

Integrating a New Framework for Inclusive Evaluation: EPIC-SCREAM

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ABSTRACT

Diversity and inclusion are critical elements of community-based organizations; however, many agencies do not have the information necessary to incorporate diversity, equity, inclusion, and social justice (DEIJ) elements into their daily operations. Nevertheless, libraries and other community-based organizations must provide services and programs to all populations at little or no cost. However, they may lack available data or the willingness of employees to engage in evaluation efforts such as strategic planning, which are necessary to ensure inclusive and equitable programs and services. Research (George et al., 2018) shows that many employees do not engage in strategic planning efforts because the process is cumbersome and daunting, they feel the goals do not apply to them, or they do not believe changes will be meaningful and long-lasting. Continual evaluation is critical in identifying demographic changes in the community while introducing culturally-sensitive programs and services.

ALISE RESEARCH TAXONOMY TOPICS

Community-led services; Social justice; Public libraries; Museums

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SCREAM, Inclusivity, Quadruple bottom line, Community-based organizations

INTRODUCTION

Strategic planning (SP) is a deliberate action meant to outline decisions and actions that impact an organization's core values (Bryson, 2011) and has five main benefits:

1. It allows organizations to focus on using their resources effectively. These resources include staff, financial resources, physical facilities, and the knowledge and skills of the organization's leaders.

2. SP clarifies the organization's strengths and where opportunities exist for all stakeholders.
3. SP encourages the organization to think of the future and the existence of unknown possibilities.
4. A well-written strategic plan guides what resources are needed to move the organization forward successfully.
5. If done correctly, SP creates shared ownership of the project by engaging all stakeholders during the process.

A valuable tool for businesses and organizations seeking a pathway towards future growth, strategic plans focus on implementing new ideas and ensuring financial feasibility. SWOT (Strengths, Weaknesses, Opportunities, and Threats) is the most well-known analytic tool allowing an organization to identify its position in the marketplace and "how it will differentiate itself from its competition to achieve its mission" (Mallon, 2019, p. 1408).

SWOT and similar SP tools fail to identify critical components of community-based, service-oriented organizations. Communal traits include diversity, equity, culture, inclusion, and social justice values. A review of current literature found little evidence that a tool exists as an alternative to existing instruments such as SWOT. The exception is Brun's (2014) SCREAM framework. Initially developed for social work, SCREAM evaluates the Strengths, Culture, Resources, and Ethical Agreements of organizations across Multiple systems.

SWOT

One of the most used SP tools, a SWOT analysis, evaluates internal components (strengths and weaknesses) that the organization can control and external forces (opportunities and threats) that may impact its long-term success (Berry, n.d.). Several benefits of SWOT exist, such as its ability to present an overall view of the organization, which can provide helpful information in the decision-making process. SWOT also allows the organization to highlight what it does better than its competitors while identifying areas of improvement that others may view as weaknesses and exploit. Since opportunities and threats are external, SWOT helps see what trends the organization can take advantage of and the obstacles in the marketplace that may harm the organization. Furthermore, employees with little or no SP experience easily understand SWOT's four-box matrix. While SWOT has stood the test of time, it may also be a victim of its success (Panagiotou & Van Wijnen, 2005).

Panagiotou and Van Wijnen (2005) define SWOT as a defective, poorly ranked, and distrusted stand-alone tool. Nonetheless, Agarwal et al. (2012) go a step further by suggesting that SWOT harms performance and recommend replacing SWOT with the alternative self-designed and freely available "Meta-SWOT," which builds upon the flawed original model to improve rather than discard it. Phadermrod et al. (2019) agree, noting that the SWOT analysis does not necessarily perform well if additional tools do not enhance it. Furthermore, Phadermrod et al. (2019) argue that "Importance-Performance Analysis [IPA]-based SWOT analysis is not intended to replace the traditional SWOT analysis but rather to provide a complete view of an organisation's situation from the customer side, while the traditional SWOT analysis provides

information from the organisation side,” (p. 202). Therefore, the IPA-based SWOT analysis attempts to improve the original SWOT’s deficiencies while focusing on market-driven companies.

