

THE SOCIAL BALANCE, ITS ANALYSIS FROM THE PERSPECTIVE OF THE EFQM MODEL AND ITS IMPACT ON SOLIDARITY ECONOMIES

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Summary: In compliance with the second general provision of the Organic Law of Popular and Solidarity Economy (LOEPS), the organizations subject to this law, will incorporate to their management report the SOCIAL BALANCE; In the framework of legal compliance this research aims to demonstrate the fusion of the theoretical foundations of the EFQM Model of excellence in the management of Organizations of Popular and Solidarity Economy applying the principles and fundamentals of quality in the macro dimensions defined within the model Of Social Balance proposed in Ecuador.

For this study we used the field research and the descriptive, in addition to the deductive, inductive and analytical methods, and the techniques of the survey and observation, as a conclusion has been obtained that the methodologies fusion proposed by the Control Entity are Which are indispensable in the application of the EFQM model, the analysis of the results of the Social Balance in relation to the theory has been divided into two groups: the first five are the Facilitating Agents or Agents Criteria in which are the leadership, people, strategies, alliances And resources and processes, products and services, which describe how results are achieved, and must be proven by documentary evidence.

The last four are the Results Criteria where we find: results in people, results in the members of the organization, results in society and key results, these describe what has resulted in the organization after the theoretical application of the EFQM model And the dimensions of the Social Balance from the management perspective with quality.

The model has the logical scheme REDER which allows planning, doing, checking and acting on the criteria and results, so it is recommended to prioritize the quality standards in which EPS organizations must improve urgently, to ensure their operation and fulfill With the principles established in Article 4 of the LOEPS.

Keywords: EFQM Model, Social Balance, Quality Management, MacrodDimensions.

1. INTRODUCTION

Currently, the government of Ecuador has been making significant innovations in the real sector of the economy, so that public institutions and EPS organizations willing to apply this new social and solidarity economic system, have the challenge of improving and adapting to the new parameters that are established to achieve the knowledge society.

For six years, the Ecuadorian Government allocated resources for the application of what is defined in the Constitution of Ecuador, determined a dynamic model where the Control Entity (SEPS) and the organizations that make up the solidarity and social system of the country seek to leverage the universal principles of cooperativism and be able to systematize cooperatives and associations within

the current legal framework complying with the established principles and being pioneers in the application of a dynamic and different social balance that achieves positive changes in the country's economy.

In 1988 the European Foundation for Quality Management was created, which in 1992 presented the European Quality Management Model, better known as the EFQM self-assessment model.

The model aims to help organizations know themselves better and, consequently, improve their functioning. It also allows to focus the cultural transformation of the organization in the search for excellence. This can be applied in any type of organization regardless of its sector, size, maturity or structure, as it is a holistic and integral model. In conclusion, this model helps organizations to face changes without neglecting quality.

Through this research it is proposed to improve the quality service of the organizations that make up the popular and solidarity sector of the country, this reflected in the number of members, directors and infrastructure of cooperatives and associations.

2. DEVELOPMENT

Administration

The conceptualization of what Administration is, becomes the starting point to define the perspectives and way to focus the results of administrative excellence in the processes that companies and organizations use.

Concepts

- **Isaac Guzmán Valdivia (2010)** "It is the effective direction of activities and the collaboration of other people to obtain certain results".
- **José A. Fernández Arena (2005)** "It is a social science that pursues the satisfaction of institutional objectives through a structure and through coordinated human effort".
- **Harold Koontz and Cyril O'Donnell** "It is the direction of a social organism and its effectiveness in achieving its objectives, based on the ability to lead its members."
- **Henry Sisk and Mario Sverdlik** "It is the coordination of all resources through the process of planning, direction and control, in order to achieve established objectives."
- **Robert F. Buchele** "The Process of Working with and Through Other People in Order to Achieve the Goals of a Formal Organization."
- **Joseph L. Massie** "Method by which a cooperative group directs its actions toward common goals. This method involves techniques by which one major group of people (managers) coordinate the activities of others." (Mtro.García Castillo & Dra.Velio Mejía López, 2013)

Administrative Process

Management is the process of designing and maintaining an environment with the purpose of efficiently achieving selected goals, managers perform the functions of planning, organization, direction, personnel integration and control.

"Series of fundamental steps and stages through which the company is managed"

Stages

The stages of the administrative process are known by the acronym PODP for Planning, Organization, Management and Control. These four phases are cyclical and repeated for each objective set by the company or organization. Generally, these stages are divided into two major phases:

- Mechanical phase: Planning (what to do) and Organization (how to do)
- Dynamic phase: Direction (how it is being done) and Control (how it was done)

Elements

- **Planning**

"Process of selecting missions and objectives, strategies, policies, programs and procedures to achieve them; decision-making; selection of a course of action from several options." (Harold Koontz)



- **Organization**

"Organizing is the establishment of effective behavioral relationships between people so that they can work together with efficiencies and can obtain personal satisfaction from doing selected tasks under given environmental conditions for the purpose of achieving a goal or objective." (Terry George, 1984)

- **Address**

"Management can be defined as the process by which the factors of production (men, materials, money and methods) combine to achieve the various aims of the enterprise" (Walter Perlick)

- **Control**

"It's the process of making sure that the actual activities stick to the planned activities." (Stoner James, 1989)

Quality

Concept

- Juran and Gryna, (1993) quality is defined as "fitness for use, this definition implies an adequacy of the design of the product or service (design quality) and the measurement of the degree to which the product conforms to that design (manufacturing quality or conformity)". Design quality refers to the features a product must potentially have to meet customer needs and conformance quality points to how the final product adopts the designed specifications.
- Ishikawa (1986) defines quality as "developing, designing, manufacturing and maintaining a product whose quality is the most economical, useful and always satisfactory to the consumer"
- Crosby (1987) defines quality as conformity to specifications or compliance with requirements and understands that the main motivation of the company is to achieve zero defects. Their motto is "Do it right the first time and get zero defects".
- ISO 9000 (2000) defines quality as "the degree to which a set of inherent characteristics meet requirements."

Historical Evolution of Quality

In the past, quality was associated exclusively with an activity of media and inspection. Once the product had been made, it was checked and measured to ensure that it was well made. The Egyptians were the pioneers in this quality control system that they applied in the construction of the pyramids.

- **Handcrafted**

In the Middle Ages the artisans were the ones who produced the consumer goods, they did everything from design to construction, and thus ensured that the final product was of an acceptable quality.

In the mid-eighteenth century the production of large quantities of consumer goods began, that is, scale production began. These pieces were manufactured by different people and finally assembled following a design. This produced the need to produce the parts following previously agreed measurements (Metrology) and standards (Standardization). Thus, following this idea, machines, tools were built and operators were instructed for mass production. Despite this, there was a large number of defective end products to which no importance was given.

- **Industrial Revolution**

This model gave way to the Industrial Revolution. At the beginning of the twentieth century, Frederick W. Taylor raised the idea of separating the different tasks within the production system, that is, while some planned, others did the work and others inspected to separate the good products from the bad. With this quality control, companies obtained products of acceptable quality but at a very high cost.

- **Postwar period**



In the fifties and sixties Japanese products were considered to be of poor quality, while the United States did not doubt that their products were the best despite the deficiencies they presented.

J. Juran and Deming traveled to Japan as part of a program of aid to rebuild it after World War II. These were basically dedicated to teaching Japanese entrepreneurs techniques of statistical quality control, techniques for continuous improvement (Deming Cycle), customer satisfaction as a priority objective, continuous training of all people, encouraged participation and all those concepts that constitute the philosophy of quality.

▪ **Japan**

In the seventies Japan presented products of quality levels and prices much better than those of the West. Which produced that consumers demanded quality at less cost, so that American companies went into crisis and had to make a great effort to implement the Quality management system so that they could be more competitive.

▪ **Germany**

After World War II, Germany recovered its productive capacity, giving rise to the historical phenomenon known as the "German Miracle". This nation was imposed in less than a decade as the first economic power in Europe.

The strategy they applied was an excellent care of the design of the products, a detailed planning of their production systems, use of good raw materials and the use of prototypes for the innumerable tests to which they subjected their designs. Unfortunately, despite having high quality products, this could only be obtained at high prices. (Social Market Economy in Latin America Reality and Challenges, 2010)

▪ **United States**

In 1980 the Americans realized that it is not true that more quality is more cost, but on the contrary, more quality produces a significant reduction in costs and an increase in productivity and competitiveness.

In 1896, Juran predicts the decline of the West in the race for competitiveness, given the lack of quality strategy.

It took Japan a decade to become a pioneer among the most industrialized countries, while the capitalist West has needed more than a century and a half to consolidate a system of business success.

▪ **Spain**

The beginnings of Quality in Spain are due to the demand of the automotive industry. In 1987 AENOR (Spanish Association for Standardization and Certification) was founded and began with the application of ISO 9000 standards and company certification systems.

▪ **Present**

At the beginning of the XXI century, the West has advanced considerably in the implementation of Quality Management systems, making possible a truly competitive business fabric.

A pleasantly satisfied customer will come back to us and even recommend you.

Philosophies of the Gurus

▪ **Deming and the PDCA Cycle**

Deming (1969) states that statistical methods provide the only method of analysis that serves as a guide to understand failures and reduce them.

✓ Plan: It means individualizing the problem, collecting data, studying cause-effect relationships and seeing the solution hypotheses

✓ Perform (Do): It consists of carrying out what is established in the plan

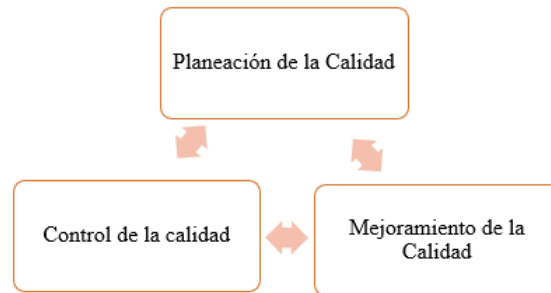
✓ Check: Compares the initial plan with the results obtained.

✓ Act (Act): Act to correct the problems encountered, foresee future problems and establish the conditions that allow the process to be maintained in a stable way and start a new process of improvement.

