



STRATEGYFINDER
Evaluations - Rating and Preferencing

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Introduction

Rating and Preferencing features of *Strategyfinder* are used often in all of the methods. They are extremely valuable for evaluation of a range of statements. The process also provides good closure to stages of a workshop and for the end of a workshop. The feature can be used in many different ways. In this manual some of the typical uses are discussed, particularly as used for Systemic Risk Assessment and Management¹, quick 2hr messy problem solving², and strategy development³.

The specific uses of rating and preferencing are presented in the appropriate manual. This brief manual provides more detailed instructions of the process of use.

Using the Rating Feature

Purpose of Rating:

Allows Users/participants to rate any number of statements against a scale set by the facilitator/leader/SuperUser.

Most often used to rate the following:


Relative importance/ priority/ impact:

For example, at the end of a session (for example when taking a break) allowing the group to make a rough judgement about the relative importance of the topics/clusters they have created provides the group with a sense of achievement and an indication of the extent of consensus about which topics they judge to be most important

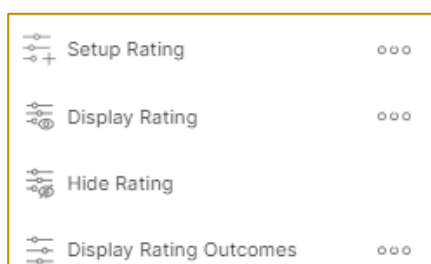
Relative progress against a target

Estimate of cost (see *Strategyfinder for Estimating using Delphi* manual)

Setting up and using the Rating Feature

1. Select the statements to be rated
Click on a statement, hold down the shift or ctrl key, select all other statements to be rated
HINT: rating more than 10-12 statements can be difficult for participants
2. Go to the 'Evaluations' menu 

Choose 'Setup Rating'.



¹ See manual: *Strategyfinder - Systemic Risk Management* manual

² See manual: *Strategyfinder - Team Solutionfinder: a 2 hr workshop – ad hoc work on a complex/messy problem*

³ See manual: *Strategyfinder - Team Strategy Finding: a 1-2 day workshop – to develop a first draft of a strategy*

- a. For Relative importance/ priority/ impact use the simple 0-10 scale.
 Instruct participants to establish those topics that they, for example, “regard as *most* important to address in the next workshop” and to set those at a rating of 10.
 Then establish which they regard as the *least* important and set these at zero (noting that because they are set at zero does not imply that they are not important, rather they are simply the least important).
 Instruct them to set at least one topic at zero and at least one at 10 – in order to establish ‘anchor points’.
 All other topics should then be set somewhere between 0 and 10 to register relative importance.
- b. For Relative progress against a target.
 Often used in a progress/review workshop. Thus, reviewing progress against ‘Strategy’ category and/or progress against ‘Action’ category.
 Typically, the scale now allows for a negative progress.
 Thus, a scale from -3 to +10 (or -30 to +100) works well.
 When there is a lack of consensus then a ‘Blind gather’ on a new view is used: asking for views on progress is variably evaluated.
 Similarly, when progress is consensually agreed to be poor or negative use ‘Blind gather’ to gather views on why this might be the case – a form of problem solving.
- c. For estimating costs.
 Setup rating, having selected a statement such as: “estimate the costs of the xxx project”.
 The scale should be set with respect to the maximum and minimum cost that will be presented by the expert group, plus 10%. Thus, if you judge the max estimate to be €70,000 then make a scale from the minimum to €80,000. Set the steps according to the degree of accuracy that is sensible. It is best to set the initial value at the most optimistic (lowest level).
 For example, for a project cost range of €30k-€80k and intervals of €1k (high accuracy) the setting looks like:

