IDEAS Step 2: Detailed Instructions for Facilitators
Set Measureable Objectives & Brainstorm Solution Activities

The process for Step 2 should take 1 – 2 meetings, again depending on the size of the group and the length of the meeting.

Worksheet 2 Goal:
A design team, preferably involving line-level employees, come up with several sets of activities, with each set of activities resulting in a full or partial solution to the main health & safety problem/issue that was identified in Worksheet 1.

Important Terms:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intervention</td>
<td>A set of activities designed to initiate workplace change to benefit employee health &amp; safety.</td>
</tr>
<tr>
<td>Major Health &amp; Safety Goal/Objective</td>
<td>An overall goal for what could be done about the health &amp; safety sub-issues identified in Worksheet 1.</td>
</tr>
<tr>
<td>Solution</td>
<td>A targeted goal for what could be done to achieve the Major Health &amp; Safety Goal/Objective/Sub-issue, making it easier to come up with ideas for specific actions.</td>
</tr>
<tr>
<td>Measureable improvement</td>
<td>An activity or solution that could be measured if the goal/objective was achieved.</td>
</tr>
</tbody>
</table>

Group Process:
1. Come up with a measureable health and safety objective that would be considered a solution (or progress toward a solution) to a sub-issue identified in Worksheet 1.
   - For example, a major goal/objective could be “Eliminating high levels of job stress” when the sub-issue is “Some jobs have become too stressful.”

- The group will need to refer to the sub-issues from a completed Worksheet 1 when choosing a major goal/objective.
- Recognizing contributing factors in Worksheet 1 that are related may suggest an overall objective that would address a majority of the sub-issues that are listed.
- This is a key step that should not be rushed because the quality of much of the intervention planning process that follows will depend on making good choices at this stage.
- The site facilitator should remind the group to focus on goals/objectives that are realistic, measurable, and achievable.
2. Brainstorm solutions that would achieve the major goal/objective.
   - Similar to what you did in Worksheet 1, break down the major goal/objective into potential solutions that are easier to work with (e.g., eliminate high levels of job stress when performing a specific task).
     - Solutions can often match up with sub-issues identified in Worksheet 1 but this is not always the case. It is important to consider new possibilities as well.
     - It should be the case that each potential solution will partially accomplish the main objective.
     - Each solution may require its own worksheet to flesh out.

3. Decide if achieving each solution would provide a measurable improvement (definition provided above).
   - If not, try to come up with a related new solution.
     - Provide the group with examples of things they could track, or measure, in the workplace, (e.g. number of accidents, specific activities during breaks, etc.).
     - Consider asking internal or external experts for help with a measurement approach, (e.g., to develop a short and targeted survey).

4. Come up with sets of specific activities that would help achieve each solution (and the major goal/objective).
   - Site facilitator should encourage balanced (or systems) approaches that incorporate both ergonomics principles and methods (changes in job design, the organization of work, workstations) and health promotion principles (information to promote changes in behaviors) and methods. A balanced approach is much more likely to be effective.

5. Decide if implementing each set of activities would be considered an important step forward in addressing the health & safety problem/issue identified in Worksheet 1.
   - If so, this specific set of activities can be considered an intervention alternative.
   - If not, come up with a new set of activities.
     - At this stage, the group should begin to cluster activities together into solutions that could become intervention alternatives.
     - All of the ideas for activities that were generated during the brainstorming process can be considered.
Each potential solution should represent something that the group would consider significant, and something the group would be satisfied with if it were the only solution that is implemented.

Remind the group that the solutions generated in this step are not yet final. Adjustments may be made to them based on the next steps in the IDEAS planning process.

6. Try to come up with at least three potential solutions. Sometimes a “hybrid solution” can be created by combining two sets of activities together to achieve greater impact (e.g., training + ergonomic redesign).

- The DT can become demoralized if the SC or upper management rejects a single intervention proposal, and this is one reason for generating a set of three potential solutions in Worksheet 2, which will make it more likely that multiple intervention alternatives will be presented to the SC. For example, the three potential solutions could vary widely depending on scope or cost. Preparing three potential solutions can also foster meaningful discussions between the DT and SC in Step 4, and may result in other potential solutions being generated.

- Remind the group that the potential solutions generated in this step are not yet final intervention alternatives. Adjustments may be made to them based on what is revealed by the next steps in the IDEAS planning process.

Important:
To promote needed creativity, avoid ruling out any contributing factors or solution activities at this stage. Discussion needs to continue until the group is satisfied that all potential solutions and activities have been identified. It may become necessary to update Worksheet 1 if new problem/issues have been raised, or if now there is a better way to define these. To the extent possible, an intervention alternative should include both ergonomic approaches and health promotion approaches.

Important for the Site Facilitator:
The IDEAS planning process has ordered steps but the group's understanding about health & safety problems/issues and corresponding solution activities and intervention possibilities will develop as you progress through the IDEAS planning process and worksheets. While it may seem to be inefficient, reviewing and updating earlier worksheets can considerably improve the quality of the resulting solution activities and intervention alternatives. Better intervention alternatives can be proposed by adopting a developmental process and philosophy.