

## Plan2Fund OPT Instructions

The **Objective Prioritization Tool** is designed to help organizations determine the order of implementation priorities for strategic activities.

The process of using the tool is relatively simple and consists of 10 steps:

1. Once you are registered, go to the **Welcome** screen and left-click on the first link; "*Click here to register or log...*"
2. This will bring you to the **Objective Prioritization Tool (OPT)** screen that you use to create a new model. In the **Title** box, enter a name for your prioritization model. Add a **Description** of the model, too.
3. Click on the **Save** button to create and save the new model. Or click on **Return** to see a listing of all of the models you have created.
4. Next, you'll see a list of the model(s) you have created. Left click on the **Title** of the model you would like to open and work with.
5. Select the menu tab called **Objectives**. You can view the sample objective by clicking on the **pencil icon** under **Edit/View**. Left click on the **Return** button.
6. Left click on the link with the **green cross (Add Objective)**. Enter an objective that you need to achieve in your strategic plan. Select a unique color for each objective so you can track the resulting prioritization later. Left click on **Save** to record this objective. Repeat this step until all of your objectives are entered.
7. Now, select the menu tab called **Rules**. Determine a set of decision rules and how each rule will be scored. A decision rule is a way to evaluate a particular set of implementation objectives. For example, one decision rule may give higher priority to an objective that needs to be accomplished sooner -- rather than later. Another rule may be based on whether a legal requirement exists for this objective to be achieved. To begin, left click on the **Add Rule** link in the lower left section of the page.
8. For each decision rule, determine an evaluation "rule" (criterion) and "value" for the rule. The value is the basis of ranking each objective. A simple binary test -- "yes" or "no" -- may work, or you can use a graduated scale -- such as "None", "Low", "Medium", and "High" with corresponding values of 0 through 3. **You must begin with the lowest score of "0"**, then score your other options in increments of 1.

Each **Rule Value** is entered by typing in the name and value in the entry boxes. To approve and add the rule value to your list, left click on the **green cross**. When you're finished, left click on the **Return** button.

9. Now, select the menu tab called **Worksheets**. Left click on the **pencil icon** to edit or view your decision model worksheet. **All** cells on the worksheet must be decided on.

Notice that your objectives, rules, and basis of ranking are presented. Initially, all of your decision rules are equally weighted. If you add a worksheet, you can change the weights of the decision rules to give some criteria more importance in the final rankings than others. Each time you add a new worksheet, the priority order of the objectives is saved as a different scenario.

10. Finally, left click on the **Return** button. At the **Worksheets** menu tab page you can choose the **Comparison Report icon**. When you left click on this link you will receive a side-by-side comparison report that shows you the order of objective priorities for each of the worksheets you have completed.