

Planning Your Programme

Helping you to be successful in delivery

ARUP



FUTUREGOV

copper

 Grant Thornton



Pitch

Audience

This session is aimed at project Town Deal Board to help them think about planning the governance and delivery of their projects that involve some construction.

It is pitched at those with a little knowledge of delivery in what ever context.

Session Objectives

This Planning Your Programme webinar will provide an overview of the approaches and ideas you may need to consider in order to develop your delivery plans, especially those involving some construction .

Introduction

Agenda

Speaker

Alistair Godbold – Nichols, Programme Manager with over 30 years experience, Hon Fellow APM and Chartered Project Professional

1. Context

2. Why now

3. General planning

4. RIBA Plan of Work

5. Key items

6. TFDP Help

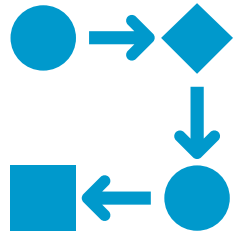
7. Q+A

Context

This follows on from:

- Looking Ahead to Project Initiation
- Management Case Good Practice
- Project Management Best Practice

Why start now



How long with this take

The longest sequence of all the things you need to do to deliver your projects is call the “critical path”

Any delay to any activities on this path will make you late

Some of the essential activities needed to deliver your projects will take more time than you first think.



Planning

Most people think about the next thing they have to do and then add up all the times to see when they will finish, left to right planning.

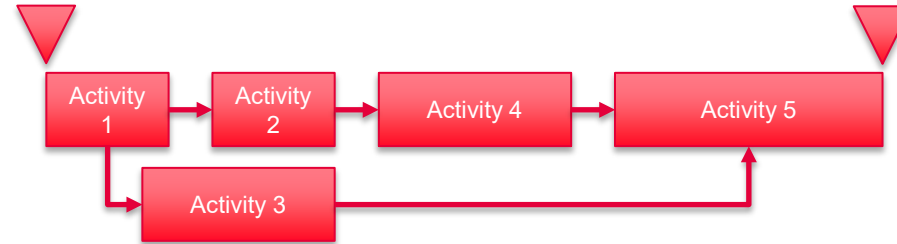
A useful technique is the think about when you need this and “stand in the future” and work backwards to see when you need to start, or in some cases when you should have already started, right to left planning.

Planning

- Planning is an unnatural process; it is much more fun to do something. And the nicest thing about not planning is that failure comes as a complete surprise rather than being preceded by a period of worry and depression
 - *Sir John Harvey Jones*
- Plans are nothing; planning is everything
 - *President Dwight D Eisenhower*
- Therefore no plan of operations extends with any certainty beyond the first contact with the main hostile force
 - *Helmuth von Moltke the Elder*
- Everyone has a plan until they get punched in the face
 - *Mike Tyson*

Left to Right planning

Most plans are constructed by thinking of the sequence of activities starting from now and then adding the durations to see when you will finish. This is known as **left to right planning**.



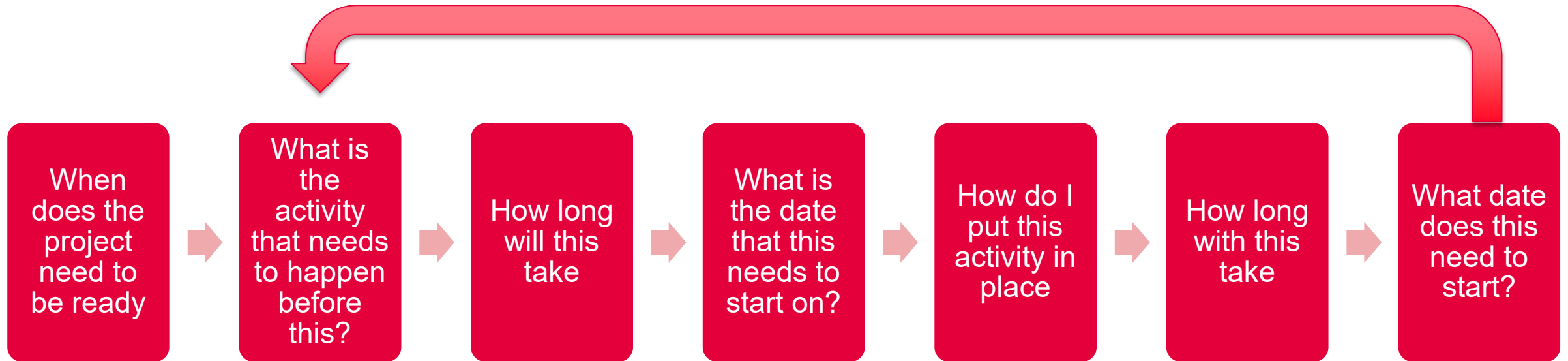
Tends to focus on what you know now and the activities needed to start

