IDEAS Step 5B: Detailed Instructions for Facilitators

Rate & Select Intervention(s)

Goal of Step 5:

The Steering Committee reviews intervention alternatives proposed by the DT, provides feedback as necessary, and selects which intervention alternative(s) to implement, or develops new intervention alternative(s).

Important Terms:

<table>
<thead>
<tr>
<th>Selection Criteria</th>
<th>Key performance indicators (KPIs) set by the group that can be used to measure the effectiveness of activities and overall success of intervention alternatives in regard to: Scope, Benefits/Effectiveness, Obstacles/Barriers, and Resources/Costs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scope</td>
<td>The part of the organization (e.g., individuals, groups, whole parts of the organization) that the intervention is intended to benefit.</td>
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<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., etc.</td>
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<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>Some 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>
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</tbody>
</table>

Group Process (Steering Committee):

1. Assign a Revised Overall Rating to each of the intervention alternatives.
   - It is not unusual for the Steering Committee’s ratings of selection criteria to differ from those of the Design Team (e.g., new cost estimates by the Steering Committee may suggest that an intervention is not feasible).
   - The Steering Committee should reach a consensus about priority ranking.

This is a challenging step for a facilitator because it requires coordination of activities of both the SC and the design team, and because communication breakdowns can undermine the review process and result in good ideas for interventions being rejected for the wrong reasons.

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2. If none of the intervention alternatives have high ratings, consider discussing specific selection criteria with the Design Team and asking the Design Team to create a new, or modified, intervention alternative(s).

It is very important to have some successful interventions early in the program. Good candidates for these first interventions are ones that can be implemented relatively easily and without much cost, and which will have immediate measurable and apparent impact. Members of the design team need to become aware of these same priorities.

In general, the SC should avoid making snap judgments regarding intervention proposals.

3. As an alternative to #2, consider creating a new intervention alternative based on a combination of activities in the intervention alternatives proposed by the Design Team. Ask the Design Team to review any new intervention alternative and recommend any needed changes/adaptations.

4. Choose which, if any, of the intervention alternative(s) to implement.

5. If no intervention is chosen for implementation, communicate the specific reasons why to the Design Team, preferably in the context of a joint meeting.

“Accepting” or “Rejecting” are not the only options open to a SC when reviewing intervention proposals. It is usually possible for the SC to adapt an intervention, ideally through collaborating with the DT, while not compromising the major goal/objective of the intervention. Alternatively, it may be possible to implement the intervention on a smaller scale, and as a way to gather data that can be used to decide about or improve a full-scale intervention.

Important:
The Steering Committee can revise ratings of the intervention alternatives as it sees fit but consultation with the Design Team is encouraged to provide opportunities for productive discussions and new relevant information to be presented by the Design Team that might alter the Steering Committee’s ratings. Communicating and collaborating with the Design Team is an important way to gain and maintain Design Team support for an intervention.

Important for the Site Facilitator:
It may not be possible for the SC to support the highest ranked intervention alternative, or even the intervention alternative ranked second. The DT should be prepared for this, and still consider the lowest ranked intervention alternative as an important step forward in addressing the health & safety problem/issue at hand. If this is not the case, another intervention alternative should be created.
Prepare the DT for the possibility that the SC or upper management may feel the need to alter some aspects of an intervention alternative based on their additional evaluation and expertise.

It is important to prepare the DT for the possibility that the SC may find that none of the intervention alternatives are acceptable in their present form. If this is the case, specific feedback should be provided by the SC in Worksheet 5B about each intervention alternative to help guide the creation of new intervention alternatives by the group that would be acceptable. Alternatively or in addition, it may be helpful to hold joint meetings between the DT and SC to explore and discuss new intervention options.

SC decisions about intervention proposals should be made in a timely manner. For those intervention proposals that require a more lengthy review process, steps should be taken to keep the DT abreast of these deliberations to gain a sense of progress being made, and also to provide the group with a realistic time frame for when a decision can be expected.