

Strategic Decision-Making Tool



An initial approach by a member of staff via a Bid, Grant or Project Plan document is presented to the Business Manager, or a request from a stakeholder will be presented to the Business Manager or CEO. The project will initially be assessed against the core values of the organisation using this Strategic Decision-Making flowchart. The questions to ask at this point are

1. Will it impact on the lives of those who work or live in Essex?
2. Does it relate to Health, Social Care or Wellbeing?
3. Is it based in lived experience?
4. Does it fit in with our strategic direction?

If it answers yes to all of these questions then progress to the next stage, if the answer is no, then consider the reasons why and if these can be adapted or amended to fit with the core values of Healthwatch Essex ([HWE Strategy Document](#)) and it links to the strategy and can fit into the operational plan.



Using the principle of project management assess if the project scope, timeframe and outcomes for the project are achievable, if not, they are negotiable. It may be that we are required to go back to the stakeholder holder with an offer. If this is the case, then tolerances should be discussed at this point so a decision can be carried out by the key contact without unnecessary delay or unagreed level of compromise. From bids we would be submitting independently we would require 3 weeks-notice, for those that require a partnership 6 weeks is required (confidence interval of 5 working days).



Occasionally we will be approached by a key stakeholder or board member with a particular request for input outside of the parameters of our normal work. It may be that this is as secondary activity that we can carry out as a learning opportunity or as a loss leader in order to support a cause or organisation we are passionate about. It may be that a decision to progress is based on the potential for additional profitmaking work in the future or due to social return on investment.

It could be that the senior managers agree to take on this project despite it not fitting in with our primary functions. At this point, we would need to ensure that no negative impacts in term of staff wellbeing, individual or organisational reputation were a possible outcome. Once these concerns have been satisfied a



decision to progress can be made, this should be supported by a pros and cons assessment which is documented for review or scrutiny.



When it has been decided that a project fits with the values of the organisation it needs to be scrutinised against the current capacity and skill set of the staff. If we do not currently have the skills set it needs to be determined what we are missing and if this can be learnt in the time scales required for the project. This may mean some formal training is required or a secondment or mentoring program is established within the organisation or with an external provider. Even if this is at a cost it could be that it is justified as learning and personal development opportunity for the staff involved. If we do not have the current capacity but the project is one we would want to progress, a full scoping activity must be carried out to access quotes for the completion of the elements of the project required. When accessing quotes, the principles outlined in terms of financial prudence must be followed ([add link to SOP](#)).



Those project in which we will not make a profit need careful assessment. We would need to assess the potential impact of the project. Some of the work we carry out has implications that positively impact on the immediate health and wellbeing of the people of Essex, others have ramification far beyond the county and can be used as a platform to start conversations or debate that led to large scale change.



Although Healthwatch Essex is a charity and is not set out to be a profit-making organisation it needs to be viable, to ensure this we need to carryout project that enable to break even or make a profit. The profits made are ploughed back into the organisation allowing us to employ more local people and address local issues relating to health and social care. We also have a firm commitment to our staff and use profits within the organisation to support the personal and professional development of those we employ, the volunteers who work with us and the communities we support.

It may be that the project is considered part of our core offer as determined by the agreement for the year with the grant provider ([Grant agreement](#)) or that it will be a cost neutral project, but it has a high social return on investment. As a trusted and responsible charity, we have a duty to support our staff and local community in an ethical and responsible way.

