1. Decision-Making Model

We use the Advice Process decision-making model. The essence of the model is this:

1) **Identify the person closest to the decision, or the person with the most energy, skill, and experience to make the decision.**
2) **That person proactively seeks advice from the following:**
    a. **Everyone who will be significantly affected by the decision.**
    b. **People with expertise in the matter being decided.**
3) **That person makes the decision.**

Clarity on how decisions will be made on a consistent basis throughout the organization is essential. Regularly using the Decision Screen creates alignment across the organization and supports clarity and commitment to common goals.

Decision Screen

Fill out the Decision Screen completely. Don't skip any sections!

1: Lay the Groundwork

What decision needs to be made? What specifically are you trying to solve with this decision? Be careful about bundling together a bunch of different decisions into one single decision!	
What is the deadline for making the decision?	
Who will make this decision? This is the person closest and/or with the most energy, skills, or experience. This person may choose to defer to a group for a given decision, but needs to hold responsibility for coordinating this decision-making process. If you do want to have a group decide, also list everyone in the decision-making group.	
Who will be consulted for advice? Must include everyone significantly impacted and people with expertise regarding the decision. Likely includes your supervisor and your team. Make sure they understand the full impact of the decision and have enough time to process. Consider the importance of involving them in this process, from those who are primary (most impacted/most useful feedback) to those who are secondary/tertiary and don't need to be involved so heavily.	

2: Choose the Right Process and Supports

In order to identify an effective process, consider: **How important is this decision?** The more people who are significantly impacted by the decision, the more intensive the process likely needs to be.

You are not alone in making your decision. There are many different tools and approaches you can use to get the support you need to make a good decision. Choose which of the following approaches you will use to make your decision:

- ❏ **Decide and announce** – If this is a decision that doesn't significantly impact anyone else, and you have all the information you need, you can just decide on your own.
- ❏ **Gather input from individuals and decide** – If this decision only impacts a few people, then you may collect feedback individually, particularly from your supervisor and people outside your organization with useful expertise.
- ❏ **Gather input from group and decide** – Often, your program team will be a good place to go for advice on important decisions, and/or you may want to convene other groups (such as partner organizations that are significantly impacted by a given decision), and use different facilitators' tools, such as dot-voting, to identify areas of shared agreement or priority.
- ❏ **Make group decision** – For larger decisions that significantly impact a group of people, where that group of people has built trust to be able to creatively collaborate and openly disagree, you can use tools such as fist-to-five or the consent principle to make group decisions. These approaches offer individuals the opportunity to provide more nuanced feedback than simple voting, and you can put guardrails in place to ensure that decisions can still move forward unless someone can identify a risk that the group cannot afford to take. Be sure to decide in advance what you will do if the decision is blocked, and communicate that transparently.
- ❏ **Ask someone else to make the decision** – If you don't feel comfortable making a decision, consider that maybe it's not yours to make; get advice from others on who should make the decision. if you do realize that you are not the right person to make a given decision, or if you want to delegate the decision to a different person whom you trust will make a good decision, you may ask them to make the decision, with full awareness that they are now the designated decision-maker, not you. You cannot override their decision, since it is no longer your decision to make.
- ❏ **Instead of trying to make a big decision, make a smaller decision to test an approach** – if you are finding it difficult/time-consuming to make a big decision, you can decide to test an approach much more quickly. Since testing something out does not change things forever, it has less of an impact on other people. Try using Design Thinking or other experimenting tools to quickly prototype and iterate options, instead of trying to decide everything in advance.

What process are you using to make the decision? Name which of the above approaches you are using, or describe what you are doing if you are using a new approach not listed here.	
What support do you need in order to feel comfortable making a good decision? What feels uncertain for you? What barriers are you facing in making this decision?	

3: Make a Plan

When and how will you first announce to others that this decision-making process is underway? Use staff-wide communication tools like the Updates Board, and share this decision screen.	
What criteria will you use to make this decision? How will you know whether the decision is good enough, and whether the decision causes harm? Consider the implications of this decision. **Share the criteria when you ask for feedback.** You may need to refine the criteria during the process, particularly if those who are most impacted provide different criteria.	
How will you make the decision? Outline the timeline and process steps. For bigger decisions, consider using "open-narrow-close" as a framework to plan your decision-making process: 1. Start with an open-ended brainstorm/idea collection involving those most impacted. 2. Identify a process for narrowing down to a few options or a single proposal, using the criteria listed above. 3. Given the decision-making process you selected, how will you "close" and make the final decision? For important/complicated decisions, you may need to develop and refine a proposal, which could involve multiple rounds of feedback. Plan ahead, clearly outlining all the steps here.	
How and when will you inform people about what decision was made and why? What are the next steps after you make this decision?	
When will you revisit this decision and learn from it? Write down a specific date and put it on your calendar right now. Taking time to reflect on the outcome of a decision is crucial to effective design thinking.	

Decision Implications

Briefly skim this section to consider whether these implications are relevant to your decision, and add notes wherever that is the case. For less-important decisions, you may not use this section as heavily.

Strategic Implications ● Is this decision in alignment with our mission and values? ● How strongly aligned is it with our strategic priorities?	
Partnership Implications ● How will this opportunity impact our community partners? ● Will it expand our ability to be present and participate in a concrete way in our community?	
Workload Implications ● Whose workloads are impacted? How much time will be needed from them? Will any time be saved? ● How will this be built into staff workplans? Will this work have a ripple effect on other timelines? ● Is the timeline realistic, in the context of other work? ● Does this decision impact other decisions? How are you planning for that effectively?	
Financial Implications ● How much will this cost? (i.e. staff time, supplies, external expertise) ● What are the budget parameters? (i.e. are you limited in your scope because there's only $X available? Will funds need to be reallocated?) ● Does this decision require someone else making a decision to allocate more funds to this? ● What are the fundraising needs of this opportunity?	