▪ Juran and the Quality Trilogy

For Juran in 1993 Quality is the suitability for use, which is achieved firstly by an adequacy of the design of the product (design quality) and secondly by the degree of conformity of the final product with that design (quality of manufacture or conformity). (Miranda & et al, 2007, pp. 36-37)

Figure 1: Quality Trilogy

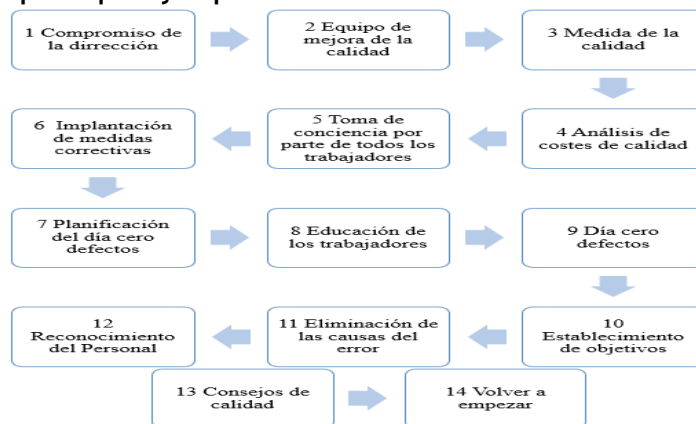


Prepared by: The Authors

Fountain: (Miranda & et al, 2007)

▪ Crosby and Zero Defects

Figure2: The 14 steps to quality improvement



Prepared by: The Authors

Fountain: (Miranda & et al, 2007, p. 41)

▪ Ishikawa

Kaoru Ishikawa 1986, Japanese engineer disciple of Deming and Juran, extended the development of quality to all members of the organization, highlighting its clear orientation towards people. Key elements in its philosophy are:

- ✓ Quality begins in education and ends with education
- ✓ The first step towards quality is to know the needs of customers.
- ✓ Eliminate the root cause and not the symptoms.
- ✓ Marketing is the input and output of quality.
- ✓ Don't confuse means with goals.



- ✓ 95% of a company's problems can be solved with simple analysis and troubleshooting tools.
- ✓ Those data that do not have variability are false (Miranda & et al, 2007, p. 42)

▪ Fig

Known for being the first to use the phrase total quality control. He introduced the concept of <<hidden factory>> or <<ghost factory>> to refer to the fact that the rejects decreased the real capacity of the plant, because the process of the product is repeated this is due to not doing the job well from the beginning.

Its philosophy is summarized in three steps towards quality:

- 1) **Quality leadership:** Management based on planning and not on reacting to error.
- 2) **Modern quality technology:** Involvement of all staff in solving quality problems
- 3) **Organizational Commitment:** Continuous training and motivation of the entire workforce and integration of quality into company planning. (Miranda & et al, 2007, pp. 42-43)

▪ Taguchi

Quality control is based on the design of the product and the design of the manufacturing process. It places emphasis on proper design and initial planning that reduces possible variations in the process. (Miranda & et al, 2007, p. 43)

Quality management models

Concept: A Total Quality Management model is a management philosophy whose ultimate objective is to supply products with a level of quality that satisfies our customers and that simultaneously achieve the motivation and satisfaction of employees, thanks to a process of continuous improvement in the processes of the organization or that is related to it directly. (Miranda & et al, 2007)

Quality assurance activities(Miranda & et al, 2007)


The management system for quality assurance is examined, and all essential activities to ensure the quality and reliability of products and services are analyzed in detail, such as new product development, quality analysis, design, production, inspection, etc. The quality assurance management system is also discussed. This criterion is subdivided into:

- Status of the management of the quality assurance system.
 - Quality control diagnostic situation.
 - Status of development of new products and technologies (including quality analysis, quality deployment and design reviews).
 - Status of process control.
 - Status of process analysis and process improvement (including process capability studies).
- (MembranoMartínez, 2002, pp. 9-14)

The Malcolm Baldrige Model (United States)

Joaquin Membrano (2002) states that the Malcolm Baldrige model bears the name of its creator and is elaborated around 11 values that represent its foundation and integrate the set of variables and Quality criteria:

- Customer-based quality.
- Leadership.

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- Organizational improvement and learning.
 - Staff participation and development.
 - Speed in response.
 - Quality in design and prevention.
 - Long-term vision of the future.
 - Management based on data and facts.
 - Development of the partnership between those involved.
 - Social responsibility.
 - Results orientation.

These values have undergone extensive modifications over the years. An education version appeared in 1996 and is being implemented. The model used for self-assessment has seven main criteria that are shown in the following table:

1. **Leadership:** The concept of Leadership refers to the extent to which Senior Management establishes and communicates to staff strategies and business management and seeks opportunities. It includes communicating and reinforcing institutional values, expectations of results, and a focus on learning and innovation. (MembranoMartínez, 2002, pp. 14-15)
2. **Strategic Planning:** how the organization raises the strategic direction of the business and how this determines key action projects, as well as the implementation of these plans and the control of their development and results. (MembranoMartínez, 2002, pp. 14-15)
3. **Customer Focus:** how the organization knows the demands and expectations of its customers and its market. Also, in what proportion all, but absolutely all the processes of the company are focused on providing customer satisfaction. (MembranoMartínez, 2002, pp. 14-15)
4. **Information and Analysis:** examines management, effective employment, data analysis, and information that supports key organizational processes and organizational performance. (MembranoMartínez, 2002, pp. 14-15)
5. **Human Resource Focus:** examines how the organization allows its workforce to develop its potential and how the human resource is aligned with the objectives of the organization. (MembranoMartínez, 2002, pp. 14-15)
6. **Administrative Process:** examines aspects such as key factors of production, delivery and support processes. How these processes are designed, how they are managed and improved. (MembranoMartínez, 2002, pp. 14-15)
7. **Business Outcomes:** Examines the performance of the organization and the improvement of its key business areas: customer satisfaction, financial performance and market performance, human resources, supplier and operational performance. The category also examines how the organization functions relative to its competitors. (MembranoMartínez, 2002, pp. 14-15)

The EFQM Model of Excellence

This model was created in the 80s, in the field of companies, due to the need to offer customers higher quality products and services, as the only way to survive in the face of international competition, mainly from Japan and the United States. (MembranoMartínez, 2002, p. 28)

According to Joaquin Membrano (2002) explains that they use the criteria of the Business Excellence Model, or European Model for Total Quality Management, divided into two groups: the first five are the Agent Criteria, which describe how the results are achieved (their evidence must be proven); the last four are the Results Criteria, that describe what the organization has achieved (they must be measurable). (page 28)



The REDER logic schema

This model establishes what an organization needs to systematically accomplish in its continuous improvement process.

The REDER logic model determines the facilitating agents and the results.

The facilitating agents are: Focus (plan), Deployment (do), Evaluation (verify) and Review (act).

This logical scheme establishes what a popular and solidarity economy organization needs to do:

- a. Determine the results that the organization wants to achieve, in economic and financial terms as well as operational and satisfaction of the expectations of the members of the same. (Ministry of Education and Science, 2010, p. 6)
- b. Plan and develop a series of well-grounded and integrated approaches. It outlines what EPS organizations plan to do and why. It must have a clear foundation, with well-defined and developed processes and be integrated, supporting planning and strategy. (Ministry of Education and Science, 2010, p. 7)
- c. Deploy approaches systematically to ensure full implementation. The deployment indicates what EPS organizations are doing to implement the approach and must be systematically implemented in all relevant areas. (Ministry of Education and Science, 2010, p. 7)
- d. Evaluate and review the approaches used based on the monitoring and analysis of the results achieved and the activities developed. (Ministry of Education and Science, 2010, p. 7)

The assessment executes the development and level at which the objectives are achieved, the results are explained within the effectiveness of the approach and deployment.

The review readjust the approach and deployment in the processes in which a dysfunction occurs by executing necessary actions, in order to plan and implement the necessary improvements based on compliance with the evaluation.

- Do you periodically measure effectiveness?
- Do they facilitate opportunities for learning?
- Do they compare to external organizations?
- Are they refined against learning outcomes and performance measurements? (Ministry of Education and Science, 2010)

Structure of the EFQM Model

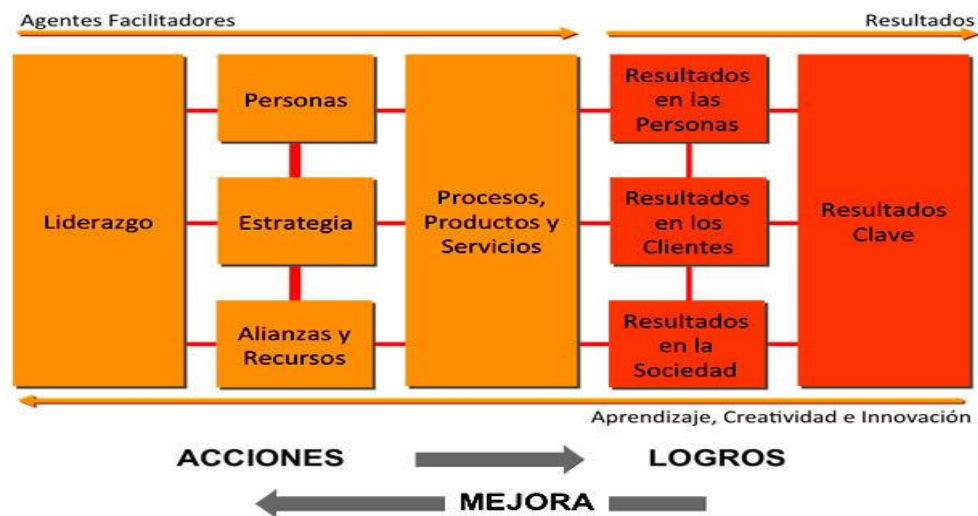
The structure of this model tells us that "excellent results in the organization, in people, in customers and in society are achieved through leadership that directs and promotes planning and strategy, the staff of EPS organizations, employees and resources, as well as processes.

Excellent results with respect to the Critical Performance of an Organization, customers, people and Society, are obtained when Leadership, inspired by a business project, directs and promotes Policy and Strategy, People, Alliances and Resources and Processes.