New Rating

Title (short description) Steps
 estimated costs of project xxx (€1k units) 1

Allowed values

30

 80

-100 -90 -80 -70 -60 -50 -40 -30 -20 -10 0 10 20 30 40 50 60 70 80 90 100

Initial value

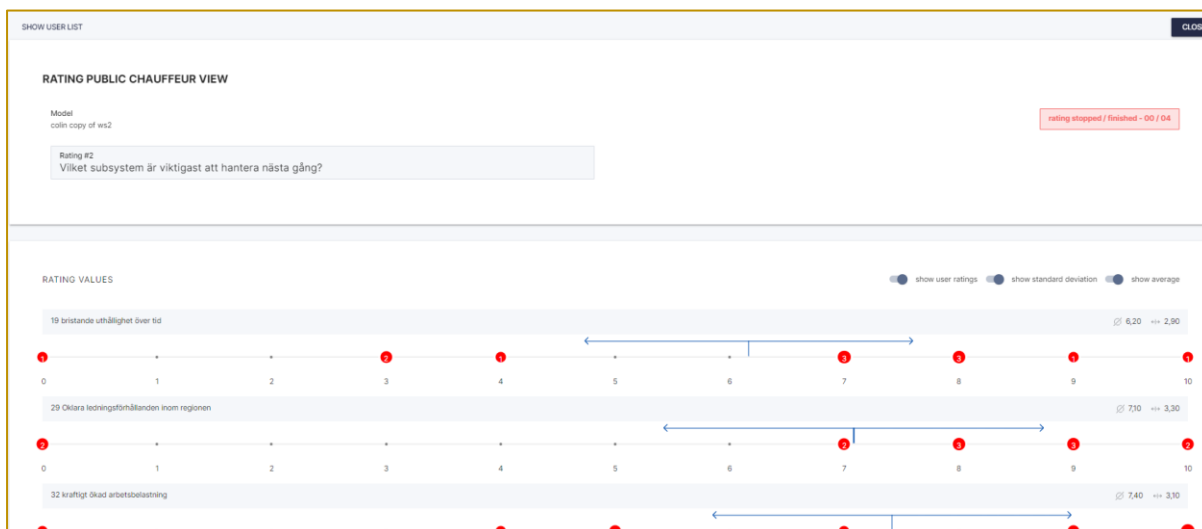
Start the rating and tell the group that this is the first best estimate, and they will continually refine it during the workshop.

Give a time limit for making the estimate (for this first estimate 5mins works well, as the experts arrive with an estimate already in their head.

Facilitator notes:

Some participants may over-think their judgments and so take too long to set their ratings. When this happens then try and encourage fast and rough judgements – remind the group that this an attempt to gain a *quick and rough idea* of whether some topics are clearly regarded consensually as the most important. Provide a timing deadline: “can you submit your ratings in the next 2 minutes please”. It is often necessary to i) suggest they use their browser controls so that they can see more of the list on their screen (using ctrl with -), and ii) that they need to submit their ratings.

- While the participants are making their judgments, the SuperUser will see the progression of the ratings being made:



Hovering over a red blob will show who entered the rating (as long as 'Show Statement Author on hover' is set to on in settings).

The number shown inside a red blob shows the number of participants who have rated at that rating.

For example:

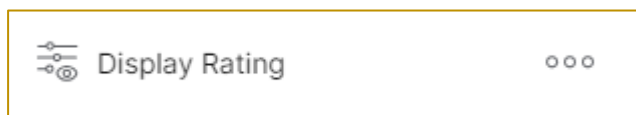


show that 2 participants entered a rating of 3.

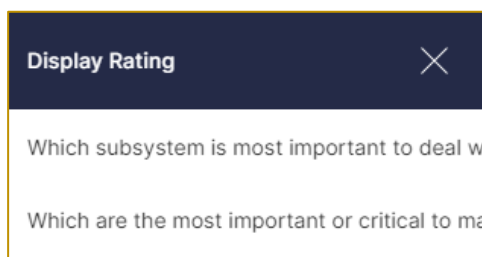
- Progress can be tracked using the 'SHOW USER LIST' at top left. This will show the list of those logged on to the model and will show green on the 3 icons: 🟢 = logged on, 🟢 = shows green started rating, and 🟢 = shows green when completed and confirmed.
- After all participants have made their judgments close the rating and return to model.

