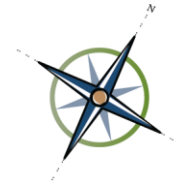


Organizational Excellence Specialists



OPPORTUNITY FOR PROFESSIONALS

Organizational Excellence Specialists (OES) is pleased to announce a new toolkit and professional development program for consulting and training professionals. The program is based on the *Organizational Excellence Framework* (OEF), a publication authored by Dawn Ringrose that also includes the contributions from a number of seasoned professionals.

The OEF publication is foundational to the toolkit and is based on four leading excellence models (European Foundation for Quality Management, Malcolm Baldrige, Canadian Framework for Excellence, Australian Business Excellence Framework) that were developed in the late 1980's and early 1990's and have evolved over the years. These jurisdictions have promoted their models, assisted organizations with implementation, developed award programs to celebrate the successes, and conducted research validating the positive relationship between implementing the model and organizational performance. Today, many countries use or have structured their programs on these models.

The OEF publication complements the good work that has been done to date and adds to the literature by 'integrating' the definitions of the principles and best management practices found in the models and providing 'implementation guidelines' used by seasoned management consultants. In other words, it merges 'what we know in organizational excellence' with 'how we implement it in management consulting'.

Other tools in the toolkit are intended to assist with the excellence journey and include scenario games, holistic and modular workshops, an automated assessment and reporting tool, global index and a train-the-trainer program. These tools are intended to be used with any excellence model so the excellence journey is simple, straightforward, time efficient and cost effective.

Some of the tools in the toolkit are provided at no charge and other tools are provided at a small fee so that price does not provide a barrier for any professional in any country. Most of the tools can be customized to meet the requirements of the organization and support a holistic or modular approach.

The only tool that cannot be customized is the automated assessment and reporting tool. This tool is being used to do global research study and develop an index that is intended to provide benefit to the excellence community in general and the working population at large
<http://organizationalexcellencespecialists.ca/activities/global-oe-index/> :

- Use a common tool that applies to any excellence model
- Gather data and report aggregate results by size, industry sector and country
- Encourage organizations to compare with others
- Enable stakeholders to address gaps in their region (e.g. consultants, trainers, educational institutions, excellence bodies, economic development authorities)

Today, the OEF toolkit is being used around the globe. Professionals have been trained in over 20 countries and tools are being used by professionals in over 65 countries.

1.0 Intent of the Turnkey Toolkit

It is anticipated the OEF publication and accompanying toolkit will be valuable to professionals across situations.

At OES, our desire is to:

- Make the toolkit available to professionals that wish to use it for:
 - professional development
 - internal and external consulting and training
 - conference presentations
 - research and case studies
- Develop a team of licensed professionals that can represent OES and:
 - use the tools with organizations
 - deliver the train-the-trainer program
 - conduct research for the global index
 - oversee geographic regions
- Enjoy the benefits of our collective efforts:
 - increase awareness about excellence models
 - encourage application of excellence models
 - help organizations improve performance
 - celebrate results across a balanced system of measurement
 - aggregate data for review, analysis, and comparison
 - encourage organizations to apply for awards and be recognized for their efforts:
 - national excellence
 - international best practice
 - international benchmarking

2.0 Tools in the Toolkit

Tools in the toolkit include:

- OEF Publication – describes the principles and best management practices used by high performing organizations, provides implementation guidelines for the professional, highlights interrelationships and indicates applicability to different size organizations
- Scenario Game – provides an opportunity for participants to see the long term consequences of decision making and reinforces the principles (culture) of excellence, best management practices that contribute to the culture, decision making that aligns with vision and mission, and benefits of pursuing excellence at the organizational, community, regional and national level
- OEF 1000 Workshops – the OEF workshops for different size organizations (i.e. micro, larger) offer a holistic approach and provide an opportunity to learn about excellence

model research, self-assess the organization against the OEF, and prepare an action-oriented improvement plan to address gaps

