Consensus Based Issue Resolution Process (CBIR)

- Evaluate the issue based on the approved Problem Statement, Issue Charge and Charter

- Four steps:

  ❶ Problem Investigation

  ❷ Proposal Development

  ❸ Decision Making

  ❹ Reporting to Standing Committees

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Problem Investigation

Develop a detailed work plan to assist the group in identifying key milestones and deliverables based on the Charter

- Education and joint fact finding:
  - o Describe existing operations and procedures
  - o Determine whether any information necessary to do the work that is missing
  - o Agree on roles, responsibilities, deadlines and goals
  - o Explore and consider "best practices"
  - o Determine whether outside expertise or assistance may be needed

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Problem Investigation

Identify interests to ensure all stakeholders have a common understanding of each others' position and/or interest

- Ask participants to communicate the importance of the issue to their organization

- Ask participants to share the most and least important interests in regards to the issue

- Consolidate responses

1 Problem Investigation	→	2 Proposal Development
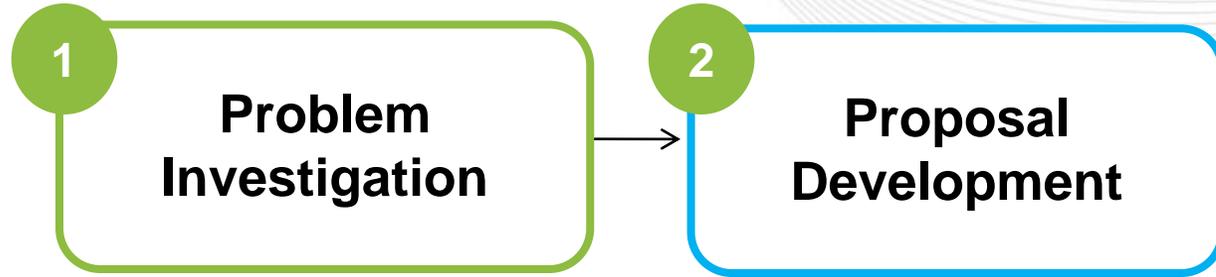
Propose solutions using a two-step process

- Step 1: Options Matrix

  o Develop options for design components

  o Identify priority level

  o Propose solution options

  o Evaluate and narrow down options ("winnowing")

| 1 | Problem Investigation | → | 2 | Proposal Development |
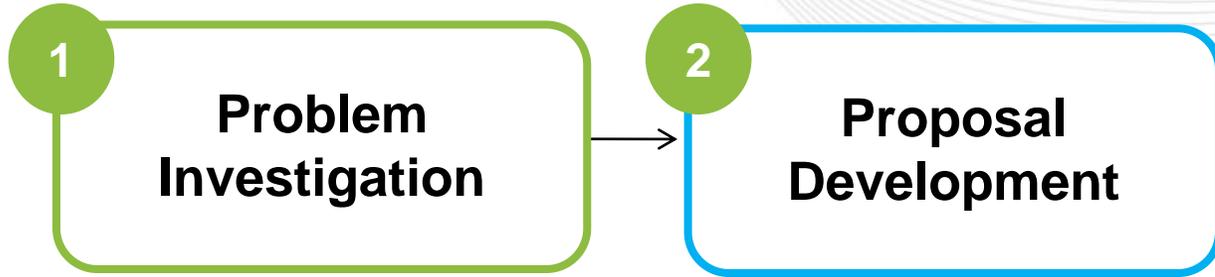
Option Matrix

Design Components	Priorities	Status Quo	A	B	C	D	E
Component 1	High	SQ Component 1	Option 1A	Option 1B	Option 1C	Option 1D	Option 1E
Component 2	Medium	SQ Component 2	Option 2A	Option 2B	Option 2C	Option 2D	Option 2E
Component 3	Low	SQ Component 3	Option 3A	Option 3B			
Component 4	High	SQ Component 4	Option 4A	Option 4B	Option 4C		

1 **Problem Investigation** → **2** **Proposal Development**
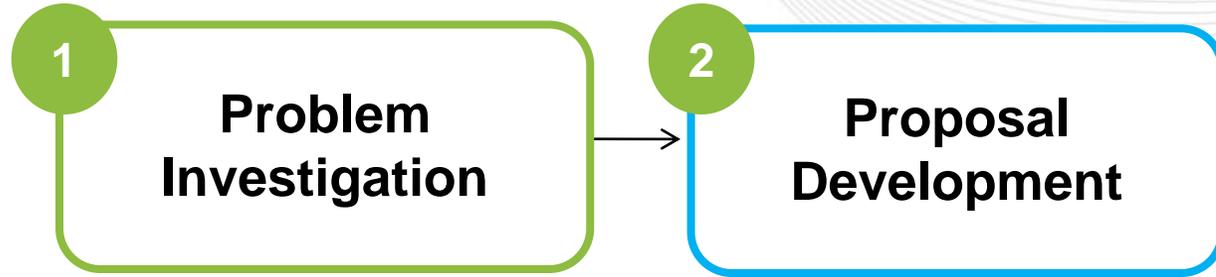
- Step 2: Solution Matrix

