

PROJECT COLLABORATION

ECITB PROJECT COLLABORATION TOOLKIT

GUIDE TO IMPEMENTATION

Introduction

The ECITB Project Collaboration Toolkit was created in 2016 and has since been extensively used to support project collaborations across many UK industry sectors. The Toolkit takes the form of a comprehensive ‘handbook’ which contains detailed guidance around behaviours and good practices to encourage effective project collaboration throughout a typical project lifecycle. Whilst abbreviating or summarising the content of the Toolkit would be detrimental and would diminish its value, it is recognised that for organisations and projects that are considering the adoption of a collaborative project delivery strategy it might be difficult to know where to start. This Guide to Implementation intends to provide guidance on how to go about establishing a collaborative project delivery strategy, by using the ECITB Project Collaboration Toolkit, with focus on the essential considerations. References to the ‘tools’ or elements of the Toolkit across all four of its phases are provided throughout the Guide to Implementation to allow further background reading where required.

The most important work that is needed to develop effective project collaboration should be performed early in the project lifecycle, corresponding to early Front-End Loading (FEL) and project set-up. Emphasis on the ECITB Project Collaboration Toolkit corresponding phases 1 and 2 is therefore reflected in this Guide to Implementation.

The ECITB Project Collaboration Toolkit presents “phase review and phase learning” checklists for the first three of the lifecycle phases. The checklists can be accessed via an online tool on the ECITB website via the following link:

<https://www.ecitb.org.uk/professional-management-training/project-collaboration-toolkit/>

[ECITB PCT Phase 1 – 1.8 Phase review & phase learning; ECITB PCT Phase 2 – 2.10 Phase review & phase learning; ECITB PCT Phase 3 – 3.5 Phase review & phase learning]

Deciding to Collaborate or Not – the Business Case

Adopting collaborative project delivery strategies is not an easy option and the establishment of appropriate collaborative relationships between project delivery stakeholders is challenging. Whilst there presently seems to be a global interest in the potential benefits of project collaboration and the improvement in performance that it can deliver, the essential permanent shift in culture and change from long established adversarial contracting practices is some distance away. Indeed a collaborative project delivery strategy may not be necessary in all cases – where project scopes are clear and well documented (with diminished risk of change) and the roles / responsibilities of the delivery stakeholders are also clear, a more traditional form of transactional style contract might

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well be the most appropriate strategy. However, in such cases it will still be important to ensure that the delivery stakeholders fully understand the contribution that is expected of them toward achieving project objectives in order to avoid contractual conflict through self-interested behaviours.

In determining whether a collaborative project delivery strategy is appropriate, the potential benefits of collaboration need to be carefully studied and documented within the Business Case. The following range of activities should be considered and pursued:-

- The Project Lead Entity should study and fully understand the challenges of forming collaborative project relationships between the project delivery stakeholders. This will require an open and honest assessment of the Lead Entity's own organisational culture and collaborative capability as well as the cultures and capacity for collaboration within potential partner organisations. [\[ECITB PCT Phase 1 – 1.2 Undertake collaborative assessment and establish enabling climate\]](#)

For potential project collaborations it is important that Project Lead Entities identify and engage with potential project delivery stakeholders at a very early stage. The process for partner selection should be different and as reflective of the need for capability to form effective relationships as it is for the need for scope and technical competence. [\[ECITB PCT Phase 1 – 1.6 Partner selection process\]](#)

- Which project scopes and stakeholder relationships will be critically important to successful achievement of project objectives?
 - All critical relationships, interfaces and interdependencies should be clearly identified and documented.
 - Where certain stakeholders do not need to form collaborative relationships, the way in which they will interact also needs to be discussed and documented.
- Resistance to change and internal 'blockers' may exist within many stakeholder organisations. These quite commonly come from certain organisational functions who see their role as protecting their organisations from external risks. However, in pursuing these perceived responsibilities, such functions quite commonly promote self-interested rather than collaborative positions. All project delivery stakeholders should consider:-
 - Is the adoption of a collaborative strategy for delivery of the project and their role and contribution toward it supported by senior leaders?
 - Would the appointment of a collaboration Champion (essential for Project Lead Entities), someone who can help to remove internal barriers and overcome

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functional 'blockers', be of benefit? [\[ECITB PCT Phase 1 – 1.1 Appoint Collaboration Champion\]](#)

- The project delivery stakeholders need to discuss and fully understand the potential mutual benefits of project collaboration and agree that these will more than warrant the investment of energy, time and cost required to establish the necessary relationships.

Establishing a Collaborative Environment

If the Business Case for adopting a collaborative project delivery strategy is compelling, there are then a number of important considerations for ensuring that the appropriate relationships between the stakeholders, based on mutual understanding and trust, can be developed:-

- Consideration should be given to adopting forms of contract that will reflect the decision to collaborate in project delivery and which will reflect both fair allocation and shared responsibility for management / mitigation of project risks and the incentive to share in up-side potential. [\[ECITB PCT Phase 1 – 1.7 Establish contracting principles\]](#)
- The project delivery stakeholders should plan events (one or a number of events, appropriate to project schedule duration and circumstances) which can be used to develop the required stakeholder relationships and build the platform of trust upon which such relationships can flourish. [\[ECITB PCT Phase 1 – 1.3 Stakeholder management conference and periodic reviews & ECITB PCT Phase 1 – 1.4 Establish foundations for stakeholder trust\]](#)