- OEF 1001 to 1009 Workshops – the OEF workshops for each key management area offer a modular approach, provide a high-level overview of the OEF and focus on the implementation guidelines. There are 9 workshops including: governance, leadership, planning, customers, employees, work processes, suppliers and partners, resource management, continuous improvement and performance measurement. Each workshop provides an opportunity to self-assess the organization against the best management practices of the key management area and prepare an action-oriented improvement plan to address gaps
- OEF Automated Assessment and Reporting Tool – may be used across situations, for example by:
 - conducting an independent and objective assessment of an organization
 - working with a leader or all employees to self-assess an organization
 - having workshop participants self-assess their organization(s)
 - inviting larger group to engage in a self-assessment exercise (e.g. conference attendees, association members)

The technological platform delivers a feedback report that summarizes the ratings and open-ended comments and provides an action-oriented improvement plan to address gaps. The report is provided in an editable Word format so that it can be further augmented by the professional with analysis, recommendations, best in class examples and strategic insights

- Global OE Index – shares the results of a global research study that was started in 2015 and has captured the current state of organizational excellence by size, industry sector and region (country). This index allows organization to see how they measure up and compare with others <https://organizationalexcellencespecialists.ca/workshops-events/global-oe-index/>
- Train the Trainer Program – a certification program for professionals that wish to become licensed to deliver programs and services on behalf of OES. The program offers certification at two levels

3.0 Professional Streams

There are two streams. The first stream includes professionals that work internally and externally with organizations. The second stream includes professionals that wish to receive an external seal of approval and become licensed to represent OES. Each of these streams is described below with respect to requirements, eligibility, and benefits of participation.

3.1 Professionals

A wide range of professionals are welcome to use the OEF toolkit. These professionals include, but are not limited to, those involved in: consulting, business advisory, accounting, mergers and acquisitions, quality assurance and management, project management, occupational health and safety, human resources, supply chain management, statistics, research, executive positions and entrepreneurial ventures. All professionals must agree to the basic terms of a User Agreement

and are encouraged to abide by the CMC Code of Professional Conduct at http://icmci.org/members_of_icmci

These professionals can purchase the OEF 1000-1009 Workshops that are most valuable to their practice or organization. The workshops are provided in 'white label' format to allow for customization with the relevant logo and name.

To assist with delivery, all workshop materials include powerpoint slides with facilitator notes and can be further customized for a situation or industry sector by adding slides and content to further augment the subject matter.

This group of professionals can get started with the toolkit quite quickly by reading the OEF Publication, completing the OEF 1000 Workshop (holistic) and using the Automated Assessment and Reporting Tool.

3.2 Licensed Professionals

Licensed Professionals that join the OES team earn a designation and are eligible to use the same 'white label' material in their practice and 'OES label' material when representing the company. Vetted with an examination and demonstration of facilitation skills, Licensed Professionals must sign a license agreement and pay an annual license fee. The annual license entitles these professionals to extended benefits of participation.

There are two designations available: Registered Organizational Excellence Specialist (ROES) and Certified Organizational Excellence Specialist (COES). Each designation has requirements that must be satisfied and related benefits of participation. Generally, the ROES has satisfied the requirements to deliver the OEF 1000 Workshop (holistic) and use the Automated Assessment and Reporting Tool and the COES has satisfied the requirements to deliver the OEF 1000-1009 Workshops (holistic and modular) and the Train-The-Trainer Program and to use the Automated Assessment and Reporting Tool.

Generally, the cost of completing the ROES designation is \$650 + and the cost of completing the COES designation is \$2450 + and the annual license fee is \$250.

