

# VALUE MANAGEMENT PRACTICE GUIDELINES

WA GOVERNMENT  
REQUIREMENTS  
FOR  
INFRASTRUCTURE  
RELATED PROJECTS

Centre for Excellence and Innovation in Infrastructure Delivery



*Sharing knowledge, developing  
leading practice and driving  
innovation to improve Government  
infrastructure planning, delivery and  
management.*

## AUTHORS

This document is based on using information, text, diagrams and charts from Utilibiz Consulting and was prepared with the assistance of the CEIID Value Management Project Reference Group (PRG).

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Mike Somerville-Brown (Chairperson) – Public Transport Authority;

Glen Buckley – Strategic Projects, Department of Treasury and Finance;

Bruce Cunningham – Main Roads WA;

Gita Siva – on behalf of Building Management and Works; and

Geoff Zimmer – Department of Health.

### **Further information on this project is available from:**

Anna Rechichi, Program Leader CEIID Program Management Office

Email: [anna.rechichi@dtf.wa.gov.au](mailto:anna.rechichi@dtf.wa.gov.au) Phone: (08) 9488 2669

All other enquiries about CEIID should be directed to Sheree Walker, Research and Business Development Officer: [Sheree.Walker@osp.wa.gov.au](mailto:Sheree.Walker@osp.wa.gov.au) or 9488 2670

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# 1. OVERVIEW OF PRACTICE GUIDELINES

**The purpose of this Value Management Practice Guidelines manual is to facilitate the use and the professional conduct of value management processes.**

**The objective is to provide an easy to use set of principles and processes which will enable Government Agencies to determine when to apply value management, what type of value management is required and the activities they will need to perform as part of the value management process.**

The Value Management Guidelines as described in the Strategic Asset Management (SAM) Framework of the Department of Treasury and Finance (DTF), outline why it is important to undertake Value Management as part of infrastructure planning and procurement. These *Practice Guidelines*, however, are a more practical, step-by-step approach to the determination and application of value management at various stages through the procurement of a project.

The Business Rules and Practice Guidelines are to be applied by general Government Agencies, Government Trading Enterprises and other public statutory organisations in accordance with all relevant legislation, Treasurer's Instructions and related government policies, as a condition of funding and as called for by DTF.

These Practice Guidelines have been prepared to complement the Western Australian Government's SAM Policy, and to meet the requirements of Australian Standard AS4183-2007 Value Management.

## 2. WHAT IS VALUE MANAGEMENT?

### What is Value?

Value is defined as the quantum of needs achieved at minimum cost. Value can be achieved through many different aspects of a project such as co-location / collaboration, non-asset solutions, economic and social benefits and lower risk. Nevertheless the equation remains the same, achieving value through the maximisation of the outcomes against minimum cost.

The equation in Figure 1 describes how value is achieved. Therefore the greater the satisfaction of needs and the more minimal the cost, the greater the value achieved.

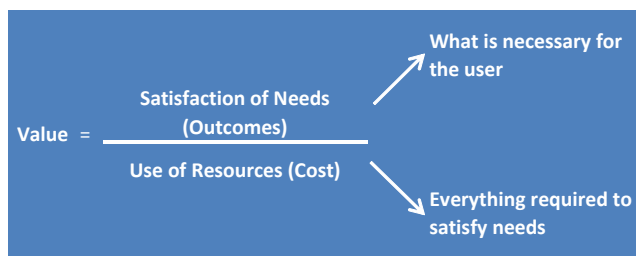


Figure 1 Value Equation

### Value Management

Value Management is a structured way of thinking, and it involves 5 stages:

**Information stage** - Background information or history, Scope, Objectives, Key issues, overviews and assumptions;

**Analysis Stage** – Functions, links and synergies, parameters, constraints and rationale;

**Creative Phase** – Divergent ideas, lateral thinking, brainstorming, alternatives;

**Evaluation Phase** – Assessments, discounting and accepting, viable options register; and

**Development and Reporting Phase** – recommendations, action plan.

For the purposes of procuring Government infrastructure, value management is a process that enables all parties potentially affected by a project to be involved in a collaborative process which encourages greater understanding of the project and ongoing cooperation in the delivery of outcomes.

### 3. TYPES OF VALUE MANAGEMENT

For the application of these Practice Guidelines, value management has been divided into two “types” for utilisation by Government Agencies. They are “Strategic Value Management” and “Compliance Value Management. Essentially, the Agency or the project team as part of good project practice instigates Strategic Value Management. Compliance Value Management, however, is “called in” by persons within or outside of the Agency when the parameters, scope, time and/or costs have changed.

