



IDEAS STEP 3

Set Criteria for Selecting and Evaluating Interventions



Scope



Benefits



Resource Considerations



Obstacles



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F Facilitator Preparation

To do:

1. **Watch:** training video and decide whether to show the video during the DT meeting:
 - a. Set Selection Criteria (7:21) <https://www.uml.edu/Research/CPH-NEW/Healthy-Work-Participatory-Program/generate-solutions/set-selection-criteria.aspx>
2. **Review:** Facilitator Preparation, Facilitator Agenda and the DT handouts.
 - a. Give particular attention to the example provided within the DT handout to understand the selection criteria.
3. **Prepare DT materials** (*i.e. print, copy*)
 - a. DT handouts (*1 copy per person*)
 - b. Completed IDEAS Step 2 worksheet (unless circulated ahead of the meeting)
4. **Prepare flip charts** to save valuable meeting time. Write the following headings at the top of flip chart paper (*one per sheet of paper*)
 - a. **Scope** -- *Who do you want to reach? How many?*
 - b. **Benefits/Effectiveness** -- *What positive outcomes are we trying to accomplish? Short term? Long term?*
 - c. **Resource Considerations** -- *What resources are currently available within the organization? Do we need to acknowledge any constraints?*
 - d. **Obstacles** -- *What could interfere with intervention success?*
5. **Send the DT a friendly reminder of the meeting date and time** at least 2-3 days before the upcoming meeting

Depending on your organization, you may wish to discuss with the Steering Committee what resources will be available (or other resource related constraints) for DT interventions prior to this meeting.

To bring:

- ☐ **Prepared flip chart paper** (with headings), extra, blank flip charts and markers (*or laptop and projector if using worksheets during the meetings*)
- ☐ **IDEAS Step 3 DT handouts**
- ☐ **IDEAS Steps 1 and 2 completed worksheets**

To know:

The purpose of Step 3 is to identify “selection criteria” (also called, Key Performance Indicators, or KPIs) for evaluating intervention activities. These selection criteria will be used several times during the remaining steps in the IDEAS process.

- Step 4 – DT will apply the selection criteria to help decide which activities to include or exclude in their intervention proposal
- Step 5 – SC will refer to the selection criteria when rating the DT proposed interventions.
- Step 7 – The SC will use the selection criteria to evaluate intervention activities that are implemented.

Step 3 typically requires one meeting. This step should involve the Design Team and the Steering Committee.

- Working together on this step can help to set the stage for intervention proposals to be received positively by organizational leaders.
- Step 3 is also a good time to brief the Steering Committee generally on what has been accomplished in IDEAS Steps 1 and 2.

Key Definitions

Selection Criteria	Key Performance Indicators (KPIs) set by the group that are used to measure the effectiveness or success of the solution activities within intervention alternatives, including: Scope, Benefits/Effectiveness, Obstacles and Resource Considerations.
Scope	The range of people (who and how many) that the intervention is intended to benefit.
Benefits / Effectiveness	Benefits of any kind that the interventions should provide. Consider short term benefits such as changes in attitudes, behaviors, satisfaction. Consider longer term benefits such as fewer accidents, cost savings, improved health, lower intention to leave, etc.

Resource Considerations	What resources are currently available within the organization that should be considered? Are there parameters or context factors to consider?
Obstacles	Anything that is likely to work against the intervention being considered. For example, uncertainty about continued financial resources, long delays in getting needed materials or equipment, a lack of top-down support, resistance to change, etc.

Activity 1: Understanding selection criteria

It is vital that the DT understand the key definitions of (Scope, Benefits/Effectiveness, Resource Considerations, and Obstacles) before beginning Activity 2. Be sure to review the definitions and show the example handout. The selection criteria will be used again in IDEAS Steps 4,5,6 & 7.

Activity 2: Develop selection criteria for interventions

The DT will generate a list of selection criteria for interventions. Encourage the DT to prioritize the most important items in each category. This will keep the process manageable when they apply the selection criteria in Step 4.

- **Note:** When considering the obstacles category, encourage DT members to avoid listing “cost”. Cost will be addressed separately in the Resources category.

Post-meeting to do:

Complete (i.e. fill out) the IDEAS Step 3 Worksheet: Set Selection Criteria. This worksheet will be used in IDEAS Step 4 to evaluate the interventions created by the Design Team.

- If DT has completed this step by themselves, coordinate a meeting with the Steering Committee to invite their input on the selection criteria.