Requirements	ROES	COES
Take OEF 1000 Workshop or purchase materials		
Take OEF 1001-1009 Workshops (9) or purchase materials		
Pass examination (score 70%+)		
Demonstrate facilitation skills (score 70%+)		
Sign license agreement		
Total cost	\$650 +	\$2450 +
Pay annual license fee	\$250	\$250

Note:

1. Total cost varies due to the price difference between purchasing materials versus attending a workshop
2. The Facilitation workshop may include 1+ participants
3. The License Agreement provides for a referral (sales) fee for any referral work that is equal to 10% of per diem revenue associated with the work

In addition to using eligible tools in the toolkit, Licensed Professionals enjoy other benefits of participation such as: attending monthly meetings, developing business opportunities with

others, seeking guidance on projects and using templates, marketing materials and resources available on a shared resource site.

Benefits of Participation	ROES	COES
Work on OES projects		
Deliver the OEF holistic workshop		
Deliver the OEF modular workshops		
Conduct train-the-trainer program		
Oversee a geographical region		
Access to Shared Site and Services:		
Annual updates to consulting toolkit		
Short presentation		
Proposal template		
Articles and research reports		
Website listing with bio and links		
Brochures		
Business Cards		
General marketing		
Monthly meetings		
Addendum materials to customize workshops		

3.3 Professional Per Diem Rates

All professionals using the toolkit may conduct client engagements and workshops according to their own per diem rate.

When developing workshop pricing, it is recommended the professional provide for: facilitator per diem rate, participant handouts, automated assessment and report(s), room rental, equipment rental, food & beverage, travel, and accommodation.

4.0 Pricing

The following table shares the tools in the turn-key toolkit and related prices in Canadian dollars. For most workshops, there are several options to choose from:

- Purchase electronic materials only
- Complete an e-learning workshop
- Attend an interactive online workshop with other participants
- Attend an in-person workshop with other participants

The automated assessment and reporting tool is available on a 'pay per use' basis. This tool has many applications and can be used by pre-purchasing codes that apply to the number of users:

- An individual in the organization (1)
- A workshop with participants from different organizations (10+)
- A larger group (1000+):
 - a conference with delegates
 - an association with members
 - a country with various government ministries

Any aggregation of data and additional customization of the platform (e.g. logo, name, dashboards, private online space) is subject to additional fees at OES and our joint venture partner QLBS, respectively.

Tools in the Toolkit	Materials Only	E-Learning Workshop	Online Workshop	In-Person Workshop
Publication	no charge	no charge	no charge	no charge
Scenario Game	200	250	300	400
Holistic Workshops:				
OEF Workshop – micro size organization	200	250	300	400
OEF Workshop – small-medium-large size	Included above	Included above	Included above	Included above
Modular Workshops:				
Governance	200	250*	300	400
Leadership	200	250*	300	400
Planning	200	250*	300	400
Customers	200	250*	300	400
Employees	200	250*	300	400
Work Processes	200	250*	300	400
Suppliers and Partners	200	250*	300	400
Resource Management	200	250*	300	400
Continuous Improvement & Performance Measurement	200	250*	300	400
Automated Assessment and Report (must pre-purchase):				
Teaser – principles only	no charge	-	-	-
Full assessment - 1 micro size organization	100	-	-	-
Full assessment - 1 full size organization	200	-	-	-
Full assessment - 10+ micro size organizations	50	-	-	-
Full assessment - 10+ full size organizations	100	-	-	-
Full assessment - 1000+ micro size organizations	25	-	-	-
Full assessment - 1000+ full size organizations	50	-	-	-

Notes:

1. * - indicates e-learning workshops are under development
2. Materials only – electronic files
3. E-Learning workshop – self-paced study, electronic files, available at www.oes-learning.ca
4. Online workshop – interactive webinar with facilitator and other participants, electronic files
5. In-Person workshop – on-site and interactive session with facilitator, hard copy and electronic files
6. All workshops include use of online automated assessment and reporting tool as applicable (i.e. teaser assessment, full assessment, key management area assessment)
7. Automated assessments may be pre-purchased as required at <http://www.qlbs.com/Orgex/OrgExFramework> For aggregated assessment reports, involving multiple respondents, additional fees will be charged for professional time at OES (e.g. aggregate) and out-of-pocket costs at QLBS (e.g. data dump)

8. Micro size organization has 1-25 employees and Full size organization have more employees:
Small (26-100), Medium (101-999), Large (1000+)

5.0 Key Benefits

The turnkey toolkit provides a new and exciting program that will help professionals work with organizations to improve their performance.