Display Rating results

From the 'Evaluations' menu, click on 'Display Rating':



A list of the ratings that have been undertaken will appear, with the most recent rating at the top of the list (thus, "Which subsystem..." is the most recent). From this list, click on the rating results to be displayed:



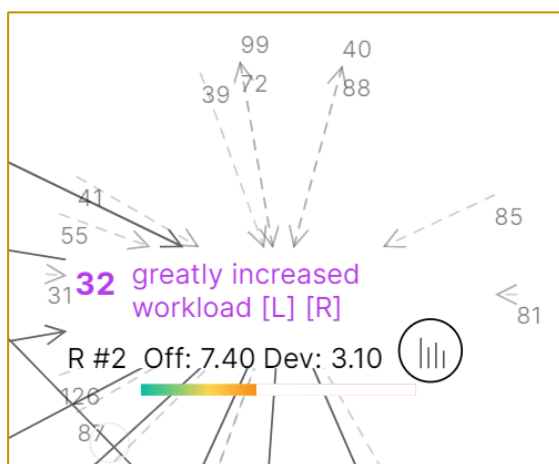
What the Rating display shows

In the below example, we see under each statement that was evaluated:

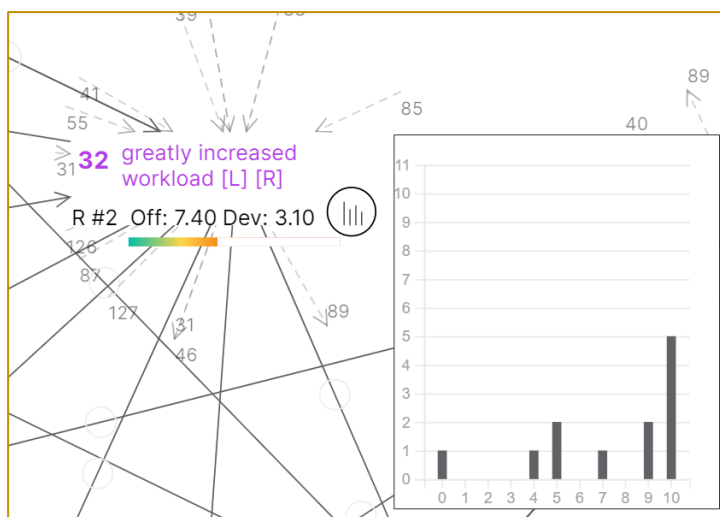
'R#2' which means that this is the 2nd rating to be undertaken

'Off: 7.40 Dev: 3.10' and a circle with vertical bars. These data show the average rating of 7.40, a measure of the relative degree of consensus (half the standard deviation) – the higher the number then the less consensus.


A coloured bar: this is a quick way to visualise the degree of consensus – when the bar shows just green then there is a high degree of consensus, when it shows red then there is little consensus. In the example below consensus is not good (almost showing red).



Clicking on the vertical bar graph icon will display the detailed results – the taller the bar then the more participants have entered that rating.



Presenting the results of Rating

Using 'presentation mode'  to display results of Rating to participants

Presentation mode is used when it is important that participants make no changes to the model. Thus, this mode 'freezes' the model except for the SuperUser (facilitator/leader).

Participants can see the display of the rating results as controlled by the SuperUser.

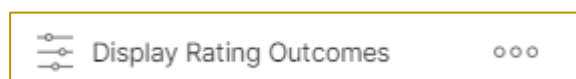
Remember to close presentation mode when display is complete. The icon turns red when turned on in order to act as a reminder.

