

# PURSUIT OF EXCELLENCE PROGRAM – STRATEGY SESSION

## SESSION OUTLINE

### PURSUIT OF EXCELLENCE PROGRAM – STRATEGY SESSION

#### 1. OBJECTIVES:

- To engage chapter members in the strategy and problem solving process
- To create a solution-oriented environment that can move the chapter forward
- To allow chapter members to have a voice in the chapter’s direction
- To develop solutions to meet expectations listed in the Pursuit of Excellence Program criteria

**FACILITATORS:** This session should utilize a guest facilitator, ideally someone involved with, but not a member of the chapter. The Greek Advisor, Chapter Advisor, or members of the Alumni Advisory Board are recommended. The facilitator should act in tandem with the Commander and Executive Board in conducting this session.

#### SESSION MATERIALS:

- Flipchart
- Markers
- Pens
- Paper
- Copies of the Pursuit of Excellence Program Standards and Criteria for Excellence
- Copies of the Discussion Questions (2 per subcategory per group)

#### 2. OUTLINE:

COMPONENTS	TIME FRAME	LEADERSHIP ROLES	RESOURCES
Open Session		Commander	
8.1 Introduction	5 min.	Session Facilitator	
8.2 Overview of the Pursuit of Excellence Program	10 min.	Commander/ Executive Board	
8.3 Working on the Key Areas	25 min.	Session Facilitator	Program Standards and Criteria for Excellence
8.4 Reviewing the Ideas	25 min.	Session Facilitator	
8.5 Wrap Up/Closing	5 min.	Commander	

#### 3. VISION:

Excelling with Honor

#### 4. MISSION:

To develop ethical leaders inspired by the principles of Love, Honor and Truth.  
 To foster the personal growth of each man’s mind, heart and character.  
 To perpetuate lifelong friendships and commitment to the Fraternity.

# PURSUIT OF EXCELLENCE PROGRAM – STRATEGY SESSION

## FACILITATOR GUIDANCE NOTES

### OBJECTIVES:

- To engage chapter members in the strategy and problem solving process
- To create a solution-oriented environment that can move the chapter forward
- To allow chapter members to have a voice in the chapter's direction
- To develop solutions to meet expectations listed in the Pursuit of Excellence Program criteria

### 8.1 Introduction 5/5

*What is the difference between excellence and being average?*

Record the responses of the members on the flipchart paper.

*What do you think about when you hear the word average? (Record responses)*

*Sigma Nu is about Excelling with Honor and that's why we are here today. We will be focusing on some of the areas that we need to work on as a chapter.*

*Many of you know that there is a structure in place to help chapters with planning for their future. This structure is called the Pursuit of Excellence Program and was it was started by Sigma Nu in 2002. The program includes a set of standards assessing chapters and determining how they are performing in 10 subcategories. Some of these areas that we will work on were identified from the results of the Pursuit of Excellence last academic year. Others are areas that brothers in the chapter feel we should improve on.*

### 8.2 Overview of the Pursuit of Excellence Program 10/15

*The areas that our chapter didn't do as well as we wanted (or needed to) last year were: (insert subcategory areas).*

Discussion questions for each of the 10 subcategories to get the discussion started are provided at the end of the Facilitator Guidance Notes. Select appropriate members of the Executive Board to lead discussions using these questions for each of the areas to be covered. Share these questions with the brother(s) who will be facilitating the discussions.

At this point, if your chapter has more than 20 members, break the brothers into groups of 15-20 brothers. If you break into smaller groups, make sure to have one brother serve as the facilitator and the recorder for the group. If your chapter has less than 20 members, please keep all the brothers together in one group.

In the discussion group(s), the facilitator will need to use the discussion questions that are relevant to the areas you want to discuss.

*Before we get started, I want to share some ground rules to help us make the most of the discussions.*

- *Don't evaluate ideas*
- *No negative comments*
- *Listen to your brothers*
- *Let everyone share their ideas, one brother at a time*

Have the areas (subcategories) to be discussed, and their descriptions pre-printed on a flipchart.

*Let's start with (insert area). I'll share the description of the area (subcategory) and list the criteria for excellence so everyone can see what we are focusing on.*

Repeat this process for each of the subcategories that you will be working on as a group.

