

# CBIR Matrix Overview

Michael Herman  
PJM Transmission Planning  
Transmission Replacement  
Processes Senior Task Force  
August 29<sup>th</sup> 2016

# Consensus Based Issue Resolution (CBIR) Process: Cake Model



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



- **Interest:** A concern, need or desire in addressing an issue (The reason **why** someone wants a certain solution and/or **why** the issue/opportunity is important to him/her).
- **Position:** A proposed solution or option. (How someone wants something to be done. **What** they want vs. why it's important.).

- **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)

- 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)

# 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		

(left hand column)

Design Components
Flour
Sweetener
Shape
Flavor
Moistener

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

(2<sup>nd</sup> 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	

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

- **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 Decision making*

- **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 includes:**

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.