#### Strategic Value Management

Strategic Value Management involves a range of people with differing views. The output of this type of value management study is a range of high-level options available to a project. The most critical Strategic Value Management to any project occurs prior to the Business Case, where the Agency considers what options are available to meet their strategic need. This is the “core” Value Management that all future value management studies will refer back to when determining the project’s objectives, desired outcomes and functional requirements.

Strategic Value Management is to be used to ensure that basic assumptions are challenged and to investigate the consequences of each option outside of the immediate impact area. The process involves:

- Information sharing;
- Divergent (creative) thinking;
- Critical (evaluative) thinking;
- Clustering and ranking of potential strategies;
- Cost assessment;
- Planning the way forward (action planning); and
- Allocating responsibilities and time frames.

A Strategic Value Management Study may take four weeks in preparation for a two-day workshop with another two weeks of follow up. The length of the workshop is determined by a work plan, which ensures sufficient time is allowed to achieve the desired outcomes.

Figure 2 demonstrates how the earlier a strategic value management process is commenced, the greater the potential influence of the process on

project outcomes. Best value is obtained during Planning, Evaluation and Definition stages of a project.

The Strategic Value Management process is tailored to deliver specific outcomes during a project. Large projects with a number of years before implementation may involve several studies prior to a business case being accepted. Similarly, large or complex projects may require more than one Strategic Value Management exercise to fully encapsulate all aspects of planning.

#### Identifying the need for a Strategic Value Management study

The following checklist identifies the context in which the use of Strategic Value Management will assist in planning for the best results:

- Has previous strategic research identified a need and a proposed solution?
- Are there multiple stakeholders affected by the solutions?
- Is this likely to be a high cost and/or complex project?
- Are the stakeholders committed to a joint solution discovery process?
- Does the project have significant impact on other projects or processes?

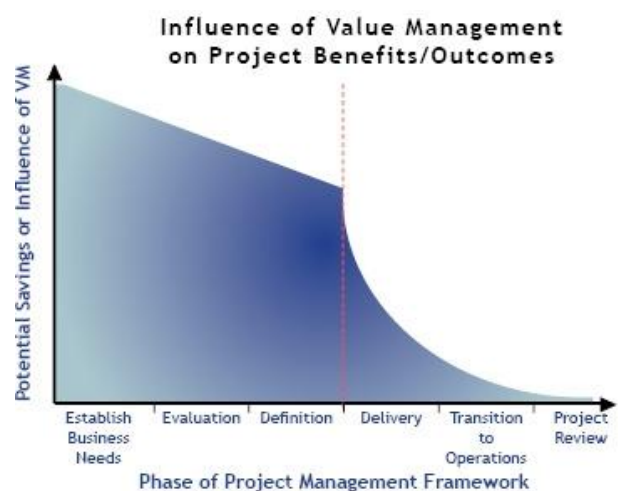


Figure 2 Value Management Influences

## 4. TYPES OF VALUE MANAGEMENT

### **Compliance Value Management Study** - Beyond Budget and Time Variance

This form of value management study is used if the scope or external factors affecting the project have changed. For example:

- Has the context in which the project exists changed?
- Have the stakeholders' requirements changed significantly?
- Has an option been changed?
- Has the proposed solution changed with respect to best value or value for money?
- Have the original assumptions been proven invalid?
- Has the funding changed?
- Has the project scope changed?

Compliance Value Management Studies shall be called in by the Agency, or DTF when project circumstances have changed and "best value" needs to be re-assessed.

It should be noted that Compliance Value Management is not necessarily "cost cutting". A typical value management investigation will still require participants to revisit what is required to achieve the desired functionality and outcomes (as determined in the original Strategic Value Management Study). Therefore, the purpose of the Compliance Value Management Study is to attempt to revisit the maximising of benefits/outcomes at minimal cost/expenditure.

This could, for instance, be achieved by;

- Co-location or sharing of facilities;
- Non-build solutions, e.g. leasing;
- Staffing efficiencies;
- Funding alternatives;
- Rationalisation - why are we doing this at all?
- Risk (are the overall risks so great that the value of proceeding on the current path remains worthwhile?) Links to Risk Management studies if previously undertaken; and
- Simplification.