SCREAM

SCREAM measures the organization’s strengths while respecting internal and external cultural components. Through a greater understanding of the organization’s resources, SCREAM seeks to ensure ethical agreements benefit clients across multiple stakeholder groups. Furthermore, SCREAM clarifies the values driving evaluations and focuses on continual improvement, specifically through developing exploratory, explanatory, and descriptive evaluation questions (Brun, 2014).

The lack of peer-reviewed literature on the SCREAM model makes it difficult to assess the benefits and challenges of using SCREAM in community-based or service-driven organizations. Nevertheless, Brun (2014) provides a foundational narrative for SCREAM by noting that no strategic plan is perfect, thereby necessitating a culture of continual evaluation by “SCREAM[ing] as often as you can” (p. xxxii). Furthermore, Brun (2014) encourages organizations to identify strengths, respect the cultural backgrounds of stakeholders, work within the means of available resources, treat all stakeholders ethically, reach agreements on the evaluation’s scope and activities, and measure results across multiple systems. Further assessment of the model’s six components provides insight into its effectiveness as a tool in SP initiatives.

Strengths.

Acknowledging organizational strengths is crucial for moving organizations forward, identified in numerous analytic tools (i.e., SWOT, SOAR, WOTSUP). In market-driven companies, strengths that provide an advantage over competitors while understanding methods for exploiting these strengths may be the difference between success and failure (Iraci, 2019). On the contrary, within community-based or service-minded organizations, “strengths are behaviors and beliefs that help individuals, families, and communities reach their optimal level of social functioning” (Burn, 2014, p. 67). When discussing organizational strengths, the distinction lies between what the agency emphasizes -- ‘financial capital’ or ‘social capital.’

Culture.

At the center of all strategic initiatives are culture and values, and an organization’s internal and external cultures play a part in its success. Iraci (2019) notes that “only through strong culture and principled values” can decisions be aligned to organizational priorities. Iraci’s (2019) findings support research that employees have less absenteeism due to sickness in organizations with high ethical culture (Kangas et al., 2017). Furthermore, external stakeholders appear to trust and be more satisfied with organizations that portray an ethical culture (Leonidou et al., 2013).

Hindering an evaluation of culture within SP is that “persons tend to equate culture with race” (Brun, 2014, p. 71). The failure to define culture beyond race or ethnicity often excludes populations based on socioeconomic class, gender identity, religion, or personal values. Therefore, when racial diversity is absent in a community, organizations neglect to measure culture in evaluation processes, necessitating the need for culture to be an identifiable characteristic in the evaluation tool.

Resources.

Aligning values and resources allows organizations to meet their highest-priority needs by considering how time, materials, staff, and money impact success (Iraci, 2019). Although money is crucial for operational success, according to Bryson (2018), “Money typically is not the most needed resource for strategic planning; the time and attention of key decision makers are more important” (p. 97). Adequate time is necessary to 1) ensure the organization follows ethical guidelines, 2) investigate conflicts of interests and gather input from stakeholder groups, and 3) clarify data-collection methods and the implementation of recommendations (Brun, 2014).

Ethical Agreements.

“Professional ethics are the values, principles, and behaviors expected of all members of an organization” (Brun, 2014, p. 90). When combined with strategic agreements between the organization and funders, service providers, clients or customers, and for-profit and non-profit organizations, the effect is the creation of a shared consensus for practical evaluation and delivery of services (Schalock et al., 2017). In addition, the successful adoption of beneficial agreements prevents violating stakeholder rights through ethical behavior, including transparency and accountability. Furthermore, ethical behavior establishes the public’s trust, thereby allowing agencies to influence the lives of more significant numbers of individuals (Brun, 2014; Bryson, 2018).

Multiple Levels.

