



The Compass

Bureau
du design

Guide to implementing the
Compass exercises.

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Participants

The Quality Vision exercise prompts participants to think about the notion of quality from a multidimensional perspective. An interdisciplinary and cross-functional approach is recommended to enrich the discussions.

We encourage you to engage eight to 12 stakeholders with varied profiles. Examples of profiles include:

- Urbanist, planner or architect resource
- Resource specialized in ecological transition
- Resource specialized in social transition
- Resource working in arts & culture or community development
- Resource specialized in economic development
- Operations and asset maintenance resource
- Representative of the client (project manager/owner)
- Elected official

Invitation

to be sent as soon as the date of the group exercise has been determined

Greetings, everyone,

You have expressed your interest in being part of a [Compass](#) exercise. The Compass is a unifying tool that enables teams to state a common vision of quality and determine what actions to implement to make that vision a reality.

The Compass contains two exercises:

- Exercise 1, Quality Vision, helps your team define the quality vision and objectives for your project.
- Exercise 2, Quality Operation, helps your team determine which strategies and actions to implement to realize the project vision and achieve your quality objectives.

Each exercise is done in two stages:

- An individual exercise, in which each member familiarizes themselves with the notions in the toolkit at their own pace, and develops a position.
- A group exercise, in which the team members gather to exchange ideas and make concerted choices for their project.

This activity is part of Exercise No. 1, Quality Vision. The activity is scheduled for [time] on [date], at [place]. A virtual presentation session of the tool will be offered before the activity.

To make sure the activity runs smoothly, please complete the [individual preparatory exercise](#) beforehand and bring it to the group session.

Looking forward to further discussing your thoughts with the entire team!

See you soon,

Virtual presentation

to plan at least 2 weeks before the activity

Plan a virtual meeting to:

- Introduce the participants
- Present the project
- Present the Quality Toolkit and the Compass
- Present the individual preparatory exercise

Reminder

to be sent three to five days prior to the group exercise

Greetings, everyone,

This is a reminder about the upcoming Quality Vision exercise.

Our group working session is coming up on [date]. It's important for everyone to do the [individual preparatory exercise](#), and bring it with you!

Thanks for participating and see you soon,

Preparation of Miro whiteboard

Access the [template](#) and follow the instructions at the top to create a copy of the Miro whiteboard.

Frame 1: Enter the name of the project

Frame 2: Write the project presentation



Quality Vision

Facilitation steps

Instructions and recommendations

Start

Welcome the participants.

Miro - Work plan

Present the work plan for the exercise, including the time allotted for each step.

Miro - Frames 2 to 6 Presentation of the project (10 min)

Present the project (complete the summary with the group as needed).

Miro - Frames 7 and 8 Roundtable (10 min)

Go around the table and ask everyone to introduce themselves in 30 seconds or less:

- Name;
- Title and organization;
- Vision statement prepared as part of the individual exercise.

The goal of the roundtable is to be sure everyone has a feel for the expertise and perspectives represented within the team, as well as to get the conversation started.

Miro - Assignment of roles (10 min)

To ensure that the exercise runs smoothly, ask for volunteers to fill the following roles, or assign them. Write the people's names in the spaces provided:

- A conductor, who makes sure that everyone understands the instructions properly and there is fair and fluid allocation of everyone's turn to speak.
 - As the Compass Bearer, you can assume this role if you wish, keeping in mind that you will then have to participate in the discussions while maintaining a degree of neutrality.
- A timekeeper, who keeps track of the time spent on each step of the exercise and makes sure enough time is allotted for all the concepts to be covered.
 - The duration of each exercise is indicated on the introductory page of each table.
- A secretary, who takes notes of the salient points of the discussions throughout the exercise (using sticky notes or another method).
 - Detailed and careful notetaking is important because (1) the team will need to refer to the notes as the exercise progresses and (2) the Compass Bearer will use them as a record of the discussions for the next steps in the project.



