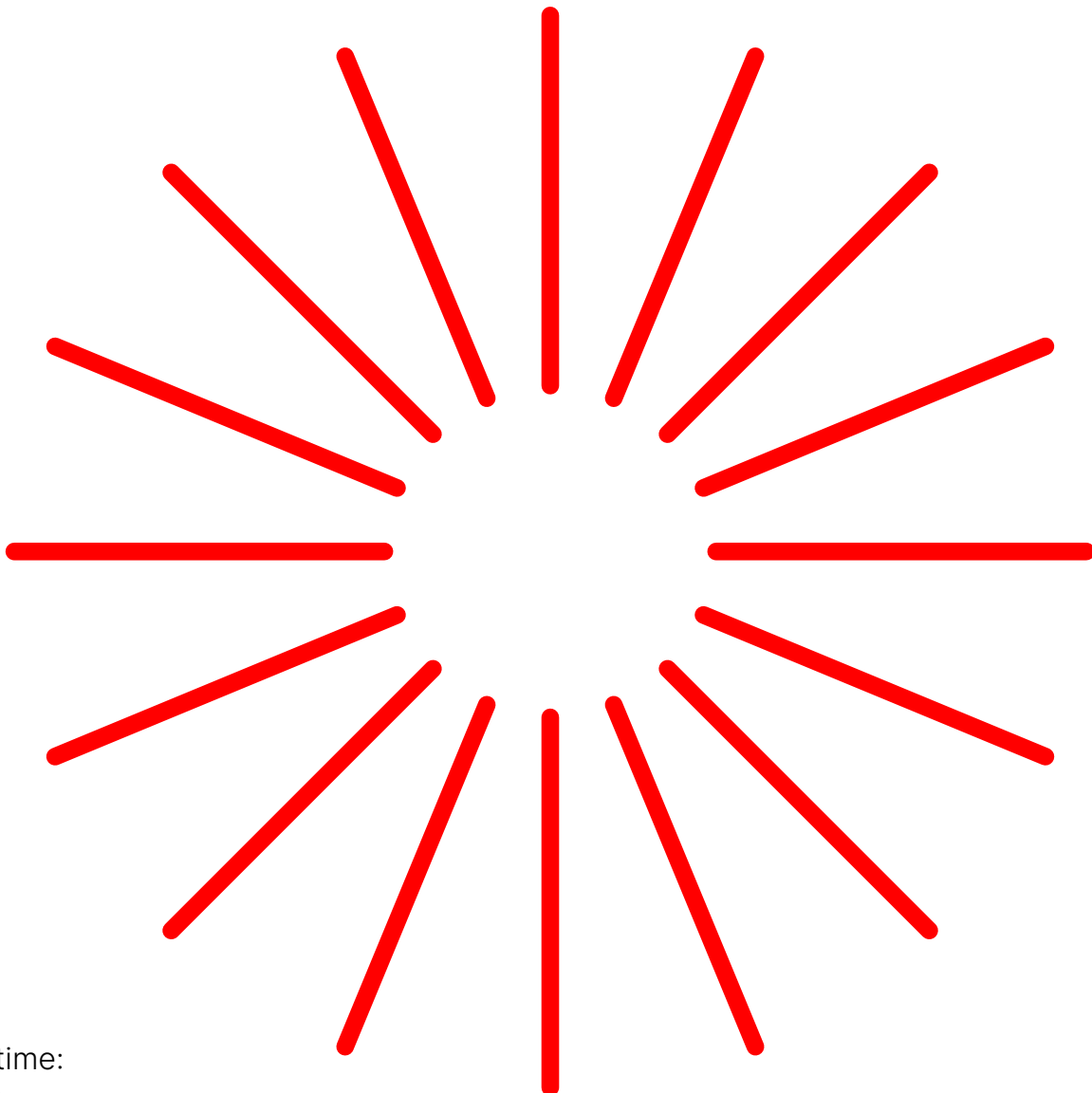




The Compass Quality Operation

Exercise No. 1

Individual Preparatory
Exercise



Estimated time:
45 minutes

The Project

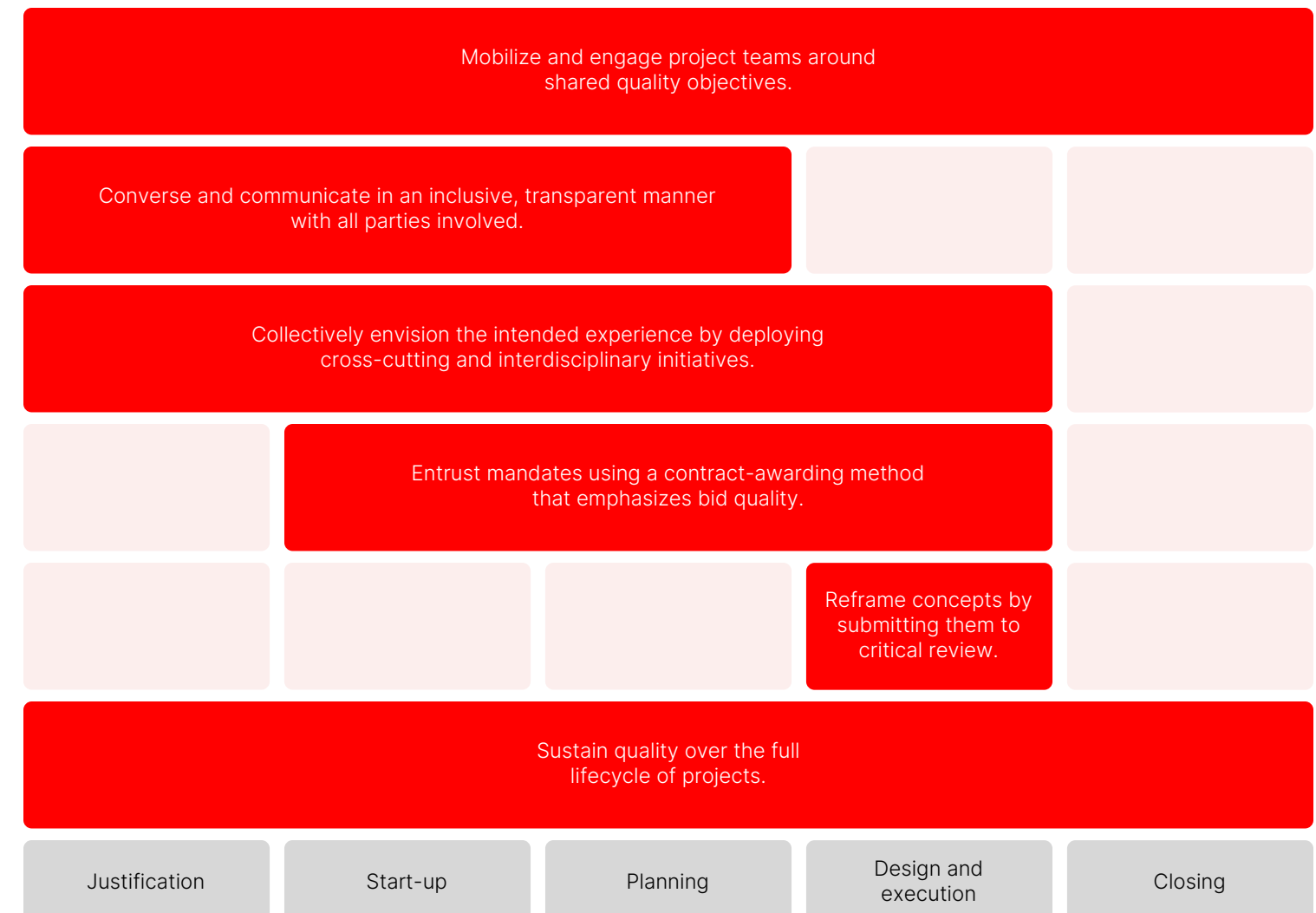
Individual preparatory exercise

Name of project:

Date:

Overview of the Quality Operation strategies

Here is a diagram view of the six Quality Operation strategies and the key moments when they are triggered in a typical project timeline.