Right to Left planning

Another, perhaps more useful method is **right to left planning**. This is where you can imagine yourself in the future when your project is completed and it is in operation or people are using it and think of the steps from that end what you do just before opening and work backwards with the activities and the durations.

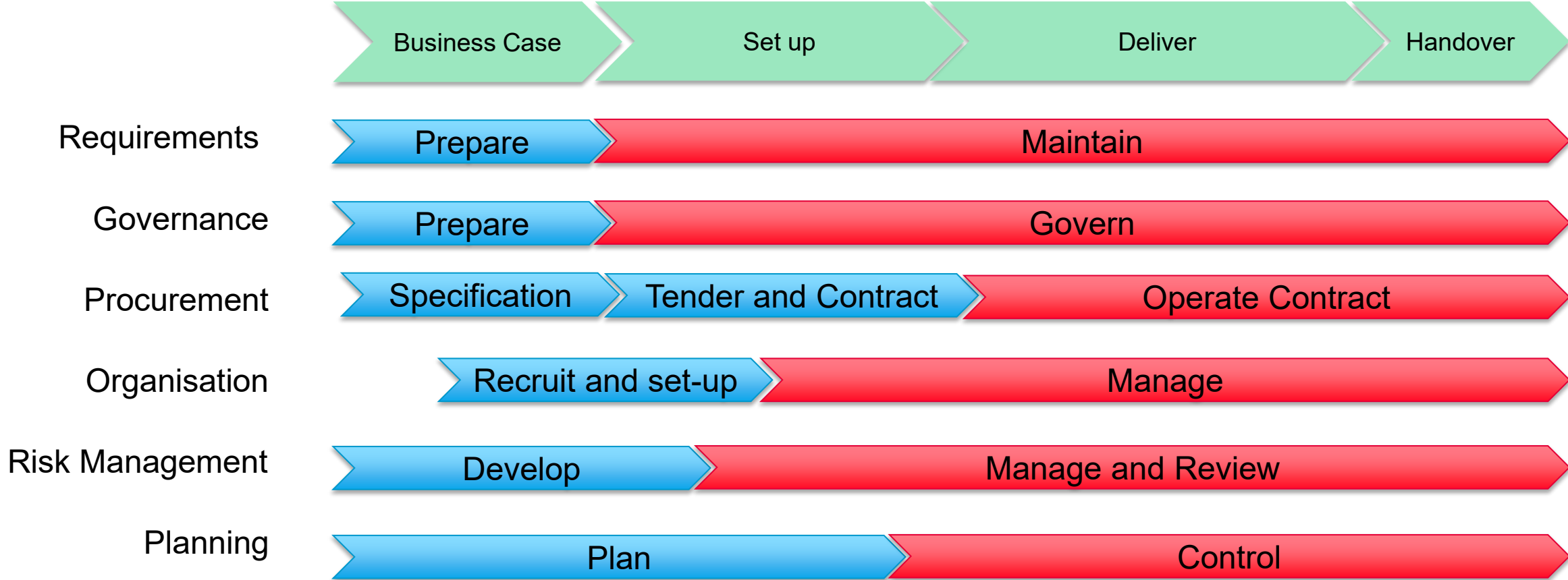
- This gives you a start date
 - which is hopefully this is ahead of where you are now, more commonly you find out that you should have started a couple of months ago.
- Allows you to review the plan, the sequencing and to see how or if you can make it fit.
- Work with the team, including procurement staff, builders, architects, town planners and project managers to make sure you have all of the activities, that you have challenged the necessity for the logic and duration and you are doing it as efficiently as possible.
- Allows you focus on the activities at the end of the project, not just at the start about which perhaps more is known.