Quality Vision

Facilitation steps

Instructions and recommendations

Miro - Frames 9 to 16
Step 1
(70 min)

Provide explanations to participants

Describe the goal of Step 1:

- The goal is to establish and prioritize the quality dimensions and quality objectives of your project, by asking the following questions:
 - What is the specific mission of this project for Montreal?
 - Where should we invest time and resources to do things in an exemplary manner (and go beyond "business as usual")?

Explain how to use the whiteboard (Frames 10 to 16):

- Position the quality objectives along the prioritization axis.
 - Place the objectives that are "To be considered for the project," i.e., relevant to the project but not core objectives, on the left of the axis.
 - Place the objectives that are "Essential to the project," i.e., those that, if not met, would cause the failure of the project, on the right of the axis.
 - Add sticky notes if there are relevant objectives that are not on the list provided.
- Use the red badges in the lower right corner to state more emphatically that a particular objective is a priority for the project.
- Objectives that do not apply to the project must remain in the lower part of the page.

Remind participants

- They should have their individual exercises handy so that they can refer to them.
- They should keep an open mind about what constitutes quality and exemplarity, and should not hesitate to express their point of view so as to enrich the conversation.
- Not everyone will be able to offer an expert opinion on every topic discussed; this is normal. The diversity of perspectives around the table will enrich the conversation and, at the end of the day, enable development of a Quality Vision that considers all six dimensions.
- The goal of the exercise is to determine, in a concerted manner, the project priorities.
- The exercise is not suited to mathematical weighting. It is primarily about zeroing in on the priority objectives of the project. The key to success is the discussions enabling the prioritization of the objectives that will form the core of the project vision. The quantity of the objectives identified as priorities is not in itself a success factor for the project, because the Compass approach is above all qualitative.
 - For example, it does not necessarily follow that selecting three objectives for the Health and Wellness dimension means that dimension is more important than the Economy dimension, which has, say, only one objective selected. That single objective may well be crucial to the project.

Facilitate the exercise

Position the objectives along the axis:

- Go over the dimensions one after the other, encouraging exchanges between the participants by going around the table. Don't hesitate to prompt the participants:
 - "Looking at Dimension 1, Health and Wellness, which of these objectives do you feel are important for the project? Where do you think they should be placed along the prioritization axis?"
 - Place the objectives deemed important along the prioritization axis based on the discussions.
 - ... and so on, until all of the objectives deemed relevant have been covered.

Decide on three core objectives for the project:

- Using the red badges, target up to three objectives that will be especially high priority for the project.

Miro - Board 6
Break
(10 min)

Announce that it is break time.

Quality Vision

Facilitation steps

Instructions and recommendations

Miro - Frames 17 and 18 Step 2 (30 min)

Provide explanations to participants

Describe the goal of Step 2:

- The goal is to use the tokens to determine the degree of priority for each dimension and thereby establish the quality target for your project.

Explain how to use the Frame 18:

- Since none of the six quality dimensions can be completely ignored, one token is awarded by default to each dimension.
- It is suggested to do the exercise in a subgroups of 2 or 3 people with varied profiles. The groups has a maximum of 15 more tokens to award among the six dimensions according to the degree of priority it should be given in the project:
 - Secondary: 1 token (already awarded by default)
 - Somewhat important (2 tokens)
 - Important (3 tokens)
 - Very important (4 tokens)
 - Essential (5 tokens)
- It is not mandatory to use all of the tokens, but no more than 15 can be used.
- The subgroups share their results and the average mark for each dimension is identified at Frame 18.

Remind participants

The exercise is not suited to mathematical weighting. It aims above all at finding the right balance among the various dimensions of quality. The key to success is the discussions enabling establishment of a concerted vision of the project from a perspective of multidimensional quality.

- For example, if three objectives have been selected for the Health and Wellness dimension at the previous step, this does not mean that three tokens will automatically be awarded to it. During the discussion, this dimension may emerge as the primary focus of the project and the participants may decide that it deserves five tokens; conversely, it may prove to be secondary and merit only one token.

