Priority Sort: An Approach to Participatory Decision-Making

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Agenda

- Introduction
- Priority Sort Exercise
- Reflection and Discussion
- Tips and Tools
Introduction
What is Priority Sort?

A participatory priority-ranking exercise

It can be used to:

- Define the scope of an evaluation
- Prioritize strategic planning goals
- Define a complex concept
What is Priority Sort?

- Priority Sort has small groups of stakeholders or “experts” rank-order specified items
- The outputs are:
  - a) comparative rankings:
  - b) rich qualitative data; and
  - c) engaged participants
- Priority Sort evolved out of Q Methodology
What is Q Methodology?

- It is a research method used in psychology and other social sciences to study people's "subjectivity"
- Q Methodology has been adapted and used in many fields
- The International Society for the Scientific Study of Subjectivity (ISSSS): the official organization committed to all things Q: www.qmethod.org
Priority Sort Exercise
The Scenario

- You work at a small not-for-profit organization
- Management is overhauling the employee benefit package.
- Which benefits are most important to staff?
- This is just the beginning of the process.
Form Small Groups

- Form groups of 5-6
- Within each group, aim for a good mix of:
  - age
  - gender
Part 1: Rapid Sort

- Each benefit is printed on a recipe card
- With your small group, sort the cards into 5 categories:
  - 5 = More important
  - 1 = Less important
- Go with your initial impression (knee jerk reaction)
- Use a democratic process, move quickly
- You have 10 minutes
Part 2: Forced Sort

Now it gets more difficult...

- Refine your sort so that there are no more than 4 cards in each category
- Try to come to agreement about where each benefit should go
- Use blank cards to record any other important benefits (do not sort these)
- You have 25 minutes
Reflection

- How did the exercise feel to you?
What Happens Next?

- Large group discussion about:
  - New items
  - Items that generated a lot of discussion
  - Items where ratings differed substantially between groups
- Analysis of the rankings
- Analysis of the discussions
- Summary of findings
- Decision-making process
- Reporting back
## Sample: Reporting Back

<table>
<thead>
<tr>
<th>Important to most</th>
<th>Important to some</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid stat holidays</td>
<td>Working with other evaluators</td>
</tr>
<tr>
<td>Health &amp; dental</td>
<td>Supplementary EI</td>
</tr>
<tr>
<td>Paid sick days</td>
<td>Life insurance</td>
</tr>
<tr>
<td>Flex time</td>
<td>Telecommuting</td>
</tr>
<tr>
<td>Paid personal days</td>
<td>Disability insurance</td>
</tr>
<tr>
<td>Pension/RRSP</td>
<td>CES membership</td>
</tr>
<tr>
<td></td>
<td>PD budget</td>
</tr>
<tr>
<td></td>
<td>PD time</td>
</tr>
</tbody>
</table>
Examples
Example: IP COMPASS

How can they work together if they don’t learn together?
Example: IP COMPASS

- Self-assessment framework to help clinical sites consider their level of IPE preparedness
- To help clinical sites consider what they can do to enhance their preparedness to teach IPE.
- Constructs, factors and indicators generated as part of the study’s first phase.
- Priority sort used to identify critical factors for IPE preparedness.
### Example: Laying the Foundation for IP COMPASS

<table>
<thead>
<tr>
<th>Level of Specificity</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,000 Feet</td>
<td>“Vision and Leadership”</td>
</tr>
<tr>
<td>500 Feet</td>
<td>Effective IPE champions are in place</td>
</tr>
<tr>
<td>100 Feet</td>
<td>IPE champions engage staff from all professions, including nursing and medicine, in IPE IPE champions gain and maintain senior leader support for IPE Etc.</td>
</tr>
</tbody>
</table>

- 8 Overarching Constructs from study
- General Themes (Factors)
- Specific Sub-themes (Indicators)
Example #2

Goal
Help 2,500 women in their journey out of poverty

Activities
10 programs training in: trades & technology; self employment; employment

Short-term outcomes
- Strengthened assets
- Strengthened ability to earn a livelihood

Long-term outcomes
- Moving out of poverty
- Sustaining her livelihood
Example #2

- Physical (basic needs)
  1. Housing
  2. Food/Nutrition
  3. Safety
  4. Transportation
  5. Childcare/eldercare
  6. Recreation facilities
  7. Information & Technology
Reflection and Discussion
Reflection

- How can you imagine using this approach in your own practice?
- What factors would make this approach more or less useful?
Tips: Planning

- Prepare the items
  - At the right level (500-foot)
  - All at the same level
  - Not too abstract

- Get the right people:
  - In the room (topic expertise, vested interest, decisive)
  - At each table (mix of perspectives) → Seating plan
Tips: Managing Expectations

- Frame the activity within the context of the larger project
- Make sure people understand how the activity fits
- Clarify that the process informs decision-making, rather than being a decision-making process.
Tips: Implementation

- Do a dry run
- Provide a clear explanation of the process
- Keep to the time limits
- Have a trained facilitator at each table
- Have a trained note-taker at each table
- Acknowledge that it is difficult!
- Post relevant cues
Tips: Facilitation

- Manage group dynamics:
  - Make sure everyone has a chance to speak
  - Moderate anyone who is overpowering others
  - Deal with people’s frustration

- Keep the group moving through the items

- Deal with any underlying issues that prevent progress
Tips: Analysis

- Remember this is a qualitative technique
- Look for:
  - items that were identified as important by any of the groups (rated 1 or 2)
  - Items where there was disagreement in ratings within groups
- Analyse the reasons that certain items are/aren’t important
- Check that items are interpreted in a consistent way
Tips: Reporting

- Prepare different reports for different audiences
- Balance simplicity with thoroughness
Resources

- Package on website
  http://www.cathexisconsulting.ca/interesting/index.htm
  - Slide deck
  - References on Q-Methodology
  - Item card template
  - Anchor sheets
  - Note taker template
  - Ranking compilation template
  - Analysis template
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