Right to left planning



Repeat this process until you get to the activity you have already completed e.g. the business case

General Planning and Control



- **Urban Regeneration, Planning and Land Use**
- **Arts, Culture, and Heritage**
- **Skills Infrastructure**
- **Local Transport**
- **Enterprise Infrastructure**
- **Digital Connectivity**

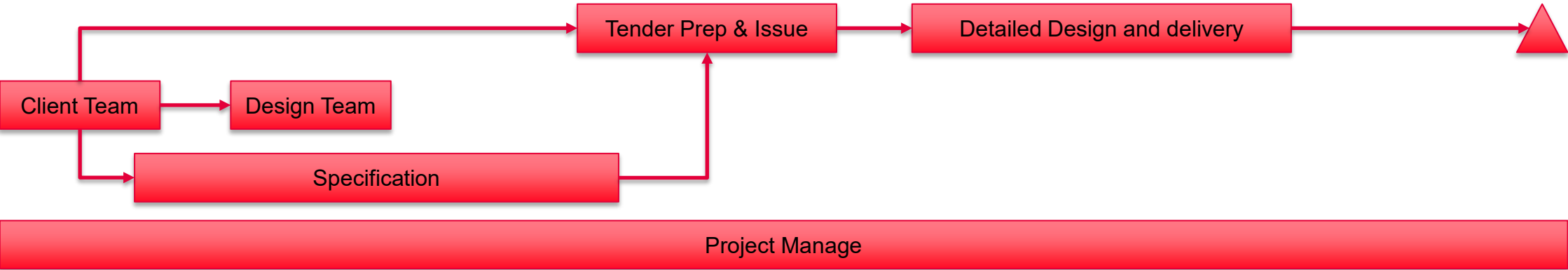
Most types of Towns Fund projects involve some construction

Good framework to use is the “RIBA Plan of work 2020”



Using the RIBA Plan of work

0 – Strategic Definition	1 – Preparation and Briefing	2 – Concept Design	3 – Spatial Coordination	4- Technical Design	5 – Manufacturing and Construction	6 – Handover	7 - Use
Get your team together Define your requirements	Define your procurement strategy Health and Safety	Review with stakeholders	Detailed studies of project	Design for construction	Manage construction	Commission building	Maintenance and operations
Business Case	Project Brief Outline Project Plan	Outline Specification CDM File	Planning Application	Detailed Project Plan and controls	Reports and controls	Lessons learned O&M Manuals	Benefits realisation report



RIBA Stage 0 – Strategic Definition

Most of this stage should be in your Business Case

- Making the right strategic decisions
- Consider the pros and cons, Project Risks and Project Budget for a range of options
- Site Surveys and planning appraisals
- Agree the best option for delivering the requirements

RIBA Stage 1 – Preparation and Briefing

Preparing the information that the design team will need to start the design process

- Feasibility Studies might be required in order to tease out the full range of briefing considerations
- Develop and agree the requirements – important to get these done and agreed by all
- May prepare and illustrative masterplan vision if this has not been done already as part of the project definition
 - Demonstrate that the requirements can be accommodated on the site / area
 - There is a direct correlation between cost and a building's size so this will need to be taken into account

RIBA Stage 2 – Concept Design

- Your design team will develop the project information which may include
 - Drawings
 - Reports
 - Structured information about facilities, floors, spaces, zones, systems and components etc.
- Develop presentation material such as photo visualisations and 3D walk-throughs to support consultations with your stakeholders in the Town
- The consultant team will prepare a concept design report which records the basic design concepts for the preferred option
- An application for planning permission might also be made at this stage.