Facilitate the exercise

Distribute the tokens:

- Ask: "How many tokens should we award to Dimension 1, Health and Wellness, and why?"
- As the discussion proceeds, place tokens on the white circles of the quality target.
- ... and so on, until all of the dimensions have been covered.

Finalize the target:

Ask: "Should we make any adjustments to the allocation of the tokens to properly reflect the balance we want between the six dimensions?"

Quality Vision

Facilitation steps

Instructions and recommendations

Miro - Frames 19 and 20
Step 3
(30 min)

Facilitate the exercise

Write short Vision Statements for each dimension, based on the order of priority established for them, starting with the dimension that has been awarded the most tokens:

- Ask the secretary to read out the notes taken at Step 1 for the first dimension.
- Ask: "How would you state the project vision for this dimension?"
- Write down what the participants suggest, refining the statement as you go along.
 - The goal is to produce draft statements that accurately reflect the group vision and can be further refined later.
- ... and so on for the other dimensions, in order of priority.
 - If time is short, concentrate on the highest-priority dimensions.
 - If time permits, close out the activity by reading aloud all of the statements that have been written.

Miro - Frames 22 and 23
Next steps
(5 min)

Present the recommendations for the next steps.

- If the process for following up on the Quality Vision group exercise has already been established, inform the participants.
- Schedule the next meeting, if applicable.

Note that it is recommended that you continue on to Exercise 2, Quality Operation, which provides guidance on the planning and implementation of quality, an essential step in realizing the vision and delivering the desired benefits.

Feedback

In the days following the Quality Vision group exercise, draft a summary statement (frame 21).

- Download the quality target (frame 18) and the summary statement (p. 21) and send the document to the participants as the outcome of the Quality Vision exercise. Or the entire contents of the Miro can be downloaded by clicking the icon "export this board" at the top of the template, to the right of the board name.

Quality Operation

Instructions and
recommendations

Quality Operation

Planning steps

Instructions and recommendations

Participants

The Quality Operation exercise concerns the quality implementation plan. It involves the promoter, the manager and the members of the project design and execution team. The participants in this exercise will become quality champions, who will be involved at various points in the project lifecycle to ensure that quality is achieved and maintained. Make sure to assemble a motivated team.

Invitation

to be sent as soon as the date of the group exercise has been determined

Greetings, everyone,

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The Compass contains two exercises:

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Each exercise is done in two stages:

- An individual exercise, in which each member familiarizes themselves with the notions in the toolkit at their own pace, and develops a position.
- A group exercise, in which the team members gather to exchange ideas and make concerted choices for their project.

This activity concerns Exercise 2, Quality Operation. The activity is scheduled for [time] on [date], at [place]. A virtual presentation session of the tool will be offered before the activity.

To make sure the activity runs smoothly, please complete the [individual preparatory exercise](#) beforehand and bring it to the group session.

Looking forward to further discussing your thoughts with the entire team!

See you soon,

Virtual presentation

to plan at least 2 weeks before the activity

Plan a virtual meeting to:

- Introduce the participants
- Present the project
- Present the Quality Toolkit and the Compass
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Reminder

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Greetings, everyone,

This is a reminder about the upcoming Quality Vision exercise.

Our group working session is coming up on [date]. It's important for everyone to do the [individual preparatory exercise](#), and bring it with you!

Thanks for participating and see you soon,

Preparation of Miro whiteboard

Access the [template](#) and follow the instructions at the top to create a copy of the Miro whiteboard.

Frame 1: Enter the name of the project

Frame 2: Copy and paste the Quality Vision statement of the project (and the key objectives by dimension)



Quality Operation

Facilitation steps

Instructions and recommendations

Start

Welcome the participants.

Miro - Work plan

Present the work plan for the exercise, including the time allotted for each step.

Miro - Frames 2 and 3 Roundtable (10 min)

Go around the table and ask everyone to introduce themselves in 30 seconds or less:

- Name;
- Title and organization;
- The strategies and actions established as part of the individual exercise.

The goal of the roundtable is to be sure everyone has a feel for the expertise and perspectives represented within the team, as well as to get the conversation started.