  - Discuss development of packages, encouraging broad stakeholder proposals

  - Use solution option for each package

  - Identify similarities and differences

  - Prioritize, refine and consolidate as best as possible

1	Problem Investigation

→

2	Proposal Development
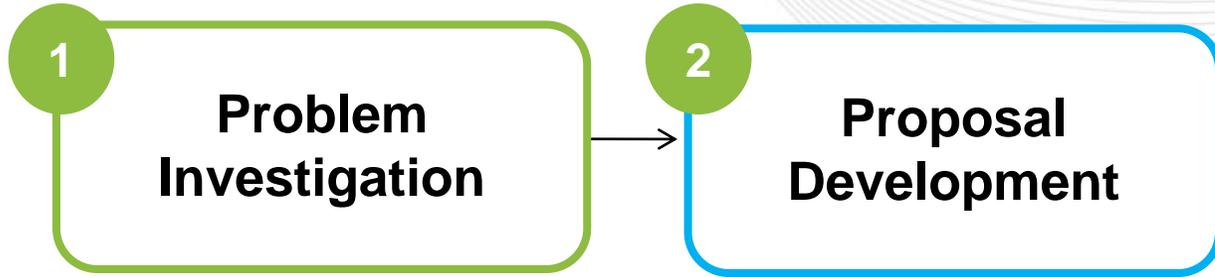
Proposal Matrix

Design Components	Priorities	Status Quo	Proposal A	Proposal B	Proposal C	Proposal D
Component 1	High	SQ Component 1	SQ Component 1	Option 1A	Option 1E	Option 1E
Component 2	Medium	SQ Component 2	Option 2C	Option 2B	Option 2D	Option 2D
Component 3	Low	SQ Component 3	SQ Component 3	Option 3B	Option 3A	Option 3B
Component 4	High	SQ Component 4	Option 4A	Option 4C	Option 4C	SQ Component 4

1 **Problem Investigation**	→	2 **Proposal Development**	→	3 **Decision Making**

- Step 3: Decision making

  - *Tier 1:* Achieve consensus on a single proposal that all parties accept with no objections

  - *Tier 2:* Provide 2-3 alternatives when consensus is not obtained under the Tier 1 approach

| 1 Problem Investigation | → | 2 Proposal Development | → | 3 Decision Making | → | 4 Reporting to Parent Committees |
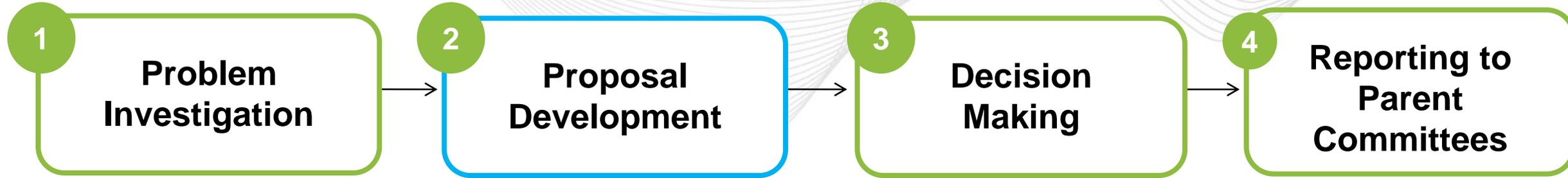
The Task Force or Subcommittee is required to provide *periodic updates* and a *final report* to the Parent Committee

- Updates should include progress on milestones and deliverables

- The final report will detail all the of steps used in the evaluation process including the proposed solutions

  o Include "3/2 Rule" packages
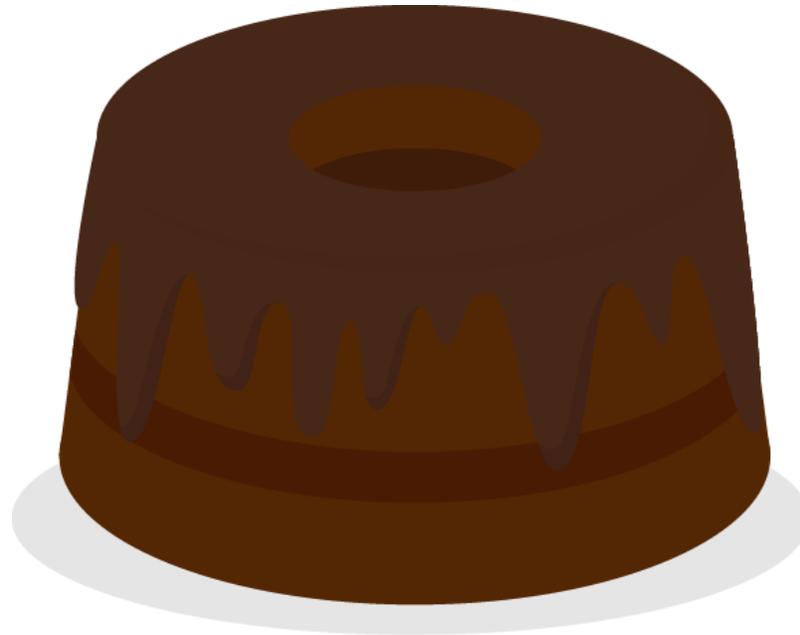
The PJM Planning Committee **decides that PJM and the Members should develop a recipe** for a cake to serve at a special event.