RIBA Stage 3 – Spatial Coordination

Make sure the building or realm is of the right size

- Design studies and cost exercises to estimate how much this will cost and that it is within your budget
- Produce a cost plan, project specification and outline specification
- Put in place change control to make sure you have control of the requirements and nothing gets added in without your control
- Make sure the design and concept complies with building and other regulations
- If not done already - submit the Planning Application

RIBA Stage 4 - Technical Design

Produce all of the information needed to be able to construct / build

- Produce the technical and architectural designs
- Incorporate any planning conditions to the programme
- Design any systems that will be needed (HVAC, lifts, lighting etc.)
- Submit Building Regulations application
- Produce a full set of specifications to pass on to the builder to be able to begin construction
- Keep your stakeholders informed about what this will look like and how it will help, when it will be ready, how to be involved.

RIBA Stage 5 – Manufacturing and Construction

Manufacture and build

- Think about site logistics to minimise impact on your Town
- Monitor the construction against plans
- Manage the contract and any stage payments
- Ensure compliance with regulations including your accountability under CDM
- Produce the Health and Safety file
- Review any documentation produced to be able to operate and maintain the building
- Manage any defects list

RIBA Stage 6 – Handover

Accepting the building or realm into use

- Review how the project went and what lessons you can learn to apply to your other projects or other Towns can use
- Final commissioning to use
 - Integrate with other projects or initiatives
 - Opening ceremonies
 - Publicity in local and national press
- Final adjustments needed in use

RIBA Stage 7 - Use

Lasts for the life of the building

- Monitor and manage the benefits
- Manage Health and Safety
- Manage Fire Safety
- Comply with planning conditions as required
- Maintain the asset

Right to left thinking – key items

Specifications

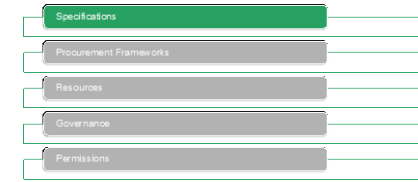
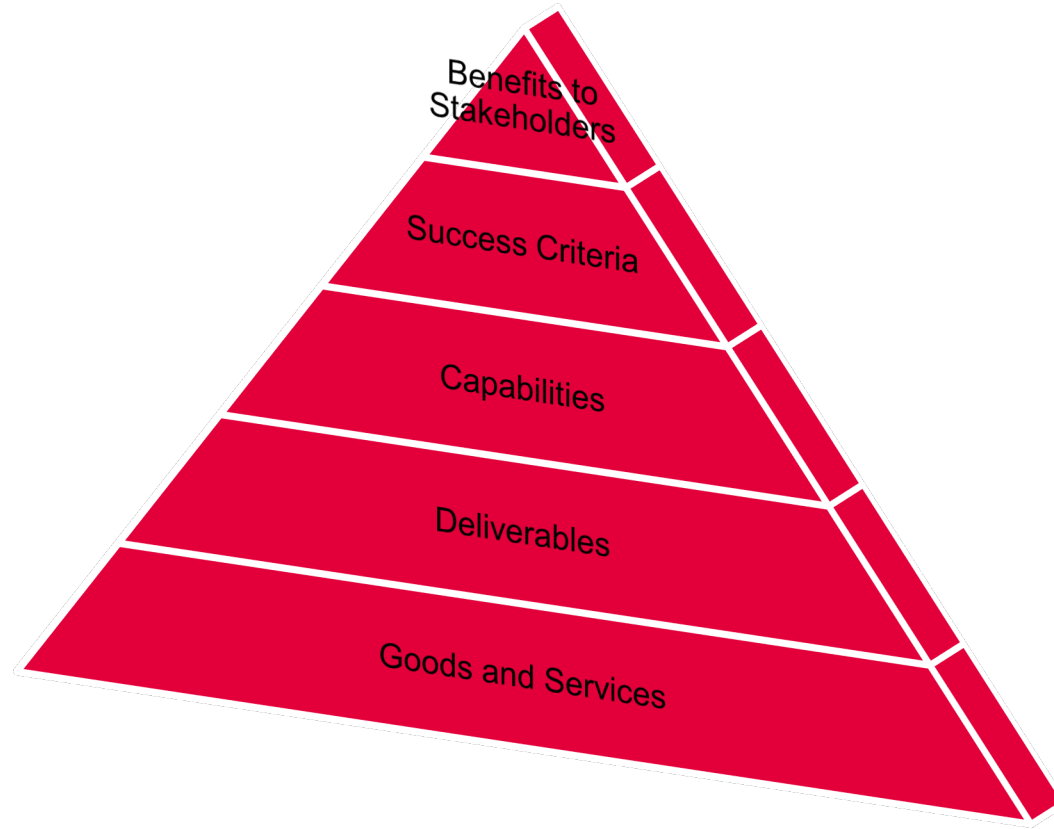
Procurement Frameworks