Context

The Montréal 2030 Agenda posits the following strategies for instilling greater design culture in Montréal:

1. **Mobilize** and engage project teams around shared quality objectives;
2. **Converse and communicate** in an inclusive, transparent manner with all parties involved;
3. **Collectively envision** the intended experience by deploying cross-cutting and interdisciplinary initiatives;
4. **Entrust** mandates using a contract-awarding method that emphasizes bid quality;
5. **Reframe** projects and concepts by submitting them to critical review; and
6. **Sustain** quality over the full lifecycle of projects.

These strategies are operationalized via concrete actions that are custom-chosen and developed by the project teams, in keeping with their objectives and capacities.

Objective and Guidelines

Objective of the exercise

The objective of this exercise is for everyone, individually, to:

- Familiarize themselves with the **six Quality Operation strategies**;
- Get a good sense of the strategies and actions that they feel are priorities to implement so as to achieve the project quality objectives.

Step 1

To familiarize yourself with each of the strategies, read the examples of actions that can be implemented to promote achievement of the quality objectives.

Check only those examples that seem to you to be “essential” or “to be considered” as part of your project.

If you like, take notes to document your thinking ahead of the discussions you will have with the entire team.

Step 2

For each strategy, state the extent to which you think **you can contribute to implementing it.**

Strategy 1 Mobilize



No: Not applicable to the project or impossible to implement
 Maybe: To be considered, but might be difficult to implement or is not a priority
 Yes: Important to the success of the project

How can team members be mobilized and engaged toward quality?

1a. By developing the quality management plan as a group

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

The quality management plan contains the strategies and actions chosen by the team members to enable them to realize the vision of the project and achieve its quality objectives.

To map out a quality management plan:

- Use the Compass and complete the Quality Vision and Quality Operation exercises as a team. The Compass is a unifying tool that allows exploration of various scenarios for implementing quality in concerted fashion.

1b. By appointing a quality champion

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

The quality champion is someone who intervenes at milestone steps of the project to continually stimulate achievement of the quality objectives.

Keys to designating the right resource:

- Do they have basic knowledge of quality in design and architecture?
- Do they show leadership and the ability to debate and express themselves in public?
- Do they possess the critical thinking skills needed to support and facilitate dialogue?
- Are they curious and openminded about new ideas, concepts, etc.?
- Do they exhibit and encourage initiative and a proactive approach to experimenting with new ways of doing things?
- If the professional mandate were to be terminated or reassigned during the course of the project, would they be able to support the resumption and continuation of the work toward achievement of the quality objectives?

Keys to continually stimulating quality:

- Identify the strategic milestones when the team is to be gathered to validate the progress of the project toward the quality objectives to be attained;
- Define the nature of the deliverables to be produced to enable assessment as a team of the project's progress.

Strategy 1 (cont'd)



No: Not applicable to the project or impossible to implement
 Maybe: To be considered, but might be difficult to implement or is not a priority
 Yes: Important to the success of the project

How can team members be mobilized and engaged toward quality?

1c. By identifying the right expertise profiles

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

The competencies required vary depending on the quality objectives to be attained. To identify which experts to bring in:

- Think interdisciplinarity
- Think in terms of a cross-cutting approach

1d. By validating the availability and stability of the team

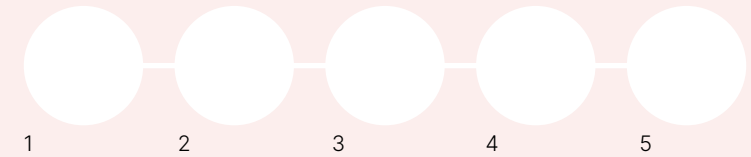
No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

To roll out the quality management plan, the team must:

- Be able to rely on availability of resources in sufficient numbers at the required points during the project;
- Guarantee linkages from one stage of the project to the next, to ensure retention and continual expansion of the project knowledge.

