Introducing the
Revised EQUASS Framework

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What is EQUASS?

- Developed, owned, managed by epr

- Mission: *to enhance the social sector by engaging social service providers in continuous improvement, learning & development*

- A Quality Framework, criteria & requirements <u>customised for the social sector</u>

- Offers 2 recognition certifications; Assurance & Excellence in social services

- Independent audits to "control", evaluate, give feedback, promote improvement
Valid 3 years, check in halfway

Overview of the Revised Framework

- **5 sections**: Rights and Dignity, Empowerment and Person-centredness, Quality Management & Improvement, Leadership & Governance, Workforce Management & Development

- **30 Criteria** with 2-4 requirements each

- **Requirements:**

  - 99 Requirements for Assurance

  - Typically integrating the PDCA approach

  - 13 additional requirements for Excellence

The Revised EQUASS Framework
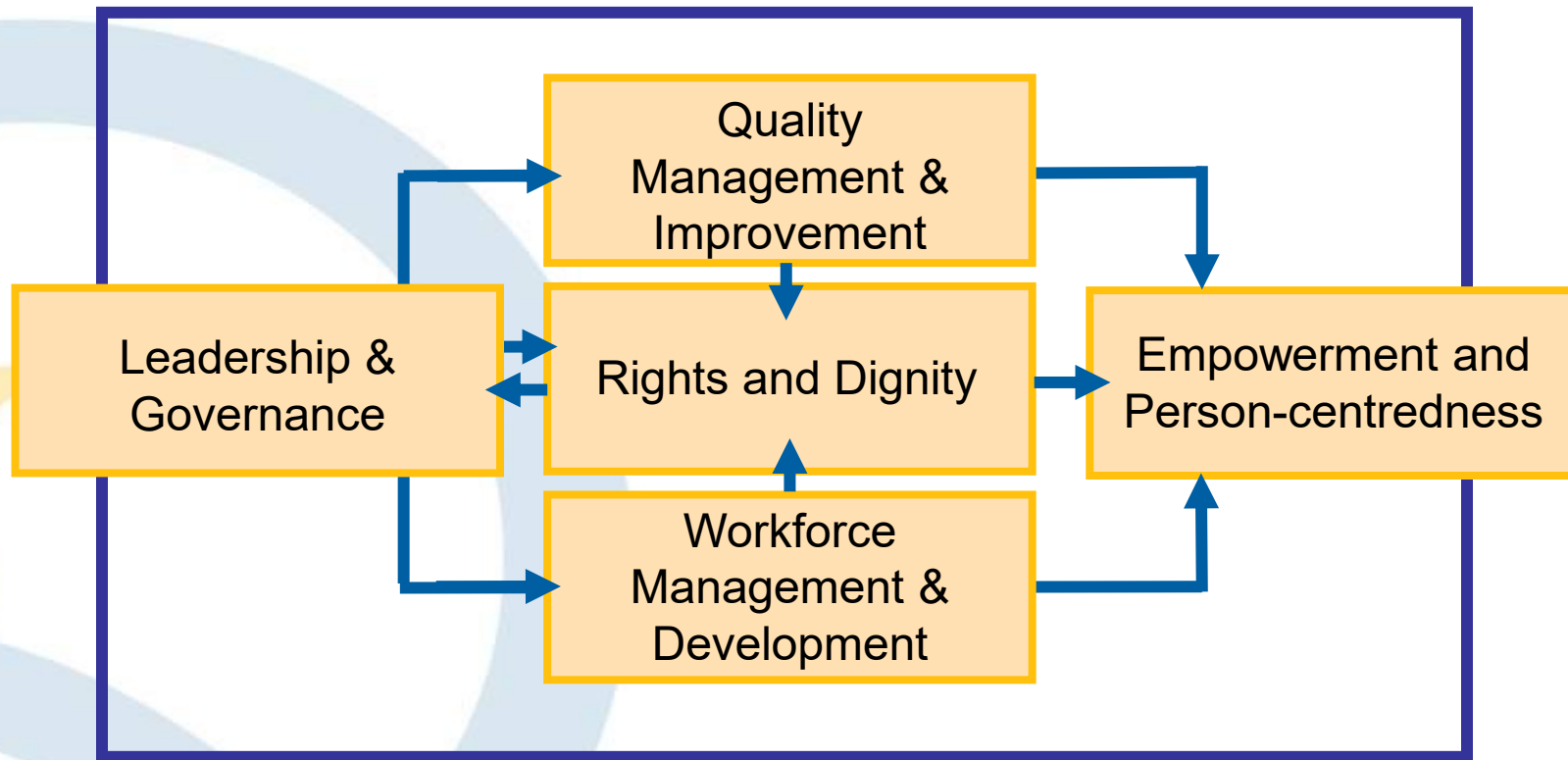
5 Sections, 30 Criteria