Some of the key benefits include:

- Using an integrated excellence model that complements other models
- Using a process that has been validated to work for over 20 years
- Offering workshops that have earned superior satisfaction ratings
- Using a leading-edge technological platform that will:
 - save time and money
 - aggregate data for review, analysis and comparison
 - allow the professional to focus on higher level activities
- Using a reasonably priced turnkey toolkit that provides tools for each step of the:
 - consulting process - identify issues, analyze issues, make recommendations, assist with implementation
 - consulting business process - identify work, do work, get results, do follow-on work
 - organization's improvement journey - transfer knowledge, conduct assessment, prepare improvement plan, address gaps
- Offering flexibility to:
 - work independently or collaboratively
 - work at own per diem rate
 - use a holistic or modular approach
 - customize workshops and reports to meet organization requirements

6.0 Next Steps

Should you have any questions or wish to get started with the turnkey toolkit, please contact:

Dawn Ringrose, dawn@organizationalexcellencespecialists.ca , Phone (250) 941-2064 (Canada)

A description of the Organizational Excellence Framework publication is appended.

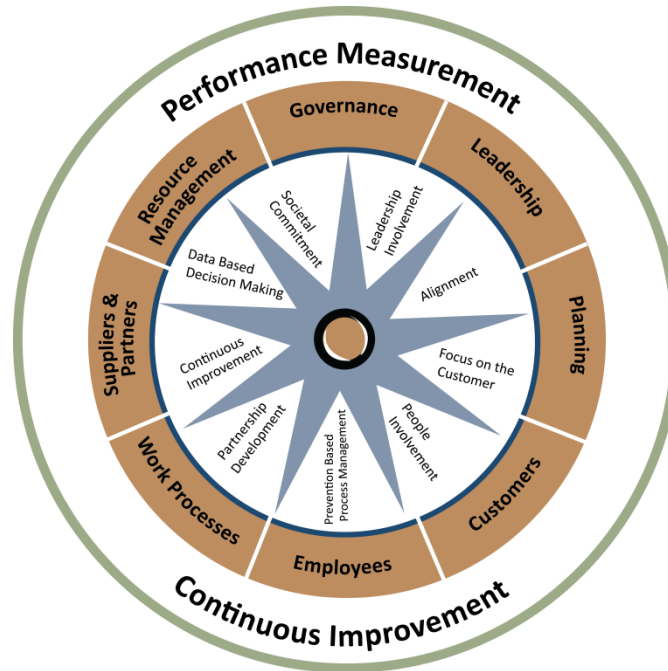
The User Agreement and Licensed Professional Agreement are provided under separate cover.

Organizational Excellence Framework

A high-level snapshot of the OEF follows. The diagram is comprised of three rings:

- Inside - principles that characterize the culture and values of the organization and depict the way people work together and with their stakeholders
- Middle – key management areas comprised of best management practices
- Outside – key management area that is used to continually improve and measure performance for each key management area and for the organization as a whole

Figure 1. Organizational Excellence Framework



The publication (240+ pages) includes:

- Statement of the best management principle, practice or measure
- Definition – the meaning of the statement within the scope of the four leading excellence models
- Implementation – a description of how to implement the practice
- Type of Organization – an indication of whether the practice is applicable to a micro size (1-25 employees), small size (26-100), medium size (101-999) and/or large size (1000+) organization
- Related Practices – other practices in the OEF that are related to the practice
- Additional Notes – helpful notes regarding application to the public, private, or non-profit sector, risks that may impact implementation and how to mitigate such, and other sources of information on the practice that may be within or outside the scope of the OEF
- Tags – key words that identify topics within the practice
- Appendices – applicability to organization size, comparison to other excellence models, self-assessment and improvement planning methodology