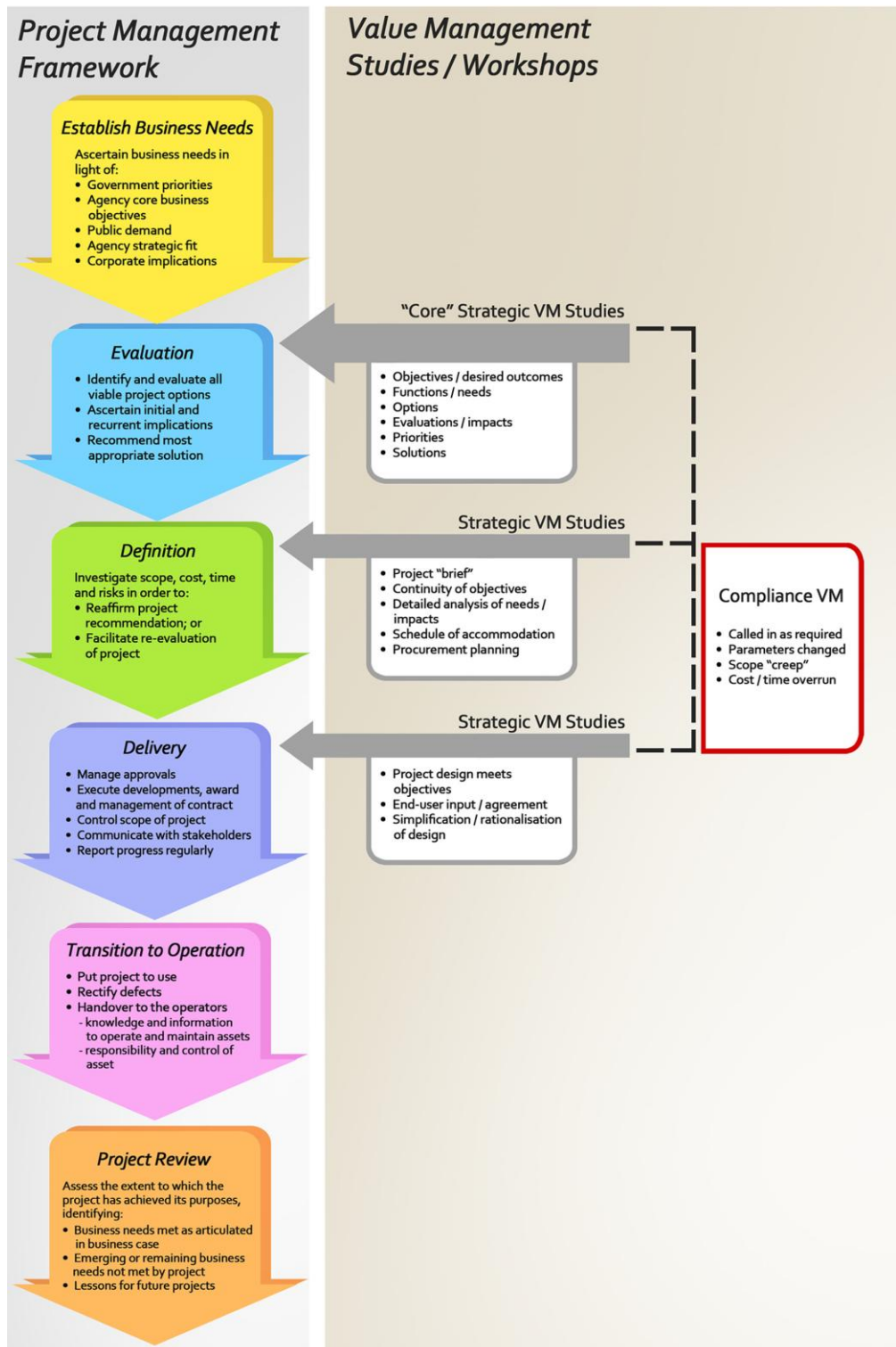
On a non-asset level, considerations include:

- Communication channels, team consultation and cooperation;
- Ownership of ideas and responsibilities;
- Time saving through focus/efforts and expediting the approvals process;
- Sharing of risks;
- Identifying practices which aid in sustainable operations;
- Adoption of innovation and technology; and
- Cost cutting. Typical scenario with options etc.

## 5. APPLICATION OF STRATEGIC VALUE MANAGEMENT

**Figure 3** illustrates where value management studies can be effectively used in the WA Government's Project Management Framework (PMF). It indicates how the implementation of "core" Strategic Value Management Studies early in the Evaluation phase of a project is critical to the process, and further value management studies should all refer back to the main objectives and outcomes.