Miro - Assignment of roles (10 min)

To ensure that the exercise runs smoothly, ask for volunteers to fill the following roles, or assign them. Write the people's names in the spaces provided:

- A conductor, who makes sure that everyone understands the instructions properly and there is fair and fluid allocation of everyone's turn to speak.
 - As the Compass Bearer, you can assume this role if you wish, keeping in mind that you will then have to participate in the discussions while maintaining a degree of neutrality.
- A timekeeper, who keeps track of the time spent on each step of the exercise and makes sure enough time is allotted for all the concepts to be covered.
 - The duration of each exercise is indicated on the introductory page of each table.
- A secretary, who takes notes of the salient points of the discussions throughout the exercise (using sticky notes or another method).
 - Detailed and careful notetaking is important because (1) the team will need to refer to the notes as the exercise progresses and (2) the Compass Bearer will use them as a record of the discussions for the next steps in the project.



Quality Operation

Facilitation steps

Instructions and recommendations

Miro - Frames 4 to 6
Step 1
(60 min)

Explications à fournir aux participants et participants

Describe the goal of Step 1:

- The goal is to establish and prioritize the strategies and actions to be implemented to achieve the Quality Vision for your project and attain your objectives.

Explain how to use the Frame 6 :

- Position the relevant actions to be implemented along the prioritization axis.
 - Place the actions that appear “Difficult to implement” with regard to the conditions for project completion on the left of the axis.
 - Place the actions that appear “Easy to implement” with regard to the conditions for project completion on the right of the axis.
 - Add sticky notes if there are relevant actions that are not on the list provided.
- Use the red badges in the lower right corner to state more emphatically that a particular action is a priority for the project.
- Actions that do not apply to the project must remain in the lower part of the page.

Remind participants

- They should have their individual exercises handy so that they can refer to them.
- They should keep an open mind about the project quality implementation plan, and should not hesitate to express their point of view so as to enrich the conversation.
- Not everyone will be able to offer an expert opinion on every topic discussed; this is normal. The diversity of perspectives around the table will enrich the conversation and, at the end of the day, enable development of an effective and realistic Quality Operation plan.
- The goal of the exercise is to determine, in a concerted manner, the strategies and actions to be implemented.

Facilitate the exercise

Position the actions along the axis:

- Go over the strategies and actions one after the other, encouraging exchanges between the participants by going around the table. Don't hesitate to prompt the participants:
 - “Looking at Strategy 1 – Mobilize, which actions do you feel are important to implement to make the project Quality Vision statement a reality? Do you think these actions are easy or difficult to implement?”
 - Place the actions deemed relevant along the prioritization axis based on the discussions.
 - ... and so on, until all of the actions deemed relevant have been covered.

Miro - Break
(10 min)

Announce that it is break time.



Quality Operation

Facilitation steps

Instructions and recommendations

Miro - Frames 7 and 8
Step 2
(30 min)

Facilitate the exercise

Formulate the mission(s) that the team will adopt in relation to the major strategies and actions chosen at the previous step:

- Ask the secretary to read out the notes taken at Step 1 for the first strategy.
- Ask: "What mission are we adopting in relation to this strategy?"
- ... and so on for the other strategies, in order of priority.

Miro - Frame 9
Next steps
(5 min)

Announce the next step in the process: the detailed mapping-out of the [Quality Operation plan](#). This detailed plan will enable, among other things:

- Assignment of the Quality Operation lead roles;
- Definition of the steps involved in planning and implementing the strategies and actions.

You may also mention that it will be possible to develop a [quality monitoring plan](#) to make sure that your Quality Operation plan is indeed enabling you to steer your project in the right direction to attain your quality objectives.

Feedback

In the days following the Quality Operation group exercise, download and forward the mission statements to the participants (Frame 8). Or the entire contents of the Miro can be downloaded by clicking the icon "export this board" at the top of the template, to the right of the board name.

In that same message, invite the participants to a working session for the detailed planning of the [Quality Operation](#).

For support and guidance on quality monitoring, [refer to this tool](#).

For more information please
reach out to us at
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