The action of the facilitating agents produces a result (arrows at the top), which originates a feedback or feedback (through learning and innovation) that drives new actions of the agents, resulting in a

cyclical process which ultimately produces an improvement in results. (Ministry of Education and Science, 2010)

Figure3: Structure of the EFQM Model



Fountain: (Sánchez & Granero Castro)

▪ **Criterion 1 Leadership.** (Moreno Alego, 2007)

It deals with the capacity, behavior, work, attitude and commitment of governing bodies, managers, managers, team coordinators, in short of all those who have responsibility in the direction or coordination of people and from their own responsibilities. Therefore, not only professional management teams are considered, but also Boards of Directors. All sub-criteria deal with leaders:

1a As guides, promoters and promoters of the identity, culture and style of the organization, materialized through the mission, vision, values and principles that characterize it. (Salcedo & Romero, 2006, p. 35)

1b In their internal involvement with the management system, i.e. in their responsibility to establish, develop, implement and improve the organisation's management system (Salcedo & Romero, 2006, p. 35)

1c In its external involvement, particularly in its relationship with users, customers, collaborators, and in general with all stakeholders, with the aim of knowing and responding to their needs and expectations, establishing alliances and collaborations, recognizing the contribution of certain groups to the results of the organization, improving the environment as well as the contribution of the organization to society. This last aspect is typical of the Third Sector but that should not be taken for granted. (Salcedo & Romero, 2006, p. 35)

1d It deals with the behavior of leaders towards the people of the organization (HR, both hired and volunteers), specifically their ability to communicate, listen, inspire, help, motivate, recognize and promote equal opportunities and diversity. (Salcedo & Romero, 2006, p. 35)

1e It deals with the capacity of leaders for change management, specifically their ability to understand the phenomena that drive change and how they identify, select, lead, guarantee and communicate these. (Salcedo & Romero, 2006, p. 35)

▪ **Criterion 2 People.** (Moreno Alego, 2007)



It deals with how HR management is carried out, including volunteering as people in the organization together with the contracted professionals. In particular, it analyzes whether and how systems or approaches exist for performance evaluation, for consultations on the work environment, for the selection of personnel, for the definition of jobs, for training plans, for internal communication, for methods of reward and recognition, to ensure greater participation and involvement of people, for professional development, for the reception and monitoring of volunteers. (Salcedo & Romero, 2006, p. 37)

Each of the sub-criteria in which it is developed is discussed below:

2a It deals with the planning, management and improvement of HR, in aspects such as its development, the involvement of people in that development, the alignment of these policies with the general policy and strategy, selection, development or career plan, succession plans, equal opportunities, the work environment. (Salcedo & Romero, 2006, p. 37)

2b It deals with the management of the skills and competencies of people and their adaptation to the needs of the organization, specifically works on aspects such as training plans and their alignment with the evaluation of people's performance (what the person offers) and the definition of positions (what the organization needs). (Salcedo & Romero, 2006, p. 37)

2c deals with the participation and involvement of people in the organization, and specifically how it is encouraged and supported. (Salcedo & Romero, 2006, p. 37)

2d It deals with internal communication, in particular whether and how people dialogue with the organisation exists, whether communication needs have been identified, whether a system consistent with those needs has been developed, communication channels and their effectiveness, and how the system is used to share and impart knowledge and good practices. (Salcedo & Romero, 2006, p. 37)

2e It deals with the criteria and systems of recognition, remuneration, reward and attention to the people of the organization. (Salcedo & Romero, 2006, p. 37)

▪ **Criterion 3 Strategy.** (Moreno Alego, 2007)

It tries to evaluate how planning is and to what extent the principle of orientation to stakeholders is implemented. That is, it analyzes whether there is a strategic planning (medium term), an annual operational planning, how its deployment and monitoring is carried out and, importantly, how it works with the different stakeholders for the development of this policy and strategy. (Cantú, 2001, p. 54)

Sub-criteria in which it is developed:

3a It deals with the orientation of the organization towards its stakeholders, specifically how the policy and strategy is based on their needs and expectations, reviewing how the collection and analysis of information is, and how the needs and expectations detected are identified, understood and anticipated. (Cantú, 2001, p. 54)

3b It deals with how and to what extent the management of the entity is based on reliable information and facts, through for example indicators, research and learning. (Cantú, 2001, p. 54)



3c It deals with how planning is developed, reviewed and updated, considering aspects such as coherence with identity, balancing the needs and expectations of all stakeholders, risk assessment and its potential management, identifying critical success factors. (Cantú, 2001, p. 54)

3d deals with communication and deployment of planning, on issues such as the definition of the scheme of processes necessary to carry out the policy and strategy, on communication to stakeholders, on the cascading deployment in the organization and its follow-up. (Cantú, 2001, p. 54)

▪ **Criterion 4 Partnerships and resources.** (Moreno Alego, 2007)

It deals with how the policies of collaborations and alliances are, their alignment with the Policy and Strategy and how material resources are managed. The following are the sub-criteria into which it is divided:

4a It deals with the management of alliances and cooperations with other organizations. Specifically if there is a formal system and criteria that establish the policy to follow to realize an alliance or collaboration (Salcedo & Romero, 2006, p. 41)

4b Deals with the management and administration of economic and financial resources: income and expenditure budget, *cash flow* budget, reporting, investment plan, evaluation of investments and divestments. (Salcedo & Romero, 2006, p. 41)

4c It deals with how material resources are managed in aspects such as maintenance, use, safety and hygiene, ergonomics, safeguarding of goods (insurance), respect for the environment, optimization of consumption, recycling. (Salcedo & Romero, 2006, p. 41)

4d It deals with how the technology applicable to the activity is managed, and if alternative and emerging technologies are evaluated, if the effectiveness and relevance of the one used is analyzed and how it contributes to improvement. (Salcedo & Romero, 2006, p. 41)

4e It deals with how knowledge and information management is carried out. Particularly if information needs and demands have been identified, how information and knowledge is collected and managed, and how it is disseminated and distributed in order to support policy and strategy. (Salcedo & Romero, 2006, p. 41)

▪ **Criterion 5 Processes, Products and Services** (Moreno Alego, 2007)

It deals with the management system adopted and developed by the organization and how it is defined and improved with the aim of satisfying stakeholders and generating increasing value. The EFQM Model proposes the application of the Process Management System. Sub-criteria in which it is developed:

5a It deals with the definition and systematic management of processes, that is, if the processes have been designed, if the key ones have been identified, if the stakeholders are identified in each process as well as the needs and expectations that it intends to meet, if standards are applied, if indicators and objectives have been defined, and if the effectiveness of the processes is reviewed. (Salcedo & Romero, 2006, p. 47)

5b Discusses how continuous improvement is integrated into the management system.



5c It deals with the orientation of the organization towards users, customers or beneficiaries in the definition and development of processes. How information about their needs and expectations is acquired and how it is used in the definition of processes. (Salcedo & Romero, 2006, p. 47)

5d Treats the services defined to channel the claims, complaints or suggestions of users, customers or beneficiaries (Customer Services). Although this is an aspect with little development in the Third Sector, the model attaches considerable importance to it. In addition, this sub-criterion works on how the services and/or products offered are disseminated and promoted. (Salcedo & Romero, 2006, p. 47)

5e It deals with how the relationship of the organization with users, customers or beneficiaries is. (Salcedo & Romero, 2006, p. 47)

▪ **Criterion 6 Customer outcomes.** (Moreno Alego, 2007)

It deals with the results obtained in customers, users or beneficiaries, both intermediate and final. In this sense, we must consider both the group served as the main object of our activity, as well as any other type of client to which we provide services. All this according to the definition of client that we have previously made. (Cantú, 2001, p. 61)

This criterion is further developed into two sub-criteria:

6a It deals with the perception that customers, users or beneficiaries have of the service received, that is, about their opinion of how we have done our work. It ultimately measures the satisfaction of customers, users or beneficiaries of the organization. These measures can refer to aspects such as: technical capacity, conduct, accessibility, communication, responsiveness, courtesy, empathy, added value, innovation, treatment of issues and complaints, loyalty. (Salcedo & Romero, 2006, p. 59)

6b It deals with internal measures to analyze the performance of the activities carried out with your customers, users or beneficiaries, that is, on the amount of things we do. These measures can refer to aspects such as: number of interventions, rate of complaints and claims, number of service demands, rate of errors or incidents, response time, types of services offered, segmentations of the group served. (Salcedo & Romero, 2006, p. 59)

▪ **Criterion 7 Outcomes in People.** (Moreno Alego, 2007)

It deals with the results obtained with the people of the organization, both the performance of their contribution and the perception they have of the organization. (Cantú, 2001, p. 58)

By sub-criteria we have, as in the previous case, one dedicated to perception (quality) and another to performance (quantity):

7a It deals with the perception that the people of the organization, hired employees and volunteers, have of it, that is, about their satisfaction. These are measures that can refer to aspects such as: belonging, communication, work environment, personal relationships, coordination and planning, training, career development, equal opportunities, safety and hygiene, wages, social benefits, incentives. (Cantú, 2001, p. 54)

7b It deals with internal measures to analyze the performance of the people who make up the organization in their activity. They can refer to aspects such as: levels of training, adequacy of required skills compared with existing skills, effectiveness of training, meeting objectives, rate of



absenteeism, accidents, turnover, strikes, complaints and claims, rate of participation in improvement teams. (Cantú, 2001, p. 54)

▪ **Criterion 8 Results in Society.** (Moreno Alego, 2007)

It deals with the results obtained in society both in perception and performance, although intermediate or representative indicators have to be used for this. That is, it tries to evaluate the qualitative and quantitative impact that our activity has on society. (Salcedo & Romero, 2006, p. 65)

It is divided into two sub-criteria:

8a It deals with the perception that society has of the organization and its activity in terms of image, valuation, appreciation. The task of obtaining this information is complex and is usually used as a source of: surveys, reports, press articles, public meetings and the opinion of social representatives and the administration. (Salcedo & Romero, 2006, p. 65)

8b It tries to analyze the performance of the organization in quantitative terms and from the point of view of society. Although, as in the case of sub-criterion 8a, it is difficult information to visualize and obtain, it is somewhat simpler since it involves more objective and tangible measures, such as: awards received, congratulations, number of press appearances, certifications, permits, authorizations, actions in the field of social responsibility. (Salcedo & Romero, 2006, p. 65)

▪ **Criterion 9 Key results.** (Moreno Alego, 2007)

It seeks to evaluate the results achieved in key aspects of its policy and strategy. The organization must define prior to the self-evaluation what its key elements are and all evaluators must consider the same elements in the evaluation. Given the difficulty in differentiating the two subcriteria into which it is divided, the number of exceptions that can be given and, fundamentally, because the result of the criterion is obtained as a simple arithmetic mean of both (they are not weighted), we have chosen to work them together, which we believe will facilitate their interpretation. (Salcedo & Romero, 2006, p. 65)