### **8.3 Working on the Key Areas 25/40 (Take additional time as needed)**

As a group or smaller working groups, take the subcategories that you have identified and use the discussion questions to address the issues.

Indicate to the groups that they will have 25 minutes to discuss. If after 25 minutes the groups feel they need more time, allow discussions to progress for as long as they are productive and all groups/individuals are still engaged.

Make sure to have one brother serve as recorder to document all the ideas on a flipchart.

### **8.4 Reviewing the Ideas 25/65 (Take additional time as needed)**

Next, review the ideas that were generated during the brainstorming process. As you do this, ask for comments on the ideas.

*Let's review the ideas that we came up with during our time together. Feel free to add any comments you have on the ideas listed.*

It will be important to build consensus on the ideas. Please review the list below to identify what tool(s) would best fit your needs.

#### **Tools that you can use to build consensus or conduct problem solving**

If you need to **plan a solution**, use ***Force Field Analysis***.

If you need to **identify the cause of a problem**, use ***Force Field Analysis***.

If you need to **identify problems in a particular process**, use ***Force Field Analysis***.

If you need to **narrow down ideas after brainstorming**, use ***Multivoting***.

If you need to **see the pros and cons of an approach**, use a ***T-Chart***

If you need to **see the advantages and disadvantages of an approach**, use a ***T-Chart***

If you need to **display the causes or contributions to a problem or goal**, use a ***Fishbone Diagram***.

If you need to **compare alternatives to each other** while graphically displaying how each rate on two dimensions, use a ***Quadrant Diagram***.

See the "Facilitation Tools for Pursuit of Excellence Chapter Discussions" at the end of the facilitator notes for further explanations on each of these tools and their use.

## **8.5 Next Steps 5/70**

*We will take all of the ideas from today and work with the appropriate officers or committees to implement them. If you would like to help, talk to me after we are done today.*

*Thanks again for all of your ideas, feedback and commitment to the chapter. We need all of you for the fraternity to move forward. I appreciate you being here today!*

Collect the recorded responses from each group and the list of consensus ideas on how to move forward. This information will need to be shared with appropriate chapter officers and committees after the session to assist them in their planning for the future.

Close with the Creed.

## **DISCUSSION QUESTIONS**

### **VALUES-BASED LEADERSHIP: SERVICE AND PHILANTHROPY**

#### **CHAPTER DISCUSSION QUESTIONS**

The following questions should be utilized in chapter and small-group discussions on the subcategory of the Pursuit of Excellence Program listed below.

Please read and discuss each of the questions as a group. Record your responses and be prepared to discuss them with the chapter.

#### **VALUES-BASED LEADERSHIP** **SERVICE AND PHILANTHROPY**

1. Imagine the brothers in our chapter committed to individual community service, looking forward to helping others and feeling good about making a difference. With that in mind, how can we encourage brothers to make community service and philanthropy a priority?
  
  
  
  
  
  
  
  
  
  
2. What causes are the brothers in our chapter passionate about? Interested in?
  
  
  
  
  
  
  
  
  
  
3. What local non-profits need our assistance?
  
  
  
  
  
  
  
  
  
  
4. How can we educate others on the causes that are important to our members?
  
  
  
  
  
  
  
  
  
  
5. How can we best advocate for the non-profits we support as a chapter?

## **DISCUSSION QUESTIONS**

### **VALUES-BASED LEADERSHIP: CAMPUS LEADERSHIP**

#### **CHAPTER DISCUSSION QUESTIONS**

The following questions should be utilized in chapter and small-group discussions on the subcategory of the Pursuit of Excellence Program listed below.

Please read and discuss each of the questions as a group. Record your responses and be prepared to discuss them with the chapter.

#### **VALUES-BASED LEADERSHIP** **CAMPUS LEADERSHIP**

1. Imagine more of our brothers serving in leadership roles in other student organizations on campus. Think about the chapter's improved reputation, the value the chapter's members are adding to the campus and the level of respect that others have for the brothers. With that in mind, how can we promote the value of getting involved in campus organizations?
2. How can we improve our relationship with the Greek Advisor/Fraternity-Sorority Advisor?
3. What programs are sponsored on campus that we should participate in as a chapter?
4. How can we help brothers become aware of opportunities to join campus organizations?
5. How can our chapter be a voice on issues facing the Greek community on our campus?
6. How is our chapter adding value to the campus community? What could we do to add more value?
7. What do we need to change to \_\_\_\_?
8. What structures or processes do we need to put in place to make this happen?
9. What is preventing us from achieving this?
10. How can we achieve this?
11. What would help our chapter to be \_\_\_\_?
12. Who will be willing to find out more about \_\_\_\_?
13. Why hasn't this happened?
14. What would this look like?

