

**SUSTAINABLE
STRATEGY
WORKBOOK^A**
(1-3-15 Draft)

Mark Light

APPENDIX A – BAM



A brainstorming, affinity grouping, and multi-voting rating process (BAM) begins with brainstorming, which is a technique used to generate as many ideas as possible. There are five official steps to structured brainstorming:

1. The central brainstorming question is stated, agreed on, and written down for everyone to see.
2. Each team member, in turn gives an idea. No idea is criticized. Ever!
3. As ideas are generated, write each one in large, visible letters on a flipchart or other writing surface [like Post-it[®] notes]
4. Ideas are generated in turn until each person passes, indicating that the ideas (or members) are exhausted.
5. Review the written list of ideas for clarity and to discard any duplicates.¹

The wonderful thing about BAM is that it allows everyone to have a voice in the process, but no one can dominate it. The quiet members who never speak up finally have a chance to offer input because you directly ask them to do so; the overbearing members finally get a chance to listen albeit this is not necessarily of their choosing. To be sure, facilitating a brainstorming session takes practice, but most executive directors can become quite good at leading brainstorming sessions rather quickly. That said, bringing in a facilitator, or training someone in house to handle the process, can be a good idea so that the executive director and senior staff can participate actively.

Here for example is a short list of 20 ideas from a question about board member duties answered by seven people:

advocate, ask questions, attend, attend events, be active, be ambassadors, be educated, contacts and resources, dedicated, do the work of the board, get money, give money, good representatives, make good decisions, participate, prepare, promote, provide tech expertise, recruit others, sit on subcommittees

When I do brainstorming, I like to go around the table at least twice and stop when the ideas get saturated, which occurs when you start hearing lots of synonyms for things already up on the board, literal repeats, and passes. That is, when the members are

^A This report is built upon a template derived from Results Now for Nonprofits: Purpose, Strategy, Operations, and Governance (Light, 2011, p. 85). All content herein © Mark Light, 2015. Thanks to Dottie Bris-Bois for invaluable editing services and sharing examples of her work.

exhausted. Keep in mind that for a group of 15 people, you might end up with 40-50 ideas, a full board of ideas.

With this many ideas, you need some way to manage them. A technique called **affinity grouping is used to arrange the answers into common themes** that become the final board member duties. Here are the steps:

1. Phrase the issue under discussion in a full sentence
2. Brainstorm at least 20 ideas or issues
3. Without talking: sort ideas simultaneously into 5-10 related groupings
4. For each grouping, create summary or header cards using consensus.²

When using this technique, invite the participants to help sort the ideas, while the facilitator remains in control. This is a game of horseshoes where getting close is good enough, but being too far away is bad. In other words, you don't want to end up having just one or two groupings when 10 are actually present. Building an affinity diagram can be done quickly, but you want to practice this before going before a group; you have to be able to see the trees for the forest and that takes some practice.

Looking at the small group of ideas from above, start with one that seems like a root idea, take advocate for example. There are three other ideas that belong: be ambassadors, promote, good representatives. The table below shows the results:

Ideas	Results
contacts and resources, get money	Raise money
recruit others, sit on sub committees, do the work of the board	Do the board's work
be ambassadors, promote, good representatives, advocate	Champion the organization
prepare, be educated, dedicated, ask questions, make good decisions, attend, provide tech expertise, be active, participate, give money, attend events	Make good decisions

The final step in the BAM process is **multi-voting to prioritize or rate the final ideas**. The easiest tool is weighted multi-voting that I like to call "Take it to Vegas," where a blue dot equals \$3, a red dot equals \$2, and a green dot equals \$1. Each person gets one dot of each color to distribute on any grouping of ideas. They can put all their dots on one grouping or spread the dots around. Adding up the money yields a strong sense of priority as shown in the following table:

Ideas	Results
prepare, be educated, dedicated, ask questions, make good decisions, attend, provide tech expertise, be active, participate, give money, attend events	Make good decisions (21)
contacts and resources, get money	Raise money (13)
be ambassadors, promote, good representatives, advocate	Champion the organization (8)
recruit others, sit on sub committees, do the work of the board	Do the board's work (0)

In the case of the last grouping that earned no points, you'd have a choice of whether to keep it in the mix. Remember that prioritization does not necessarily require discarding groupings; it's simply a method for establishing importance. **Indeed, perhaps less important than what is at the top of the list is what ends up at the bottom.** Multi-voting is a good way to winnow out the things that you're not going to pursue further.

A word of caution: not every BAM process requires the multi-voting step. Sometimes the consensus of the group is so strong, it is not necessary. This is also true when time is at a premium or when prioritization is not necessary.

The supplies you'll need for a BAM process include four lightweight aluminum telescoping display easels, four packages (three boards per package) of 30" x 40" foam boards, magic markers, a role of clear packing tape, and 10 packages of 5" x 8" Post-it® notes. You should also get black magic markers and sticky dots in blue, red, and green colors.

Assemble the foam boards into six bigger 60" x 80" boards by taping the adjoining seams on both sides. Leave two boards blank and load the four other boards with Post-it® notes in vertical columns, seven notes to a column with seven columns to a board. Put the two blank boards abutting each other spanned across the four easels. Place the four loaded boards one behind the other in the middle of the two blank boards, which leaves one-half of each blank board on each end.

Arrange the participants around a table set up in an open U shape with an equal number of comfortable chairs on the three outside sides. Put the easels at the head of the open U. You're now ready to go!

REFERENCES

- Brassard, M., & Ritter, D. (1994). *The memory jogger II*. Methuen, MA: GOAL/QPC.
- Light, M. (2011). *Results now for nonprofits: Purpose, strategy, operations, and governance*. Hoboken, N.J.: John Wiley & Sons.

ENDNOTES

- ¹ (Brassard & Ritter, 1994, p. 20)
- ² (Brassard & Ritter, 1994, pp. 12-14)