

BIRP – SET OF PERSONAL PERFORMANCE INDICATORS

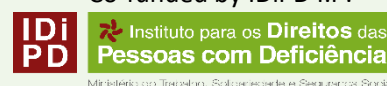


OVERVIEW

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Ministério do Trabalho, Solidariedade e Segurança Social

OVERVIEW

The need

FORMEM – Portuguese Federation for Vocational Training and Employment of Persons with Disabilities – has, over the course of more than a decade, promoted a wide-ranging discussion on the indicators that can best reflect the impact of the activities and interventions carried out by organizations that support persons with disabilities.

In the years preceding the COVID-19 pandemic, benchmarking groups played a highly relevant role, providing strong support to organizations that continued progressing toward Quality certification, namely following the EQUASS 2018 standard.

This process resulted in a significant set of documents:

1. *Compilation of Outcome Indicators – Annexes K | EQUASS Excellence in Portugal*, published in 2015;
2. *FORMEM Magazine No. 6 | Benchmarking Base*, published in 2015;
3. *Re-edition of the Compilation of Outcome Indicators – Annexes K | EQUASS Excellence in Portugal*, published in 2016;
4. *Benchmarking Base of Social Sector Entities (2013/2014/2015)*, published in 2016;
5. *Benchmarking in the Social Sector: A Path Taken and Shared Knowledge*, published in 2018;
6. *Benchmarking Base of Social Sector Entities (2018/2019/2020)*, published in 2021.

A review of these publications shows the effort made in searching for a set of indicators that are more meaningful for organizations that support persons with disabilities. This evolution was only possible due to a continuous dynamic, initiated in 2012, of sharing and openness among peers—particularly through Benchmarking Meetings and Quality Meetings involving dozens of organizations, as well as the creation of a team of auditors among FORMEM members to carry out reciprocal internal audits.

One of the conclusions from this debate of over a decade, together with a growing concern within EQUASS regarding the measurement of personal outcomes, was the realization that there were many indicators of organizational performance — also known as effort indicators. In fact, there were inputs (resources used for the activity) and outputs (products of the activity), but outcomes were missing (the impact of the activity—results in the lives of the supported individuals).

In 2020, despite the constraints imposed by the COVID-19 pandemic, an online discussion was launched regarding the identification and measurement of these

outcomes for citizens participating in vocational training and employment support programs for persons with disabilities.

As a federative body representing the sector, FORMEM requires data that characterizes the distinctive nature of vocational training and employment activities in Portugal and evaluates their impact on the quality of life of supported individuals. This is essential to enable meaningful and well-founded dialogue with policymakers, legislators, and funding bodies.

In this context, the Set of Personal Performance Indicators (BIRP – Bateria de Indicadores de Resultados Pessoais) is aligned with the nine domains defined by the National Disability Authority (NDA) of the Republic of Ireland, which serves as a reference standard for all services supporting persons with disabilities.

We consistently affirm that “our” vocational training is not limited to skill acquisition but includes support across all areas of a person’s life. BIRP aims, among other objectives, to evaluate the impact of our activities across all these domains, which often escape traditional tools for evaluation and reporting, but represent the distinctive nature of our intervention.

Although BIRP was not initially intended to be a psychometric instrument, the results from pilot samples and subsequent data collections indicated very significant and interesting statistical properties, making it a statistically robust tool.

The Process of Building BIRP

Initially, several FORMEM member organizations were invited to participate in a working-group to discuss the applicability and relevance of the nine domains proposed by the NDA. It was concluded that there was no need to “reinvent the wheel,” as these domains and subdomains provided an excellent guide, and aligned with *Quality of Life* principles.

In a second phase, organizations participating in FORMEM benchmarking groups were asked to suggest indicators that could objectively reflect the issues within each subdomain. This process produced several hundred potential indicators—some similar, some slightly different, and others that ultimately did not measure personal outcomes.

From this pool, a group of seven experts met to select indicators using *focus group* discussions and analysis through the Content Validity Index (CVI). After this refinement process: 91 items remained initially. These were reanalysed and reduced to 84 indicators. Individual item variation ranged between 0.57 and 1. The overall CVI was 0.92, indicating very strong consistency

At this stage, and considering that EQUASS 2018 was the most widely used Quality standard among FORMEM members, efforts were made to ensure that each indicator corresponded to, at least, one EQUASS principle.

Following validation, BIRP was constructed using two main questionnaires: One based on **self-report**, completed by the supported individual (or via interview with a professional if needed). Another completed by the **support team**. Since they assess different indicators, both questionnaires are complementary and must be completed.

To improve sector analysis and centralize monitoring data, additional forms were included: *sociodemographic characterization* of supported individuals, sociodemographic characterization of staff, and a form of *activity data* (inputs and outputs).

