



THE MEASURE OF SUCCESS FOR LEADERS

TECHNICAL & EVIDENCE BRIEF

The Science Behind The OES

Validity, Reliability, and Real-World Impact

A resource for organizational development consultants,
executive coaches, and internal HR/OD/Talent leaders
evaluating the OES for their own practice

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Performance Dashboard

PerformanceDashboard.com • The book about the OES: SailSink.com

Why This Brief Exists

When you put your name behind an assessment, recommending it to a client, building a certification practice around it, or using it as the diagnostic foundation for an engagement, you're lending your own credibility to that instrument. Your clients trust you to have already done the due diligence they don't have time to do themselves.

This brief is written for that due-diligence moment. It pulls the technical evidence behind the Organizational Effectiveness Survey (OES) out of the appendix of Sail or Sink and presents it the way a practitioner needs to see it: what was tested, how, on what sample, with what results, alongside real engagement case studies that show what the data looks like in practice. Where the evidence has a gap or could be stronger, we say so directly, because a partner who hides the limitations of their own tool isn't a partner worth building a practice on.

What the OES Measures

The OES is a quantitative, online diagnostic assessment that evaluates organizational and departmental health across three core traits, each built from a defined set of measurable competencies:

- **Relational Behaviors (soft skills) — the interpersonal, trust-based dynamics that determine how people work together**
- **Operational Practices (hard skills) — the structures, systems, and execution disciplines that determine how work gets done**
- **Immune System (resilience) — the organization's capacity to detect, absorb, and adapt to internal and external threats**

Within these traits, the OES reports on 28 competencies across four functions — Effective Leadership, Engaged People, Strategy Implementation, and Performance Measurement — plus two diagnostic overlays: Change Readiness and Values Gap Analysis (the distance between an organization's stated and lived values). Results map organizations into one of four culture types: Interpersonal, Relentless, Detached, or Engaged, giving practitioners a shared vocabulary for diagnosis, intervention design, and re-measurement over time.

The Evidence: Validity & Reliability

“Validated” is a word every assessment vendor uses. Here is what it means for the OES, translated from statistical language into what it means for your practice.

Study at a Glance

Conducted by: E-TEAM (Educational Training, Evaluation, Assessment, and Measurement) Department, University of Oklahoma

Study type: External, independent evaluation of the OES’s construct validity and reliability

Organization-level sample: 12,973 respondents, January 2008, July 2015

Department-level sample: 5,019 respondents, March 2008, May 2015

Methods: Principal component analysis (varimax rotation, Kaiser normalization), Guttman split-half reliability, Cronbach’s alpha

Construct Validity — Does the OES measure what it claims to?

Construct validity asks whether an assessment’s items actually cluster around the concepts they’re designed to measure, rather than measuring something else or nothing coherent at all. The E-TEAM researchers tested this using principal component analysis, a statistical method that identifies which questions in an assessment form independent, coherent subsets (“components”). For practitioners, the results break down as follows:

Provider	Organization Survey
Sample size	12,973 respondents
Items tested	46 items
Resulting components	6 (Leadership, Desired Values, Current Values, Job Satisfaction, Performance & Progress, Pay & Benefits)
Variance explained	69.50%
Sampling adequacy (KMO)	.98 — well above the .5 acceptable threshold
Bartlett’s test of sphericity	$\chi^2(1035) = 324,291.45, p < .001$

Metric	Department Survey
Sample size	5,019 respondents
Items tested	30 items
Resulting components	3 (Leadership, Job Satisfaction, Performance & Progress)
Variance explained	68.22%
Sampling adequacy (KMO)	.98 — well above the .5 acceptable threshold
Bartlett's test of sphericity	$\chi^2(435) = 89,918.97, p < .001$

In plain terms: the sample was large enough and the item correlations strong enough for this type of analysis to be meaningful (KMO and Bartlett's results), and the questions consistently grouped into coherent, interpretable themes rather than scattering randomly (the component structure). That's the statistical signature of an instrument that measures real, distinct constructs — not a survey that just feels intuitively organized.

Reliability — Does it produce consistent, trustworthy results?

Reliability is a separate question from validity: even an instrument measuring the right thing is only useful if it measures it consistently. Two methods were used:

- Guttman split-half reliability randomly splits the data in half and checks whether both halves produce highly correlated scores
- Cronbach's alpha measures how consistently the items within each component correlate with one another

Both coefficients run from 0 (no reliability) to 1 (perfect reliability). Every one of the six organization-level components scored above .70, and all three department-level components scored above .80 — both comfortably within the range considered appropriate for an assessment of this kind.

What This Means for Your Practice

When you present OES results to a client, you can say with statistical backing, not just marketing language, that the instrument measures distinct, real organizational constructs (construct validity) and that a client retaking it, or a comparable group taking it, would produce consistent results (reliability). That's the foundation a defensible diagnosis needs to rest on before you ever start designing an intervention.