9a . 9b Deal with key results, indicators or operational measures. Although each organization must define what its key results are, by way of guidance we relate some that could be considered as such: compliance with budgets, % of people served over the total number of people in need, economic profitability, % of therapeutic discharges, indebtedness, quality management, alliances and collaborations, treasury. (Moreno Alego, 2007)

3. ANALYSIS

Data obtained from the application of the Social Balance (BS) management model

The methodology proposed by the control body is systematized in the following procedure:

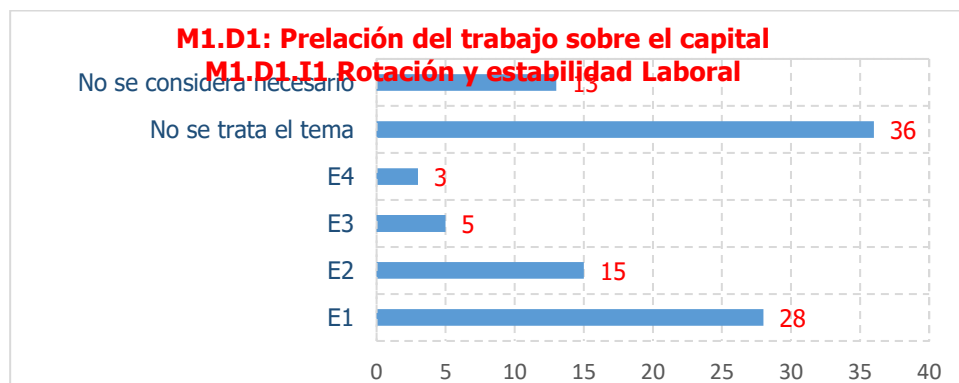
1. Part of carrying out an analysis of the principles and values of Good Living, LOEPS and ACI.
2. Determine the definition of macro dimensions and dimensions (7 macro dimensions and 24 dimensions).
3. Identify the indicators and variables: Quantitative Variables, Quantitative Indicators, Binary Indicators and Qualitative Indicators.
4. Application of a virtual questionnaire through a form that facilitates the sending of information.
5. Evaluation of questionnaires, variables and indicators.

Based on these precisions, the Social Balance as a periodic management tool related to the mission and vision of the organization determines the macro dimensions and dimensions detailed below:

M1: PRIORITY DIMENSION OF LABOUR OVER CAPITAL

A) Job rotation and stability

Figure 4: Job Turnover and Stability



E-1: Trata de evitar la salida de personal por medio del incremento salarial

E-2: Posee o realiza prácticas no asalariadas que eviten la salida o marcha del personal

E-3: Posee un documento informal con medidas que buscan incrementar la estabilidad laboral

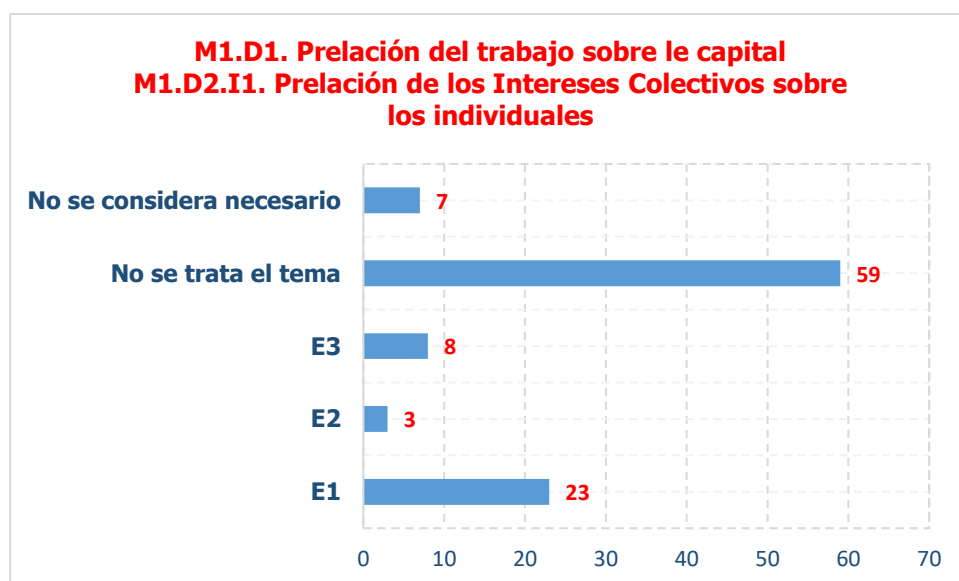
E-4: Posee un documento aprobado por la asamblea que contiene las medidas necesarias para garantizar la estabilidad laboral

Fountain: SEPS

Prepared by: The Authors

B) Job rotation and stability

Figure 5: Priority of Collective Interests over Individual Interests



E-1: La cooperativa proporciona a sus asociados planes de beneficio colectivo

E-2: Además de lo anterior, posee indicadores para monitorear tanto los planes como las metas en todos los programas

E-3: Junto a las anteriores etapas, define las metas e indicadores de desempeño para los programas

Fountain: SEPS

Prepared by: The Authors

M2: EQUITABLE, VOLUNTARY ASSOCIATION WITH RESPECT FOR CULTURAL IDENTITY

A) Associative and cooperative accessibility

Figure 6: Associative and cooperative accessibility



E-1: No posee una directriz clara que determine cómo se incorporarán los nuevos socios, solo procedimientos informales

E-2: Existe un documento aprobado por la asamblea que establece los procedimientos para incorporar nuevos socios

E-3: Además de las etapas anteriores, este documento que regula la incorporación de nuevos socios establece mecanismos de no discriminación.

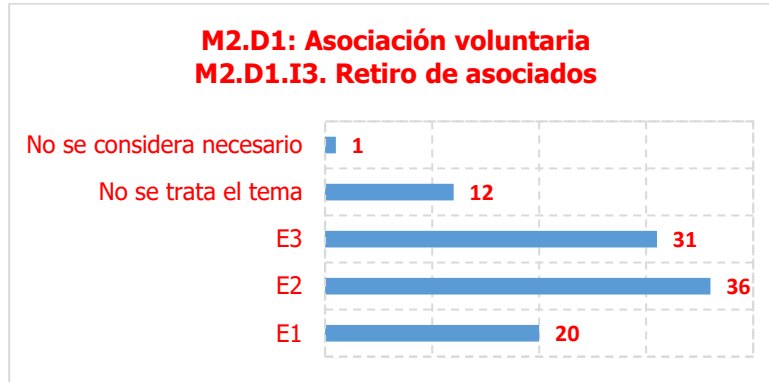
E-4: Posee una política clara que establece los procesos para la incorporación de nuevos socios y ha sido socializada a sus socios potenciales y demás interesados

Fountain: SEPS

Prepared by: The Authors

B) Withdrawal of partners

Figure 7: Withdrawal of Associates



E-1: No posee normativa que determine la salida de socios, aunque sí existen procesos informales

E-2: Posee un documento aprobado por la asamblea en el cual se establecen los procedimientos para la salida de los socios

E-3: Existe una política clara que establece los procesos para la salida de socios, misma que se ha socializado y es de conocimiento de los mismos

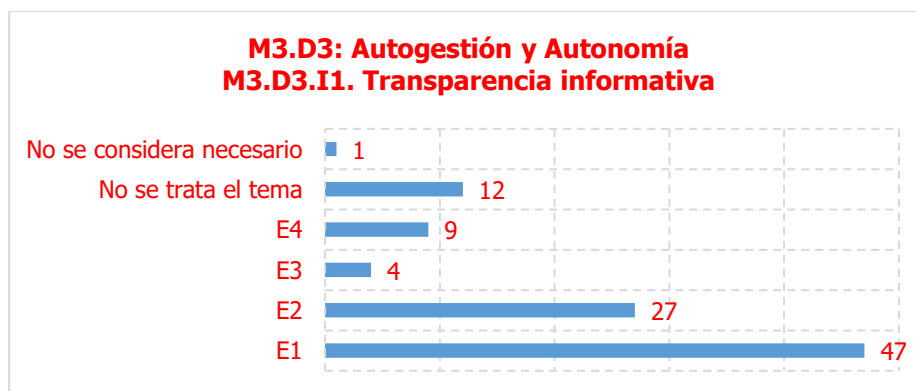
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Prepared by: The Authors

M3: SELF-MANAGEMENT AND AUTONOMY.

A) Information transparency

Figure 8: Information transparency



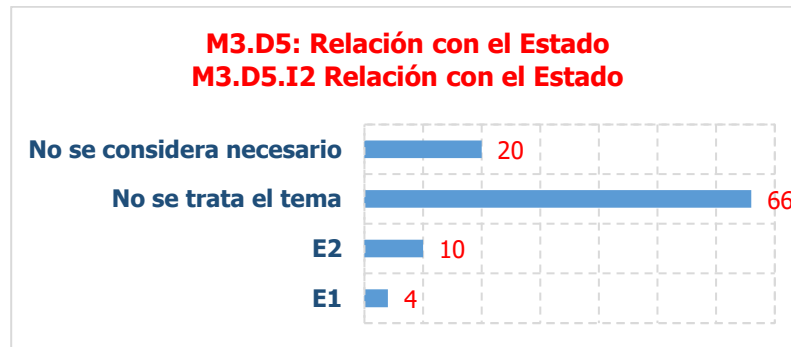


E-1: Establece canales de diálogo para mantener relaciones con sus socios
E-2: Establece canales de diálogo para mantener relaciones con sus socios, socios potenciales y demás interesados
E-3: Establece mecanismos de diálogo que los involucren a sus socios y demás interesados, y así previene los posibles impactos socioeconómicos y ambientales ocasionados por su actividad
E-4: Adopta una estrategia de gestión de la información y conocimiento para interiorizar los impactos socioeconómicos y ambientales negativos

Fountain: SEPS
Prepared by: The Authors

B) Relationship with the State

Figure 9: Relationship with the State



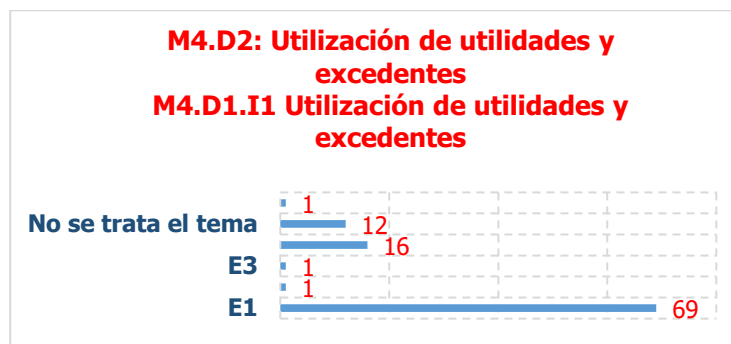
E-1: Cuando financia partidos políticos o hace donaciones a otras organizaciones de tipo sindical o de influencia en la sociedad, limita el aporte a la decisión de la Asamblea
E-2: Cuando financia partidos políticos o hace donaciones a otras organizaciones de tipo sindical, se fundamenta en reglas y criterios definidos internamente por la Asamblea

Fountain: SEPS
Prepared by: The Authors

M4: ECONOMIC PARTICIPATION IN SOLIDARITY AND EQUITABLE DISTRIBUTION OF SURPLUS.