Resources

Governance

Permissions

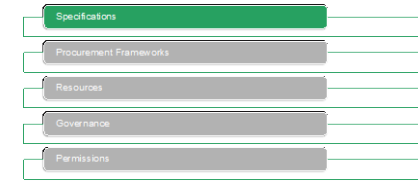
Specifications



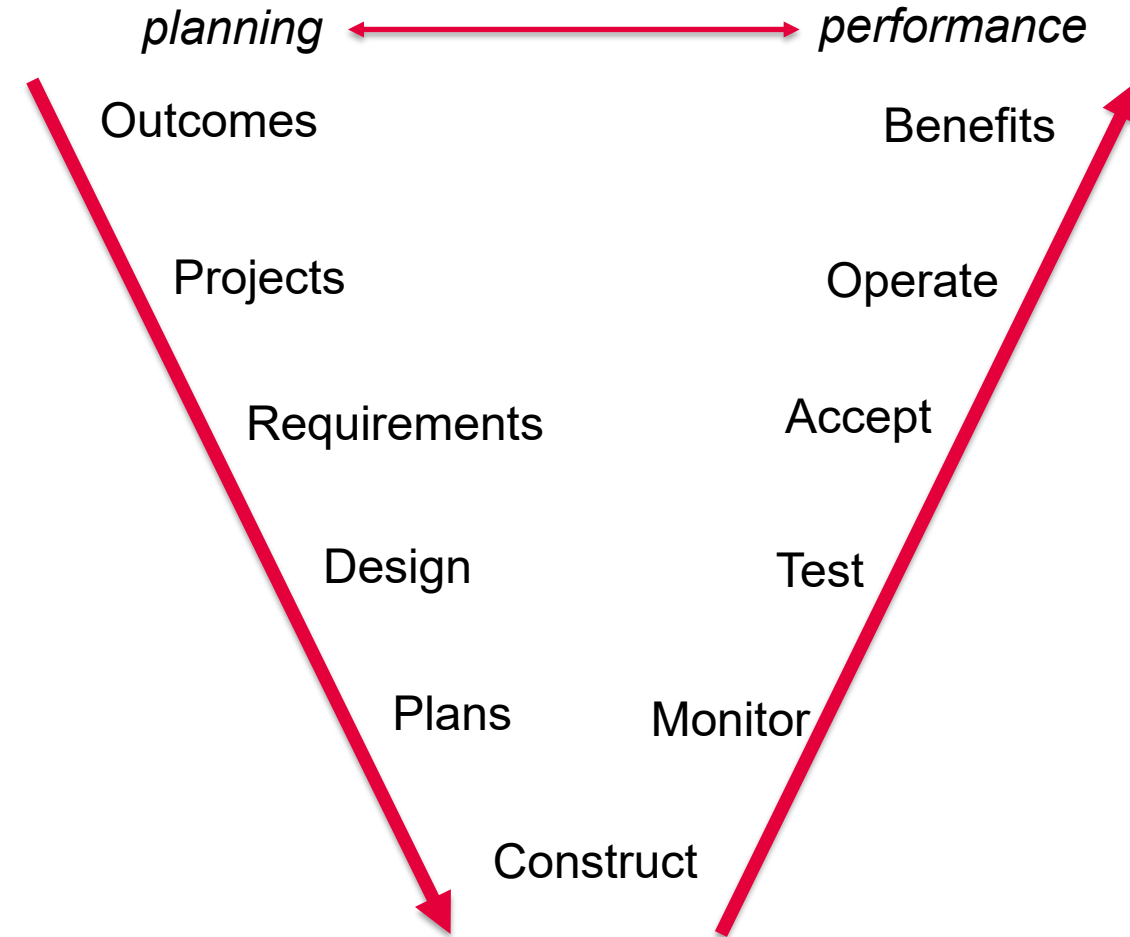
Normally it is very hard to specify every nut and bolt so contract specifications are normally defined in terms of its function or performance. The supplier then uses their expertise in cooperation with you to determine the best way to deliver this.