The PJM Planning Committee reaches agreement on a Problem Statement and a draft Issue Charge, and since there is no preexisting group that handles cake recipes, **establishes a new Cake Task Force (CTF).**

The CTF **takes the Problem Statement and Issue Charge, and incorporates them into a draft Charter** that is then approved by the Planning Committee, and off they go.

Step 1A: Review the Issue Charge and Charter, and develop a work plan

Step 1B: Educate and perform joint fact finding

Step 1C: Identify interests

Prior to the next meeting, the facilitator then consolidates *all* the interests into an organized list of themes, categories or buckets of interests.

Tasty

Affordable

Non-Allergenic

Attractive

Consolidated Interests

- All participants agree: the cake should be tasty, attractive, and affordable.
- These interests mean different things to different people and may lead to conflict.

Example: Considering Allergies

- Participants agree that avoiding allergies is important.
- Non-allergenic ingredients can have a negative effect on taste and affordability.
- Consensus on a recipe that addresses all food allergies is unlikely.
- Participants agree to focus on potentially deadly nut allergies.
- Participants agree that the final recipe should be nut free.

Design Components

Flour

Sweetener

Shape

Flavor

Moistener

	Relative Importance
Flour	Medium
Sweetener	Medium
Shape	Low
Flavor	High
Moistener	Low/Medium

	Relative Importance	A	B	C
Flour	Medium	White	Whole Wheat	Gluten Free
Sweetener	Medium	White Sugar	Brown Sugar	Honey
Shape	Low	Flat	Round	Bundt
Flavor	High	Vanilla	Chocolate	Strawberry
Moistener	Low/Medium	Oil	Butter	Sour Cream

Relative Importance		A	B	C	D
Flour	Medium	White	Whole Wheat	Gluten Free	~~Rye~~
Sweetener	Medium	White Sugar	Brown Sugar	Honey	
Shape	Low	Flat	Round	Bundt	
Flavor	High	Vanilla	Chocolate	Strawberry	~~Almond~~
Moistener	Low/Medium	Oil	Butter	Sour Cream	

	Relative Importance	Recipe 1	Recipe 2	Recipe 3
Flour	Medium	White	Gluten Free	Whole Wheat
Sweetener	Medium	White Sugar	Honey	Brown Sugar
Shape	Low	Flat	Round	Bundt
Flavor	High	Vanilla	Strawberry	Chocolate
Moistener	Low/Medium	Butter	Sour Cream	Oil

- **Step 3A:** Compare Recipes (Packages) to Interests

- **Step 3B:** Winnow Recipes (Packages)

- **Step 3C:** Test for Consensus

- **Step 3D** (if no consensus)**:** Step Back Briefly to Seek Alternative Recipes (Packages)

- **Step 3E:** Make a decision– Final Tier 1/Tier 2 Decision making

	Relative Importance	Recipe 1	Recipe 2	Recipe 3	Recipe 4
Flour	Medium	White	Gluten Free	Whole Wheat	White
Sweetener	Medium	White Sugar	Honey	Brown Sugar	Brown Sugar
Shape	Low	Flat	Round	Bundt	Bundt
Flavor	High	Vanilla	Strawberry	Chocolate	Chocolate
Moistener	Low/Medium	Butter	Sour Cream	Oil	Butter

The facilitator prepared a report on behalf of the task force, which included the preferred recipe of the vast majority of the participants (Recipe 4) and Recipe 2, the gluten-free alternative.
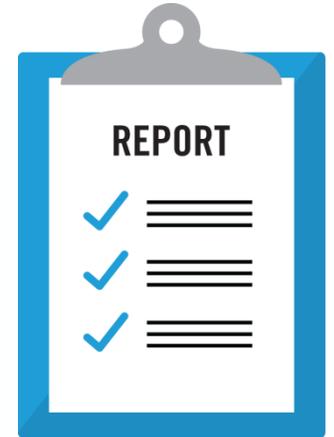
REPORT

The report included:

1. A copy of the matrices (both component options and recipes/packages)

2. Polling results

3. A brief discussion of the consolidated interests considered in reviewing the options and recipes (packages)

4. A recommendation for further future research on gluten-free flours— perhaps for PJM's next cake

5. A query about the possibility of making a few gluten-free cupcakes to go along with the chocolate cake this time around