## **DISCUSSION QUESTIONS**

### **VALUES-BASED LEADERSHIP: VALUES CONGRUENT ENVIRONMENTS**

#### **CHAPTER DISCUSSION QUESTIONS**

The following questions should be utilized in chapter and small-group discussions on the subcategory of the Pursuit of Excellence Program listed below.

Please read and discuss each of the questions as a group. Record your responses and be prepared to discuss them with the chapter.

#### **VALUES-BASED LEADERSHIP**

#### **VALUES CONGRUENT ENVIRONMENTS**

1. Consider the values of Sigma Nu – Love, Honor, Truth – and what they mean to you as a brother and a person. What can we do to create a chapter environment that supports and promotes those values?
  
2. How could we create a safe/healthy social environment?
  
3. What would a safe/healthy social environment look like?
  
4. What programs related to wellness could our chapter sponsor this academic year?
  
5. What sessions from the Risk Reduction or Personal Development modules of All-Chapter LEAD would our brothers be most interested in?

## DISCUSSION QUESTIONS

### PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE: INTELLECTUAL DEVELOPMENT

#### CHAPTER DISCUSSION QUESTIONS

The following questions should be utilized in chapter and small-group discussions on the subcategory of the Pursuit of Excellence Program listed below.

Please read and discuss each of the questions as a group. Record your responses and be prepared to discuss them with the chapter.

#### PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE INTELLECTUAL DEVELOPMENT

1. Imagine our brothers excelling academically, our chapter placing in the top \_\_\_ in GPA of all fraternities on campus. Imagine candidates doing well academically. With those images in mind, how can we better support our brothers academically?
2. How can we promote the intellectual development of our brothers?
3. How can we better connect new members and brothers to the academic resources on campus?
4. How should we recognize brothers who excel academically?
5. What incentives should we provide to brothers?
6. What are the criteria for Omicron Delta Kappa (Leadership Honorary) and Order of Omega (Greek Leadership Honorary), (or insert other applicable Leadership Honoraries on your campus) on our campus?
7. How can we show brothers the value of participating in \_\_\_\_?
8. How can we promote the academic groups on campus to our brothers?
9. Who would be an effective and helpful Faculty Advisor (if the chapter does not currently have one)?
10. How can our Faculty Advisor best assist brothers with academics?
11. What programs can we create to increase interaction between faculty members and our brothers?

## **DISCUSSION QUESTIONS**

### **PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE: CANDIDATE DEVELOPMENT**

#### **CHAPTER DISCUSSION QUESTIONS**

The following questions should be utilized in chapter and small-group discussions on the subcategory of the Pursuit of Excellence Program listed below.

Please read and discuss each of the questions as a group. Record your responses and be prepared to discuss them with the chapter.

#### **PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE** **CANDIDATE DEVELOPMENT**

1. Think about a future Candidate Class as they are about to be initiated. Imagine they are committed to the Fraternity, know our history, embrace and live our values, are dedicated to the brotherhood and have developed leadership skills to help them and advance the chapter. With those images in mind, what can we do to strengthen LEAD Phase I and the Candidate Education process in the chapter?
2. What are the strengths and weaknesses of the current Candidate Education Program and our use of LEAD Phase I?
3. What methods should we use to articulate the anti-hazing stance of Sigma Nu to our members?
4. What do we want our candidates to know, be able to do and feel by the end of the Candidate Program (outcomes)?
5. How can we better involve brothers that are role models in the Candidate Education process?
6. What can our Candidates expect of the chapter and active members?
7. What sessions in LEAD Phase I need to be improved?

## **DISCUSSION QUESTIONS**

### **PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE: BROTHER DEVELOPMENT**

#### **CHAPTER DISCUSSION QUESTIONS**

The following questions should be utilized in chapter and small-group discussions on the subcategory of the Pursuit of Excellence Program listed below.

