



PRIORITIZATION CRITERIA MATRIX WORKSHEET

The following worksheet guides users through identifying potential prioritization criteria, refining these priorities, and developing a matrix to rank the climate action strategies.

Figure 1. Potential Prioritization Criteria

This figure presents a list of potential criteria that may be of use in prioritizing climate action strategies. It is not an exhaustive list of criteria.

Criteria	Explanation
A. Anticipated Outcomes	
Equity	
Health Equity	<i>Does this strategy promote health equity? Will this strategy reduce health disparities?</i>
Population of Focus	<i>Does this strategy positively affect those currently experiencing health inequities or most burdened/most likely to be burdened by the impact of climate?</i>
Effect on Specific Populations	<i>Will the proposed action adversely affect one or a few segments of the population?</i>
Racial Justice	<i>Does this strategy contribute to more racial equity or justice in your jurisdiction as a whole?</i>
Impact	
Overall Health Impact	<i>How significant will the overall health benefits be?</i>
Mitigation Impacts	<i>How significant are the mitigation benefits? Does this strategy target sectors with the highest emissions?</i>
Effectiveness/ Plausible Outcomes	<i>Can this strategy reasonably be expected to lead to relevant outcomes?</i>
Reach	<i>How many people in our jurisdiction are affected by this strategy?</i>
Time frame	<i>How long until this strategy shows effects? Does the strategy reflect the urgency of the problem?</i>
Return on Investment	<i>Does the amount of benefit received from this strategy outweigh what we will spend on this strategy? Can we quantify it in economic terms?</i>
Long Term Solution	<i>How much does this strategy address the problem, not just symptoms?</i>
Other	
Mitigation/ Adaptation Win-Win	<i>Does this strategy address both adaptation and mitigation?</i>
Co-benefits	<i>Are there multiple benefits from this strategy? (For example, improving active transportation and reducing air pollution.)</i>
Unintended Consequences/ Maladaptation	<i>Is there potential for unintended consequences or maladaptation from this strategy? Could the strategy create more or bigger problems than it solves?</i>
Challenges	<i>Are there significant challenges with this strategy?</i>



PRIORITIZATION CRITERIA MATRIX WORKSHEET

Criteria	Explanation
Replicability	<i>Could other jurisdictions learn from and implement this strategy?</i>
Unique Role	<i>Is another agency likely to take significant action? Or is nothing likely to happen unless we take it on?</i>
B. Feasibility	
Staff Time	<i>Do we have enough staff time for this strategy?</i>
Expertise	<i>Do we have the appropriate experts, either on our team or identified, for this strategy?</i>
Funding	<i>Do we have enough funding to plan and implement this strategy?</i>
Maintenance	<i>If this strategy requires upkeep, can the community/organization commit to continued care or investment?</i>
Sequencing	<i>Does this strategy make more sense after another has been implemented?</i>
Maturity	<i>What is the stage of development or implementation for this strategy?</i>
Leadership Support	<i>Is there support to plan and implement this strategy? Let "leadership" be defined by the highest level of decision maker who will be involved.</i>
Interest Holder Engagement	<i>Are there multiple interest holders invested in this strategy?</i>
Centrality	<i>Is this strategy connected to a larger goal or priority for our partners across the jurisdiction?</i>
Plan Alignment	<i>How closely aligned is this strategy with our jurisdiction's public health plan?</i>
Evaluation Ease	<i>How easy will evaluating the process or outcome be? Is there a specific, measurable data source available for measuring the health impact of this strategy? (Potential metrics: DALYs, economic, heat related illness rates, emergency department visits, asthma rate)</i>
Evaluation Use	<i>Is it likely that results or recommendations from this evaluation will be used by the intended audiences?</i>
Challenges	<i>How challenging will it be to implement this strategy</i>
Potential Legal Challenge	<i>Are there any potential legal consequences? Is the action likely to be challenged through legal processes?</i>



PRIORITIZATION CRITERIA MATRIX WORKSHEET

Selecting Prioritization Criteria

Use Table 1 to generate a list of possible criteria for prioritizing your climate action strategies, narrowing them down, and making a decision about which criteria to use

Instructions:

1. Review Figure 1, which provides a list of potential prioritization criteria for climate and health projects. Also review ideas for prioritization criteria from community input and agency and team priorities.
2. Add all criteria of interest to the first column in Table 1. Add information about the core idea of each criterion to the Explanation column; add information about the source of the criterion to the Source column.
3. Share the draft table with the team and partners and discuss.
4. Thinking broadly about the goals, consider what factors are key to selecting a climate action strategy. Add any missing criteria to the list.
5. Continuing to think about overall goals, indicate in the final column whether the criterion should be used, should not be, or is a maybe.
6. Narrow the list. The ideal number of criteria is likely 3 - 7.
 - a. Criteria fall into different types of categories. You will likely want to select some criteria from each of two categories above in Figure 1: (A) anticipated outcomes and (B) feasibility.
 - b. Can you group or bundle any naturally related ideas?
 - c. As you are honing in on the criteria, consider whether you are including factors emphasized by community representatives and members.
 - d. When you have selected the criteria, go to Table 2.