My ability to contribute to implementing strategy 1:

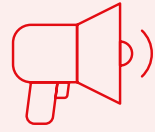
1 : None 2 : Low 3 : Moderate
 4 : High 5 : Very high



How to contribute?

General notes

Strategy 2 Communicate



No: Not applicable to the project or impossible to implement
 Maybe: To be considered, but might be difficult to implement or is not a priority
 Yes: Important to the success of the project

How can communication be a lever for achieving greater benefits with the project?

2a. By consulting a broader audience

- Using public participation tools to present the vision and preliminary program of the project to a wider audience and to sound out the concerns and recommendations of users and neighbouring communities.

Examples of groups to consult:

- Beneficiaries
- Citizens concerned
- Underrepresented citizens
- Neighbouring property owners
- Local community organizations
- Borough councillors
- The borough's planning advisory committee

Examples of participation and consultation mechanisms:

- Public consultation with a plenary session
- Themed issue table
- Field survey
- Multichannel online survey
- Call for briefs
- Transitional project

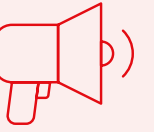
2b. By emphasizing transparency of the decision-making process

- Involving the decision-making resources early in the process to avoid procedural blockage and delays;
- Prioritizing democratic decision-making processes to strengthen civic engagement and ensure the project process is accessible to the public.

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

Strategy 2 (cont'd)



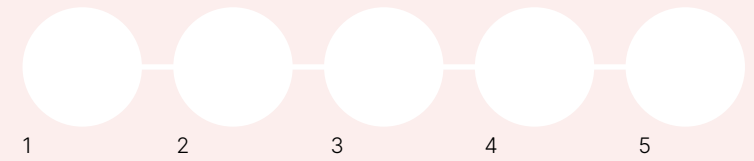
No: Not applicable to the project or impossible to implement
 Maybe: To be considered, but might be difficult to implement or is not a priority
 Yes: Important to the success of the project

How can communication be a lever for achieving greater benefits with the project?

My ability to contribute to implementing strategy 2:

1 : None 2 : Low 3 : Moderate
 4 : High 5 : Very high

How to contribute?



General notes

Strategy 3 Envision



No: Not applicable to the project or impossible to implement
 Maybe: To be considered, but might be difficult to implement or is not a priority
 Yes: Important to the success of the project

How should the project experience be envisioned in a way that extends beyond the program functional and technical parameters and that encapsulates its essence?

3a. By setting the table for innovation

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

- Identifying potential opportunities for research and innovation in the project that would be worth exploring.
- Reframing, if required, the timeline and resources so that the project team can deploy an exploratory approach.
- Questioning, if required, the regulatory requirements, including making the necessary representations to policymakers.

3b. By drawing inspiration from transferable best practices

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

- Exploring, as a team, case studies that document the intended concepts and best practices of the project (e.g., videos, themed backgrounders and publications of the Quality Toolkit).
- Discussing, as a team, completed projects of a similar nature that could provide avenues for solutions.

3c. By comparing diverse scenarios

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

- Exploring various programmatic scenarios and their formatting, using charrettes, design workshops or ideas competitions.
- Experimenting with prototyping methods.

3d. By challenging the preliminary vision

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

- Adjusting the preliminary vision statement based on the outcomes of studies, consultations and collaborative idea-generation sessions that explored and tested various scenarios.

Strategy 3 (cont'd)



No: Not applicable to the project or impossible to implement
 Maybe: To be considered, but might be difficult to implement or is not a priority
 Yes: Important to the success of the project

How should the project experience be envisioned in a way that extends beyond the program functional and technical parameters and that encapsulates its essence?

