

Priority-Setting Evaluation Tool

Description:

This tool provides a checklist and two group priority-setting exercises.

How it can be used:

Everyone has had the experience of generating lists of potential actions, programs, interventions, and policy options. The challenge is how to decide which ideas should become priorities for action.

There are two key stages when considering how to assign priority to options. The first stage is a set of questions that assess elements over which you have no control. The second stage includes processes that provide the opportunity to assign priority based on criteria. The second stage narrows the options down to a meaningful and actionable plan and is often conducted in groups.

The techniques below take you through the two stages with differing levels of complexity and rigour to help you be more strategic in your decision-making. Use these to help make decisions faster, justify your choices to your leaders and funders, and build stakeholder engagement.

Stage 1 – Priority-Setting Criteria

High Priority

- It is required by legislation or a contractual obligation.
- It will result in a cost reduction and is consistent with organizational direction.
- It is identified by survey as a priority and will increase staff or client satisfaction.
- It is required for safety and protection of people and property.

Medium Priority

- It is required to ensure general management and control of resources and services.
- It will reduce costs in future years.
- It is required to inform as a result of accountability.
- It is required to assist with planning, coordination or modification of programs and services.

Low Priority

- It is not a critical support to client service.
- It benefits only a limited number of staff or clients.
- It is primarily promotional in nature.
- Demand has or will decline.

Stage 2 – Priority-Setting Processes

The priority-setting process starts when you already have a list of options. These options may have been identified through consultation with community members, professionals, literature and other sources.

Once you have a list of options, a good priority-setting process must have clearly defined:

- criteria on which to compare options
- processes to vote/score/rank
- roles and processes to make the final choices

Regardless of your process, there may be situations in which judgment calls are required. Clarify the roles and expectations at the outset, as failing to do so can result in conflict and damaged relationships. For

example, are 'votes' binding or 'recommendations'? Do any individuals have the power to make judgment calls (i.e., 'tie-breaker' situations) or veto certain group decisions?

The role of process facilitator should be carefully considered. It is important to have a neutral facilitator who is familiar with the process and skilled in handling differences of opinions, including all participants, and managing any conflict or issues that might arise during discussion. Being able to manage both the process and the people will help ensure that the exercise is successful and will be endorsed by those involved.

Two examples of priority-setting exercises are outlined below.

Dotmocracy

Dotmocracy is a technique that is quite common where participants are provided with sticky dots and invited to 'vote' on their top options. It is a subjective priority-setting process that is useful in situations when the opinions of participants are acceptable for making decisions. It works well with large groups (i.e., 20 – 30 participants) in situations when a quick 'read' of the group feelings is required.

1. Explain the voting criteria. Give stakeholders a direction on which to base their opinions, such as urgency, importance, reach, impact, etc. For example, if impact is a criterion, ask participants to place a dot beside the issue that would have the most impact.
2. Establish the voting process and rules. Provide direction about how many dots they will get and what they are allowed, or not allowed, to do with them. This includes whether or not they can put more than one dot on an item, if there is a time limit, or if they have to use all their dots.
3. Clarify how the decision will be made after the dots are posted. For example, does the option with the most votes win? The top three votes? Is the vote binding or is the process meant to serve as 'advice' for another group that will make decisions?
4. Post options on the wall and have people place their dots beside their choice.
5. Provide feedback to the group on the chosen options.

Quadrant Analysis or Decision Box

Quadrant analysis is useful if you have two clear criteria upon which to make a decision (for example, effort and impact), and those two criteria can be qualified in a dichotomous way (for example, high versus low.) Although this analysis reviews only two criteria, it is a slightly more rigorous and time-consuming method than the Dotmocracy method.

1. Choose and explain your two criteria. Examples of criteria pairs include:
 - cost / benefit
 - effort / impact
 - internal environment / external environment
 - mandate / community need
2. Identify your response categories. Examples of response categories include:
 - yes / no
 - good / bad
 - high / low
3. Name and provide a suggested action for each quadrant.

For example, if assessing tobacco cessation activities, make a list of all the options (e.g., establishing a full-time residency program, creating awareness brochures, setting up a school-based program, weekly radio ads, etc.)

| Tobacco Cessation Activities | High Effort | Low Effort |
|-------------------------------------|--|--|
| High Impact | Do we have the resources? <i>Is it sustainable?</i> | Most effective <i>Pursue these options</i> |
| Low Impact | No value <i>Avoid these options</i> | Are these worth the effort? <i>Can we avoid these activities?</i> |

4. Assign each option to a quadrant.
5. Based on actions in the quadrants, make a decision and create a plan.