A) Use of profits and surpluses

Figure 10: Utilization of profits and surpluses



E-1: La cooperativa distribuye las utilidades y los excedentes solamente considerando las disposiciones legales

E-2: Distribuye el resto de las utilidades y los excedentes entre los socios en base a sus aportaciones al capital

E-3: Distribuye las utilidades y los excedentes a partes iguales entre todos los socios

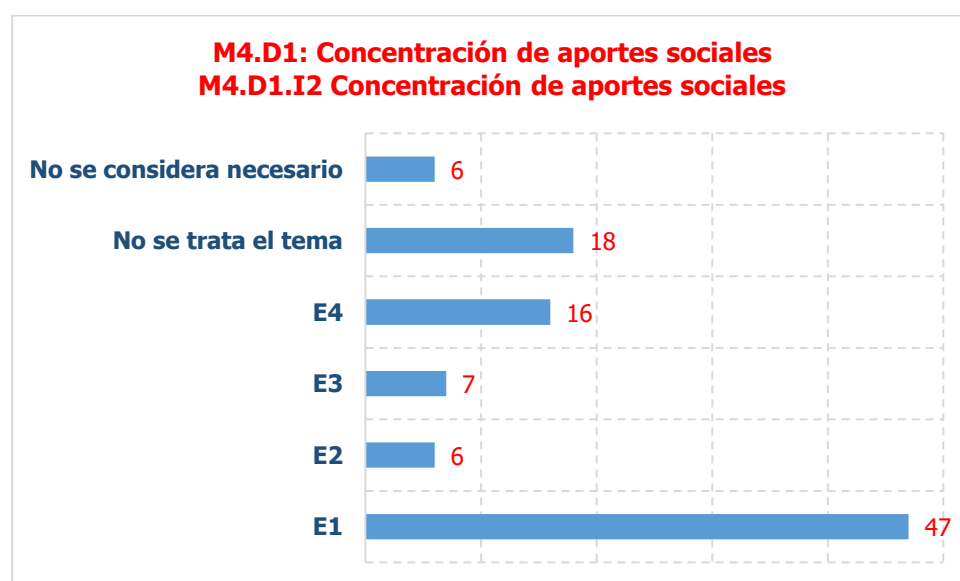
E-4: Además de lo anterior y de distribuir las utilidades y los excedentes, capitaliza una parte de éstos.

Fountain: SEPS

Prepared by: The Authors

B) Concentration of social contributions

Figure 11: Concentration of social contributions





E-1: Cumple con los porcentajes establecidos por la Ley sobre la concentración de aportes sociales

E-2: Además de lo anterior, tienen políticas para el tratamiento que debe darse a los certificados de aportación

E-3: Cuentan con una política para promover de forma voluntaria que todos los socios posean el mismo número de certificados de aportación

E-4: Además de poseer políticas, todos los socios poseen el mismo número de aportes o certificados de aportación

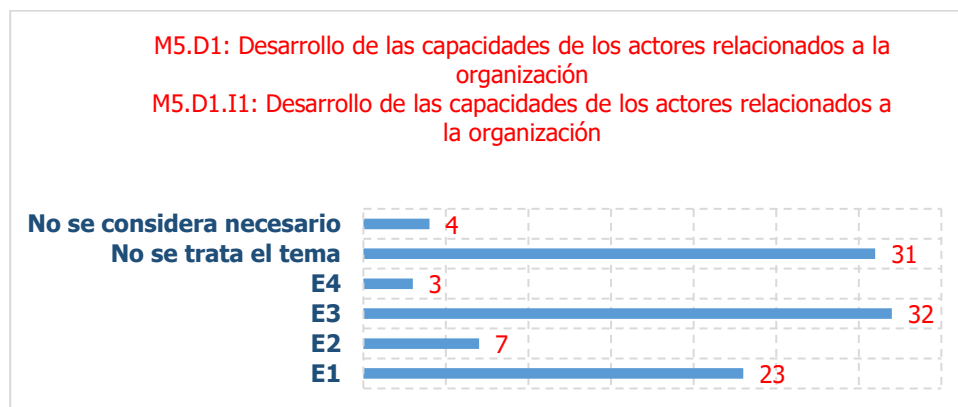
Fountain: SEPS

Prepared by: The Authors

M5: EDUCATION, TRAINING AND COMMUNICATION.

A) Development of the capacities of the actors related to the organization

Figure 12: Development of the capacities of the actors related to the organization



E-1: La cooperativa realiza actividades de formación destinadas a trabajadores y socios.

E-2: En la cooperativa existe un plan de formación aunque no dispone para su ejecución de partida presupuestaria

E-3: Existe un plan de capacitación o formación para trabajadores y socios con partida presupuestaria aprobada

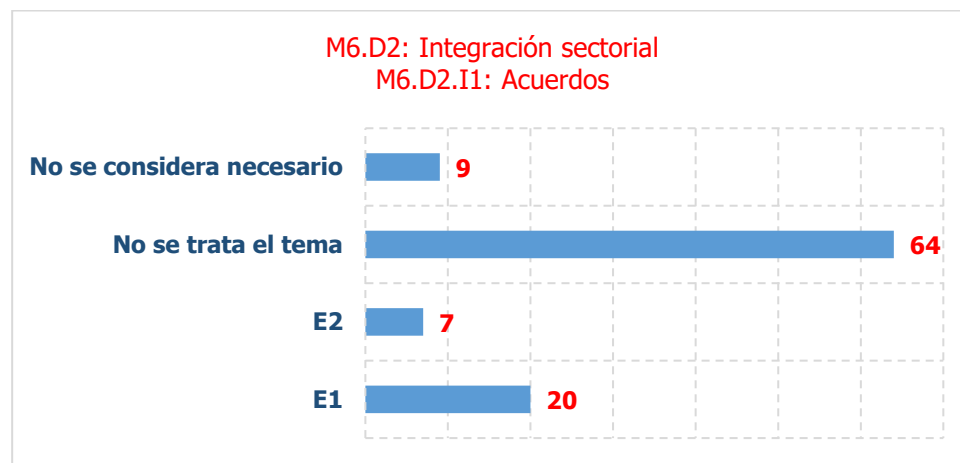
E-4: El plan de formación de la etapa anterior diferencia entre acciones de formación y capacitación

Fountain: SEPS

Prepared by: The Authors

M6: COOPERATION AND INTEGRATION OF THE POPULAR AND SOLIDARITY ECONOMIC SECTOR.
A) Sectoral integration

Figure 13: Sectoral integration



E-1: Realiza intercambios comerciales, de apoyo, de colaboración, etc., basados en la reciprocidad con otras organizaciones

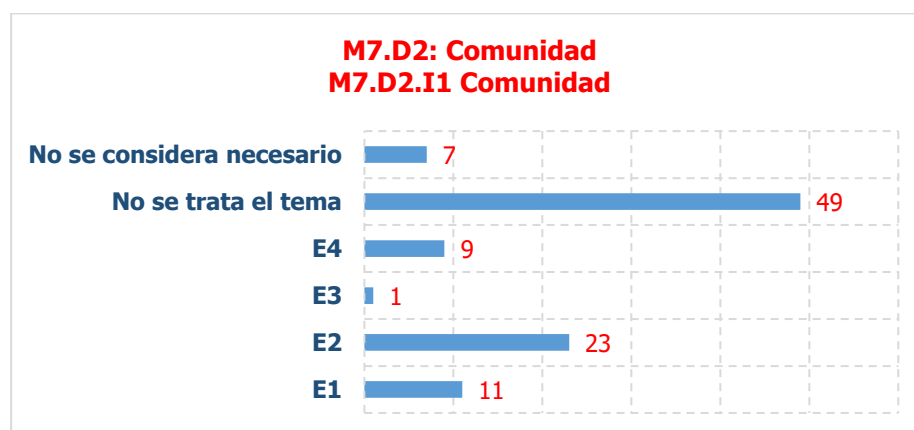
E-2: Posee acuerdos firmados de apoyo mutuo, colaboración y comercio basados en la reciprocidad con otras entidades

Fountain: SEPS

Prepared by: The Authors

M7: SOCIAL AND SOLIDARITY COMMITMENT TO COMMUNITY AND ENVIRONMENT.
A) Community

Figure 14: Community



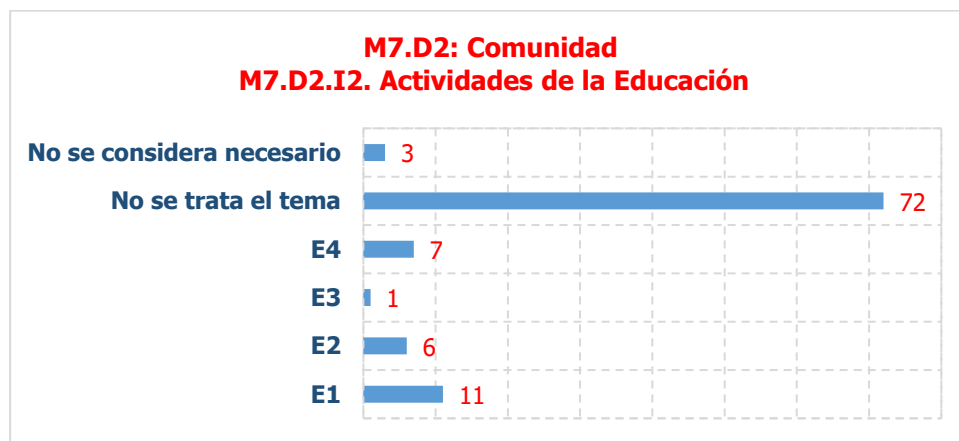


- E-1: La acción y los fondos destinados al compromiso con la comunidad se administran arbitrariamente por la gerencia
- E-2: Los fondos destinados por el presupuesto de la entidad para el compromiso con la comunidad, son administrados por el consejo de administración
- E-3: Posee una política que le permite anticiparse a demandas de la comunidad e informarla sobre el posible impacto de sus planes
- E-4: Posee comités para organizar sus compromisos con la comunidad