Please read and discuss each of the questions as a group. Record your responses and be prepared to discuss them with the chapter.

#### **PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE** **BROTHER DEVELOPMENT**

1. Imagine a better, more effective LEAD Program; something that brothers look forward to participating in, something that will help them learn about themselves and their brothers, an experience that will challenge them and help brothers develop ideas to move the chapter forward. What would we need to create this in our chapter?
2. How can we strengthen our chapter's LEAD Committee?
3. How can we improve our chapter's execution of the LEAD Program?
4. What suggestions do brothers have on possible guest facilitators (faculty, staff, alumni) for LEAD?
5. Beyond the LEAD Program, what leadership and development programs, organizations and opportunities exist on campus?
6. How can we better promote these leadership and development programs, organizations and opportunities to our membership?

## **DISCUSSION QUESTIONS**

### **PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE: ALUMNI DEVELOPMENT**

#### **CHAPTER DISCUSSION QUESTIONS**

The following questions should be utilized in chapter and small-group discussions on the subcategory of the Pursuit of Excellence Program listed below.

Please read and discuss each of the questions as a group. Record your responses and be prepared to discuss them with the chapter.

#### **PERSONAL DEVELOPMENT AND MEMBERSHIP VALUE** **ALUMNI DEVELOPMENT**

1. Consider what it would be like if we had four times (4x) as many alumni visit the chapter or participate in the chapter's alumni activities each year. Imagine these events drawing alumni from all ages, professions and locations around the state and country. With this in mind, what would we need to do to make this a reality?
  
2. What process needs to be in place for the chapter to write and produce a quality alumni newsletter twice a year?
  
3. What kinds of events can the chapter plan or host for alumni that will draw alumni from different age groups?
  
4. How can we get more alumni from our chapter interacting with each other?
  
5. How can we better communicate with our alumni?
  
6. How can we involve alumni in the life of the chapter?
  
7. How can we involve alumni as volunteers in the chapter?

## **DISCUSSION QUESTIONS**

### **OPERATIONAL EXCELLENCE: RECRUITMENT AND MANPOWER**

#### **CHAPTER DISCUSSION QUESTIONS**

The following questions should be utilized in chapter and small-group discussions on the subcategory of the Pursuit of Excellence Program listed below.

Please read and discuss each of the questions as a group. Record your responses and be prepared to discuss them with the chapter.

#### **OPERATIONAL EXCELLENCE** **RECRUITMENT AND MANPOWER**

1. Imagine our chapter with (insert number) more members. Members who are solid brothers, who are involved in the chapter, involved on campus, excel academically, pay their bills and believe in the values of Sigma Nu. What do we need to do to recruit the number and quality of men we need for our chapter to thrive in the future?
  
2. How is our chapter focusing on Values-Based Recruitment?
  
3. How could our chapter better incorporate the principles of Values-Based Recruitment?
  
4. What characteristics do we want in a prospective member?
  
5. What can we do to improve our recruitment program to give us the number and quality of Candidates we need?
  
6. How can we better prepare our brothers to be effective in conversations with prospective members?



## **DISCUSSION QUESTIONS**

### **OPERATIONAL EXCELLENCE: GOVERNANCE AND ACCOUNTABILITY**

#### **CHAPTER DISCUSSION QUESTIONS**

The following questions should be utilized in chapter and small-group discussions on the subcategory of the Pursuit of Excellence Program listed below.

Please read and discuss each of the questions as a group. Record your responses and be prepared to discuss them with the chapter.

#### **OPERATIONAL EXCELLENCE** **GOVERNANCE AND ACCOUNTABILITY**

1. What resources can we utilize to better understand The Law of Sigma Nu Fraternity, Inc. as a chapter?
  
2. How can we ensure that our chapter bylaws are reviewed and updated on a regular basis? Who should be involved in that process?
  
3. What can our chapter do to create a stronger sense of accountability?
  
4. What are some of the problems related to accountability in our chapter? Areas where brothers don't live up to their responsibilities, ducked responsibilities, did not follow through on commitments or made excuses.
  
5. How can we ensure chapter members are held accountable for their actions and understand their responsibility to live up to the *Ritual* and values of Sigma Nu?

