

Capturing lessons – the seventh pillar of partnering

The Cross Organisational Learning Approach

Client - Isle of Wight Housing Association

Supply Team – Mountjoy (constructor), Denley King Partnership (cost consultants), Woods Plumbing, F W Marsh Electrical, Howdens Joinery, Coastline Windows
Partnering Facilitator – Mike Thomas

Case history

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Although the project-led construction industry is good at forming, dispersing and reforming teams, this flexibility has spawned a weakness - somewhat haphazard (if any) debriefing. The Cross Organisational Learning Approach (COLA) is a process to review and share what team members learn, project by project. The Isle of Wight Housing Association (IoWHA) has applied COLA as a simple learning tool for project partners.

The Reading Construction Forum highlighted this lack of feedback in its seminal publication, *The seven pillars of partnering*: "The construction industry has many innovative ideas that get lost because there is little systematic feedback. Lessons should be captured so they are applied in future projects."

IoWHA employs partnering to develop refurbish and repair its portfolio of social housing properties. Contractor Mountjoy was selected on a balanced quality and cost process. The partnering process commenced with an initial partnering workshop that also involved tenants and specialist contractors. There were two interim reviews and a post-completion review for learning from what went well and what didn't.

Former IoWHA Director, Bill Gordon, explains why the COLA approach appealed to them: "As a small organisation we were acutely aware that we could not afford to go through the same initial [forming] process again and again on every project."

Mike Thomas, who is the association's independent partnering facilitator, says: "COLA adds rigour to the partnering process, which would become complacent if there was not a regular review. The team want evidence that true partnering is being carried out."

WHAT IS COLA?

COLA is a process for review, intended for construction project teams working in partnership. It focuses on commitment to actions that add value through shared feedback of learning. COLA can also be used to share learning between departments of a single organisation.

The COLA approach works in both leading edge IT and paper-based environments.

In the 'seven pillars' model (opposite), COLA is a 'project process' for getting 'feedback' (the seventh pillar).

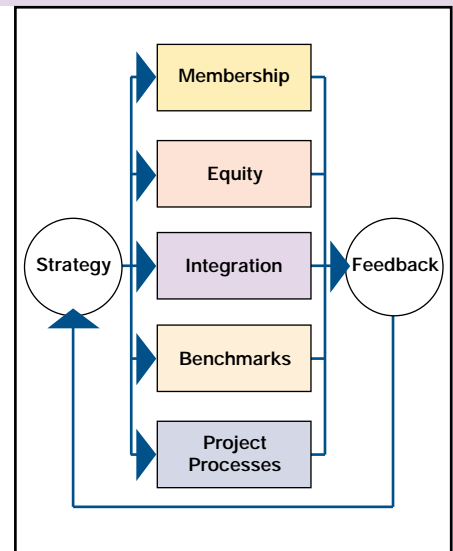
EXAMPLES OF FEEDBACK USING COLA AT LUKELY COURT

There are three routes for feedback in the COLA model (see diagram, page two): feedback to the [current] project, to individual organisations, and to future partnered projects.

Feedback to the project – At an interim COLA workshop it emerged that tradesmen were unhappy about a decision to reduce the specification, which led to a cost saving by omitting decoration. They felt this created an impression of a 'cheap job' and would jeopardise relations with tenants. The client listened and decided to reverse this decision, leading to a noticeable improvement in performance in this trade and avoiding conflict with tenants.

Feedback to individual organisations – The weekly site 'surgeries' where tenants met with the contractor and subcontractor staff proved to be quite a success. Communication and mutual understanding improved substantially leading to satisfied tenants and almost zero defects. Mountjoy Managing Director, Graham Pengelly, says: "We now positively encourage tenant participation in all our refurbishment projects."

Feedback to partners on future projects – Under normal circumstances, a windows specialist who under-performed on the first stage of Lukely Court would not have been asked back. The interim COLA review led the team to find out and resolve the root cause of the problem. This stopped the same problem recurring and the specialist's proactive approach in the workshop rescued their reputation.