Fountain: SEPS
Prepared by: The Authors

(B) Education activities

Figure 15: Education activities



- E-1: La entidad eventualmente desarrolla actividades destinadas a la educación para la ciudadanía (derechos, deberes, temas cívicos)
- E-2: Previa programación, desarrolla actividades en educación para la ciudadanía (derechos, deberes, tema cívicos)
- E-3: Promueve alianzas encaminadas hacia la participación ciudadana
- E-4: Consciente de su papel de intervención social, desarrolla programas de educación para la ciudadanía, incluidos en el presupuesto de la entidad

Fountain: SEPS
Prepared by: The Authors



In today's world, companies as well as ministries and touches class of organizations ask for rapid adaptation to the work environment to achieve high performance in the functions entrusted to them in order to compete in a globalized world, in organizations in the health sector they have to manage the orientation of services to the user and decision-making are fundamental of professionals when it comes to improving quality of the products and services, the method that is most used in the health sector for change is the EFQM of Excellence whose principle of Total Quality Management (TQM) of organizations is the method of continuous improvement, which the method proposes to determine the final results to identify the areas that should be enhanced and those that need improvement.

The TQM and the EFQM model change the culture in people and also the functioning of organizations and companies that are necessary to have the provision of services oriented to the needs of users, overcoming the dilemma between the profession and management to achieve the desired efficiency and good results.

In current times the European Foundation for Quality Management (EFQM) has more than 800 members, this model was developed since 1991, the application of this model in a clinic and in general for any organization consists of carrying out an evaluation of all the elements that are integrated such as values, management model, processes, results and compare the results with the EFQM model, this comparison helps to identify the problem and the areas of improvement of the unit that is evaluated, in short the EFQM contains approaches such as the results so that clinical organizations are able to adapt to changes in the environment.

The excellence model is composed of nine main criteria that refer to what organizations do and how they do it, and the group of criteria "Results" that account for the achievements obtained by the organization with respect to all stakeholders (customers, workers, society) and in relation to the global objectives. The premise established by the model explains how the Facilitating Agents are the determinants of the Results achieved.

The criteria used by the EFQM model are:

- Leadership
- Policy and strategy
- People
- Resources and partnerships
- Processes
- Customer-related results
- Staffing results
- Societal outcomes
- Key results

The philosophy of the EFQM Excellence model is based on the following principles:

- Results orientation.
- Customer orientation
- Leadership and perseverance in the objectives
- Management by processes and facts
- Development and involvement of people.
- Continuous learning, innovation and improvement.
- Development of alliances.
- Social responsibility.



- The self-evaluation through the EFQM model of Excellence is a self-evaluation opted for different options.
- Self-Assessment Questionnaire Approach. It is a fast method, easy to use and requires few resources, and can be adapted to the reality of each organization.
- Self-assessment approach through "Improvement Matrix". This approach requires the elaboration of an improvement table or matrix in which different levels are specified.
- Self-evaluation approach by Working Meeting. Each of the members of the evaluation group is responsible for gathering the existing information in the organization on each of the criteria.
- Self-assessment by Forms or Proforma Approach. It consists of the systematization of obtaining information through the preparation, for each of the subcriteria, of a document or form.
- Self-evaluation approach by Simulation of Presentation to the Award. Organisations adopting this method must draw up a report following the rules for the presentation of the European Quality Award.
- The redeer scoring scheme is a representation in the scoring process this strategy has been practiced in order to know the strengths and areas for improvement.

The "Results" element is the results obtained by the organization which is the planning of the organization.

In recent years there has been an interest in the model, which is manifested in the proliferation of training activities, in scientific meetings there is talk of EFQM and the number of publications on the subject, from both the field of Primary Care and specialized, reveal that the EFQM is growing every day more in companies in the world and what to say in Ecuadorian companies.

4. RESULTS

Analysis of the EFQM Model of Excellence with the macrodimensions proposed in the Social Balance. For the application of the Model to be effective and achieve the objectives with which it is faced, these principles must be fully assumed by the managers of the organization, otherwise their application will be meaningless.

In addition to the attractiveness of the foundations that define the conceptual framework, the model brings together a series of characteristics that make it particularly robust and that have favored the growing interest with which it is contemplated in our environment.

It is a generic and very flexible instrument so that it can be used in any type of organization or company, regardless of size, business sector, or public or private character, and can refer to both the entire organization and different divisions, units or services. In this way, within the EFQM, specific groups have been created in the public sector and specific areas such as education or health.

It has a non-prescriptive character, in the sense that the application of the model does not dictate what must be done, but it must be each unit that decides the actions to be undertaken, recognizing that the characteristics and singularities of each organization can determine the path to follow to improve the efficiency of an organization. . (Martinez, 2002)

Chart 16: EFQM Model 2010



Fountain:(EdeFundazioa, 2016)

According to Ana Isabel Zardoya (2011). The European Foundation for Quality Management (EFQM) was founded in 1988 by 14 leading European companies in their sector, with the support of the Commission of the European Union, with the aim of helping European companies to be more competitive in the world market. It currently has more than 800 members and its role is decisive in achieving the efficiency of European organizations, and in spreading the importance of quality improvement, supporting managers in the process towards the implementation of TQM programs.

The European Model for Business Excellence was developed in 1991 in line with the Malcolm Baldrige models in the USA and the Deming Prize in Japan, as a framework for organisational self-assessment and as a basis for evaluating applications for the European Quality Award, which was first awarded in 1992. In 1999, after a review process that lasted two years, the current version of the model was presented and renamed the EFQM Model of Excellence.

The EFQM proposes a model constituted by a set of factors or criteria that interrelate with each other define a theoretically excellent organization, capable of achieving and maintaining the best possible results.

The application of this model to a clinical unit, service, area and in general any organization consists of carrying out an evaluation of the different elements that integrate it (values, management model, processes, results, etc.) and comparing the results with the theoretical reference defined by the EFQM.

This comparison allows, fundamentally, to identify the strengths and areas of improvement of the unit that is evaluated and facilitates a vision of its situation with respect to the sustained excellence defined by the model. From this perspective, the EFQM Model of Excellence can be considered as a tool for identifying opportunities for improvement, but with the advantage that by using a reference it allows a global, in-depth and systematic evaluation, without neglecting any of the important aspects that can determine the quality of the organization.

In addition, the information provided by the evaluation is of great help to understand and analyze the reasons for the deficiencies detected, promotes the identification of creative solutions and facilitates the implementation of improvement actions. Based on this philosophy of continuous improvement, the model guides the organization on the readjustments that must be undertaken in its resources, activities and objectives to achieve a more efficient organization.

Regardless of sector, size, structure or maturity, organizations need to establish appropriate management systems.



The EFQM Model is a practical tool to help organizations by measuring them on their path to excellence, helping them understand their gaps and stimulating the search for solutions. The concepts of excellence are aligned with the principles of total quality. Organizations use the Model as a basis for the operation of the goals to be achieved, from the planning of their processes, their realization and self-evaluation for the review of their project.

THE EUROPEAN EFQM MODEL OF EXCELLENCE CAN BE USED AS:

- Tool for self-assessment.
- How to compare best practices across organizations.
- Guide to identify areas for improvement.
- Basis for a common vocabulary and style of thought,
- Structure for the management systems of organizations.

The EFQM Model of Excellence is a non-prescriptive framework based on nine criteria, five of them "Facilitators or Agents" and four "Results". The "Agents" criteria refer to what an organization does. The "Results" criteria relate to what the organization achieves. Results are caused by "Agents" and are enhanced by feedback. The model, which recognizes that there are many approaches to achieving sustainable excellence in all aspects of performance, is based on the premise that: "Excellent results with respect to the realization of your goals, the satisfaction of your customers, your staff and society are achieved through leadership, driving policy and strategy, through its people, its partners and resources and its processes."

Leadership. It refers to the inescapable responsibility of management teams to be the promoters of leading the organization towards excellence. Leaders must clearly show their commitment to continuous improvement, developing the mission and vision and acting as a model for the rest of the organization. Getting involved with customers and collaborators and recognizing the efforts and achievements of employees.

Policy and strategy. It reviews to what extent the mission, vision and values of the organization are based on information from relevant indicators (performance, research, creativity and comparison with best practices, etc.), as well as on the needs and expectations of customers and other stakeholders. It also analyzes the structure of processes that develop the policy and strategy and how it is transmitted throughout the organization.

People. It considers the organization's human resource management and the plans it develops to harness the potential of professionals. It also studies systems of communication, recognition and distribution of responsibilities.

Resources and partnerships. It evaluates how the organization manages the most important resources (financial, material, technological, information), with the exception of Human Resources, and the collaborations it establishes with external organizations.

Processes. It refers to the design and management of the processes implemented in the organization, their analysis and how they are oriented to the needs and expectations of customers.

Customer-related results. It refers both to the perception that customers have of the organization, measured through surveys or direct contacts, and to the internal indicators that the organization contemplates to understand its performance and adapt to the needs of customers.



Personnel results. It refers to the same aspects as the previous criterion but in reference to the professionals of the organization. In the same way, measures of perception of the organization by the people who integrate it, and internal performance indicators are contemplated.

Results relating to society. It analyzes the achievements that the organization achieves in society. To do this, it considers the impact of the organization on the environment, the economy, education, welfare, etc.

Key results. It evaluates the achievements of the organization with respect to the planned performance, both in terms of financial objectives and those related to processes, resources, technology, knowledge and information.

FUNDAMENTALS AND CHARACTERISTICS OF THE MODEL

The philosophy of the EFQM Model of Excellence is based on the principles of TQM, also called fundamental concepts of excellence and which can be considered as the compendium of "best practices" in the field of organizational management.