Consideration of various stakeholder groups ranging from individuals to groups and continued expansion into greater society is necessary for SP. Integration of these three systems is necessary to provide the ultimate support and understanding to fully engage with all stakeholder groups (Schalock et al., 2017). Nevertheless, some organizations fail to evaluate internal and external stakeholder groups as equally important, eliminating the catalyst in addressing complex community issues through SP initiatives. Blanchard’s (2019) ‘Quadruple Bottom Line’ (QBL) addresses these failures by encouraging organizations to ‘lead at a higher level by striving to be the Employer, Provider, Investment, and Corporate Citizen of Choice. In addition, conducting critical evaluations of each stakeholder group offers the opportunity to determine how the organization can best meet the needs of multiple systems while maintaining sustainability.

In summary, each SP model has a place in organizational planning initiatives. However, research (George et al., 2018, Supiano, 2020) illustrates the critical role communal traits such as creativity, persuasion, and emotional intelligence play in workforce development, highlighting

the need to factor in human components when evaluating programs and services. Slightly modifying Brun's (2014) SCREAM model allows community-based organizations to continually evaluate services by measuring strengths, respecting culture, analyzing resources, promoting equity, and researching mutually beneficial agreements or partnerships. Modifying Blanchard's (2019) QBL to focus on community collaboration instead of corporate relevance also benefits service-driven agencies. Finally, implementing SCREAM across the Employer (E), Provider (P), Investment (I), and Community Collaborator (C) groups allow a holistic view of the organization's programs and services to foster greater inclusivity. Based on this new EPIC-SCREAM model, this study aims to determine how administrators of community-based organizations feel about including communal traits in SP initiatives and if they prefer the SWOT or EPIC-SCREAM analytic tool as part of an SP initiative.

METHOD

A recruitment email to public libraries, museums, and select non-profit organizations seeking administrators for the mixed-method study solicited 48 responses as of July 2022, resulting in 40 interviews. Study participants represent 31 libraries, three museums, and six non-profit organizations in 10 states. Most ($n=36$) of the study activities consisted of one administrator and the researcher. However, four interviews had multiple participants ranging from 2 to 8 individuals. When multiple opinions existed, the researcher recorded the response of the participating administrator as identified in the pre-activity correspondence. Subordinate opinions were noted but not included in this study's findings.

Study activities, including SWOT and EPIC-SCREAM analyses, and a 15-question interview of 40 individuals, provide the basis of the study results to date. The SWOT analysis consisted of the researcher explaining the components of a SWOT analysis and providing one strength, weakness, opportunity, and threat for a popular fast-food restaurant as an example. Participants then identified as many organizational strengths, weaknesses, opportunities, and threats as possible. There were no time limits and the average time for the SWOT analysis was 18 minutes.

The EPIC-SCREAM analysis followed the researcher's overview of the EPIC-SCREAM model. Subsequently, the EPIC-SCREAM analysis solicited responses to questions about strengths, culture, resources, and ethical/inclusive considerations across the EPIC stakeholder groups. The researcher did not impose time limits; however, participants concluded the activity due to other commitments. The average time dedicated to the EPIC-SCREAM activity was 63 minutes.

Following the organizational EPIC-SCREAM analysis, the researcher conducted a 15-question interview. Interview questions were multiple choice, Likert ratings, and open-ended questions. Multiple choice questions included participants identifying which tool (SWOT or EPIC-SCREAM) took longer, was more comprehensive, would help them make more informed decisions, and would feel the most comfortable using in the future. Using a Likert scale of 'Necessary,' 'Somewhat Necessary,' or 'Not Necessary,' participants rated the importance of

including weaknesses, culture, ethics, resources, and evaluation across four distinct stakeholder groups in SP initiatives. Finally, open-ended questions asked participants to explain their previous answers and describe why they would select either SWOT or EPIC-SCREAM as an SP tool in the future.

