

# ***Evaluation Matrix:***

This tool involves deliberate efforts to evaluate, weigh or choose options against a number of specific criteria

## **Uses:**

- ✚ Offers a structured approach to evaluate options against specific criteria
- ✚ Need to weigh the value of a moderate to large (8-15) number of options
- ✚ Need an accurate, detailed examination or scrutiny of numerous possibilities
- ✚ Need to evaluate all your options fairly and rigorously, and there are many relevant criteria
- ✚ Need to know which options from a large pool of possibilities are options to be developed immediately, held for further study, need modifying or rejected

## **Possible Applications:**

- ✚ Finding the strongest options for *Side Trips*
- ✚ Choosing one of several possible themes for a story performance
- ✚ Evaluating choices of action or of configuration of a mechanical device
- ✚ Guiding team members to evaluate choices relating to materials purchases for their *Team Challenge* solution

## **Steps:**

- ✚ Determine your goal or purpose and state it clearly and concisely.
- ✚ Identify and list the options you want to evaluate in rows, down the page.
- ✚ Identify the criteria on which to evaluate all options and write it as column headings across the page. Be sure that the criteria are relevant for ALL of the options being examined.
- ✚ Establish a rating scale to use in evaluating each option against all criteria.

Consider:

Excellent = 4

Good = 3

Fair = 2

Poor = 1

Or symbols:    Smiley face = yes  
                     Solemn face = maybe  
                     Frowning face = no

- ✚ Take each criterion and evaluate all the options on it before proceeding to the next criterion. This usually works better than taking one option at a time and evaluation it on all the criteria.
- ✚ Ask, “If we (use this option), to what extent will it (criterion)?” This will assist you in determining the ratings.
- ✚ Summarize the ratings for each option. Analyze the results. Remember that the goal is not just to find “one winning choice,” but to find the strongest or most effective solution, which might represent several options – modified, combined, used together, or used sequentially. Use the “decision” columns to analyze the results thoroughly.













