Consensus Based Issue Resolution (CBIR) Process: Cake Model

The Situation

- The PJM Planning Committee decides that PJM and the Members should develop a recipe for a cake to feed its growing membership at a special event.

- The PJM Planning Committee reaches agreement on a Problem Statement and a draft 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 Charge, and incorporates them into a draft Charter that is then approved by the Planning Committee, and off they go.

Step 1: Problem Investigation

- Step 1A: Review the Charge and Charter, and Develop a Workplan
- Step 1B: Educate and Perform Joint Fact Finding
- Step 1C: Interest Identification

Preparation & Consolidation

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

- The facilitator lists the following broad cake-related interests and then leads a discussion on the consolidated list of interests—to see if the consolidation is complete and accurate, and whether there's convergence or divergence of opinion on the relative importance of each consolidated interest.

  - **Tasty** (fine finish to meal, a tasty dessert, show off good cooking skills, please the most guests)
  - **Affordable** (avoid expensive ingredients)
  - **Non-allergenic** (address special dietary needs)
  - **Attractive** (fine finish to meal, show off good cooking skills, please the most guests)

Early Consensus

- Following the discussion, the participants agreed that the cake should be tasty, attractive, and affordable.

- Members noted that there was likely to be a range of opinion across participants regarding what alternatives best meet each of these consolidated interests and that some interests might end up in conflict.

  – For instance, the members agreed that the cakes should be as non-allergenic as possible, but that meeting this interest might be difficult when balanced against other interests, like tasty or affordable.

  – Members noted that it might be difficult to ensure that everyone, including those few with various food sensitivities, could agree to the eventual outcome. But they did agree that since nut allergies can be deadly and triggered by the mere smell of nuts, that the final cake recipe should be nut-free.

Step 2: Proposal Development (Using a 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	
Component 3	Low	SQ Component 3	Option 3A	Option 3B			
Component 4	High	SQ Component 4	Option 4A	Option 4B	Option 4C		

Step 2A: Components

(left hand column)

Design Components
Flour
Sweetener
Shape
Flavor
Moistener

Step 2B: Relative Importance

Design Components	Relative Importance
Flour	**Medium**
Sweetener	**Medium**
Shape	**Low**
Flavor	**High**
Moistener	**Low-Medium**

(2nd column from left)

Step 2C: Options for Each Component

Design Components	Priority	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**	

Step 2D: Narrowing Options

Design Components	Priority	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**

Sub-Step 2E: Creating Packages

Design Components	Priority	*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 3: Decision-making

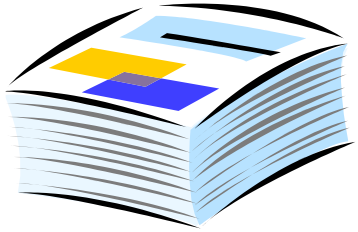
- *Step 3A: Comparing Recipes (Packages) to Interests*
- *Step 3B: Winnow Recipes (Packages)*
- *Step 3C: Testing for Consensus*
- *Step 3D: Stepping Back Briefly to Seek Alternative Recipes (Packages) (if no consensus)*
- *Step 3E: Final Tier 1/Tier 2 Decisionmaking*

Proposed Solutions

Design Components	Priority	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***

Step 4: Reporting

- The facilitator prepared a report on behalf of the Task Force.
- It included the preferred recipe of the vast majority of the participants (Recipe #4) and Recipe #2, the gluten-free alternative.



- 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-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.

Still have questions about the CBIR process?

Contact:

Your committee chair/secretary/facilitator

or

Dave Anders – David.Anders@pjm.com

or

Janell Fabiano – Janell.Fabiano@pjm.com