RESULTS

Evaluation of the necessity of culture (85%), ethics (90%), resources (100%), and evaluation across four distinct stakeholder groups (92.5%) found that most administrators believe each to be an integral part of the organization's effectiveness. However, only 70% of administrators frequently consider culture when planning community programs and services. Slightly more than half (52.5%) frequently consider ethics and inclusivity in program planning. In comparison, 55% acknowledge that they review the impact programs and services will have on the various stakeholder groups. However, most admitted to not thinking about investors unless it was to solicit new funds or report on prior donations. Table 1 illustrates the participants' responses.

Table 1

Communal traits

	Culture	Ethics	Resources	Multiple Systems
	Required for Evaluation			
Necessary	34	36	40	37
Somewhat Necessary	6	2	0	3
Not Necessary	0	2	0	0
Total	40	40	40	40
	Prior Consideration			
Frequently	28	21	35	22
Somewhat Frequently	9	12	5	12
Not Frequently	9	7	0	6
Total	40	40	40	40

Of the 40 participants, 39 (97.5%) indicated that they preferred the EPIC-SCREAM framework over a SWOT analysis, given its focus on understanding the organization's impact on employees, patrons, investors, and community partners. Most (n=38, 95%) also feel the EPIC-SCREAM model would help make more informed decisions. Thirty-five participants (87.5%) indicated that they would use the EPIC-SCREAM model in the future. Three participants (7.5%) indicated they would continue to use SWOT primarily because they "have used SWOT in the past and are comfortable with it" (Study participant, March 2022). Two (5%) individuals reported that they would combine the two models in future SP initiatives. Table 2 illustrates the participating responses.

Table 2*SWOT or EPIC-SCREAM Comparisons*

	More comprehensive	More informed decisions	More likely to use in the future
SWOT	0	0	3
EPIC-SCREAM	39	38	35
Both similar	1	2	2

DISCUSSION

The study answers two critical questions. First, results indicate that most community-based organizational administrators believe communal traits are essential when evaluating programs and services. However, gaps exist between those who believe the inclusion of these components is necessary to those who frequently employ them. For example, 85% of participants believe culture is vital, but only 70% frequently consider it when evaluating programs and services – a 15% gap. The gap for ethics is 37.5% between those who feel it is a necessary element in evaluation and assessment compared with the 52.5% of respondents who frequently list it as a measure of success. Several participants indicated that they always consider patrons but may not consider the impacts of programs and services on employees, investors, or community partners, thereby skewing the results of the interview question. Based on this feedback, future research may wish to revise the question, “Prior to this exercise, how often did you consider how programs and services affect each of the four stakeholder groups of employees, patrons, investors, and community collaborators?” to segregate each stakeholder group. In turn, this may help determine each group's consideration in the organizational evaluation as part of a strategic plan.

Second, research (Bryson, 2018) shows that few studies (Jorgensen & Bozeman, 2007) focus on equity, social justice, transparency, and accountability, among other broader public values, in strategic evaluations conducted within government agencies. Therefore, the findings of this research study support the need for an SP tool in community-based organizations that accounts for communal traits. As illustrated in the findings, most administrators of community-based organizations believe the EPIC-SCREAM model to be more comprehensive (97.5%), thereby allowing them to make informed decisions (95%). Additionally, EPIC-SCREAM “paints a robust and nuanced picture of the library’s assets and environments utilizing a systematic method for achieving our objectives using foresight instead of a snapshot in time” (Study participant 14, December 2021).

CONCLUSION

Disrupting standard thinking patterns and becoming more intentional in addressing societal needs begins with an in-depth analysis of an organization’s strengths, culture, resources, ethics, and agreements across the EPIC stakeholder groups. Unfortunately, traditional tools such as SWOT fail to address diversity, equity, inclusion, and social justice issues, limiting the ability

of community-based and non-profit organizations to ensure inclusivity in programs and services. This limited research study demonstrates the need for future research and the continued development of an analytic tool for evaluating the impact of communal traits on employees, patrons, investors, and community collaborators.

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