These concepts, which are briefly described are:

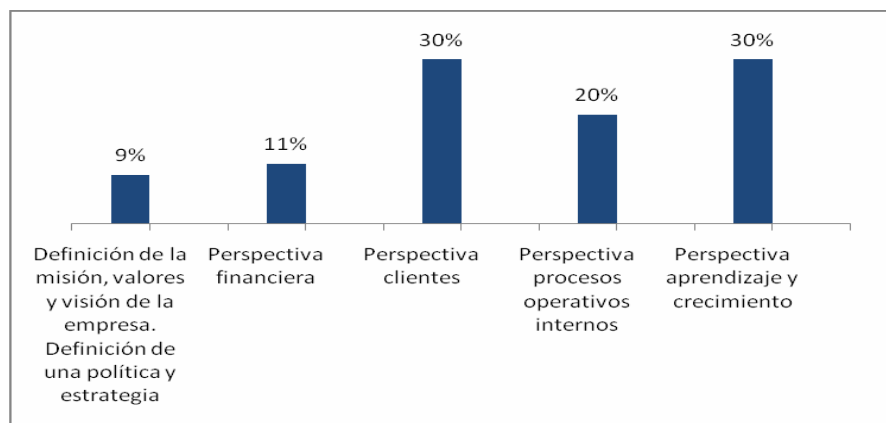
- Results orientation.
- Customer orientation.
- Leadership and perseverance in the objectives.
- Management by processes and facts.
- Development and involvement of people.
- Continuous learning, innovation and improvement.
- Development of alliances.
- Social responsibility.

As the models evaluate different criteria and sub-criteria, in order to compare the weight that each of the models establishes, we will use as a reference for comparison, the most used and best valued strategic management model, the CMI of Kaplan and Norton.

This model establishes 4 perspectives for the evaluation of business management: financial, customers, processes and learning and growth.

Sub-criteria have been assigned to each of the WCC's perspectives. For the identification of the criteria and subcriteria of business excellence of the EFQM model, the assignment proposed by Pastor (2009) was taken as a reference, based on this assignment it has acted with the rest of the models of excellence.

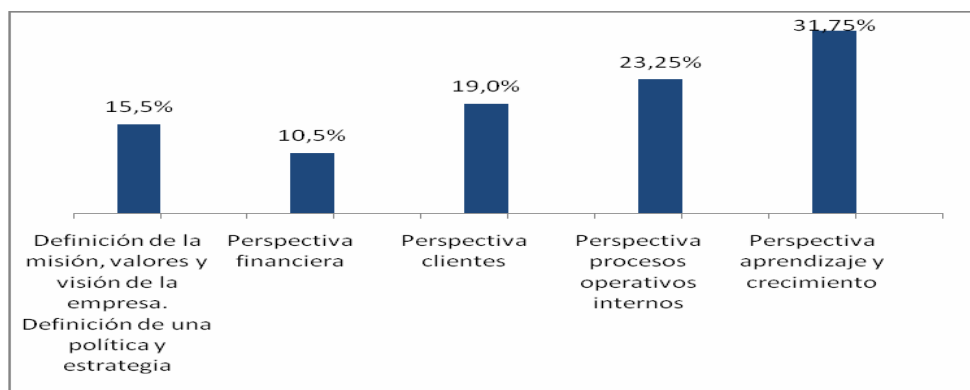
Figure 17 EFQM MODEL REFERENCE MODELS



Prepared by: The Authors

Source: Field Research

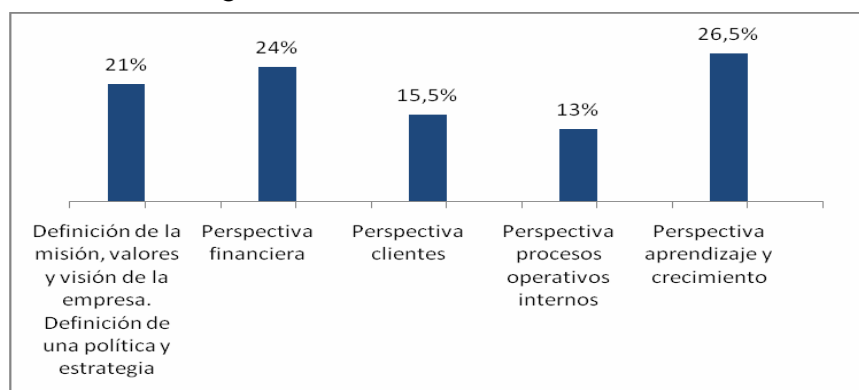
Figure 18 IBERIAN-AMERICAN MODEL



Prepared by: The Authors

Source: Field Research

Figure 19 MALCOLM MODEL

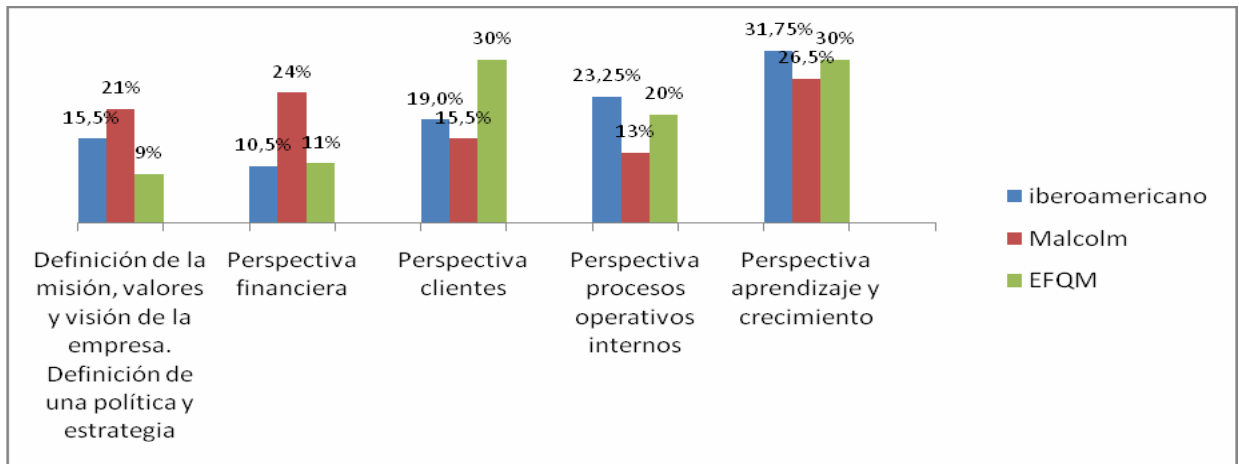


Prepared by: The Authors

Source: Field Research

Figure 20 COMPARISON OF MODELS

Prepared by: The Authors



Source: Field Research

• FACILITATING AGENTS

Agents are aspects of the organization's management system. They are the causes of the results. That is, it is the set of activities of the organization. These systematically examine everything that EPS organisations do, and especially how they do it and how they manage it.

Leadership

Behavior and performance of the management team and the restor those responsible guiding the EPS organization towards continuous improvement.

Personal

Personnel of EPS organizations are considered to be any person, whatever their responsibility, who provides their services in the organization.

This criterion refers to how it manages, develops and takes advantage of the organization, the knowledge and all the potential of the people who compose it, both in individual aspects and teams or the organization as a whole; and how it organizes these activities in support of its planning and strategy and the effective functioning of its processes.

Planning and Strategies

Set of purposes, objectives and values of the EPS organization, as well as the way in which these are formulated and integrated into the projects of each organization.

Collaborators and Resources

Resources are understood as the set of economic means, facilities, equipment, information and new technologies, used by EPS organizations in the process of fulfilling their corporate purpose.

They are external collaborators, external auditors and consultants.

Processes, Products and Services

Set of activities that serve to achieve the training of and the provision of services offered by EPS organizations.

This model has become the basis for the evaluation of organizations in most national and regional quality awards across Europe (González et al. 2005).

Organizations that apply the EFQM Excellence Model, as Hiden et al. (2004) say, face the objective of improving excellence in their results, based on excellent management of their activities and resources. What an organization does can be determined through 5 concepts (called criteria –facilitating agentsll in the model itself), while what an organization obtains can be determined through 4 concepts (called criteria –resultsll). These nine concepts constitute, in short, constructs that are measured through observed variables or indicators (subcriteria).



The EFQM Model is based on the premise that excellent results with respect to performance, customers, people and society are achieved through leadership, people, policy and strategy, partnerships and resources, and processes. The Ibero-American Model of excellence has a very similar premise because excellent results are achieved not only with leadership, but also with a management style and appropriate processes.

Table 1 WEIGHTING EFQM MODEL CRITERIA AND SUB-CRITERIA

CRITERIA	SCORE	SUBCRITERIOS
1.LIDERAZGO	100	1a. Leaders develop the+mission, vision, values and ethical principles and act as a reference model.
		1b. Leaders define, monitor, review and drive both the improvement of the organization's management system and its performance
		1c. Leaders engage with external stakeholders.
		1d. Leaders reinforce a culture of excellence among the people in the organization.
		1e. Leaders ensure that the organization is flexible and manage change effectively.
2 STRATEGY	100	2a. The strategy is based on understanding the needs and expectations of stakeholders and the external environment
		2b. The strategy is based on understanding the performance of the organization and its capabilities.
		2c. The strategy and its supporting policies are developed, reviewed and updated.



		2d. The strategy and its supporting policies are communicated, implemented and monitored	
3. PEOPLE	100	3a. People management plans support the organization's strategy.	
		3b. The knowledge and skills of the people in the organization are developed	
		3c. People are aligned with the needs of the organization, involved and assume their responsibility.	
		3d. People communicate effectively throughout the organization.	
		3e. Reward, recognition and attention to the people of the organization.	
4. PARTNERSHIPS AND RESOURCES	100	4a. Management of <i>partners</i> and suppliers to obtain a sustainable benefit.	
		4b. Management of economic and financial resources to ensure sustainable success	
		4c. Sustainable management of buildings, equipment, materials and natural resources.	
		4d. Technology management to make strategy a reality.	
		4e. Information and knowledge management to support effective decision-making and build organizational capabilities	
5. PROCESSES ,PRODUCTS , AND SERVICES	100	5a. Processes are designed and managed in order to optimize value for stakeholders.	
		5b. Products and services are developed to give optimal value to customers.	
		5c. Products and services are effectively promoted and placed on the market.	
		5d. Products and services are produced, distributed and managed.	
		5e. Customer relationships are managed and improved.	
6. CUSTOMER RESULTS	150	6a. Perceptions.	
		6b. Performance indicators.	
7. HUMAN OUTCOMES	100	7a. Perceptions.	
		7b. Performance indicators.	
8. RESULTS IN SOCIETY	100	8a. Perceptions.	

