

# ***Organizational Excellence Specialists***



## **OPPORTUNITY FOR PROFESSIONALS**

Organizational Excellence Specialists (OES) is pleased to offer a toolkit and professional development program for consultants and trainers.

Foundational to the toolkit is the *Organizational Excellence Framework* (OEF), a publication based on leading excellence models (EFQM, Baldrige, Canadian Framework for Excellence, Australian Business Excellence Framework) that have defined the best management practices common to high performing organizations. Global research over the past 25 years has validated the positive relationship between implementing the practices and improving organizational performance.

Accompanying the publication are additional tools designed to make the improvement journey more simple, straightforward, time efficient and cost effective. All tools are based on work with different sizes and types of organizations and can be customized to meet varying requirements.

Today, the publication and tools are being used around the world by professionals in 65+ countries.

### ***1.0 Intention***

At OES, we want organizations to be the best they can be. Our desire is to transfer knowledge and license professionals so they can use the toolkit in their work with organizations to improve performance.

We believe suitably qualified professionals around the world can work toward a common aim - using the toolkit to help organizations improve performance. And in doing so, these higher performing organizations can ultimately contribute to the economy, trade and resident quality of life.

### ***2.0 Tools in the Toolkit***

Tools in the OEF Toolkit include:

- OEF Publication – describes the principles and best management practices used by high performing organizations, provides implementation guidelines for the user, highlights interrelationships between the principles and practices, indicates applicability to different size organizations and shares improvement planning methodology

- Scenario Game – reinforces the principles and best management practices and the benefits of pursuing excellence at the organizational, community, regional and national level
- Workbook – provides a bridge between the publication and the workshops and allows the organization to document the current state of their management system and improvement initiatives
- OEF 1000 Workshop – transfers knowledge using a holistic approach. This workshop is designed for different size organizations and provides an opportunity to learn about the excellence research, self-assess against the OEF and prepare an action-oriented improvement plan to address gaps
- OEF 1001 to 1009 Workshops – transfers knowledge using a modular approach. These workshops focus on a key management area and provide an opportunity to examine the practices and implementation guidelines in more depth. There are 9 workshops including: governance, leadership, planning, customers, employees, work processes, suppliers and partners, resource management, continuous improvement & performance measurement. Each workshop provides an opportunity to self-assess the organization against the practices and prepare an action-oriented improvement plan to address gaps
- OEF Assessment and Reporting Tool – assesses the extent to which an organization has a culture committed to excellence and/or has deployed best management practices. The tool is scalable, customizable and available in a number of languages. It can be used in a variety of ways such as:
  - conducting an independent and objective assessment of an organization
  - working with a leader or all employees to self-assess an organization
  - engaging workshop participants in self-assessment of their organization
  - inviting a larger group to engage in self-assessment (e.g. conference attendees, association members)
- Global OE Index – shares the results of a global research study that captures the current state of organizational excellence by role, size, industry sector and region (country). The index allows an organization to see how they measure up and compare with others <https://organizationalexcellencespecialists.ca/workshops-events/global-oe-index/>
- Train the Trainer Program – offers 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 Professionals**

A wide variety of professionals can add value to the work they do, by learning about the OEF Toolkit. They can participate in professional development or earn a designation. Such professionals include, but are not limited to: management 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, entrepreneurs.

### 3.1 Ongoing Professional Development

Workshops are available on a Learner Management System (LMS) and through the Licensed Professionals.

The LMS is available 24/7 and offers a self-paced experience. The cost of workshops on this system follows:

Workshop	Cost CN\$
Holistic Workshop:	
OEF 1000 Workshop	150
Modular Workshops:	
OEF 1001 Workshop - Governance	75
OEF 1002 Workshop - Leadership	75
OEF 1003 Workshop - Planning	75
OEF 1004 Workshop - Customers	75
OEF 1005 Workshop - Employees	75
OEF 1006 Workshop - Work Processes	75
OEF 1007 Workshop - Suppliers and Partners	75
OEF 1008 Workshop - Resource Management	75
OEF 1009 Workshop – CI & Performance Measurement	75

Note: LMS is available at <http://oes-learning.ca/>

The cost of workshops provided by Licensed Professionals vary by country as they deliver services in different formats (online, in-person) and according to their own per diem rate.