Workshop style events can be a very useful means to address and agree on such important considerations as:-

- Relationship Plans and Behavioural Charter content. [\[ECITB PCT Phase 1 – 1.5 Establish collaboration plan and behavioural charter\]](#)
- Agreement / language for common project delivery objectives (that all project delivery stakeholders understand and can 'buy into' and alignment to such objectives. [\[ECITB PCT Phase 2 – 2.2 Establish common project delivery objectives and align\]](#)

Setting up the Project for Collaboration

Based on the content of ECITB Project Collaboration Toolkit – Phase 2, the following areas of consideration relate to setting up the project correctly for effective collaboration:-

- A process for selection of project team members needs to be adopted which addresses the importance of the individual's ability to develop effective interpersonal

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relationships, as well as functional / technical competence. [\[ECITB PCT Phase 2 – 2.1 Project team selection process\]](#)

- Consideration should be given to establishing a common project team environment, such as a shared electronic whiteboard workspace. Many project collaborations are effectively using such tools to informally communicate between organisations and members of integrated project teams and share and recognise achievements. [\[ECITB PCT Phase 2 – Create collaborative project team environment\]](#)
- Whilst collaborative project delivery strategies can be worked very effectively in circumstances where there is potential for project scope growth or where there are considerable uncertainties, the PCT promotes the practice of detailed documentation of the project scope and allocation of scope between the delivery stakeholders. Disagreements concerning scope and scope allocation together with how change is managed can quickly lead to conflict and adversity in conventional contracted arrangements. The PCT promotes up-front discussion between the project parties and consideration of how the stakeholders should respond to certain scope and change scenarios in order to avoid such conflict. [\[ECITB PCT Phase 2 – 2.4 Document and agree project scope & ECITB PCT Phase 2 – 2.5 Scope management & change management protocol\]](#)
- As previously stated, barriers and ‘blockers’ to effective collaboration can exist within many organisations. Problems can periodically occur when functional representatives, who have not been formally engaged or involved in agreeing the project strategy take up positions of self interest in opposition to the agreed strategy, processes and objectives of the project. The PCT promotes that functional stakeholders should be regularly communicated with and engaged to ensure alignment. [\[ECITB PCT Phase 2 – 2.7 Engagement of functional stakeholders\]](#)
- In agreeing a collaborative strategy for the delivery of a project, there are many opportunities for efficiency gain through the elimination of duplicated work processes and reducing the wasted effort which results from role duplication and ‘man-marking’. The PCT generally promotes the advantages of integrated team working. A number of ‘single team’ approaches to the management of certain aspects of the project are cited in ECITB PCT Phase 2 with a further number of such tools incorporated into Phase 3. [\[ECITB PCT Phase 2 – 2.6 Processes for managing risk and uncertainty; ECITB PCT Phase 2 – 2.8 Agree project reporting format & ECITB PCT Phase 2 – 2.9 Agree project processes standards and specifications\]](#)

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Executing a Collaborative Project

As mentioned in the foregoing section, effective collaboration presents many opportunities to streamline work processes and provide innovative solutions to some of the problems that can be encountered throughout project delivery. ECITB PCT Phase 3 incorporates tools for the efficient performance of some of the most important project execution processes.

- On conventional projects the effort associated with maintaining project controls can become very intensive with many parties (Project Lead Entities, contractors, sub-contractors) duplicating the overall work in schedule and cost control. The PCT advocates the adoption of a single project control process to result in “one version of the truth” as far as project control status is concerned.[\[ECITB PCT Phase 3 – 3.1 Collaborative schedule and cost control processes\]](#)
- In similar manner, although the stakeholders on most projects (whether collaborative or not) are prepared to cooperate with each other in order to ensure the best achievable safety, health and environmental performance, the imposition of differing standards, management processes, auditing practices etc. can result in unnecessary wasted or duplicated effort. ECITB PCT Phase 3 promotes a “single team” approach to the way in which project safety, health, environment and quality performance and assurance are managed.[\[ECITB PCT Phase 3 – 3.3 ‘Single team’ quality monitoring & assurance and ECITB PCT Phase 3 – 3.4 ‘Single team’ safety, health & environmental management\]](#)
- As previously stated, for collaborative projects it is good practice to reflect the risk sharing and gainshare opportunities of the project delivery stakeholders in the project contracting framework. The use of visible KPIs to measure and monitor stakeholder performance is encouraged and all KPIs should be transparently visible to all stakeholders and incorporated into project control dashboards.[\[ECITB PCT Phase 3 – 3.2 Stakeholder risk & reward – KPI measurement\]](#)

Closing Out and Learning from a Collaborative Project

As with all projects, the approach to closing out a collaborative project is important to ensuring that all ‘Lessons Learned’ can be evaluated and reflected in future plans and strategies. Lessons Learned should be identified, recorded and reviewed on a regular basis throughout the project lifecycle but ECITB PCT Phase 4 promotes a number of tools to ensure that project learning is openly and transparently discussed and disseminated during the final phase of project delivery.[\[ECITB PCT Phase 4 – 4.1 Evaluate project lessons learned; ECITB PCT Phase 4 – 4.2 Collaborative lessons learned conference; ECITB PCT Phase 4 – 4.3 Close out collaborative \(risk and reward\) project agreements; ECITB PCT](#)

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Phase 4 – 4.4 Review, agree & record project outcomes; ECITB PCT Phase 4 – 4.5 Establish basis for future project collaborations.