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Expand core team and clusters: develop potential solution



Home

TheToolkit Guide

Integrated Supply Chain

Integrated Project Team

What's new

At a glance

4.1 Induct new members

4.2 Reconfirm goals and objectives

4.3 Brief the Team on the Strategic Solutions

4.4 Redefine Roles and responsibilities

4.5 Reconfirm procedures for resolving issues

4.6 Refine solutions

4.7 Confirm funding

4.8 Test solutions against funding

4.9 Confirm solution

4.10 Confirm team

4.11 Review and establish remuneration strategy and processes

4.12 Establish project insurances

4.13 Establish IPT board, and confirm team including clusters for project

Workbook

Step	Process	Culture and activities	Tools and techniques
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4.1 Induct new members


With some emerging direction in potential solutions, additional skills will be required to take the options to a greater level of development. This may also require a different balance within the clusters already covered.

Partners and cluster partners:

- The senior person offering the commitment.
- His/her organisation.
- Structure of supply clusters.

Every time new people join an Integrated Project Team (IPT), they should undergo a properly structured and consistent induction, focused on the agreed values and behaviours and designed to:

- enable individuals and teams to understand what makes an effective collaborative team
- explore ways for teams from different companies, disciplines

 The Building Down Barriers Toolkit - Tool C1 **Forming Supply Clusters and Appointing Cluster Leaders**, contains information on the principles and practicalities of managing clusters.

and backgrounds to come together and work as one team

- stimulate enthusiasm for the IPT and the benefits of collaborative thinking and working
- develop the potential for an atmosphere of trust, openness and no blame
- achieve integration in as short a time-frame as possible, with minimal or no reduction in individual or team performance
- ensure core values are applied equally to all partners in a cluster.


<p>4.2</p> <p>Reconfirm goals and objectives</p>	<p>After the expanded team has been agreed, it is necessary to reaffirm the goals and objectives. Are the needs that were identified still being met? Are the budget and the programme still correct? Will the specified timeframe allow the project needs to be delivered?</p>	<p>Any developments in goals and objectives</p> <ul style="list-style-type: none"> • value criteria selected • their order of priority • how performance will be measured.
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Back to 'At a glance'

<p>4.3</p> <p>Brief the team on the strategic solutions</p>	<p>All members of the team need to fully understand the background and thinking behind the strategic solutions being considered so that they are able effectively to contribute to the project as it moves forward.</p>
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<p>4.4</p> <p>Redefine roles and responsibilities</p>	<p>Roles identified at the start of the project need not be fixed for the duration. The project will inevitably change, requiring individual roles to adapt. Individuals will develop, or new people will join the project, bringing new and different skills. Training additional project members will ensure that they quickly become familiar with IPT principles.</p>	<p>Roles and responsibilities of the project team – developed from those in 3.5</p> <ul style="list-style-type: none"> • Reconfirm existing roles • Develop any new roles.
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<p>4.5</p> <p>Reconfirm procedures for resolving issues</p>	<p>Ensure that everyone is aware of the processes for resolving problems and issues before they arise.</p>
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<p>4.6</p> <p>Refine solutions</p>	<p>The team will take the solutions to the next stage of development to enable them to be reviewed in more detail. The project programme must reflect the constraints that apply to all participants, be collectively agreed and be realistic, while ensuring that opportunities to reduce the length of the project are fully explored. A collaborative project involves enthusiastic individuals and a time-scale</p>	<div style="border: 1px solid black; padding: 5px;">  <p>Refer to the Building Down Barriers Toolkit - Tool B2 Drafting the Project Brief</p> </div>
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that is unnecessarily long will diminish this enthusiasm just as much as one that is too short.

After the reforming process has been completed, it is necessary for the new team to refine potential solutions to ensure they meet the goals and objectives. This is the process of unlayering the options, i.e. taking them to a more developed, but not fully detailed, level of evaluation. This level will be different for different elements of the project, but in general must ensure that the interactions can be clearly defined and implications understood. Team members should be able to take value decisions on what should be included, what should be left out and what needs to be changed, in order to meet the needs at the start and as they change throughout the project. This includes any contingency or risk elements, which should be clearly identified for all to see.

The same principle applies to the programme, the standards and the specifications. Everyone must understand the criteria, why they are important and what their value is in terms of the successful completion of the project.

Back to 'At a glance'

4.7 Confirm funding

The client/funders/stakeholders must be consulted to confirm the investment parameters which are to be applied.

4.8 Test solutions against funding

The potential solutions need to be tested in detail against the prioritised value criteria. It is unlikely that all the criteria can be met with the same likelihood of success. The team will need to draw on all the available experience to properly evaluate the most advantageous solution to recommend to the client.

Generate comparison of options.

4.9 Confirm solution

The IPT should propose the preferred solution to the client who should formally agree it to be adopted for the project.

4.10 Confirm team

Once the solution to be progressed has been agreed the appropriate team member necessary to continue to develop and deliver the solution can be confirmed. Generally speaking the team should comprise the same organisation and individuals who have been involved since inception. Limited change may be



required due to different skills being necessary, but not because of any desire to create a 'commercial' advantage.

4.11 Review and establish remuneration strategy and processes

Align the financial interests of all partners (and in turn cluster partners) with the Client's Objectives, by agreeing where appropriate;

- reward formulae, to quantify the benefits to the Client of different levels of achievement of each objective
- percentage shares, to predetermine for each partner (including the client) their share of the reward eventually earned
- risk allocation
- payment procedures which minimise sequential transactions.

Reward formulae (if appropriate), based on measured performance against selected value criteria and their priorities, and shares of partners (and sub- shares of cluster partners) allocation of risk (if appropriate), e.g. by capping of recoverable costs.

	<p>Refer to the Building Down Barriers Toolkit - Tool A5 Setting Incentives and Share Saving Schemes...</p>
	<p>...and Tool A6 Applying Risk Management in Practice.</p>

4.12 Establish project insurances

Insurances which cover the potential liabilities of one party versus another are divisive and promote blame culture. Innovations in insurance have therefore been under development and trial for some time. All Risks Insurance and more recently Professional Indemnity Insurance are being arranged on a project basis, whereby the client, the consultants and the contractors are all covered. Product liability insurance can also be arranged for supply chains. A further innovation under discussion is to replace all 'liability insurances' with one single 'financial loss insurance' – a development of interest to insurers if the partners are themselves financially aligned to achievement of the client's measurable objectives.

Such types of Project Insurance have to be tested on Demonstration Projects using IPT's in order to establish their cost, coverage and viability, and expert advice should always be taken. Endeavour to secure insurances on a project basis wherever possible, embracing:

- all IPT partners (including the client and cluster partners)
- under collective cover (whether on a liability or financial loss basis)
- on a no-individual-blame basis (with rights of subrogation)

Project insurances– e.g.:

- beneficiaries
- policy wordings
- limits/excesses

waived).

4.13	Establish IPT board, and confirm team including clusters for project	Establish the Integrated Project Team board membership including, cluster strategies and representation.	IPT board names Project team including cluster leaders' names See Chainlink workbooks for different types of supply chain arrangements.
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[back to top](#)

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