The specification may be expressed in terms of outputs, and the metrics used to measure them.

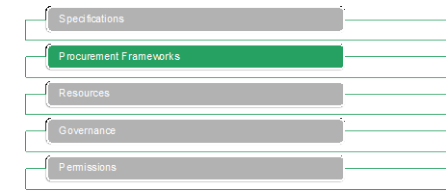
Specifications – Scope Management



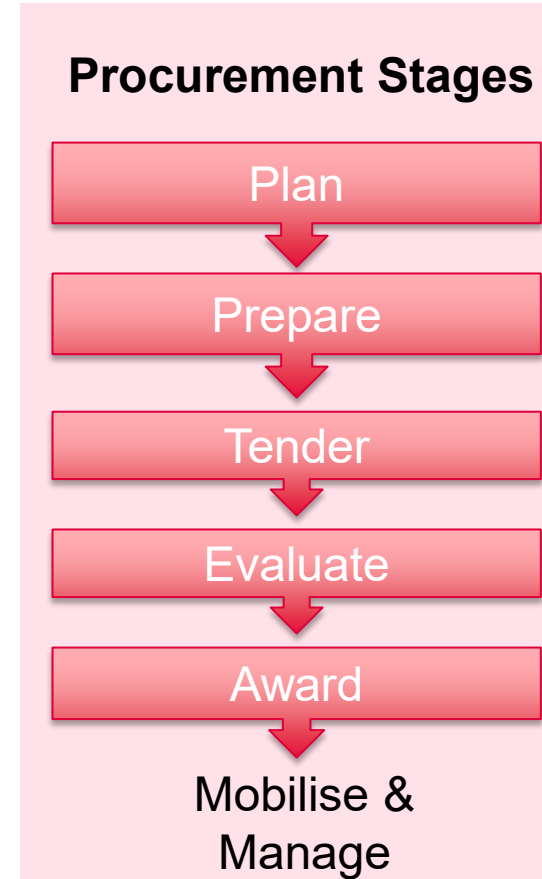
- Scope of the project and its key elements
- Approach to specifying, approving, and managing requirements
- Approach to solution development, confirmation management, acceptance
- Interfaces with third parties and management approach



Procurement Frameworks



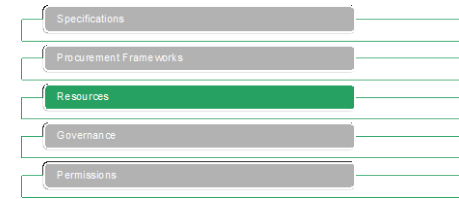
- Consider and choose appropriate routes:
 - Bespoke competition: single stage/multi stage
 - Framework: range of providers (may be quicker)
- Consider and choose appropriate procedure:
 - Open, restricted (PQ), competitive dialogue, competitive with negotiation, innovation partnership
- Plan for Invitation to Tender and Evaluation
 - Basis: ‘most economically advantageous’
 - Components: reflecting balance scorecard themes
- Plan for how you will mobilise and manage
 - Managing any deviation from contract, changes
 - Assurance of delivery e.g. with a Quantity Surveyor