Using share screen to display Rating results to participants

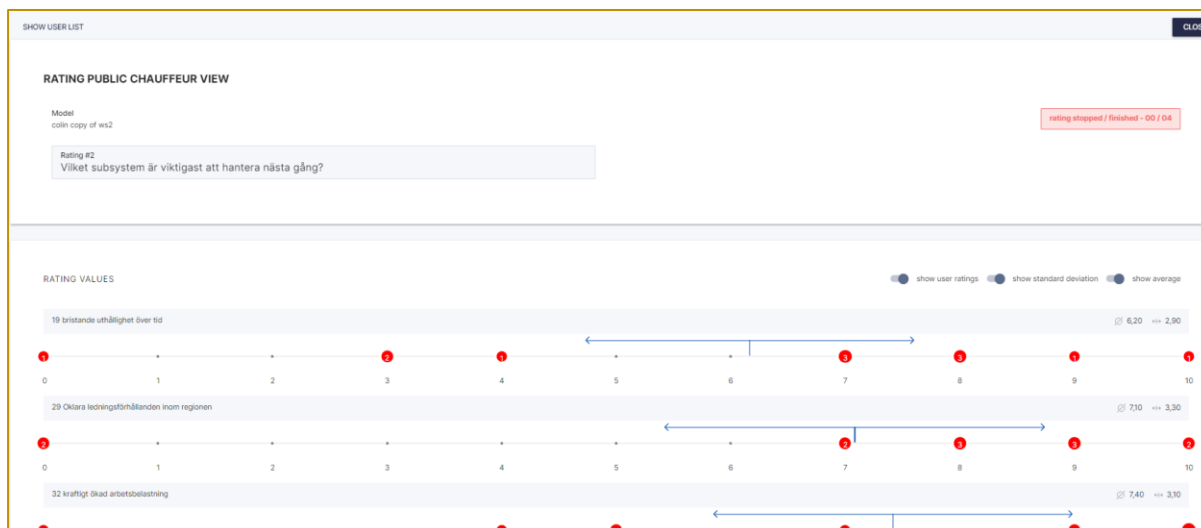
Beware that if sharing screen, then participants may see authorship as you hover over a statement (if 'Show Statement Author on hover' is on). Turn off 'Show Statement Author on hover' to avoid this outcome.

Remember to close shared screen when display is complete.

Using 'Display Rating Outcomes'



Display Rating Outcomes is a way of recalling the results of a rating session as seen by the SuperUser. Thus recalling:



This is useful for i) keeping an historical record of rating outcomes that can then be printed and enclosed in a report, or ii) recalling it during a workshop and using share screen to show the results in full (beware: if 'Show Statement Author on hover' is turned on then revealing author will occur).

Using the Preferencing Feature


Purpose of Preferencing:

Preferencing allows participants to express a preference for a selected statement by allocating resources. As compared to rating, preferencing forces a choice on the understanding that there are restricted resources.

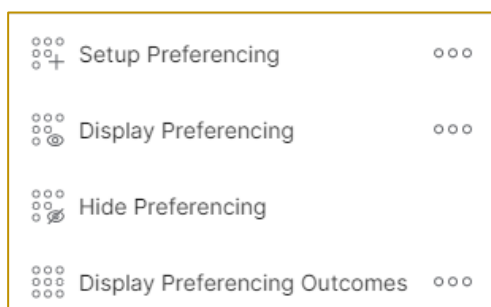
The resources are in the form of 'sticky blobs' of a variety of different colours. The sticky blobs are allocated to statements by moving them from a given stock of blobs, determined by the SuperUser/facilitator/leader, to a statement of choice. Blobs can be moved back to the stock or from one statement to another.

Typically preferencing is used to make an evaluation of a range of options. Participants are given two sets of resources they can allocate for i) the relative degree of impact (usually blue blobs) the option is judged to have on the key strategy to be addressed, and ii) the relative practicality (usually green blobs) of the option for the delivery of the strategy. In addition, often a third resource is available to enable anonymous expression of veto (red blobs).

Setting up and using the Preferencing Feature

1. Select the statements to be evaluated – usually those categorised as 'options' on a particular view that is focused on a particular strategy.
Click on a statement, hold down the shift or ctrl key, select all other statements to be rated
HINT: rating more than 10-12 statements can be difficult for participants
2. Go to the 'Evaluations' menu 

Choose 'Setup Preferencing'.