Leadership & Governance

1. Purpose and Goals
2. Strategic Planning and Review
3. Corporate Responsibility and Sustainability
4. Transparency and Accountability
5. Strategic Partnerships
6. Resource Management
7. Physical Safety and Security

Quality Management & Improvement

8. Comprehensive Quality Management
9. Individual and Stakeholder Feedback
10. Results and Outcome Orientation
11. Risk Management

5 Sections, 30 Criteria

Workforce Management & Development

12. Competency and Recruitment
13. Workforce Diversity
14. Workforce Development
15. Workforce Wellbeing
16. Working and Employment Conditions
17. Workforce Engagement and Influence
18. Workforce Recognition and Reward

Rights and Dignity

19. Understanding and Asserting Rights
20. Respect and Protection of Rights
21. Safeguarding
22. Privacy and Data Protection
23. Non-Discrimination and Equal Treatment
24. Accessibility and Universal Design

5 Sections, 30 Criteria

Empowerment and Person-centredness

25. Individual Autonomy and Independence
26. Representation
27. Person-Centred Planning
28. Quality of Life
29. Social Inclusion
30. Comprehensiveness

Example:
Criterion 2 - *Strategic Planning and Review*

The organisation defines and implements a structured strategic planning process, in order to develop a strategy that reflects organisational goals, and which can adapt to the changing external environment and demands.

2 Requirements

Criterion 2 - *Strategic Planning and Review*

Requirement 2.1: Strategic Plan Development and Alignment

The organisation develops a strategic plan or equivalent framework that aligns with its purpose, values, and available resources. The plan sets out clear objectives and intended outcomes and allows for flexibility in determining and measuring progress.

A well-developed strategic plan connects the organisation's purpose and values with practical goals and available resources. It provides clear direction, helps everyone work towards shared objectives, and facilitates adaptation to changes.

Criterion 2 - *Strategic Planning and Review*

Requirement 2.2. Regular Review & Stakeholder Involvement
The organisation conducts regular reviews of the plan or equivalent to assess progress, address changing needs, and refine priorities and objectives. These reviews actively involve relevant stakeholders.

Regular reviews and involving stakeholders ensure the strategy stays relevant and effective. By listening to the workforce, service users, funders, and partners, the organisation can respond to new needs, build trust, and make better decisions together. This keeps the strategy practical and participatory.

Criterion 2 - *Strategic Planning and Review*

E2 - Additional requirement for Excellence:

Predictive Strategic Planning

The organisation integrates forward-looking planning tools—such as scenario planning, environmental scanning, or AI-based forecasting—into its strategic review process, leading to adaptations.

Example from the Draft:
Criterion 28 – *Quality of Life*

The organisation implements a systematic approach to understanding, measuring, and contributing to the quality of life of each individual.

1. Defining Quality of life

Individuals, or their proxy if they have one, are actively involved in defining what quality of life means to them, identifying areas for improvement and co-creating solutions.

Example Criterion 28 – *Quality of Life*

2. **Quality of life assessment**
   The organisation uses appropriate methods to assess quality of life outcomes, ensuring they are relevant to individuals' diverse needs and are adaptable to different contexts. Quality of life assessments are conducted regularly and used to inform service improvements, with appropriate data collection (e.g., structured tools, informal feedback, self-reports).

3. **Workforce training and guidance**
   The workforce receives training or guidance on approaches to enhancing well-being and personal fulfilment, ensuring services are delivered in a way that maximizes quality of life.

Evaluation of project implementing EQUASS in Lithuania (ESF funding)

Impact on Social Services (Study 2022)

Significant positive changes in:

Rights

Business efficiency, Innovation

Staff professional development

Involvement of stakeholders

Focus on continuous improvement

This implementation of quality aspects via the EQUASS quality system has changed the organisation of the work within the social service providers in a significant and positive way, and is recognised
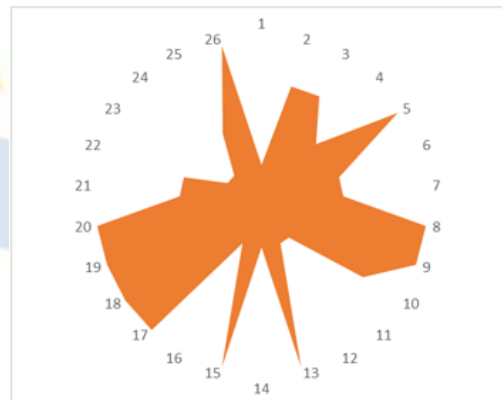
The described changes are completely in line with the needs of the service users
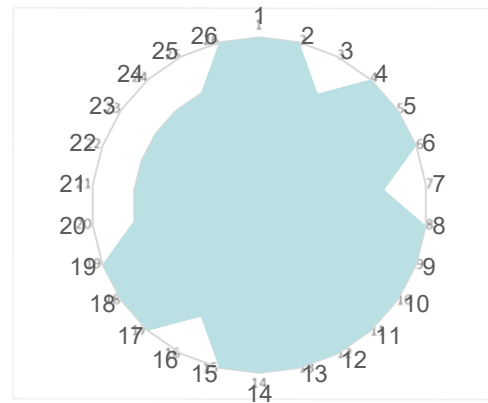
How does EQUASS compare?