Examples

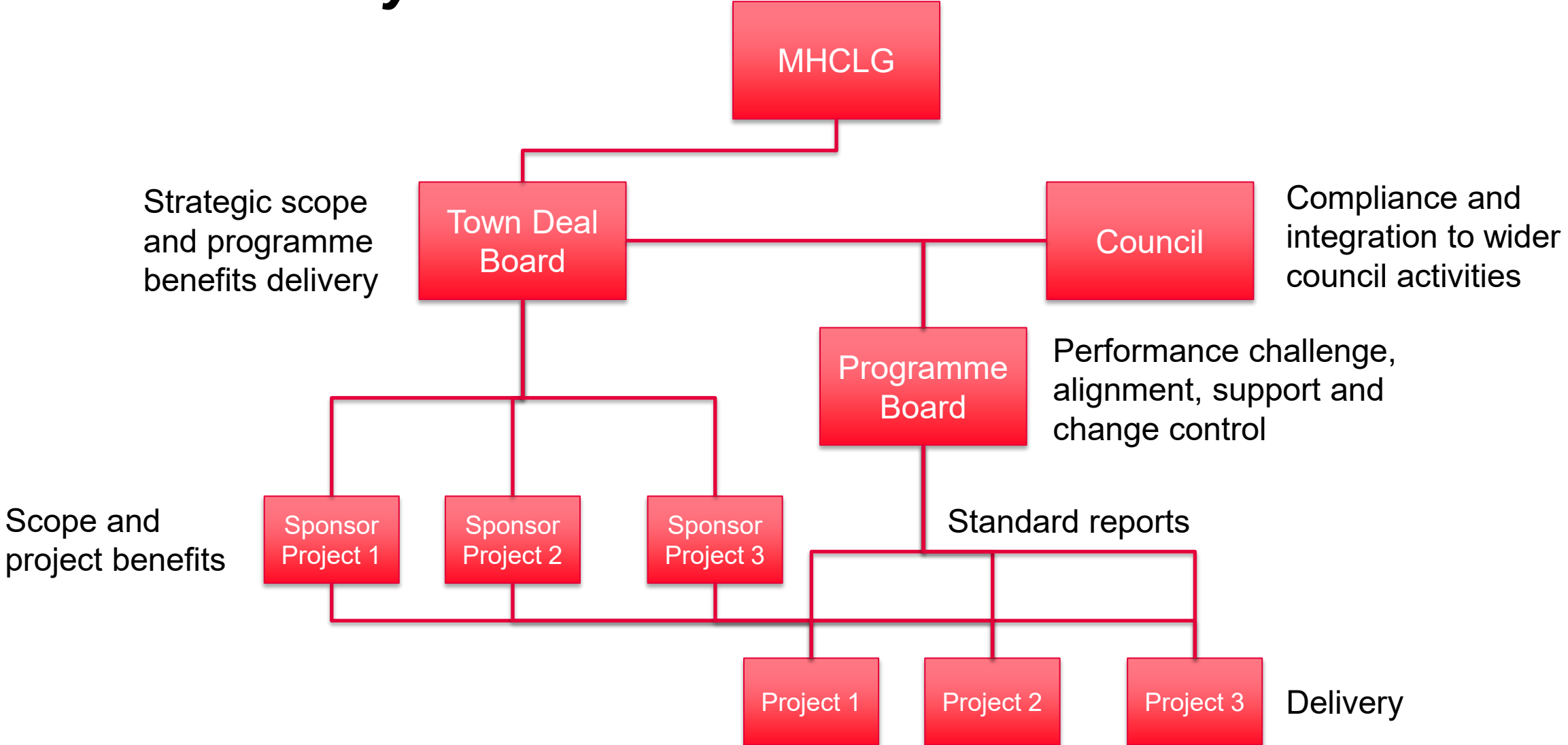


Resources

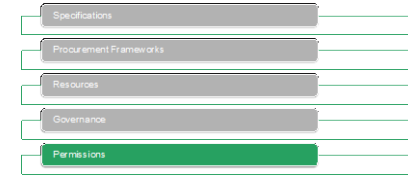


- Getting the right people on your project is essential, having people qualified for what they do with enough time to devote to the task will help.
- Engage with local large employers who may be able to supply staff to help