- a. Configure the preferencing:
The default settings are shown below

Configure your new preferencing

Title (short description)
Date 2023 06 03 Time 03:00:14

Types

Color	Quantity	all must be set	
■ green	- 3 +	<input checked="" type="checkbox"/>	
■ blue	- 3 +	<input checked="" type="checkbox"/>	×
■ red	- 3 +	<input checked="" type="checkbox"/>	×

Number of types 3 ADD TYPE

Selected statements

#	STATEMENT
16	deliver an action plan that strengthens mental health locally
17	open school for children in abusive households
19	more focus on specific vulnerable groups

CANCEL START PREFERENCING

Set the following:

- i) Change the default title to reflect the nature of the preferencing – in this case the options were addressing mental health during the pandemic.
- ii) Change the colours if required. Click on the colour and a complete palette of colours will appear from which a colour of choice can be made.
- iii) Change the description of the colour. In this example green will be used to indicate practicality, blue for impact, and red for veto.
- iv) Adjust the amount of resource. A good 'rule of thumb' is to allocate approximately two-thirds the number of resources as there are statements to evaluate. Thus in the example there are 10 options to be evaluated and so 7 blue and 7 green blobs will be given.
If participants are working in pairs then ensure that an odd number of blobs are given, so that at least one blob must be allocated by agreement.
For the veto evaluation it is usual to give 3 blobs.
- v) Finally determine whether all of the blobs for a colour must be set. For the veto (red) blobs this will be unticked, to allow for no vetos.
- vi) Note that additional colour blobs can be set, and the blue and red blobs removed (use the 'x' to remove) if only one colour is to be used.

Thus, the final configuration for our example is:

Configure your new preferencing

Title (short description)
Mental health strategy

Types

<p>Color</p> <div style="display: flex; align-items: center; margin-bottom: 5px;"> <div style="width: 15px; height: 15px; background-color: #00ff00; margin-right: 5px;"></div> practicality </div> <hr/> <div style="display: flex; align-items: center; margin-bottom: 5px;"> <div style="width: 15px; height: 15px; background-color: #0000ff; margin-right: 5px;"></div> impact </div> <hr/> <div style="display: flex; align-items: center; margin-bottom: 5px;"> <div style="width: 15px; height: 15px; background-color: #ff0000; margin-right: 5px;"></div> veto </div>	<p>Quantity</p> <div style="display: flex; align-items: center; margin-bottom: 5px;"> - 7 + </div> <hr/> <div style="display: flex; align-items: center; margin-bottom: 5px;"> - 7 + </div> <hr/> <div style="display: flex; align-items: center; margin-bottom: 5px;"> - 3 + </div>	<p><input checked="" type="checkbox"/> all must be set</p> <hr/> <p><input checked="" type="checkbox"/> all must be set</p> <hr/> <p><input type="checkbox"/> all must be set</p>	<div style="margin-bottom: 10px;">✕</div> <div>✕</div>
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Number of types 3 ADD TYPE

Selected statements

#	STATEMENT
16	deliver an action plan that strengthens mental health locally
17	open school for children in abusive households
19	more focus on specific vulnerable groups

CANCEL
START PREFERENCING

3. Start Preferencing, and the SuperUser screen changes to show progress:

SHOW USER LIST CLOSE PREFERENCING & RETURN TO M

PREFERENCING PUBLIC CHAUFFEUR VIEW

Model
StratDev and Analysis 4 Preferencing in progress - 00 / 07

Preferencing #3
Mental health strategy


STOP PREFERENCING

PREFERENCES AVAILABLE

practicality

impact

veto



PREFERENCES

#	Statement	Practicality	Impact	Veto
16	deliver an action plan that strengthens mental health locally	⊙	⊙	⊙
17	open school for children in abusive households	⊙	⊙	⊙
19	more focus on specific vulnerable groups	⊙	⊙	⊙
22	allocate more resources to volunteer agencies	⊙	⊙	⊙
23	make better use of the child protection unit	⊙	⊙	⊙
24	keep children's outside sports activities open	⊙	⊙	⊙
25	keep child protection services operative	⊙	⊙	⊙

Note that it can be helpful to temporarily change the browser setting to zoom out and see more of the statements (using ctrl -).