**Figure 3 Application of Value Management**



## 6. THE VALUE MANAGEMENT WORKSHOP PROCESS

### Pre workshop planning

- Obtain Senior Responsible Officer (SRO) endorsement to proceed;
- Define the purpose of the study;
- Define scope and limits of the study;
- Prepare Value Management study objectives;
- Identify stakeholders;
- Select participants;
- Select workshop dates and arrange venue;
- Prepare background papers;
- Identify and nominate presenters;
- Selection of value management team
  - Facilitator
  - Independent person/s
  - Value analyst;
- Prepare the agenda;
- Site / project visit;
- Send formal invitations to participants (4 weeks prior to workshop);
- Receive RSVP's and send background papers (2 weeks prior to workshop); and
- Identify any key project constraints by contacting critical stakeholders who may have unique views.

### Selection of Participants

Appropriate participants are outlined below:

- Senior responsible owner;
- Client Representative;
- Value Management Coordinator;
- Value Management Facilitator;
- Project Manager;
- Stakeholders (beneficiaries);
- Stakeholders (process);
- Technical Expert;
- Independent Person;
- Relevant compliance agency personnel.

It is essential that the group involved in the study comprises members who:

- Have the necessary breadth and depth of experience to achieve the VM objectives;
- Have appropriate responsibility and authority; and
- Are committed to working collaboratively.

Selection of the group's membership should consider:

- Personal commitment to interact openly with each other;
- Willingness to collaborate in pursuing best value or best value for money;
- Receptiveness to new ideas;
- Commitment to active participation throughout all stages of the study;
- Technical expertise appropriate for the project being studied;
- Knowledge and experience of the context and situation of the project;
- Appropriate responsibility and authority to make decisions affecting the project; and
- Be a credible representative of the respective participating group.

### Workshop Overview

Refer to the Value Management "Practice Guidelines" Workshop Flowchart, appended at Attachment 1.

### Workshop

- Confirm Study Objectives;
- Confirm scope;
- Build knowledge and understanding of the project and its context (including the elements of value);
- Establish agreed success criteria;
- Generate multiple ideas to achieve best value and, where appropriate, best value for money of the project;
- Evaluate ideas against success criteria;
- Develop options;
- Make recommendations and where appropriate, decisions;
- Analysis, Development & Evaluation; and
- Prepare a report and an action plan, including time, cost and assignment of responsibility.

### Post Workshop

- Nominees pursue action items;
- Resolve ideas and options;
- Detailed documentation of: cost, time, risks, program delivery;
- Follow up Sessions (up to 2 weeks); and
- Final report / action plans.

## **Value Management Study Outcomes/Output**

The outcome of a value management study is the achievement of a deeper understanding of the project by all parties and establishes an agreed way forward.

The output is a report that includes a description of the preferred strategy, how the decisions were made, identified key actions and responsibilities and a description of how best value is obtained through the chosen strategy and actions.

## 7. VALUE MANAGEMENT TEAM RESPONSIBILITIES

### The Value Management Team Responsibilities

#### Senior Responsible Owner

The SRO or Client Representative(s) is the sponsor or proponent of the project and is responsible for endorsement of the study objectives. They are responsible for progressing and monitoring the outcomes. Responsibilities also include executive client support for adequate monitoring and follow-up of study recommendations, action plans and outcomes, client vision, objectives, timeframe, values, and constraints.

#### Value Management Coordinator

(The Client Representative may elect to undertake this position).

A number of activities are generally necessary prior to a workshop. Responsibility for these, include the following activities:

- Developing a brief for the facilitator;
- Identifying the scope of work;
- Engaging the facilitator;
- Designing the format of the workshop;
- Venue and date confirmation;
- Identification of stakeholders;
- Clarification of objectives of the Study, (including the basis of agreement with the client);
- Selection and invitation of participants;
- Preparation of necessary workshop data;
- Development of an agenda; and
- Briefing participants for the information stage.

Within these roles, the assigned tasks may vary depending on the nature of the value management topic, the scale of the participating organisations and the extent of value management activities undertaken by the parties. In some cases the facilitator may take on all arrangements.

The role of Coordinator may be a dedicated position within the team, or a role assigned to one or more of the client or project participants.

A Value Management Coordinator's Guide, comprising a series of templates, is available to assist the Coordinator at **Attachment 2**.

