IDEAS Step 3: Detailed Instructions for Facilitators
Set Selection Criteria for Evaluating Solution Activities and Interventions

The process for Step 3 requires 1 meeting. The group may need to return to this step later for updating.

Worksheet 3 Goal:
A design team, preferably involving line-level employees, develops a set of important aspects to consider when evaluating each proposed solution activity.

Important Terms:

<table>
<thead>
<tr>
<th>Selection Criteria</th>
<th>Key performance indicators (KPIs) set by the group that are used to measure the effectiveness or success of activities and intervention alternatives, including: Scope, Benefits/Effectiveness, Obstacles/Barriers, and Resources/Costs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scope</td>
<td>That part of the organization (e.g., individuals, groups, whole parts of the organization) that the intervention is intended to benefit.</td>
</tr>
<tr>
<td>Benefits/Effectiveness</td>
<td>Benefits of any kind that the intervention should provide. For example, fewer accidents, cost savings, improved job performance, improved health, improved safety, improved sense of wellbeing, lower job turnover, etc.</td>
</tr>
<tr>
<td>Obstacles/Barriers</td>
<td>Anything that is likely to work against the interventions being considered; for example, uncertainty about continued financial resources, long delays in getting needed materials or equipment, difficulty in scheduling meetings, a lack of top-down support, resistance to change, etc., etc.</td>
</tr>
<tr>
<td>Resources/Costs</td>
<td>Estimates by the group of the financial or other types of resources available for an intervention. Need to consider both the short and long-term resources/costs.</td>
</tr>
</tbody>
</table>

Group Process:
1. Define the scope in terms of the numbers of employees that should definitely benefit from an intervention.
   - Who would a good solution reach?
   - How many people should benefit?

- It may be necessary to place a higher priority on those interventions that benefit a larger number of people.
Would other employees also stand to benefit in some limited way?

- It is possible that an intervention that targets a problem shared by only a limited number of employees will also help prevent this problem from occurring in other employees. For example, an ergonomic training program on how to properly adjust a workstation cannot only benefit employees with musculoskeletal discomfort, it can also help other employees prevent musculoskeletal disorders.

2. Define the expected benefits/effectiveness of an intervention.
   - What would you like to see happen as a result of the intervention both long and short term?
   - Specific examples could be a 50% reduction in injuries, 20% fewer absences, a 50% reduction in stress, improved employee morale, improved customer relations, etc., etc.

   - Encourage the DT to think in terms of both long-term and short-term benefits.

3. Estimate the resources available for an intervention.
   - Consider any resources the group has, or other resources available in the organization.
   - May need to gather information from other organizational sources (e.g., the SC).

   - If the DT is initiating the IDEAS process, information from the SC may be most helpful at this point. Line-level employees are not likely to be aware of the current organizational/financial resources that are available. There also might be another planned initiative that the intervention could become a part of.

4. Define potential obstacles/barriers to success of an intervention.
   - Is there anything in the organization that might prevent the intervention from happening as proposed?
   - For example: What about the timing of the intervention, will a delay result in failure?

   - The culture and climate of the organization and different units or departments should be considered in this step. Is it likely that an intervention will be well received? Are some groups of employees particularly resistant to change?

Important:
As you consider the many factors that could “make or break” interventions, other contributing factors and/or new ideas for activities may become obvious. It is a good idea to review Worksheets 1 and 2 and make any needed changes or additions before going on to Worksheet 4.

© Center for the Promotion of Health in the New England Workplace, March 2013
Important for the Site Facilitator:

Explain that solution activities for each major goal/objective will have different selection criteria. There is some advantage to having the DT ‘take one step back’ from each of the sets of activities they generated in Worksheet 2 before combining activities into final intervention alternatives. The focus should instead be on the broad goals that are shared by all of the potential solutions. What are some measurable results the group hopes for, regardless of which intervention alternative will be chosen?