

Facilitated Project Planning Workshop

an experiment

Can a project manager - right from the start - “facilitate” us, as members of a project team with our requisite roles, by means of:

- Optimal project definition with timely decisions ;
- Realistic, risk-based budget and schedule;
- Committed management and funding;
- Prudent selection of consultants/ contractors; and
- An integrated team?

and so accumulate success?

What and Why Facilitation?

- Series of meetings – or a management approach, for when project managers need to influence?
- For a project management team – or others too?
- To pilot projects in a series of decisions/ deliverables – or make sure each deliverable is optimal while keeping an open mind for beneficial change?
- To engage, influence or placate senior managers and external stakeholders?
- To address project problems – or root out issues in the larger organization?

Facilitated Project Planning

from the Owner's formation of a team to plan a potential project

to the Owner's approval for construction contract documentation to begin.

or technology project equivalents

Prior Status

developed into

Viable Project

Community or Corporate Needs/ Capital Plans

+

Owner's Priorities, Experience, Culture

+

Owner's Methods, Good Practice, Regulations

+

Owner's Decisions: Objectives, Organization, Budget and Financing, Project Procurement

Plans and Preparations for Final Design and Construction

Choose an Experiment

Construction Project Groups for Business Planning (Concept) Stage

- A. Project alternatives, feasibility and justification – of viable alternatives.
- B. Financing plans, initial project funding, and approval to develop project.

Construction Project Groups for Project Development Stage

- C. Forming the design team. Developing the Plan, setting the configuration and performance requirements and agreeing on the Schematic Design.
- D. Optimizing the preliminary design and project definition to enable the Master Project Plan. Featuring Value Engineering and Partnering.

Technology Project Group(s)

- E. Forming Client/Project Team (internal or external). Verifying objectives. Setting and double-check requirements. Withstanding untimely or unjustified changes. Facing and anticipating problems.

A, Chris D; B, Sukumar?; C, Alberto; D, Bryan; E, Glynis? & Linda, Chris Q back-up.

How Facilitation?

it's not about the facilitator

- Can / must project managers, when facilitating, overcome the SPMP guidepost warnings that:
 - *“It’s hard for some facilitators to get around wanting to meet their own agenda, and just guide without directing”* and ...
 - *“The facilitator MUST remain neutral”*?
- When a project manager is directing, is it advisable to have a different facilitator? Is there a danger of a facilitator upstaging the project manager?

Be Prepared to Be Facilitated

from April 2008 SPMPGV Facilitation School

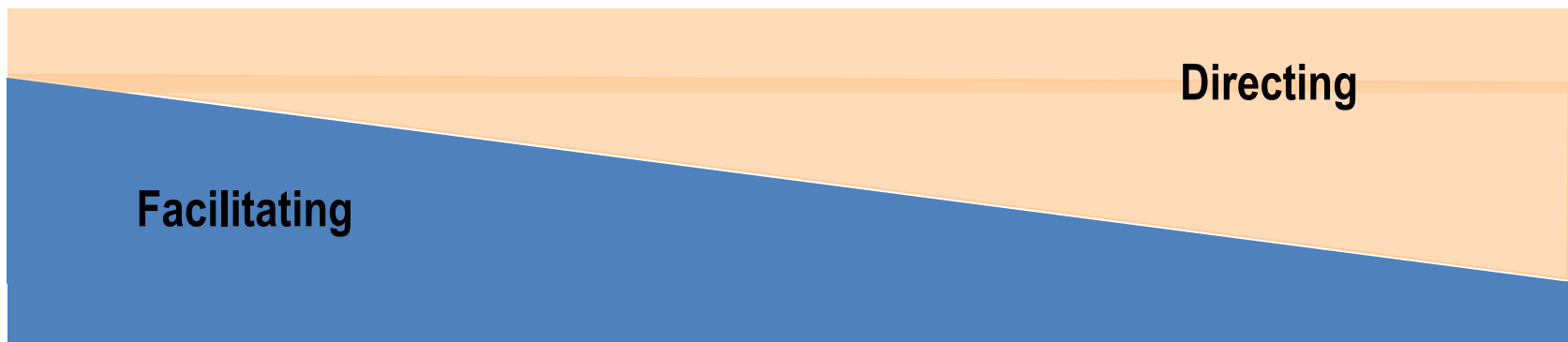
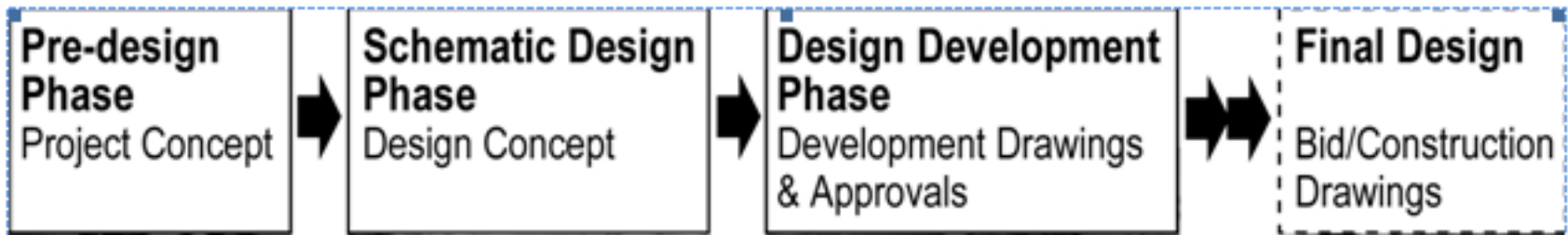
- Pay attention to objectives, roles and rules up front, e.g. no “bad” ideas – these are essential to the process.
- Engage in the facilitator’s methods:
 - a visual framework with fishbone and other diagrams
 - charting plus/minus/interesting/trade-offs
 - humour
- Be led by leading questions, probing, prodding, prompting, and provocative statements. Help facilitator separate ideas from problems, “+”s from “-”s, etc.
- Compromise without giving up a fundamental value.
- Be confident in your strengths and support the group’s safety in taking risks/ revealing weakness/inexperience.