#### Value Management Facilitator

The Facilitator begins their work at the start of the pre-workshop process assisting the sponsor to clearly define the scope, highlight assumptions and identify key viewpoints of stakeholders. The Facilitator is a specialist who assists in the process throughout all stages and provides support and advice to the project sponsor on pre and post workshop components. The Facilitator needs access to all relevant documents.

During the workshop stage the Facilitator focuses more on process than content.

The Facilitator is typically involved in the following pre-workshop activities:

- Confirming project scope and objectives;
- Preparing invitation letters;
- Timing of workshop and pre-workshop activities;
- Clarity of workshop briefing papers; and
- Seeking views of stakeholders.

The Facilitator manages the workshop process, including:

- Managing time;
- Determining appropriate processes;
- Actively listening;
- Encouraging interpersonal communications;
- Managing group dynamics;
- Questioning;
- Thinking laterally;
- Analysing, synthesising and evaluating information and options developed in the workshop;
- Promoting cooperative / collaborative behaviour;
- Helping overcome resistance to change;
- Changing processes when required to achieve the study objectives;
- Identifying gaps in information;
- Seeking agreement at key stages in the process; and
- Providing written report to participants on the day of the workshop.

The Value Management Facilitator assists in post workshop actions including:

- Updating and presenting the workshop report within one week;
- Assisting the sponsor to clarify activities and time lines;
- Assisting development of strategies to address workshop actions; and
- Providing follow up support where appropriate.

The Facilitator has a responsibility to maintain client confidentiality, to be impartial and to manage the process to ensure the participants positively contribute to the achievement of value.

### **Project Manager**

The Project Manager has specific accountability for the progress of the Value Management Study. It is usual for the Project Manager to have a coordination role in the pre and post-workshop phases to act as both a reference point and a team catalyst for continued action.

Specific responsibilities include:

- Managing scope, timelines and resources
- Ensuring project continuity; and
- Acting as a reference point.

### **Stakeholders (beneficiaries)**

Specific responsibilities include:

- Communicating objectives;
- Defining needs;
- Identifying constraints; and
- Identifying contingent issues.

### **Stakeholders (process)**

For the purposes of a study, Stakeholders should represent members that provide the processes within which the initiative may progress. This could include project development, governance, probity, funding and regulatory matters.

Specific responsibilities include:

- Providing advice and guidance regarding respective processes;
- Applying regulatory controls; and
- Sharing experiences in previous similar initiatives.

### **Technical Experts**

Public and/or private sector personnel with specialist skills in the topic under consideration, who attend the workshop, but remain independent of the project personnel.

Specific responsibilities include:

- Providing advice and guidance in the relevant specialist area for which they were invited.