QUASAR

- 26 criteria important for quality, focus on care & vocational rehab., score 1-4: Mandatory, Promoted, Mentioned, Absent

- E.g. *Does the framework address whether the organisation applies a rights-based approach?*
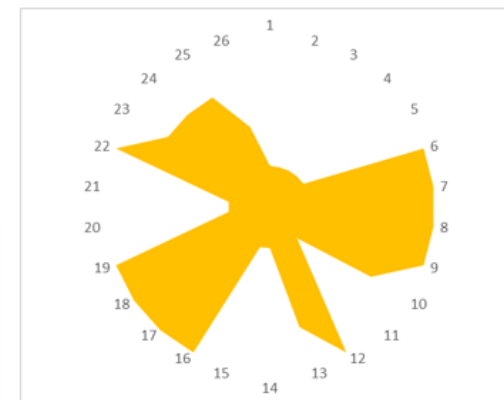
- Overview of 3 systems

EFQM   EQUASS   ISO 9001

ISO & EQUASS, some comparisons

- **Philosophy:** ISO – Processes & compliance vs. EQUASS – Values & social impact

- **Approach**: Process-oriented vs Person-centred, outcome-oriented

- **Evaluation**: Document-dependent vs flexibility of evidence, importance of interviews with stakeholders

- **Feedback:** Report with recommendations vs corrective actions needed

Some quotations from service providers

- *The selling points for EQUASS are its focus on the participation of service users (person-centred approach) and its focus on utilising results for improving services*

- *We wanted more content, not only to focus on the process and the management, but also on what is important for people who receive services and the impact of rehabilitation on their lives*

Some quotations from service providers

- *EQUASS is more demanding, but it is tailor-made to service providers like us*

- *the implementation and certification of EQUASS enables us …to improve performance*

both in services provided

and in client and stakeholder satisfaction

Thank you!

Questions & feedback?

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Audit process

- **1 day preparation** (including online meetings, document review) **+ 1 day site visit** (minimum)

- **Scoring** per requirement**:** 0-3, based on level of fulfilment.

- **Assurance & Excellence**

- **Assurance**: Minimum level 2 needed for all requirements to pass, some requirements level 4

- **Excellence:** Higher scores required & meeting additional requirements

- More detailed scoring rules & audit length calculations being finalised

Meeting a requirement

What evidence will you provide to illustrate how you meet this requirement?

The evidence should show how, where and for whom in the organisation this has been implemented.

Does not need to be a document, but documents used should be shared with the application and listed in the Document Overview.

Examples of documents: policies, process charts, meeting notes, agendas, PowerPoints, templates or surveys.

Examples of non-document evidence: digital management systems, physical constructions, people's testimony (interviews), posters, online forms

Similarities – facilitating the transition

- **Builds on the principles of the current version**; clarifies, re-organizes, expands, updates

- **Many core requirements in both frameworks** (e.g., quality system, staff development, engagement of individuals), just different wording and approaches.

Potential challenges (for existing EQUASS certified organisations, depending on practice)

New thematic areas (such as ESG, universal design, data security) may require new competences, documentation, and processes.

Greater involvement of stakeholders and participatory structures may require cultural change and organisational adjustments.

New structure; time will be needed to understand the style, structure and approach (but we believe it is easier to work with in the end)

Accompanying tools, documents, services

- Online application form & document sharing

- Audit preparation guidelines

- Audit report guidelines

- Scoring tool

- Comprehensive Glossary; facilitating understanding & accurate translations

- Tool for self-assessment

- Developing the EQUASS Community

Leadership & Governance

Quality Management & Improvement

Empowerment and Person-centredness

Rights and Dignity

Workforce Management & Development

Advantages of revised framework

- **Greater relevance:** e.g. updated and increased focus on topics such as sustainability, crisis preparedness, and digital security.

- **Stronger link to human rights-based approach:** easier to document compliance with international and national standards.

- **Stronger emphasis on individuals' (persons served) particiption:** The autonomy and influence of the individual feature clearly

- **More emphasis on "workforce" engagement & good mental health:** staff to be involved in service design and improvement, addresses working conditions

Advantages of the new framework for service providers

- **Support for continuous improvement and innovation:** promotes organisational learning and uses indicators that allow for qualitative, not just quantitative, assessment.

- **Adaptable for organisations of different sizes:** more flexible requirements & evidence, no mandatory documents, structured or informal approach

- **Clearer texts and guidance:** what key words mean, how to implement & how to prepare for audit