Table 1: Selecting Prioritization Criteria

Criteria of Interest	Explanation	Source <i>(Community, Team, Chart, etc)</i>	How Important to Include? <i>(yes, maybe, no)</i>



PRIORITIZATION CRITERIA MATRIX WORKSHEET

Preparing Prioritization Criteria

Use Table 2 to think through decisions about the criteria that you selected. You can do this exercise individually or as a group.

Instructions

1. Take the criteria you selected in Table 1 and list them in the Selected Criteria column in Table 2.
2. Use the second column (Explanation) to describe the gist of each criterion, framing it so that reviewers can answer the question or issue posed in selecting a rating. You can start with an initial effort and then revisit it and rephrase it once you have thought more in the next few steps about the decisions reviewers will make.
3. Use the third column (Scale) to make decisions about how to rate each criterion. It is simplest to use a consistent scale with a narrow range for ranking each criterion. We recommend a scale from 1 to 3.
 - 1 = Does not meet criteria
 - 2 = Moderately meets criteria
 - 3 = Fully meets criteria

Use a scale with more differentiation or different scales for each criteria if needed – just be sure there is clarity about what each designation means. Another popular approach is to assign a stoplight color as your rank – red, yellow, or green.

As part of this step, we also recommend writing out in the table what each rank means for a given criterion, to make sure reviewers agree. For example, use the table to explain what each rank means for a given criterion and ensure that all reviewers agree.

- 1 = Has low to no positive health impact
 - 2 = Has moderate positive health impact
 - 3 = Has significant positive health impact
4. Use the fourth column to consider criteria weighting. Weighting reflects different levels of importance, due to community values, practical factors, or other reasons. One approach is to multiply the most important criterion or criteria by 2. A second method is to assign each criterion a percentage value (all factors should add up to 100%). Participants should agree on the weighting system.



PRIORITIZATION CRITERIA MATRIX WORKSHEET

Table 2: Preparing Prioritization Criteria

Selected Criteria	Explanation <i>(Revise to match how the team understands criteria)</i>	Scale <i>(What range and what does each choice mean in terms of a specific criterion)</i>	Weighting
<i>Example: Health Equity</i>	<i>Considers how meaningfully this strategy promotes health equity and reduces disparities</i>	<i>1=little to no health equity benefits 2=moderate health equity benefits 3= high health equity benefits</i>	<i>25%</i>



PRIORITIZATION CRITERIA MATRIX WORKSHEET

Matrix for Ranking Strategies with Prioritization Criteria

Use this matrix below to engage in the actual ranking of climate action strategies using the selected criteria. Have each member of the team fill the matrix out individually and then come together to compare them, or complete it together as a group exercise.

Instructions:

1. Use Table 3 to develop the matrix for use by one or more people for ranking the potential climate action strategies by the prioritization criteria.
 - a. You may want to begin by copying the matrix into a spreadsheet format, so that you can use formulas to add up the rankings.
 - b. Insert the climate action strategy options from the Investigate Options list.
 - c. Next, insert the selected criteria from Table 2.
 - d. If you want to have them in Table 3, add a row to include the scale for each criterion.
 - e. Add the weighting information, if any.
 - f. Next, have someone who is experienced with spreadsheets create a formula that takes the ranking for each criterion, weights it, and adds the results to produce a total score for each strategy.
 - g. Once the matrix is ready, test it and explore the weightings by running some examples – see whether the strategy rankings fit with the goals. Revise the plan as needed.
2. Rank the strategies.
 - a. Share the completed table with the team.
 - b. Make sure that the team is familiar with the results of Investigate Options systematic investigation of the strategy options, so that they have a sense of what each strategy would involve, as well as any results that might inform prioritization criteria rankings.
 - c. Have each reviewer or participant rank each strategy and then compare or average the results. Alternatively, do this as a group exercise.
 - d. Review the findings. The results provide an indication of how well different strategies fit the criteria, but do not determine which strategy is best. Give due consideration to the rankings while also being open to other factors that may influence the final decision.
3. Finalize and share.
 - a. Make modifications as needed, with particular consideration for health equity.
 - b. Share the process and results with partners.



PRIORITIZATION CRITERIA MATRIX WORKSHEET

Example Matrix

Climate Action Strategy	Criteria and Weighting					Total Score =
<i>Example:</i> Tree Planting	<i>insert criteria</i>	Health Equity	Challenges	Staff Time	Overall Health Impact	100%
	<i>insert weighting</i>	25%	25%	15%	35%	

Table 3. Matrix for Ranking Strategies with Prioritization Criteria

Climate Action Strategy	Criteria and Weighting					Total Score =
Strategy 1:						
Strategy 2:						
Strategy 3:						