Data collection is structured across three Excel documents: *Activity Data*, *Vocational Training Questionnaires* and *Resource Centre for Qualification and Employment (CRQE)*¹ Questionnaires. An online platform will also be available soon.

The Instrument

BIRP consists of the following components:

Set of Personal Performance Indicators

Indicators aim to measure the benefits of support on individuals. Each includes:

- List of the domain and its subdomains, as specified by the *National Disability Authority* of Ireland
- Alphanumeric code for identifying the indicator
- Metric
- Data collection method
- Monitoring method
- Scope of application
- Possible link to EQUASS principles

Form A1: Sociodemographic Characterization of Persons with Disabilities

Questionnaire designed to gather additional data for a sociodemographic profile and analysis of the population we support.

Form A2: Sociodemographic Characterization of Support Staff

Questionnaire requesting additional information for a sociodemographic profile and analysis of professionals who provide support to persons with disabilities.

Form B: Activity Data: Organizational Inputs and Outputs

It requests information on the activities and resources involved, which are typically already collected systematically by organizations.

Form C: Satisfaction and Evaluation Questionnaire for Vocational Training (VT) Services

To be completed by each trainee. The responses are entered into the *Excel form* or *online platform* by the person(s) in charge of the organization.

¹ Translation remark: CRQE stands for Centros de Recursos para a Qualificação e Emprego, which are specialized organization funded by the public employment centres to provide specialized support to citizens with disability that pretend to enter the labour market.

Form D: *Satisfaction and Evaluation Questionnaire for the Services of Resource Centers for Qualification and Employment (CRQE)*

To be completed by each person receiving support. Responses are entered into the *Excel form or online platform* by the person(s) in charge of the organization.

Form E: *Vocational Training Indicator Registration and Evaluation Form*

To be completed by the Vocation Training Team through interviews or other means. Responses are entered into the *Excel form/online platform* by the person(s) in charge at the organization.

Form F: *CRQE Indicator Registration and Evaluation Form*

To be completed by the CRQE team through interviews or other means. The responses are entered into the *Excel form/online platform* by the person(s) in charge of the organization.

Map of record G: *Excel spreadsheet for recording the results of vocational training*

Document for compiling responses regarding vocational training. The responses are entered into the *Excel form or online platform* by the person(s) in charge at the organization.

Map of record H: *Excel spreadsheet for recording CRQE results*

Document for compiling CRQE responses. Responses are entered into the *Excel form or online platform* by the person(s) in charge of the organization.

Use of the Set of Personal Performance Indicators (BIRP)

BIRP's outcome indicators aim to measure the impact of support services on the lives of this population, a process that is essential for improving the services provided and for organizations to assess their own capabilities. When the focus shifts to the impact generated in the various spheres of the lives of the persons receiving support, the objectives of the intervention change: results are no longer measured in terms of the quantity of activities undertaken and services provided, but rather focus on the changes brought about in quality of life, well-being, autonomy, and integration.

In addition to being a useful tool for the individual planning and monitoring of support programs and for the internal management of organizations, BIRP has enormous potential for active benchmarking and bench learning among entities that provide the same type of support. Based on a set of common and broadly aligned indicators, the process of comparison, learning, and improvement among peers is greatly facilitated.

Last, but not least, gathering concrete data on the activities carried out and their impacts is a key factor in ensuring the sustainability of social sector organizations. Demonstrating the results achieved to society in an objective and clear manner is essential for social sector organizations to be recognized as vital and necessary for providing effective and efficient responses to the community.

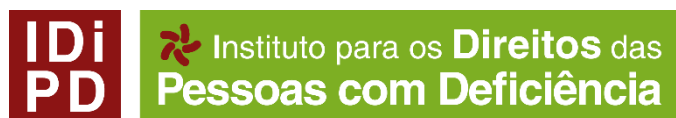
Over the past few years, FORMEM has been consolidating BIRP as a key tool for monitoring the impact of support for vocational training and employment for persons

with disabilities. In 2025, some small improvements were made to the tool; awareness-raising initiatives regarding its use were promoted; and a new data collection was conducted, part of which is available to all interested parties on our *website* in the publication BIRP – Graphical Presentation of the 2025 Data Collection – in a digital and accessible format.

Continuing along this path, in 2026 FORMEM will develop a digital tool dedicated to the BIRP, designed to facilitate interaction with persons with disabilities and the professionals involved. This digital solution will aim to save time for professionals and enable more efficient management of data collection. In addition, it will feature automatic generation of graphs, systematic monitoring of results and data for support planning, and the continuous improvement of the service provided.

For any questions regarding BIRP, please contact benchmarking@formem.org.pt.

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