Feedback in the 'seven pillars' model of partnering

LESSONS LEARNED:

- **Half-day feedback sessions may be sufficient**
- **An independent, external facilitator is likely to bring out the best results**
- **Acknowledge that it is not always possible to get it right first time; this gives confidence to admit faults**
- **Minor players sometimes contribute the most**
- **Keep the method simple; databases of facts and figures can be a turn off.**

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The Rethinking Construction Strategy Model – applied to this innovation



THE CHALLENGE

loWHA wanted a simple process for capturing lessons from projects and transferring what was learned to future projects, across everyone in the supply team and eventually along the supply chains supporting the team.

THE SOLUTION

Mike Thomas recommended the COLA process, developed by the B-Hive Research Team comprising the London School of Economics, Taylor Woodrow Construction, Thames Water Utilities, Whitbread Hotel Company, Davis Langdon Consultancy, Ove Arup Partnership and Leeds Metropolitan University.

There are two COLA processes – review and management of knowledge.

The COLA review

Communication – To avoid the usual blame-culture focus on failures, COLA uses a structured pre-workshop questionnaire for interim and final project reviews. The partnering charter and continuous improvement targets are prompts. The facilitator:

- asks intended delegates questions like: “What were the successes from the project” and “Identify two key areas for improvement.”

- seeks scores from the team on subjective responses (for example, “team satisfaction” on a scale of 1-10)
- presents the results graphically
- uses this information to generate discussion in workshops.

Organisation – The facilitator summarises the comments from the delegates, helps them to check for cause and effect, to identify the root causes of successes and failures, and then to prioritise the key issues to be resolved.

Learning – The team sets up cross-organisational subgroups to identify what needs to be done about the key issues - who does what and when, and what value the benefits would bring.

Application – The subgroups report to the full team who agree an action plan with review dates.

Management of knowledge

The learning is fed back via three routes. See page one for examples.

WHAT HAPPENS NEXT

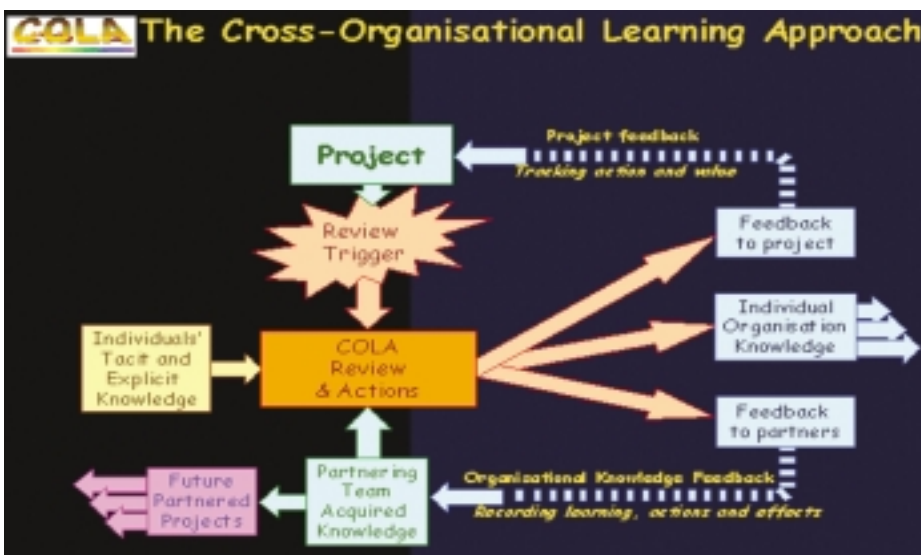
loWHA is planning for in-house facilitators to be trained by Mike Thomas who will also monitor samples of their work in project-team workshops.

The partners want to pay more attention to learning from things that go well.

Next steps:

Things you could do to apply these ideas:

- For details of COLA, including a users guide, go to http://is.lse.ac.uk/B-Hive/COLA_home.htm
- Ask Camargue about the Learning by Doing course: *Introduction to partnering*.
Tel: 01242 577277
- Talk to Mike Thomas about how COLA would help your Partnering team to learn
- Read *The seven pillars of partnering*, Reading Construction Forum, 1998
- Take up the challenges in *Accelerating change*, The Strategic Forum for Construction, 2002.



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