# FACILITATION TOOLS

## FOR PURSUIT OF EXCELLENCE CHAPTER DISCUSSIONS

As you review the ideas that were generated during the brainstorming process it will be important to build consensus. Several tools have been suggested and explained below for your use.

### T-CHART

#### WHAT IT IS

A T-Chart is a simple tool to organize material into two columns. A T-shaped bar is drawn, with room for headings at the top, and material is sorted into two columns. The T-Chart can be created while the group is coming up with ideas.

#### WHY USE IT?

A T-Chart helps the group be more focused and organized about an issue. It helps people think in two dimensions; sometimes without a T-Chart, people discuss only one dimension of a plan or idea. T-Charts are also useful in comparing and contrasting information and presenting the information in a visually clear way.

#### WHEN TO USE IT

Use a T-Chart to compare and contrast information or to show relationships. Use it to help people see the opposite dimension of an issue. A T-Chart helps groups:

- To see the pros and cons, advantages and disadvantages, or strengths and weaknesses of a particular approach
- To identify the issues faced when making a change: one column represents what happens if things stay as they are, the other what happens if a change is made
- To show changes over time: (1) one column indicating how things were at a point in the past, the other how things are now, or (2) one column showing how things are now, the other how people want things in the future

#### HOW TO USE IT

- Explain the reason for using the T-Chart; to help make a decision, solve a problem, understand a change, or identify strengths and weaknesses. If necessary, tell the group how making the T-Chart will help to achieve the stated objectives for the meeting and how its use supports the group's overall goals.
- Draw the T-Chart and its headers on flip-chart paper. If there will be a lot of data, place two easels side by side, one for each column, or post two flip-chart sheets side by side on the wall.
- Ask the group to come up with material that fits in each column. Record each idea in the appropriate column. The group may believe that a particular idea belongs in both columns. If so, place it in both columns and make a note as to why it appears in both.

#### EXAMPLE

### T-Chart

+ item	- item
+ item	- item
+ item	- item

## **MULTI-VOTING**

### **WHAT IT IS**

Multi-voting allows a group to select the most important or preferred items from a list with a minimum amount of discussion. Those items that move to the top of the list can then be explored in depth. Multi-voting is a series of votes, with low-ranking items eliminated after each round.

### **WHY USE IT**

Many issues are so complex and broad that long lists of items emerge during a brainstorming session. Multi-voting is a quick way to eliminate items and determine those on which group members want to focus.

### **WHEN TO USE IT**

Multi-voting is used after a brainstorming session or to narrow down any long list.

### **HOW TO USE IT**

After a brainstorming session, post all the flipcharts for the group and follow the process below:

- Ask the group if any two or more items are so similar that they can be combined. Combine the items the group chooses by using the most representative working and drawing a line through the duplicates.
- Clearly number (or letter) all remaining ideas.
- Decide how many votes each person will have to use. A good rule of thumb is to allow each person a number of votes equal to one-third of the total items on the list. For example, if there are 21 items on the list, each person will have 7 votes.
- Have each group member vote for items by listing the item number or letter on a piece of paper.
- Collect the pieces of paper and tally the number of votes for each item, placing the number of votes beside each item on the flip chart.
- Eliminate the items with the fewest votes. If there is no obvious separation between items, simply eliminate any that fall in the lower third of the ranking.
- Repeat this step until there is an obvious favorite or until there are a few clear favorites at the top of the list.
- Stop the voting and have the group discuss the results. If there is one clear favorite, ask the group if and why this represents the best choice. If there are several top choices, determine with the group whether one choice must be selected.

## **FORCE FIELD ANALYSIS**

### **WHAT IT IS**

Force-field analysis is a visual representation of the positive and negative forces at work when moving toward a goal. In any effort to reach a goal or to implement change, there are enabling and opposing forces. To reach the goal, the enabling forces must be strengthened and the opposing forces diminished. Looking at problems and goals in this way helps people bring about desired change. Force-field analysis is a complete process that can take a group from beginning to end in identifying and solving problems or in reaching goals.

### **WHY USE IT**

People tend to overlook the forces that may affect success and rush into the planning phase before considering the environment or “field” in which they will be working. Force-field analysis highlights both the assets and the liabilities people have for reaching a goal and helps them make realistic plans. It also can highlight why progress is not being made.

