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IPT Workbook 2

Advisory team: develop strategic brief and value criteria

At a glance

2.1 Form advisory team	2.5 Prioritise value criteria
2.2 Consider opportunities	2.6 Screen options
2.3 Establish value criteria	2.7 Translate options in Strategic Brief
2.4 Identify stakeholders	2.8 Adopt collaborative working

Workbook

Step	Process	Culture and activities	Tools and techniques
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<p>2.1</p>	<p>Form advisory team capable of reviewing:</p> <ul style="list-style-type: none"> • required functionality • external trends and influences • industry norms and comparators • financial affordability and constraints. 	<p>An advisory team can be formed from internal resources, ongoing relationships or specific one-off short-term appointments. It should be populated by people skilled in translating business needs into physical requirements, and who have strategic knowledge of the working (especially clusters) of the construction environment.</p>	<p>Simple brief to every member of advisory team, confirming the nature of the appointment, the basis of remuneration, expected duration and freedom to act in the selection and utilisation of additional resources. In cases of one-off short-term appointments, where no framework exists, a letter of appointment should be used.</p> <div data-bbox="1120 1302 1550 1470" style="border: 1px solid black; padding: 5px;"> <p><i>Constructing Success</i>, CIB/ Thomas Telford. ISBN 0-7277-2541-6 (view at amazon.co.uk)</p> </div>
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<p>2.2</p>	<p>Consider opportunities and alternatives, e.g.:</p> <ul style="list-style-type: none"> • obtain speculative built facility • re-organise to obviate need • outsourcing • extend or refurbish • new build. 	<p>Process of challenging and questioning of business needs. This requires people with the vision to think outside of the problem and the communication skills to be able to challenge in a constructive way. This is the stage at which the decision needs to be made that a built solution is required. Other alternatives must first be identified and eliminated.</p>	<div data-bbox="1120 1512 1550 1711" style="border: 1px solid black; padding: 5px;"> <p>Guidance relating to these steps can be found in the Building Down Barriers Toolkit - Tool B1, Value Planning in Practice</p> </div> <div data-bbox="1120 1711 1550 1869" style="border: 1px solid black; padding: 5px;"> <p>OGC Achieving Excellence: A Manager's Checklist (PDF)</p> </div>
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2.3 Establish value criteria

These are the criteria that will be used throughout the project to measure the suitability and performance of the solutions being considered and delivered.

- Functionality–workflow needs
 - productivity enhancers
 - space, access, use
 - climate, services, lighting
 - flexibility
 - future needs.
- Costs:
 - capital
 - running
 - maintenance
 - cashflow constraints
 - sensitivity trade-off.
 - net present value.
- Design–aesthetic standards
 - design features that enhance business performance.
- Health, safety and welfare
 - in construction
 - in operation
 - in maintenance.
- Quality – quality standards for whole- life considerations
 - defects policy
 - quality standards for design.
- Sustainability–people (core values)
 - community
 - environmental policy and standards.
- Programme/-sequence
 - sequencing – dependency
 - key decision points
 - criticality of timescale.

Further guidance on cost criteria can be found in the **Building Down Barriers Toolkit**, specifically:

	Building Down Barriers Toolkit – Tool A3 – <i>Developing historic through life cost baseline</i>
	Building Down Barriers Toolkit – Tool C4 – <i>Collecting and documenting through-life cost data</i>
	OGC Achieving Excellence Procurement Guide No 4: Risk and Value Management
	Connaughton JN, Green SD. <i>Value Management in Construction - A Client's Guide</i>

2.4 Identify internal and external stakeholders

It is important to understand who the key stakeholders are, what their level of commitment is and how they wish to be involved and/or consulted. In particular, it is essential to understand who represents the client and what authority they have at different

Client definition including Stakeholder Mapping and Management Plan.

stages.

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2.5 Prioritise the value criteria

The relative priority of the value criteria will set the philosophy for the whole project, e.g.

- Is it time critical?
- Is it intended to win a design award?
- Has it a limited lifespan?

The risks associated with the elements of the criteria need to be carefully assessed in reaching decisions about the relative merits and priorities. This will require interaction with appropriate key stakeholders.

2.6 Screen the options and alternatives using the prioritised criteria

Select those options most likely to meet the highest priority criteria.

2.7 Translate the screened options and alternatives and value criteria into the Strategic Brief

These will form the initial goals and objectives of the project and should be signed off by the client as the definition of the business need to be met.

Strategic Brief, covering (provisionally):

- nature of project or projects
- periods of design/ construction, operation or maintenance
- value criteria and their priorities.

2.8 Decide to adopt collaborative working


The prioritised value criteria and the level of support of key stakeholders will determine whether a collaborative approach will deliver the expected benefits.



The **Collaborative Working Centre** training packages cover an overview of the principles, supplier selection, managing change, integrating procedures, measuring performance and continuous improvement.



The Handbook of Supply Chain Management – the essentials also gives more information in this area. Available from the **CIRIA** website (publications).

 The CBP website has a **Partnering self-assessment diagnostic tool.**

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