IDEAS STEP 3

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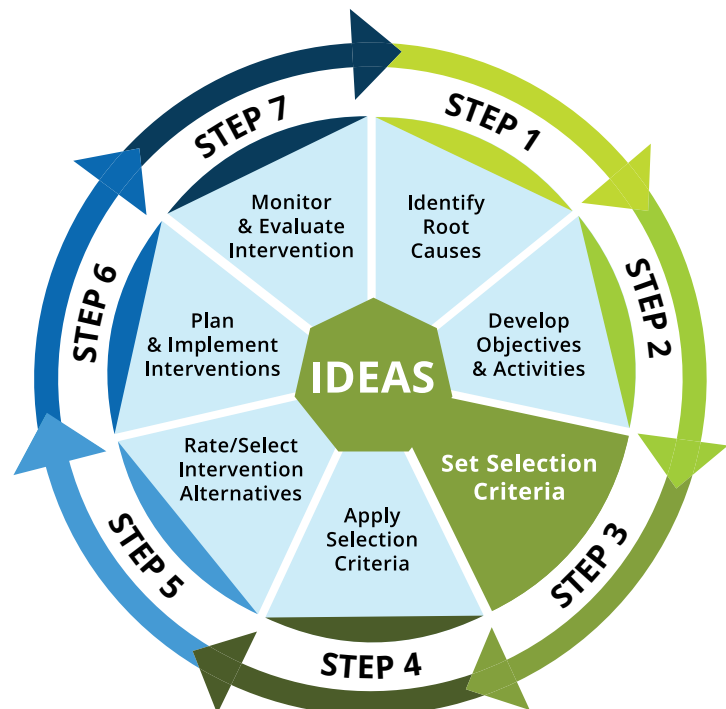
F Facilitator Agenda

Meeting Intent:

To identify criteria to be used to select and evaluate intervention activities.

Desired Outcomes for IDEAS Step 3:

1. Understand of the four categories of selection criteria for interventions, and how they will be used.
2. Initial list of specific selection criteria within each category.





Facilitator Agenda

When	What	How
0:00 (5 min)	Arrival/Check-in	<p>Show up, find a seat, settle in.</p> <p>Round-robin: <i>Facilitator inserts check-in question here (10-20 sec each)</i></p>
0:05 (2 min)	Approve meeting minutes	Facilitator asks Design Team members for any changes and then asks for a vote to approve meeting minutes
0:07 (2 min)	Review Meeting Plan	<ol style="list-style-type: none"> 1. Review Intent and Desired Outcomes for the meeting 2. Facilitator briefly reviews the agenda 3. Questions and comments after each step 4. Facilitator ask for a volunteer recorder
0:09 (6 min)	<p>1. Understanding selection criteria</p> <p><u>Handouts:</u> Key Definitions Step 3: Set Criteria for Selecting and Evaluating Interventions example</p>	<ol style="list-style-type: none"> 1. Volunteers offer to read out loud the definitions in the handout 2. Clarifying questions from group, if needed 3. Facilitator guides DT through the Step 3 completed worksheet example 4. Facilitator explains how selection criteria will be used in future IDEAS steps. 5. Clarifying questions from group
0:15 (38 min)	<p>2. Develop selection criteria for interventions</p> <p><u>Handout:</u> (optional) Step 3: Set Criteria for Selecting and Evaluating Interventions blank worksheet</p>	<ol style="list-style-type: none"> 1. Team develops specific intervention evaluation criteria for each category of the worksheet <ol style="list-style-type: none"> a. Scope b. Benefits/Effectiveness c. Resource Considerations d. Obstacles



When	What	How
		<p>Use the prompting questions for each category to help DT identify the evaluation criteria:</p> <p><i>Scope -- Who do you want to reach? How many?</i></p> <p><i>Benefits/Effectiveness -- What positive outcomes are we trying to accomplish? Short term? Long term?</i></p> <p><i>Resource Considerations -- What resources are currently available within the organization? Do we need to acknowledge any constraints?</i></p> <p><i>Obstacles -- What could interfere with intervention success?</i></p> <p>2. Recorder will capture:</p> <ol style="list-style-type: none"> agreed criteria unknown (gaps in our knowledge) uncertain or disagreed <p>3. DT prioritizes 2-4 items per category.</p> <p><i>Explain that it is important to keep these criteria to a manageable number. Too many criteria will be overwhelming to work with in Step 5.</i></p> <p><i>Try to spend ~8 min/category to ensure you can cover all four selection categories</i></p>
0:53 (5 min)	3. Next Steps	<p>Generate/review next steps:</p> <ol style="list-style-type: none"> Facilitator reviews preparation for next meeting Ask which DT members would like to participate in a meeting with SC to provide a DT update and invite feedback on the selection criteria.
0:58 (2 min)	Check-out	1-2 words to describe how you are feeling as you leave this meeting
1:00	Adjourn	