### **WHEN TO USE IT**

Force-field analysis can be used in the following situations and is especially useful when issues seem complex and deeply rooted:

- When planning a solution
- When launching a project or team effort
- When identifying the causes of a problem
- When identifying problems in a particular process

### **HOW TO USE IT**

Explain to the group that force-field analysis is a way to identify a strategy for success. The five major steps in the process are as follows:

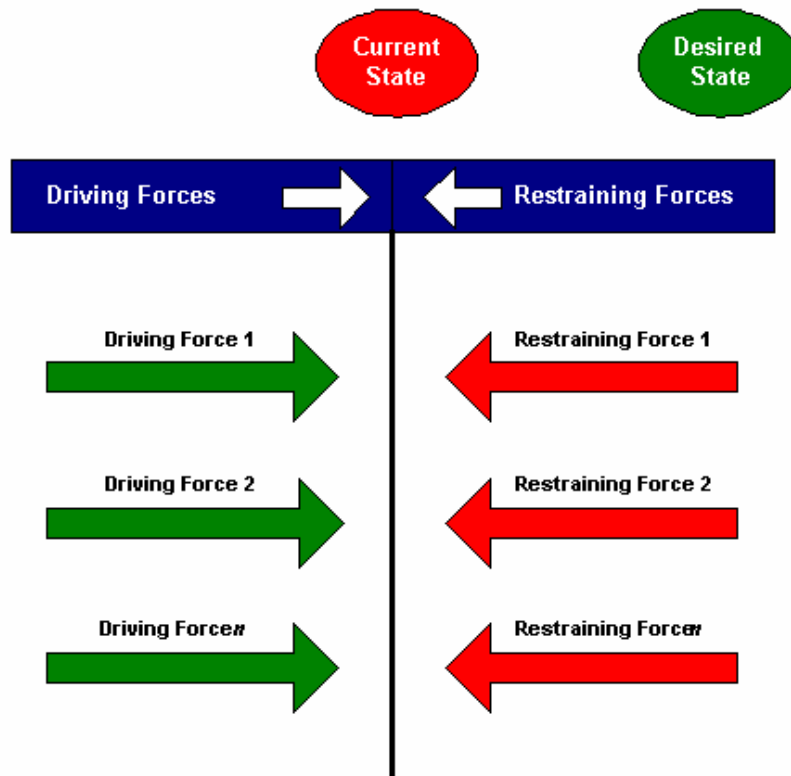
- Describe the current situation- the status quo, the way things are today.

- Define the desired situation- the objectives the group would like to accomplish.
- Brainstorm the driving and restraining forces in relation to the desired objectives.
- Develop a strategy for solution by determining which of the driving forces to strengthen and which of the restraining forces to weaken.
- Check the strategy to see whether it will move the group toward goal.

### HOW TO FACILITATE THE GROUP THROUGH THE PROCESS

- Ask the group to define the problem or the status quo- the way things are today. Ask the following questions: “What is the situation today?” “What problem exists?” “What contributes to the problem?” Record responses on a flip chart and post them.
- Next, ask the group to read over the responses and come up with a definition of the problem. Write the group’s definition and post it beside their previous responses.
- Ask the group to think about what the situation would be like if the problem were solved.” “If we overcame this problem, what would be the desired situation?” “Can the desired situation, the objective, be acted on? Can it be measured? Are there any time constraints?” Note what is said along with the description of the desired situation. Post the description of the desired situation.
- Now ask the group to brainstorm all the forces it can think of that will help it achieve its objectives: “What forces can you think of that are likely to help us reach our objective?” Label a flip-chart page “Status Quo” and then draw a line down the middle of the sheet.
- Ask the group to brainstorm all the forces.

### EXAMPLE



### QUADRANT DIAGRAM

#### WHAT IT IS

A quadrant diagram is a method to determine which solution best meets two goals at once, such as low cost and high benefit. Ideas are discussed and placed on a quadrant in relation to how they rank in relation to two factors. Quadrant diagrams help groups see how a particular solution may be desirable in one way and undesirable in another. Solutions that have the most potential are those that fall in the most desirable cell (for example, low cost/high benefit).

#### WHY USE IT

Use a quadrant diagram to compare alternatives to one another while graphically portraying how each rates on two dimensions.