### **Independent Person**

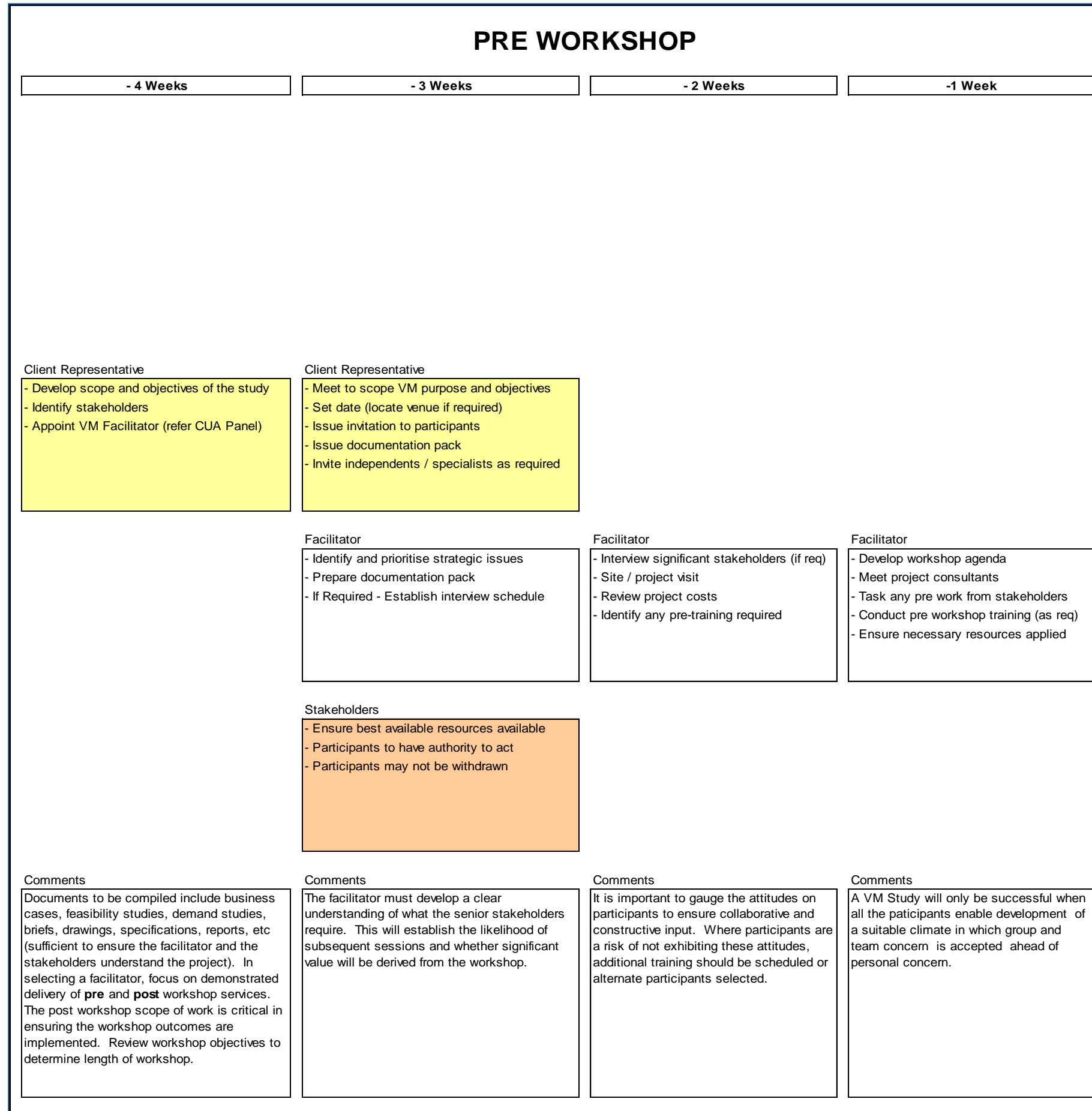
This could be independent public and or private sector personnel with knowledge of the topic under construction. Typically from a similar organisation, business or university locally, interstate or overseas.

### **Relevant Compliance Agencies**

Relevant compliance agencies such as DTF and the Office of Strategic Projects are informed of the sponsor agency's intent to conduct a Value Management Study on a particular project, and are invited to attend the workshop if they see fit. Value Management briefing papers should be forwarded to the relevant agencies so that they can be certain that the process has been followed as per the "*Practice Guidelines*".

# Attachment 1

## Workshop Overview Flow Chart



# WORKSHOP

|                                 |                                 |                                 |                                 |                                 |                                 |
|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|
| 1 Day Workshop<br><b>Hour 1</b> | 1 Day Workshop<br><b>Hour 2</b> | 1 Day Workshop<br><b>Hour 3</b> | 1 Day Workshop<br><b>Hour 4</b> | 1 Day Workshop<br><b>Hour 5</b> | 1 Day Workshop<br><b>Hour 6</b> |
|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|

|  |  |  |  |  |  |
|--|--|--|--|--|--|
| 2 Day Workshop<br><b>Day 1 (2-3 hours)</b> | 2 Day Workshop<br><b>Day 1 (2-3 Hours)</b> | 2 Day Workshop<br><b>Day 1 (2-3 Hours)</b> | 2 Day Workshop<br><b>Day 2 (2-3 Hours)</b> | 2 Day Workshop<br><b>Day 2 (2-3 hours)</b> | 2 Day Workshop<br><b>Day 2 (2-3 Hours)</b> |
|--|--|--|--|--|--|

