

Criteria Screen¹

A criteria screen can be an effective decision-making tool to test potential strategies with criteria that reflect your needs and values, especially for big decisions that have a long term impact or affect multiple people. It:

- Provides a process to include and understand the values and needs of all of the stakeholders in a decision.
- Stimulates potential strategy ideas that are outside of our normal brain maps and routines.
- Guides evaluation of potential strategies as to how well they accomplish our Quality of Life criteria.
- Helps us decide what matters most. We might not be able to meet all of our criteria to a maximum level.

Criteria Screen Process

A Criteria Screen template for your use is provided on the last page of this document.

1. **Identify the Big Question** you want to evaluate.²
 - a. The importance of laying the proper groundwork before evaluating a strategy is emphasized in a quote from Albert Einstein. *If I had an hour to solve a problem and my life depended on the solution, I would spend the first 55 minutes determining the questions to ask, for once I know the proper questions, I could solve the problem in less than 5 minutes.*
 - b. Consider carefully who is affected by and should be involved with the decision. You might have two levels of stakeholders: primary and secondary.

Stakeholders: Primary and Secondary

- **Primary stakeholders** are the people who are most affected by the decision and the primary decision makers.
- **Secondary stakeholders** are affected by the decision but might not make the final decision or have the same weight on the final decision. It can be important to understand their criteria, and include them in strategic planning.

Case Study:

1. Big Question

Martin and I often use the *Criteria Screen* as part of our process when we are making big decisions.

On one occasion we were working on shifting our focus to life goals other than fulltime farming. It wasn't that we weren't enjoying farming anymore. We wanted to free up time and creative energy from the focus of the farm to develop other interests: writing, public speaking, helping farmers succeed, and studying music.

We first spent time collecting information about our present structure and assets. We articulated and challenged our assumptions. We talked with our kids—secondary stakeholders—and were reasonably certain they were not going to change their minds in the future and want to run the business.

We cycled through our big question in different formats: What, Why, How, When, Where, Which, and Yes or No. This helped us articulate what we really needed to ask. Some of the questions we shaped include: *What should we do with our lives? Should we quit farming? What is most important to us?* Different questions would have led us toward different strategies.

The big question that we ended up working with was: *How do we want to structure our time, living situation, and assets to accomplish our future life goals?*

¹ Adapted from, *The Nonprofit Strategy Revolution: Real-Time Strategic Planning in a Rapid-Response World*, David La Piana

² For further exploration on writing powerful questions see, *The Art Of Powerful Questions*, Eric E. Vogt, Juanita Brown, and David Isaacs http://umanitoba.ca/admin/human_resources/change/media/the-art-of-powerful-questions.pdf

2. Identify The Important Criteria: to evaluate your big question by.

- a. 4-6 is an effective number of criteria. More than 6 is generally too many.
- b. One of your criteria should address your financial needs.
- c. You may find that some of your criteria are similar and can be combined into one concept.
- d. Look to your holistic goal to inform your criteria.
- e. Include the values and needs of all the stakeholders in your criteria development.

3. Brainstorm Potential Strategies to address your big question.

- a. Set a goal of a minimum of 20 ideas. Often it takes a few crazy ones to get the juices flowing. Write them down as they come.
- b. In your brainstorm, temporarily suspend judgment—that includes financial impacts. You will evaluate later in the scoring process. Analysis at this point shuts down the process.
- c. Any idea is great. **Yes and!** is a good response. Crazy ideas from can morph into creative solutions.

4. Discuss The Potential Strategies

- a. There may be some that you'd like to work on developing further before evaluating.
- b. Decide which of them you'd like to score.

5. Score Each Potential Strategy

- a. For each strategy, ask, *on a scale of 0-5, if we do this strategy, how well do I expect we will meet this criteria. (5 is best)*
- b. First do this scoring each person independently without discussion. The goal is to bring out everyone's perspective for an in-depth analysis.