Facilitator notes:

Some participants may over-think their judgments and so take too long to set their ratings. When this happens then try and encourage fast and rough judgements – remind the group that this an attempt to gain a *quick and rough idea* of the relative impact and practicality of options. Provide a timing deadline: “can you submit your evaluations in the next 2 minutes please”. It is often

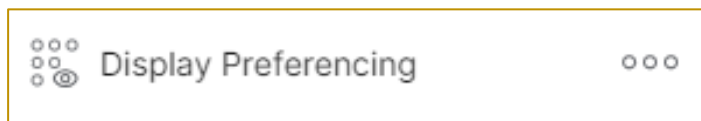
necessary to i) suggest they use their browser controls so that they can see more of the list on their screen (using ctrl with -), and ii) that they need to submit their ratings.

- Progress can be tracked using the 'SHOW USER LIST' at top left. This will show the list of those logged on to the model and will show green on the 3 icons: 🟢 = logged on, 🟡 = shows green started rating, and 🟢 = shows green when completed and confirmed.

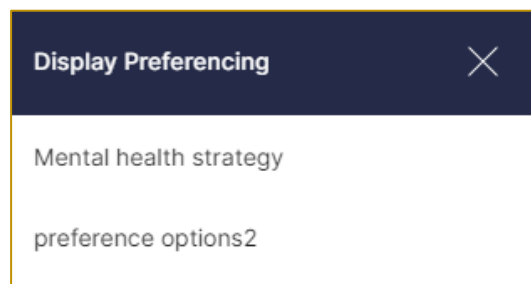
After all participants have made their judgments close the preferencing and return to model.

Display Preferencing results

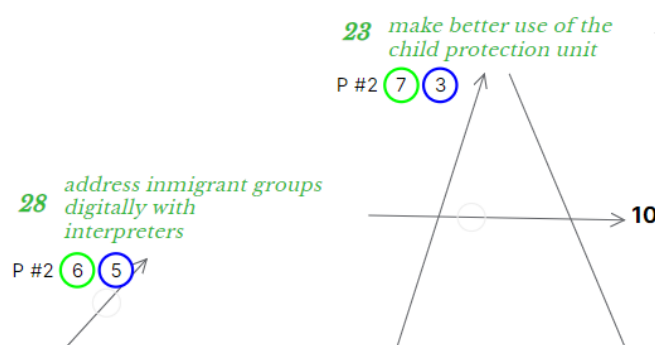
From the 'Evaluations' menu, click on 'Display Preferencing':



A list of the ratings that have been undertaken will appear, with the most recent preferencing at the top of the list (thus, "Mental health strategy" is the most recent). From this list, click on the preferencing results to be displayed:



What the Preferencing display shows




In this example, we see, under each statement that was evaluated:

'P #2' which means that this is the 2nd preferencing to be undertaken

The number of green blobs placed on the statement, then the number of blue blobs, the red (if placed). Thus statement 28 showed reasonable consensus and resources allocated to both impact and practicality, whereas for statement 23 impact was relatively low.

Presenting the results of Preferencing

Using 'presentation mode'  to display results of Preferencing to participants
Presentation mode is used when it is important that participants make no changes to the model. Thus, this mode 'freezes' the model except for the SuperUser (facilitator/leader).

Participants can see the display of the preferencing results as controlled by the SuperUser.

Remember to close presentation mode when display is complete. The icon turns red when turned on in order to act as a reminder.

Using share screen to display Preferencing results to participants

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Remember to close shared screen when display is complete.

Using 'Display Preferencing Outcomes'



Display Preferencing Outcomes is a way of recalling the results of a preferencing session as seen by the SuperUser. Thus recalling:

#	Statement	Practicality	Impact	Veto
16	deliver an action plan that strengthens mental health locally	5 green	0 blue	0 red
17	open school for children in abusive households	0 green	0 blue	0 red
19	more focus on specific vulnerable groups	0 green	0 blue	0 red
22	allocate more resources to volunteer agencies	0 green	0 blue	0 red
23	make better use of the child protection unit	0 green	0 blue	0 red
24	keep children's outside sports activities open	0 green	0 blue	0 red
25	keep child protection services operative	0 green	0 blue	0 red

This is useful for i) keeping an historical record of preferencing outcomes that can then be printed and enclosed in a report, or ii) recalling it during a workshop and using share screen to show the results in full (beware: if 'Show Statement Author on hover' is turned on then revealing author will occur).