Governance – Possible structure and accountability



Planning Permission



The Towns Fund have produced detailed guidance on any planning permission you may need for your project, or Environmental Impact Assessment. This is contained in the document on the Delivery Partner Towns Fund Web site called [“Road to Delivery: Planning and EIA Requirements”](#)

The briefing pack covers:

- Plan making – establishing your projects in planning policy.
- Development management – gaining planning permission for your projects.
- Environmental impact assessment.
- Habitat regulation assessment.

Planning out the activities and making sure you have the resources and expertise to navigate your way through these should be part of your plan. It is these sorts of activities that can take longer than you think.

TFDP support offer

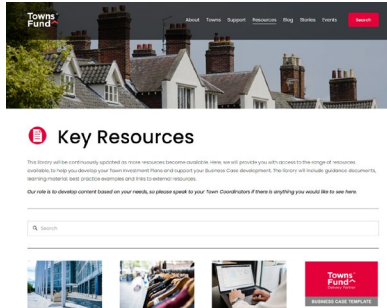
Many of the projects in the towns fund will not have been carried out by the Town before and will be new to many of the people taking part. It is important that you take advice from professionals or to learn from the experience of other towns who may have done something similar before or be doing it at the moment.

This guidance document is only a brief summary of some of the basic tools and techniques that can be used to help deliver your projects. It is not a substitute for having the right professionals manage the delivery of your projects.

There is support available from the Towns Fund Delivery Partner to help Towns set up their projects and get them off to the best possible start.

Working with us

You can work with the TFDP to support the delivery of your projects by:



Online resources

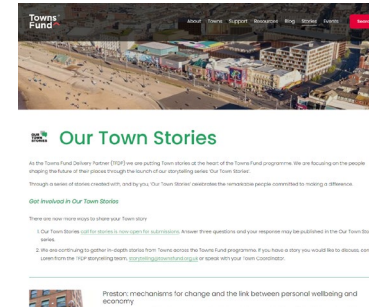
- Blog posts
- Guidance
- Tools



Expert drop-in sessions & 1-2-1 support



Online Workshops



Storytelling: Sharing your projects and experience



Town working group: connecting with other towns

Useful resources

Topic area	Existing resources	Forthcoming resources
Social value	<ul style="list-style-type: none"> • Social Value 101 • Social Value in Procurement (Crown Commercial Service) 	Social Value guidance for business cases
Health and wellbeing	<ul style="list-style-type: none"> • Including Health and Wellbeing in your TIP • Health and Wellbeing Dashboard • Mitigating the impacts of COVID-19 • Evidence in your TIP: Health and Wellbeing 	Estimating health and wellbeing benefits in your economic case
Climate Change / Net Zero	<ul style="list-style-type: none"> • You've declared a Climate Emergency – What next? • You've declared a Climate Emergency... Next steps: Transport • Taking account of Net Zero in your TIP • National Strategic Brief: Climate Change 	Further resources linking to strategic and economic case
Education and training	Introduction to Education, Skills & Enterprise	TBC
Planning & EIA	<ul style="list-style-type: none"> • Addressing your Planning, EIA and HRA needs in your business case • Road to Delivery: Planning & EIA requirements • Introduction to Planning, EIA and HRA • Introduction to Environmental Monitoring & Impact Analysis • EIA Screening Guidance • Biodiversity Net Gain Webinar 	Guidance on Public Sector Equalities Duty

TFDP offerings



What can we offer?

The TFDP can offer:

- Advice on **shaping the narrative**
- Advice on **project management methodologies**
- Advice on **project and programme office**
- Advice on **planning, analysis and project performance reporting**
- Advice and workshops **on risk management**
- **Advice on stakeholder engagement**
- **Advice on benefits management**

*“I’ve learned
from my
mistakes and I
am sure I can
repeat them
exactly.....”*

Peter Cook



Q+A