### WHEN TO USE IT

Use a quadrant diagram to compare potential solutions to one another in relation to key factors. Some common factors are listed below:

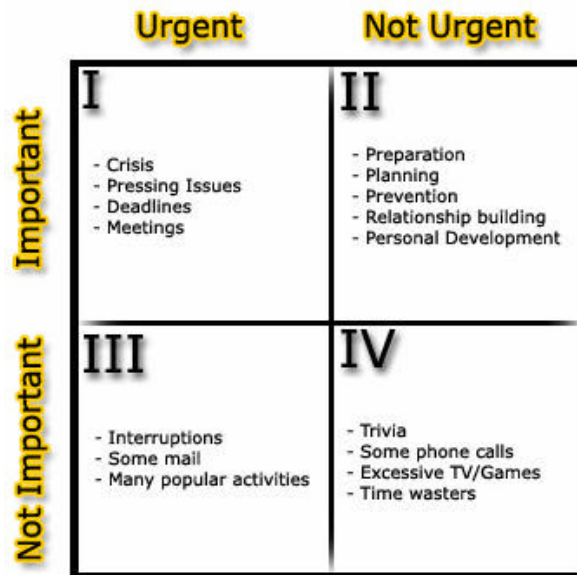
- Cost/Benefit
- Effective/Achievable
- Impact/Effort
- Cost/Time Needed to implement

### HOW TO USE IT

Discuss the issues involved in selecting a solution to the problem. Decide which two factors to evaluate and draw a four-quadrant diagram. Label the quadrants, like the example in the figure. After drawing and labeling the quadrant, follow these steps:

1. Brainstorm criteria the group will use in its evaluation. For example, if the group is using an effective/achievable matrix, define what is meant by “effective”. Ask, “What aspects of effectiveness are the most important?” Define “achievable” also: “Just what do we mean by ‘achievable’”? “What are we looking for?” Post the results of the discussion for the group to see during the next steps.
2. For each solution, ask the group to consider where it falls in the quadrant. For the example above, ask the group: “How effective is this potential solution? Where does it fit on the effectiveness continuum?” Next ask, “How achievable is this potential solution?” “Where does it fit on the achievable continuum?” When the group determines where the potential solution should go, place a symbol in the appropriate quadrant.
3. Continue evaluating each potential solution in this manner, showing where each fits in the quadrant.

### EXAMPLE



## FISHBONE DIAGRAM

### WHAT IT IS

This technique allows a group to visually display the causes or contributions to a problem or goal. The fishbone diagram allows material to be easily organized under major headings and subheadings by adding “bones” at appropriate places on a fish-shaped diagram.

### WHY USE IT

The fishbone diagram helps people organize and view material that might otherwise be lost. Being able to see the cause and effect graphically enhances the understanding of a particular issue and encourages groups not to overlook factors that impact a problem or goal. It allows people to understand more fully an entire operation and identify and acknowledge factors that may be taken for granted. It becomes valuable data for the group.

### WHEN TO USE IT

Use a fishbone diagram whenever you need to show cause and effect relationships, generally for one of the following two outcomes:

- To identify what is needed to achieve a certain goal or outcome
- To identify the causes of a problem

The fishbone diagram can be used to initiate and structure a brainstorming activity or it can be used following a brainstorming activity to organize the ideas generated.

### HOW TO USE IT

1. Agree on a problem statement (effect). Write it at the center right of the flipchart or whiteboard. Draw a box around it and draw a horizontal arrow running to it.
2. Brainstorm the major categories of causes of the problem. If this is difficult use generic headings:
  1. Methods
  2. Machines (equipment)
  3. People (manpower)
  4. Materials
  5. Measurement
  6. Environment
3. Write the categories of causes as branches from the main arrow.
4. Brainstorm all the possible causes of the problem. Ask: "Why does this happen?" As each idea is given, the facilitator writes it as a branch from the appropriate category. Causes can be written in several places if they relate to several categories.
5. Again ask "why does this happen?" about each cause. Write sub-causes branching off the causes. Continue to ask "Why?" and generate deeper levels of causes. Layers of branches indicate causal relationships.
6. When the group runs out of ideas, focus attention to places on the chart where ideas are few.

### EXAMPLE