Where We're Being Transparent With You

We'd rather you hear this from us than discover it during your own diligence:

- Recency: the E-TEAM study's data runs through July 2015. The methodology and findings remain sound; principal component analysis and reliability coefficients don't expire, but the underlying sample doesn't reflect the last decade of client data, including how work and culture shifted through and after 2020. We're actively scoping a refreshed validity and reliability analysis using current client data, and will make it available to certified practitioners once it's complete.
- Public accessibility: the full study, with complete item-level tables, is available on request rather than published in a peer-reviewed journal. If your firm or your client requires a citable, third-party-published source as part of formal procurement, tell us early; we can provide the full report directly, and we're exploring paths toward a more formally published version.
- External accreditation: the study was conducted by a university research department, which we consider a strong and credible source, but the OES does not currently carry a separate endorsement from a testing-standards body (e.g., a formal listing with an assessment review clearinghouse). We're transparent about that distinction so you can represent it accurately to your own clients.

We're including this section deliberately. If you're building a practice or a client relationship on this data, you deserve to know exactly what you're standing on, and where we're actively working to make that ground firmer.



Real-World Impact: Case Studies

Statistics establish that the OES measures what it claims to measure. These two engagements, spanning nine and four years respectively, show what that measurement looks like translated into practitioner-led intervention and business results. Both are drawn from Sail or Sink; client names are withheld per standard confidentiality practice.

Case Study 1: Staffing/HR Solutions Organization

A nine-year culture transition from Relentless to Engaged

The situation

Leadership at a staffing and HR solutions organization set an ambitious nine-year goal: grow revenues to \$2.4 billion. They knew the growth target alone wouldn't get them there; it would require shifting the organization's underlying culture from Relentless (high performance results-no excuses, lower relational caring and warmth) to Engaged (high performance results, balanced with high relational caring and warmth), while keeping employees committed through a major strategic pivot.

What the diagnostic findings showed

The OES was deployed across the employee population. Results gave leadership a specific, function-by-function map of where Relational Behaviors and Operational Practices needed to move, rather than a general sense that "culture needed work."

What the practitioner team did with the data

Using the OES findings as the intervention roadmap, the organization implemented a coordinated set of changes across several categories, including:

- Executive coaching sessions cascaded through supervisors, managers, directors, and vice presidents
- Structural cadence: ongoing quarterly team meetings, monthly new-team welcomes, and a buddy program
- Recognition and connection: milestone travel vouchers tied to years of service, team celebrations, and discussion groups
- Management capability building: training in active listening, motivating behavior, and FAST (Frequent, Accurate, Specific, Timely) feedback
- Operational discipline: streamlined processes, innovative and helpful performance appraisals, and a competitive salary and incentive structure

The result

Within nine years, the organization added \$1.2 billion in sales revenue, landing roughly \$200 million short of its original target. By year ten, it had exceeded the initial financial goal. The multi-year revenue trend line, tracked alongside the specific interventions above, gave leadership (and the practitioners advising them) a direct, visible link between the culture work and the business outcome, not just a coincidence of timing.

Why this matters to you

This is the template for a defensible ROI narrative: diagnostic data → specific, attributable interventions → a tracked business metric over multiple measurement points. It's exactly the structure the coaching and consulting literature says clients now expect before they'll credit an engagement with results.

Case Study 2: College of Continuing Education

A four-year turnaround inside a state university

The situation

A continuing-education college within a state university, with roughly 500 employees, faced a competitive crisis: advancing technology, growing competition from online/dot-com education providers, and a shifting student profile were eroding its position. Leadership recognized that training initiatives alone hadn't been enough; the college of continuing education and public community services needed the underlying processes and systems to change, not just employee skill-building.

What the diagnostic findings showed

OES findings identified specific gaps in Relational Behaviors and Operational Practices standing in the way of the customer-relationship and performance improvements the college needed.

What the practitioner team did with the data

Acting directly on the OES findings and recommended interventions, college leadership:

- Adjusted specific Relational Behaviors and Operational Practices identified in the assessment
- Adopted a digital system to track performance levels
- Implemented a competitive pay program and resolved personnel conflict issues
- Streamlined critical processes for efficiency and excellence
- Encouraged cross-group collaboration to surface innovative efficiency and accountability improvements

The result

A follow-up OES administration confirmed the college had shifted into an Engaged culture, with employees measurably more committed to and engaged in the college's growth goals. Revenues, indirect cost recovery, and gross margins all increased, and within the four-year period the college ranked among the nation's top three colleges of continuing education.

Why this matters to you

The re-administered OES is the key detail here: the "before" and "after" aren't inferred from business results alone, they're confirmed by the same validated instrument, at two points in time. That repeat-measurement structure is what turns a single diagnostic into an ongoing engagement, and it's a natural model for how you might structure a multi-year client relationship around the OES.



Case Study 3: Reserved for Our Certified Practitioner Cohort

Coming soon

We're intentionally leaving this slot open rather than filling it with a generic example. As we bring OD consultants, executive coaches, and internal HR/OD/Talent leaders into a certified practitioner cohort, our plan is to feature a case built directly from that work, co-authored with the practitioner, focused specifically on how they used OES data inside a coaching or consulting engagement (as distinct from the org-wide initiatives above).

If you're an early certified partner, this is where your engagement can be featured, with your name and expertise attached, if you choose.

Get the Full Study, or Talk to Us About Certification

This brief summarizes the E-TEAM validity and reliability study; we're glad to share the complete report with full item-level tables on request, useful if you need to attach it to an RFP response or your own client-facing due-diligence materials.

If you're an OD consultant, executive coach, or internal HR/OD/Talent leader interested in becoming a certified OES practitioner, including how certification, case-study collaboration, and referral or white-label structures work, we'd like to talk.

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