|   |   |   |   |  |   |
|---|---|---|---|--|---|
| <p>Agenda</p> <ul style="list-style-type: none"> <li>- Introductions and expectation discussion</li> <li>- Team building exercise (if required)</li> <li>- Information Phase</li> <li>- Project Objectives</li> </ul> | <p>Agenda</p> <ul style="list-style-type: none"> <li>- Information Phase (continued)</li> <li>- Significant Facts</li> <li>- Assumptions</li> </ul> | <p>Agenda</p> <ul style="list-style-type: none"> <li>- Analysis</li> <li>- Key Functional Issues</li> <li>- Recap the day</li> <li>- Agenda for next day</li> </ul> | <p>Agenda</p> <ul style="list-style-type: none"> <li>- Creativity Phase</li> <li>- Idea Generation</li> </ul> | <p>Agenda</p> <ul style="list-style-type: none"> <li>- Judgment Phase</li> <li>- Analysis</li> </ul> | <p>Agenda</p> <ul style="list-style-type: none"> <li>- Development Phase</li> <li>- Action Plan</li> <li>- Prioritisation</li> <li>- Agree follow-up program</li> </ul> |
|---|---|---|---|--|---|

|  |  |  |  |   |   |
|--|--|--|--|---|---|
| <p>Facilitator</p> <ul style="list-style-type: none"> <li>- Utilise team creation tools as required</li> <li>- Emphasise all voices are equal</li> <li>- Ensure all voices are heard</li> <li>- Ensure all understand each other</li> <li>- Confirm VM objectives</li> <li>- Have a parking lot for related ideas</li> </ul> | <p>Facilitator</p> <ul style="list-style-type: none"> <li>- Encourage quick-fire responses</li> <li>- Look for all comments - refine later</li> <li>- Refer issues to parking lot to consider later</li> </ul> | <p>Facilitator</p> <ul style="list-style-type: none"> <li>- Encourage quick-fire responses</li> <li>- Look for all comments - refine later</li> <li>- Refer issues to parking lot to consider later</li> </ul> | <p>Facilitator</p> <ul style="list-style-type: none"> <li>- Utilise group exercise tools as required</li> <li>- Re-cap the previous days output</li> <li>- Encourage rapid idea development</li> </ul> | <p>Facilitator</p> <ul style="list-style-type: none"> <li>- Prioritise ideas generated</li> <li>- Focus analysis on preferred ideas</li> <li>- Challenge available resources</li> </ul> | <p>Facilitator</p> <ul style="list-style-type: none"> <li>- Develop achievable short-list of actions</li> <li>- Issue Action List in workshop or same day</li> <li>- Agree detailed action plans</li> <li>- Document responsibilities</li> <li>- Ensure stakeholders allocate resources</li> <li>- Review the risk management plan / profile</li> </ul> |
|--|--|--|--|---|---|

|  |
|--|
| <p>Stakeholders</p> <ul style="list-style-type: none"> <li>- Be realistic with what is achievable</li> <li>- Prioritise as per resource availability</li> <li>- Be specific with detailed action plans</li> <li>- Be willing to allocate the required resources</li> </ul> |
|--|

|  |   |  |  |   |   |
|--|---|--|--|---|---|
| <p>Comments</p> <p>The objective of this session is to break down hierarchies, empower all participants and to create an environment of honest, open-ness and creativity. Collect all project information, customer requirements, specifications, constraints, policy decisions, costs, etc Ensure all team members have a common understanding of the project. Tools may include SWOT analysis, benchmarking, WBS analysis.</p> | <p>Comments</p> <p>Seek alignment and a deeper understanding of all participants to the spectrum of OBJECTIVES. Once participants understand that there is more to the project than they anticipated, there is a higher likelihood of breakthroughs in subsequent sessions.</p> | <p>Comments</p> <p>Analysis Phase - Listing significant functions, and where necessary, determining cost of each function. Consider development of a Functional Analysis System Technique (FAST) diagram to determine those functions for more detailed analysis. Understand the project from a functional point of view. Ensure the team validates the project is achieving the NEED and OBJECTIVES identified in the pre-workshop papers and in the INFORMATION PHASE.</p> | <p>Comments</p> <p>Creativity Phase - Using focused lateral thinking, processes, lists for the selected functions, the numerous alternative ideas or options for performing existing or proposed functions. A large quantity of ideas (and not solutions) should be generated without any stoppages for judgment or criticism.</p> | <p>Comments</p> <p>Judgment Phase - Apply analytical judgment to the lists of ideas or options, to select the alternatives which will achieve the necessary functions at lowest total cost, consistent with the required levels of quality and performance. Specialists or experts will be of most use to the group in assessing which alternatives will be developed as recommendations.</p> | <p>Comments</p> <p>Development Phase - Consider the difficulties involved in implementing the developed recommendations, how they can be overcome, recommend action by whom and by when. Be focused on the criteria for development of any new idea. Ensure all other stakeholders understand the intent of any prioritised actions. Prioritise the action plan against the risk profile of the selected actions.</p> |
|--|---|--|--|---|---|