Getting to First Base

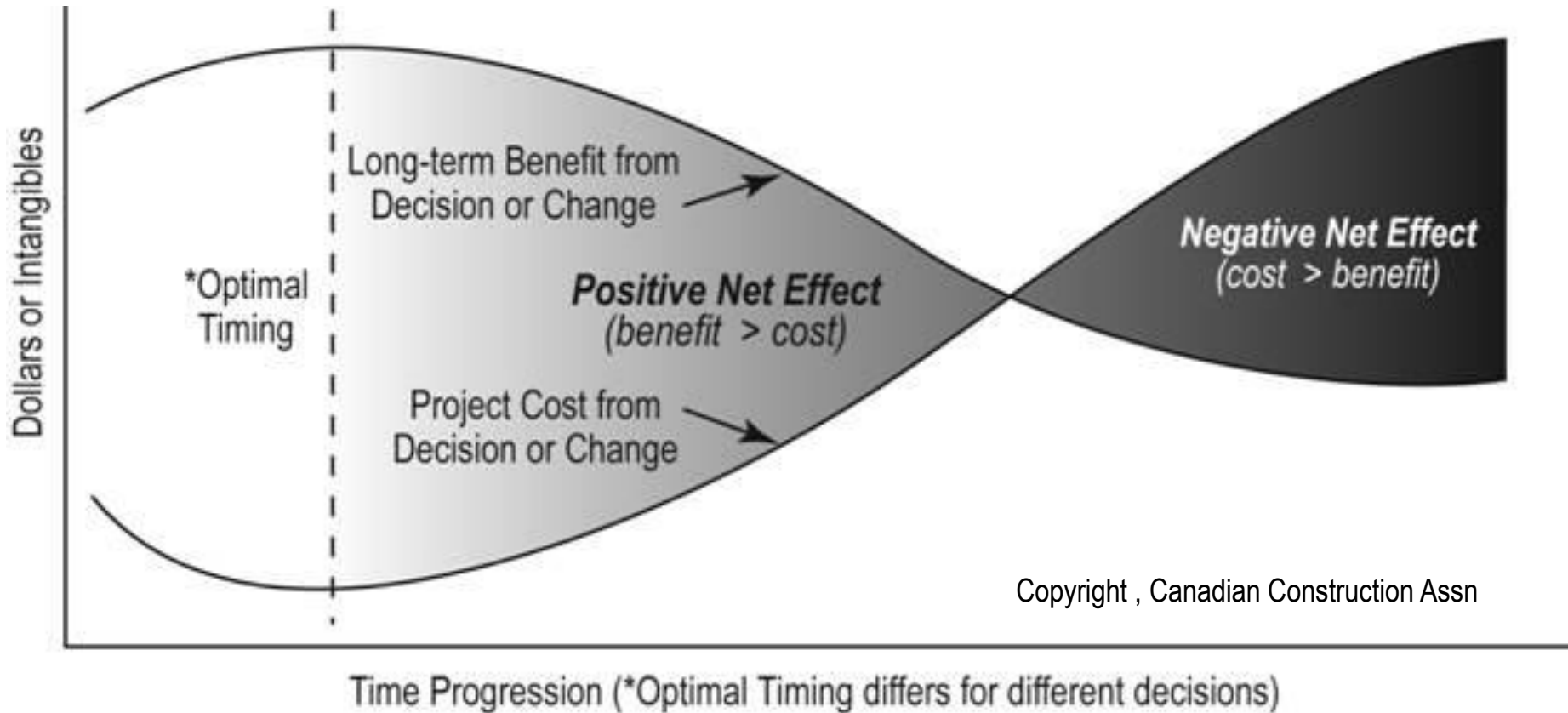
with Home Base in mind – and beyond



Design and Project Definition Phases



Investing in Project Preparations



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teamwork and hierarchy

