



Healthy Workplace Participatory Program

A toolkit for advancing Total Worker Health®

IDEAS STEP 5

Rate and Select Interventions





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F Facilitator & Champion Preparation

To do:

1. **Watch:** Step 5 Training video: Rate and Select Intervention (*See Key Resources*)
2. **Review:** the Intervention Proposal Presentation Planning Guide for Design Team and Steering Committee (*See Key Resources*)
3. **Review:** the Detailed Guidance for leading IDEAS Step 5 on the following pages.

To know:

- The goal of IDEAS Step 5 is for the Steering Committee to rate and approve a Design Team intervention to be implemented.
- IDEAS Step 5 involves both the Design Team and the Steering Committee in three distinct phases. (*See Figure 1*)
- All SC members should plan to attend the DT proposal presentation. The proposal presentation is a time for managers to learn how workers view key safety or well-being concerns and to understand their thinking regarding solutions to problems. Decisions about interventions will be made later.
- Decisions about interventions should be made only after the SC has met separately to discuss and rate the proposed options. The SC will recommend approval for at least one option, although modifications may be requested.
- The success of Step 5 depends upon the quality of the communication between the Steering Committee and the Design Team. Taking time to coach and prepare both teams is well worth the effort to help ensure a positive, trust-building experience.



Fig 1: Sequence of activities for IDEAS Step 5: Rate and Select Interventions

Key Resources for rating and selecting interventions:

- **Step 5 Training Video:** Rate and Select Interventions
<https://www.uml.edu/Research/CPH-NEW/Healthy-Work-Participatory-Program/generate-solutions/rate-interventions.aspx>
- **IDEAS Step 5 Steering Committee Tools**
 - Handout -- Intervention Proposal Presentation Planning Guide for Design Team and Steering Committee
 - Handout -- Active Listening
 - Handout -- Giving and Receiving Feedback Effectively
- **Copies of completed IDEAS Steps 1-4 worksheets** (*from Design Team*)
- **Flip chart paper and markers** (*for general use during the proposal presentation*)
- **Blank Step 5 worksheet: Rate and Select Intervention Options**

Detailed guidance for leading IDEAS Step 5

Design Team presents interventions to SC

The Steering Committee and/or upper managers meet with the Design Team to receive a presentation regarding proposed interventions to address a specific safety, health, and well-being concern.

- It is important that all, or most, members of the Steering Committee are present at this meeting, and that the atmosphere is respectful, and open.

The proposal presentation is a time to learn how workers view key health, safety, or well-being concerns and understand their thinking regarding solutions to problems. Decisions about interventions will be made later.

Training should be provided to Steering Committee members **before** the Design Team presentation so they understand expectations and roles during IDEAS Steps 5, 6, & 7.

- Share the “Planning Guide” handout before the training meeting.
- Review the IDEAS 7-Step process, and the details of the Step 5 process.
- Review the communication techniques in the “Active Listening” and “Giving and Receiving Feedback” handouts.
 - Explain the importance of supportive communication during the proposal presentation.
 - Effective communication will help build a trusting partnership with the Design Team.

Design Team members should prepare and practice a presentation of their three intervention proposals. Help them to review the handouts: Active Listening, and Giving and Receiving Feedback Effectively.

SC rates interventions using the Step 5 Scoring Sheet

Step 5 involves the Steering Committee scoring and prioritizing the intervention options using the Rate and Select Intervention Options worksheet.

SC members will use the DT proposal information together with their management experience to rate the strengths and drawbacks of each intervention option.

- Completing this step after the DT proposal presentation allows the SC to use information from the DT as part of their appraisal process.

It is recommended that the SC discuss the proposal together as a group in a meeting that follows the DT proposal.

- The SC scores may or may not match the DT scores, and they may rank the intervention options in a different order than the DT.
- When the scores or rankings differ, it is important to document the reasons why so these can be effectively communicated to the Design Team.

Rating method

The Steering Committee assigns ratings for Scope, Effectiveness, Resources/Costs, and Obstacles to each intervention option that is proposed.

Ratings can be HIGH, MEDIUM, or LOW.

A HIGH rating (H)

An “H” is used to indicate that the activities, taken together in an intervention, **meet or exceed** what is stated in the selection criteria.

- For example, if “Scope” for an intervention would benefit all employees targeted for the intervention, then “Scope” for the intervention would receive a rating of “H” (high).

A MEDIUM rating (M)

An “M” is used to indicate that the activities, taken together in an intervention, only partially accomplishes what is stated in the selection criteria.

A LOW rating (L)

An “L” is used to indicate that the activities, taken together in an intervention, fail to accomplish, or barely accomplishes what is stated in the selection criteria.

Note: Using a numerical rating system is an acceptable alternative. However, the same rating system must be applied consistently by DT and SC during IDEAS Steps 4 and 5.

Steering Committee presents decision to Design Team

Once the SC has completed scoring and prioritizing of intervention options, they should prepare a detailed response to the DT proposal.

- Communicating a response to the Design Team in a timely manner is essential for instilling trust and a shared responsibility for advancing safety, health and well-being in the organization.
- An in-person meeting is most effective for trust-building and will allow DT members to ask follow up questions. Try to schedule a time when SC and all or most DT members can be present. Name a spokesperson to take the lead.
- Taking time to explain differences in perspectives on the scores is vital for building knowledge of DT members about the organizational resources, priorities and decision considerations. This new knowledge will increase DT commitment and their skills for future problem solving.
- Meeting materials should include Step 5 worksheet, and possibly, a brief outline of reasons for any scores that differ from those of the DT.

Moving to IDEAS Step 6:

Once a decision has been reached to approve an intervention, the Steering Committee can begin preparations for IDEAS Step 6 -- Intervention Implementation.

- Although the SC takes the lead, they can continue engaging the DT members as partners in the implementation and evaluation phases. DT members have valuable knowledge and can suggest practical considerations for preparation and roll-out of new interventions.
- DT members can assist by providing feedback on action plans, pilot testing or prototyping of new solutions, promoting and encouraging employees to participate in new interventions, and assisting with evaluation activities.

Post-meeting to do:

Prepare a follow up meeting with the SC (*and possibly selected DT members*) to plan for IDEAS Step 6: Intervention Implementation.

Schedule a follow up meeting with the DT to celebrate their accomplishments and to debrief on the Step 5 experience. They may wish to discuss any follow up communications needed with the SC relative to implementation and evaluation phases.

The Design Team will need to decide how and when to proceed with a new cycle of IDEAS to address another health, safety, and well-being issue or concern. They can review their list of priority issues from the "Getting Started" sessions, or they can consult with the Steering Committee when deciding the next issue they will tackle.