# POST WORKSHOP

+ 1 Week

+ 2Weeks

+4 Weeks

Client Representative

- De-brief with Facilitator

Client Representative

- Finalise and circulate VM Report
- Demonstrate progress against actions

Client Representative

- Assess Facilitator feedback on progress
- Report to Compliance Agencies
- Close out VM process

Facilitator

- Debrief with CR
- Issue draft VM Report

Facilitator

- Meet with those assigned actions

Facilitator

- Meet with those assigned actions
- Provide feed-back to CR on:
  - Progress
  - Appropriateness of actions plan
  - Any suggested changes to action plan
- Identify opportunities missed
- Update report recommendations (if req)

Stakeholders

- Allocate resources to action plan

Stakeholders

- Meet with facilitator
- Provide progress report
- Demonstrate progress against actions

Stakeholders

- Meet with facilitator
- Provide progress report

## Attachment 2

### VM Coordinator's Guide

This template is to be used to ensure that you have obtained as much information as possible in preparation for the Value Management study. Your role as coordinator is vital to the success of the VM and the base preparation and information you provide will enable the participants to maximise their contribution in the workshop. The VM facilitator may assist you in defining some of the components so make sure you make use of their experience.

#### Organisational Information

|                |  |
|----------------|--|
| Organisation   |  |
| Address        |  |
| Contact Person |  |
| Contact Number |  |
| Email          |  |

#### Project Information

|                  |  |
|------------------|--|
| Project name     |  |
| Location         |  |
| Stage in project |  |
| Estimated value  |  |

#### Project background –Please supply any information you have including but not limited to

|                           |  |
|---------------------------|--|
| Project Brief             |  |
| Previous studies          |  |
| Significant issues        |  |
| Drawings, surveys, charts |  |
| Historical data           |  |
| Other documents           |  |

#### What are the objectives of the Study

|  |  |
|--|--|
|  |  |
|  |  |
|  |  |
|  |  |

#### Affect on other projects – The consequences of this project/service going ahead (or not) on the other project

| Project | Affect \$, Resources, personnel, timing, other |
|---------|--|
|         |  |
|         |  |

#### VM Study information

|                        |  |
|------------------------|--|
| Possible date/s for VM |  |
| Location               |  |
| Resources available    |  |
| Resources required     |  |

**Key Technical or other invitees** – Other people who would provide valuable technical or practical input

| Title | First Name | Surname | Company & Address | Telephone | Email |
|-------|------------|---------|-------------------|-----------|-------|
|       |            |         |                   |           |       |
|       |            |         |                   |           |       |

**Key Stakeholders** – Indicate the stakeholders who should be involved in the VM Study

| Title | Firs Name | Surname | Company & Address | Telephone | Email |
|-------|-----------|---------|-------------------|-----------|-------|
|       |           |         |                   |           |       |
|       |           |         |                   |           |       |
|       |           |         |                   |           |       |
|       |           |         |                   |           |       |
|       |           |         |                   |           |       |
|       |           |         |                   |           |       |
|       |           |         |                   |           |       |

**Key Issues & Concerns** – What are the key issues and concerns from the Sponsoring Agency’s perspective?

|  |
|--|
|  |
|  |
|  |
|  |

**Key Assumptions** - What are the key assumptions that underpin the project. What aspects influence the attitudes and behaviours of stakeholders? Identify what stakeholders may hold these to be true.

| Assumption | Held by |
|------------|---------|
|            |         |
|            |         |
|            |         |

**Key issues & concerns** – What might be the key issues and concerns of the stakeholders?

| Stakeholder | Issue/concern |
|-------------|---------------|
|             |               |
|             |               |
|             |               |

**Key Relationships** – What are the key relationships that may impact on the project or the VM Study e.g. Political interests, commercial interest. Role challenges (who’s job is it).

| Stakeholder 1 | Stakeholder 2 | Relationship |
|---------------|---------------|--------------|
|               |               |              |
|               |               |              |
|               |               |              |

### **Information for the Facilitator**

All of the above information will be useful for the facilitator for them to tailor the workshop accordingly and ensure that they are aware of the issues surrounding the subject of the study and can draw out useful information, challenge assumptions and drill down to identify key opportunities to best value. The Facilitator will also need to know about travel requirements possible accommodation options and may want to contact some of the stakeholders directly to determine their position on some sensitive aspects of the study.