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Helping Organizations Change

EXERCISE

PRIORITY SETTING NOMINAL GROUP PROCESS

POLICY MAKERS, MANAGERS, EXECUTIVES, STAFF

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The following exercise starts the issue identification and action prioritization process. It is best conducted at the very beginning of a strategic planning or budget process to catch the energy and enthusiasm participants bring to the early stages of the long, tiring policy planning journey. The most beneficial aspect of this exercise is the ability to focus attention quickly, and help participants select their highest priorities among a broader set of attractive options. In addition, people who are charged with implementing policy gain insight into the policy makers' intentions.

Objectives of this exercise:

- To develop plans for the future, or...
- To review current plans for changes... completions, deletions, additions, and modifications.
- To discuss and decide on general issue or program / project categories.
- To establish and/or confirm general preferences.
- To develop specific priorities for allocating resources.
- To make relative assignments of high priorities among a larger group of alternatives, and to assign resources to those priorities.

The instructions to the group are given by the facilitator as follows:

- This first exercise should take between forty-five and ninety minutes to process. Total time to conduct this exercise depends on the number of participants and the breadth of the issues.
- After an orientation to the issues or plan by staff or other informed individual, the group discusses the details of the planning document or the options for no more than ten minutes.
- Once the group is centered on the issues and/or plan, the group should decide what no longer needed in the current plan, and the boundaries of the subsequent plan, program or projects.
- Consider recent discussions, experiences and beliefs about community and organizational needs. Place your suggestions for changes on data cards and be prepared to discuss your small group's recommendations with the larger group.

- The small groups reassemble as a single plenary group. Each table group is asked to identify the changes and additions they would like to make to the plan, or items they would like to include in subsequent plans. Other participants may ask questions as each table presents findings.
- The data cards are placed on a storyboard and, if needed, clustered into affinity groups. (see affinity diagrams) If a large number of data cards are generated during the discussion, the facilitator may want to assign “header” titles that describe broad categories under which the white data cards can be placed and clustered. Usually “headers” are of a different color with short titles that describe the general theme of the white data cards listed under them.
- After any further discussion, the policy-makers are given a fixed number of sticky dots that are used to indicate priority for action or resources. Distribute the dots to the policy-makers and then give each up to two minutes to solicit support from other policy-makers for their priorities. This is in anticipation of policy-makers placing their dots on the white data cards that describe their preferred issues, programs or projects.
- Once the policy-makers finish their presentations, they move to the storyboards and place their dots on the issues, projects and/or programs that they believe should be given priority for resources. The rules for placing priority dots:
 - Dots may be placed only on white data cards, not colored header cards.
 - Only one dot may be assigned per white data card
 - You may give any excess dots to others, and they may accept those dots, but you may not solicit other peoples’ dots.
 - For purposes of tracking, all dots must be placed on data cards.

Exercise Process

Step 1 – Briefly present and review the plan

- Manager or a staff member quickly review the current plan for the group

Step 2 – Small group exercise to review plan

- The large group breaks into smaller groups of approximately the same size.
- Each of the policy makers heads a small group. The policy-maker is the group leader.
- A facilitator/recorder is selected by the policy-maker; the facilitator/recorder will manage and document the discussion.

Step 3 – Review the current plans

- Participants in small groups review the existing plans.
- On the document make note of any changes that you believe would be appropriate.

Step 4 – Revamp current plan by exception

- Consider the community's / organization's needs, wants and desires, and your experience and beliefs about needs for additions or changes.
- After reviewing the entire plan, create white data cards highlighting major changes, additions.
- Develop any additional projects, programs and options you'd like the large group to consider.
- Place your suggestions for changes on a white data card and be prepared to discuss your group's recommendations.

Step 5 – Large group discussion

- The small groups reassemble as a single plenary group. Each table is asked to identify the changes they would like to make to the plan. Participants may ask questions as each table presents their findings.
- The data cards are placed on a storyboard and, if needed, clustered into affinity clusters with colored card "headers."

Step 6 – Establishing priorities with dots

- After the discussion of the small group findings, the policy-makers are given a fixed number of "priority" dots.
- Each policy-maker is given up to two minutes to describe their priorities for assigning priorities in anticipation of all policy-makers placing their priority dots on specific items.
- Policy-makers move to the storyboard and place their priority dots on the projects and/or programs that they believe should be given priority for resources. Rules for placing the priority dots include:
 - Dots may be placed only on white data cards, not colored header cards.
 - Only one dot may be assigned per white data card
 - You may give any excess dots to others, and they may accept those dots, but you may not solicit other peoples' dots.
 - For purposes of tracking, all dots must be placed on data cards.

Step 7 – Discuss findings

The large group takes a short break while the dots are being counted then reassembles.

The group should answer the questions: "Are their trends or patterns emerging? What do you see when you look at these cards? Do these cards accurately reflect your priorities?"