### 3.2 Licensed Professionals

Licensed Professionals earn a designation, that provides an external seal of approval, and are eligible to use the ‘OES branded’ material. They are vetted with an examination, must demonstrate strong facilitation skills and abide by the CMC Code of Professional Conduct [http://icmci.org/members\\_of\\_icmci](http://icmci.org/members_of_icmci).

There are two designations available: Registered Organizational Excellence Specialist (ROES) and Certified Organizational Excellence Specialist (COES). The **ROES** is eligible to do assessments, deliver the OEF 1000 Workshop (holistic) and offer related consulting services. This designation is a prerequisite to the COES designation. The **COES** is eligible to deliver additional services such as the OEF 1001-1009 Workshops (modular) and the Train-The-Trainer Program.

Generally, the cost of completing the ROES is \$550 and the cost of completing the COES designation is \$775. The annual license fee is recurring at \$250.

<b>Requirements</b>	<b>Cost CN\$</b>
	<b>ROES</b>
Take OEF 1000 Workshop	150
Pass examination (score 70%+)	100
Demonstrate facilitation skills (score 70%+)	300
Sign license agreement	0
<b>Total cost</b>	<b>\$550</b>
	<b>COES</b>
Take OEF 1001-1009 Workshops (9)	675
Pass case study (score 70%+)	100
<b>Total cost</b>	<b>\$775</b>
	<b>LICENSE</b>
Both ROES and COES pay annual license fee	\$250

In addition to using tools in the toolkit, Licensed Professionals enjoy a number of benefits such as:

- Work on OES engagements
- Access to Shared Site:
  - Annual updates to OEF toolkit
  - Presentations
  - Proposal template
  - Articles and research reports
  - Content to customize workshops
- Access to Services:
  - Website listing with bio and links
  - Team marketing initiative
  - Monthly meetings
  - Learning sessions
  - Subject matter experts

#### **4.0 Key Benefits**

The turnkey toolkit provides an 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 25 years
- Offering workshops that have earned superior satisfaction ratings

- Using leading-edge assessment and reporting tools 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 project, do project, get results, earn return and referral engagements
  - organization's improvement journey - transfer knowledge, assess current state, work toward desired future state, continue to improve
  
- Offering flexibility to:
  - work independently or collaboratively
  - work at own per diem rate
  - use a holistic or modular approach
  - customize tools to meet organization requirements

## ***5.0 Next Steps***

Should you have any questions or wish to get started with the turnkey toolkit, please contact us:  
<https://organizationalexcellencespecialists.ca/contact-us/>

A description of the Organizational Excellence Framework publication is appended.

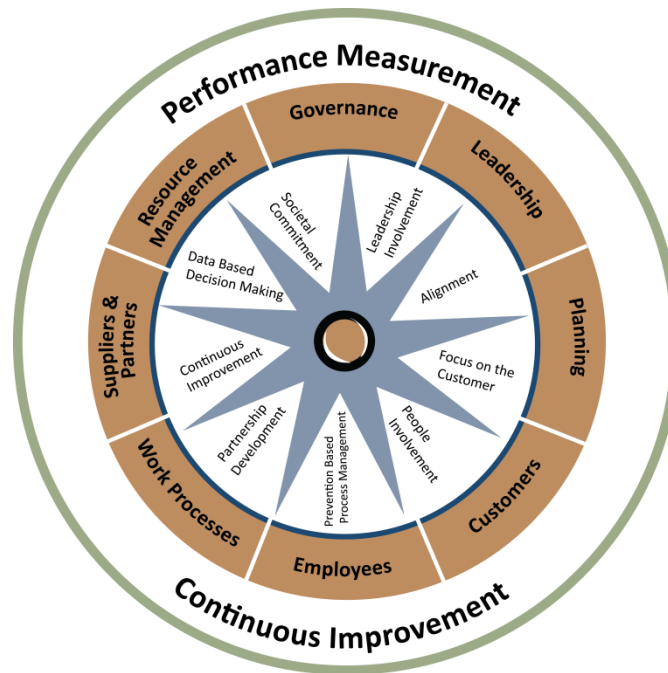
The Licensed Professional Agreement is available upon request.

# 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