		8b. Performance Indicators	
9. KEY RESULTS	150	9a. Key strategic results.	
		9b. Key performance indicators.	
TOTAL POINTS			1000

Prepared by: The Authors

Fountain:(Miranda & et al, 2007)

The EFQM and WCC are complementary, The EFQM needs the WCC to:

- Align it with the mission, vision and strategy.
- Prioritize action and allocate resources.
- Facilitate the communication of strategic objectives.
- The WCC needs the EFQM to:
- Be evaluated, completed and reviewed.
- Integrate it with management processes

After the analysis and study of the criteria proposed by the EFQM Model against the results obtained from the macro dimensions and dimensions of the Social Balance (7 macro dimensions and 24 dimensions), the indicators and variables: Quantitative Variables, Quantitative Indicators, Binary Indicators and Qualitative Indicators framed in the principles and values of Good Living, LOEPS and ACI.

You get the following

Table 2 Criteria and sub-criteria

Criterion	Subcriterio	Current situation	Improvement Action
Leadership	1a Development of the purposes, objectives and values by the management team and the other managers, and their performance having as a reference model an approach of continuous improvement.	As for this sub-criterion, only an approximate percentage of 80% is developed, it does not clearly propose continuous improvement actions.	Define goals, objectives and values. Define processes.
	1b Personal involvement of the management team and other managers to ensure the development and implementation of continuous improvement processes in EPS organizations.	Meetings are not held regularly in order to communicate changes or events that occur.	Hold periodic meetings and development of improvement plans in each governing body.
	1c Involvement of the management team and other managers with the	EPS organizations do not clearly know the principles of the LOEPS applied in the	Promotion of the service of EPS organizations

	beneficiary partners of the service provided by the organizations. Managers and institutions of the environment Managers and with the Administration.	Social methodology	Balance	
	1d. Recognition and timely assessment by the management team and others responsible for the efforts and achievements of people or institutions interested in the real sector of the country (EPS)	No recognition is made for efforts for continuous improvement.		Effort recognition plan
People	2a The planning and strategy of EPS organizations are based on the needs and expectations of all sectors of the community: partners, administrator or manager and accountant and internal auditor staff.	It does not objectively analyze the data collected or suggestions of the current needs of the organization.		Make a plan and budget to meet the needs of the partners
	2b Planning and strategy are based on information from the analysis and measurements carried out in EPS organisations on their results and on personnel processes, which are typical of improvement practices.	By not having real updated information, action cannot be taken in the face of events in the organization.		Determine basic indicators that help to take corrective and preventive measures in the face of events.
	2c Planning and strategy are developed, reviewed and updated.	It is done superficially and only the documents requested by the Control Entity (SEPS).		Establish base documents that help update and locate information
	2d Planning and strategy are developed by identifying key processes.	It is done through the processes established by the SEPS and these are fulfilled almost in their entirety.		Update current processes

	2e Planning and strategy are communicated and implemented.	Only strategies are established but they are not communicated in a timely manner so they apply to us in their entirety.	Regular planning meetings
Policies and Strategies	3a Planning, management and improvement of personnel.	It is done in essential parts and urgent issues	Motivation and induction of staff to continuous improvement.
	3b Identifying, developing, updating and maintaining the knowledge and capacity of partners in EPS organizations	It is done at approximately 70% since each person is responsible for their own process	Motivate the participation of training courses and updating of knowledge of partners and staff.
	3c Involvement, participation and assumption of responsibilities by the staff of the EPS organization	It is done superficially since the needs of partners and staff are not taken into account.	Accountability negotiation meetings in which your rights and the current legal framework are taken into account
	3d Effective communication between managers and partners	There is no effective communication	Have better communication
	3E Recognition and attention to the staff and partner of the organization	It is recognized but not effectively so the motivation of the same is not expected	Motivate staff and partner
Partnerships & Resources	4a Management of external collaborations	They are few since the level or segment of the organizations does not oblige according to the regulations issued by the SEPS	Promote the service of the EPS organization
	4b Management of economic resources	It is done empirically not to prepare budgets.	Budgeting
	4c Management of buildings, facilities and equipment	It is done empirically.	Preparation of management plans and needs.
	4d Technology Management	They have outdated technology	Manage for the update of the equipment
	4e Management of information and knowledge resources	They do not have up-to-date learning materials	Manage for the acquisition of new materials
Processes	5a Design and systematic management of all processes identified in EPS organizations.	The information is mostly recorded manually	Create a template for information management

	5b The necessary improvements are introduced into the processes, through innovation, in order to fully satisfy the partners	It is not innovated by ignorance of the needs of the organization	Establish information innovation processes
	5c Services are designed and developed taking into account the needs and expectations of partners	Needs are not taken into account objectively, i.e. the provision of the organization's service is subjective	Make a suggestion box
	5d Services are managed systematically	You don't have an information system	Develop an information system
	5e Management, review and improvement of relations with partners and managers, in relation to the services offered by the EPS organization	Partners are evaluated and taken into account only when information needs to be submitted	Perform constant evaluations to managers and staff.

Prepared by: The Authors

Source: EFQM and SEPS Model

Once all the information has been collected, the respective analysis is carried out based on the articles presented.

It can be seen that in the first article is a mechanical company that seeks to adopt the EFQM model once this system was adopted according to the author of this article discloses that when implementing this model several changes arose for the company that are very favorable since it did not have adequate control within the mechanics itself in article number two that is a restaurant in the same way the EFQM model was adopted that gave great change because through this model it can be seen that the changes were favorable since there was no quality control that was not favorable for the company since this caused great losses and finally to conclude we have the third article that is from the Aragonese company that this company was most successful since that with the implementation of this model it was possible to have better distribution in terms of leadership, policies and strategies, people, alliances and resources and without missing the processes that the company did not have at the beginning but by implementing the EFQM model these companies achieved success.

The constant searches and applications of new and more efficient managerial techniques and practices for planning and measuring the performance of the organization have been the result of the visible transformation of the business world that, during the last decades, has revealed that



urgent need for change and improvement of both operational results, as of the organization's own financial system.

Such techniques or tools must compromise the characterization of the strategy to be followed in order to achieve high performance, as well as the possible expression of such strategies in specific objectives that are measurable thanks to the performance indicators of the organization or business. Another emerging mechanism is the orientation towards a systemic vision of a business environment in which both the roles and the same needs of each actor involved can be identified; This would result in a rethinking of the evaluation schemes of results, as well as the definition of strategies in business.

However, for the achievement of the previous objective it is necessary to establish an implementation plan which must be composed of some elements such as:

- "An evaluation of the design status of pending indicators to be defined or completed, each with its design plan and data collection for final incorporation into the reports.
- Strategic vector development plan, when it is perceived that they have not been fully defined.
- Ratification of those responsible by strategic vector when it is perceived that they have not been fully defined.
- Responsible for resolving outstanding issues.
- A summary of the current scheme of management agenda and proposal of adjustment or modification to incorporate as a management system
- Presentation of the model of managerial meetings, general sequence of planning-management, as a scheme called the four meetings.
- Communication, education and outreach program from the corporate level down. Means and strategies
- Incorporation of the system should be an evaluation of the alternatives in the market and the characteristics of the organization. In some cases, existing systems within the company can be adapted for less complex organizations" (Kaplan, 2009)

5. CONCLUSIONS

- EPS organizations do not have any type of manual of their own, in which they can be guided since they recognize and ensure that they do so through the indications and communications that the Control Entity (SEPS) informs.
- In the review of quality standards, EPS organizations do not mostly comply with the minimum established by each of them, the main factor is the training of the partners and their infrastructure is not adequate.
- Regarding the management of the payroll of members do not have formal records of the entry and exit of partners in EPS organizations, a part of the members of the organizations are untrained people, that is, they do not meet the minimum requirements to exercise the positions according to the requirements provided in the LOEPS.



- As for the process of compliance with the provisions of the SEPS, this is detailed correctly in the portal of the superintendence, but it is not carried out in reality, since the principles established in the Social Balance are not applied in all EPS organizations.
- The model considers the perspectives of learning and growth and financial the most important and gives more value to the definition of the mission, vision and strategy of the organization, than the rest of the models compared. However, customer and process perspectives are the least valued in the model.
- The EFQM model, after its last revision in 2010, and in an approach to sustainable management, downplays the importance of the financial perspective, in favor of customer prospects, learning and growth.
- The Latin American model gives more importance to the learning and growth perspective than to other perspectives.
- From the comparison of the three models of business excellence, it is observed that all three value with the greatest weight and in a similar way the perspective of learning and growth. The least homogeneous perspective in valuation is the customer perspective, since it is highly valued by the European model and very little valued by the American one.
- The financial perspective has a low weight, for the European and Ibero-American models, with respect to the importance given to it by the American model.
- As for the process perspective is valued similarly by the European and Ibero-American models, this perspective is less valued by the American model.
- After comparing the differences between the models, the most important contribution is the table of equivalences that assigns the subcriteria of each model of business excellence to each of the perspectives of the social balance, in order to compare the weight given by each model of excellence to each perspective.
- Multinational companies that own companies around the world and use different models of excellence according to the country and thanks to the table of equivalences between models, can unify their self-assessments. They could know the differences and similarities of their different models and thus be able to apply internal benchmarking techniques with the indicators used in their models of excellence in each country.
- Presenting a model for evaluating business excellence integrating the three models: the European EFQM model, the American MBNQA model and the Ibero-American model, is an ambition, perhaps utopian. However, it may be interesting to calculate the average of the valuation of each perspective, from the particular reassignment of each of the three models to the four perspectives.
- Observing the comparison of the three models to evaluate the business excellence of a company, and with the objective of discovering the weight that falls as an average in each perspective, appears as the most important perspective for the three models, the perspective of learning and growth with a weight of almost 30% as an average for the achievement of business excellence.
- The next most important perspective to evaluate excellence is the customer perspective, with a weight greater than 20% on average.
- The third most important perspective is the perspective of internal operational processes with a weight of less than 20%.

- The fourth most important perspective is the financial perspective with a weight of around 15%.
- The definition of the mission, values and policy and strategy in this average evaluation of excellence from the three models studied would have a theoretical weight of approximately 15% as well.
- Interestingly, it is observed that the Ibero-American model is the closest to this theoretical mean calculated from the particular reassignment of each of the three models to the four perspectives of the BSC.

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