Case Study Continued:

2. Identify Criteria

- a. Our criteria included financial stability, what we might think looking backwards in time from our death, how the strategy would serves our family, community, and the world, self-care, and how well the strategy might serve our new life direction.
- c. Emotional, personal, and physical health are of high importance to us and are linked criteria—they affect each other. They were combined into one criteria of self-care. The term self-care helps us address these needs through an active concept because meeting our health goals requires dedicated time, planning, and effort.
- d. These criteria reflected our holistic goals of self-care, and meaningful lives that serve our family, community, and the world. The deathbed criteria helped us to consider our holistic goals from a hindsight perspective.
- e. Martin and I were the primary decision makers. We first laid out our criteria together. Then we had a discussion with our kids to gather their input on criteria. They were secondary decision makers in this decision—what we did with the farm would affect them even though they were no longer directly involved and they have expressed that they have no desire to run the farm in the future. They also provided valuable input, perspective, and insight. They knew they would not be final decision makers.

3. Brainstorm Potential Strategies

Brainstorming gave us 20 unique—YES and!—strategies. Some of them seemed crazy—*spend 4 years living in a different city of the world each month*. Others seemed non-adventurous (to me)—*continue a downsized farm, hire a manager and farm half time*.

4. Discuss Potential Strategies

One potential strategy from the brainstorm that caught our interest and generated a lot of discussion was *downsize and farm half time*. We discussed what we saw as pros and cons about the idea. This led to the additional potential strategy of *rent the farm to a beginning farmer and focus 100% on our new life goals*.

Below is an example of the *Criteria Screen* with 5 of the 20 strategies that Martin and I evaluated.

Before we evaluated our scored strategies we asked; *if we take no action, just let life happen, which of these strategies is most likely to happen—the default.* We were fascinated later, when the two strategies we had identified as defaults, got low scores in the evaluation process.

5. Score Each Potential Strategy

Martin and I have very different thinking processes and ways of perceiving. This can be a big challenge if one of us gets caught up with being right. However, when we work together and incorporate our diverse perspectives, the reality that we are so different is a huge asset to our decision-making. When we come back together to discuss our scores we often have significantly different numbers. We each think about the criteria through different lenses. This gives us a broad and valuable analysis to make a solid decision with.

Question: <i>How do we want to structure our time, living situation, and assets to accomplish our future life goals?</i>					
Stakeholders Involved: Atina and Martin—primary, kids—secondary				Date: 11.5.2005	
Strategies →	<i>Downsize farm, hire a manager, farm half time.</i>	<i>4 years living in a different city each month.</i>	<i>Sell out in MN, move to Montana mountains.</i>	<i>Restructure farm as rental to a beginning farmer. Dedicate life to new goals.</i>	<i>Keep farm as is, work on selling farm to employee.</i>
Criteria ↓					
Financial stability	3	2	5	4	4
Serves our family	3	2	1	4	3
Serves the community	3	1	3	5	3
Focus: new life goals	2	3	3	5	2
Look back from death	0	2	3	5	2
Self-care	1	2	3	5	2
TOTAL SCORE	12	12	18	28	16

6. Total Your Scores The highest score doesn't automatically make it the best decision. This is a discussion and creativity tool.

- 7. Discuss:** After each person has finished scoring, share your numbers and discuss.
- Look first for where you are in agreement.
 - Share your different perspectives without trying to change each other.
 - Work to understand each other's perspective. Ask questions, like, *tell me about your thought process on ____.*

8. Discuss Your Next Steps. Consider using an *Action Plan* to support planning and implementation.³

Case Study Continued:

Before we began this process we were confused and felt stuck. The process raised questions, helped develop our thinking, and gave us an invaluable tool to evaluate ideas.

This was a BIG decision for us. When we began the process in 2005, our farm was 36 years old, financially successful, and had been our fulltime work focus for decades. The Criteria Screen was one of multiple processes we used. As we moved through the process our potential strategies evolved. *Restructure farm as a rental to a beginning farmer and dedicate life to new goals*, combined with *sell the business* and with *live in Montana*.

In 2008 we sold our name and equipment to one of our customers. The farmland has been placed into a conservation easement to protect it from development; the land has been fenced with a NRCS grant and is being rotationally grazed by a beginning farmer. Martin and I spend time both on the MN farm and in Montana. Our primary life focus is now as we envisioned—writing, public speaking, helping farmers succeed, and music.

³ Download *Action Plan Template* at www.atinadiffley.com/quality-of-life
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