKees interview: 8/13/2013 1:53:57 PM CON Delete Selected Interview Create New Interview

[Show Survey](#) | [Show Results](#) | [Organizations](#) | [Enable/Disable Delete](#) | [Log out](#)

Customer Perspective			
Evidence-Based Indicator	Evidence Criteria	Examples of Evidence	Scoring
1 Aligns services/supports to identified support needs	Develops a standardized approach to the assessment of individual support needs that are important to [redacted] for the individual	Assessed supports needs data; incorporation of support need data into the Individual Supports Plan	

Fig. 13: use the logout link to close the OEES system

When closing the application without using the log out link, the system will still remain open for maximum 30 minutes. When the user reopens the website again within 30 minutes, the login screen will be skipped and the user is still logged in. To prevent this, **use the logout link to close the system.**