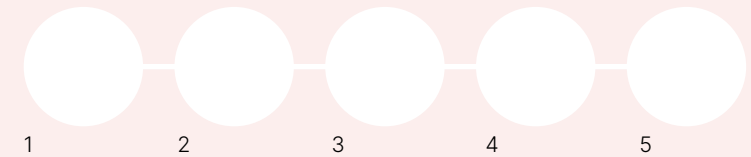
3e. By anchoring the final vision to the budgetary and scheduling metrics

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

- Ensuring that the Quality Vision and objectives to be achieved are realistic, budget- and time-wise.
- Identifying complementary sources of funding as a lever for enhanced project funding (e.g., funds for implementation of green infrastructure, carbon-neutral or heritage restoration projects; sustainable development and mobility program; contaminated land remediation program).

My ability to contribute to implementing strategy 3:

1 : None 2 : Low 3 : Moderate
 4 : High 5 : Very high



How to contribute?

General notes

Strategy 4 Entrust



No: Not applicable to the project or impossible to implement
 Maybe: To be considered, but might be difficult to implement or is not a priority
 Yes: Important to the success of the project

How can a commissioning process that promotes quality in design and architecture be structured?

4a. By using a tendering process that emphasizes quality

- Providing details of the Quality Vision and objectives in the call for tenders documents (or other contractual documents), to which the client and the professionals to whom the contract is awarded then commit.
- Structuring the service offering evaluation format to give greater weight to quality than to price (lowest compliant bidder rule).

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

4b. By using a design or architecture competition process

- Choosing a competition-based awarding method to stimulate emulation among competitors and assess the quality of the conceptual proposals fairly and transparently (presence of a jury).
- Preferring anonymous proposals so as to eliminate reputational bias: with an anonymous competition form, assessment of quality is solely on the basis of the conceptual proposal (and not appreciation of the competitor's portfolio).

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

4c. By fostering networking with emerging professionals

- Enabling younger firms to position themselves in the market and improve their execution capacity, with mentoring opportunities.

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

4d. By stimulating the market

- Deploying a communications strategy that motivates potential tenderers to engage in the process.

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

How to build interest:

- By outlining the Quality Vision of the project, the quality objectives to be attained and the primary means of attaining them. This demonstrates the client's intention to make quality a priority.

Strategy 4 (cont'd)

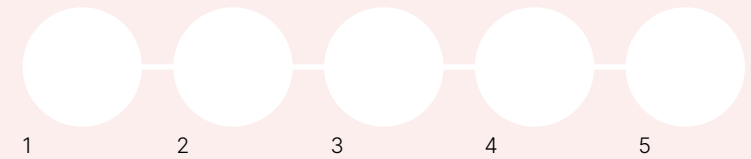


No: Not applicable to the project or impossible to implement
 Maybe: To be considered, but might be difficult to implement or is not a priority
 Yes: Important to the success of the project

How can a commissioning process that promotes quality in design and architecture be structured?

My ability to contribute to implementing strategy 4:

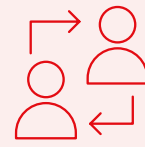
1 : None 2 : Low 3 : Moderate
 4 : High 5 : Very high



How to contribute?

General notes

Strategy 5 Reframe



No: Not applicable to the project or impossible to implement
 Maybe: To be considered, but might be difficult to implement or is not a priority
 Yes: Important to the success of the project

How can the project be reviewed and reframed at the conceptual stage so as to optimize the solutions and enhance the quality of the project?

5a. By setting up a prototyping lab

- The prototyping lab, also known as a design lab, emphasizes experimentation with spatial planning and occupancy via prototyping and field observations. Learnings emergent from the lab context are meant to be generic, transferable and adaptable to a variety of implementation contexts.

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

5b. By setting up a design panel

- A design panel ensures the qualitative monitoring of a project. The panel designates a group of experts from various disciplines (e.g., architecture, design, landscaping, heritage, engineering) to provide support and guidance to the design team assigned to execute the project. It is a consultative body, not a decision-making one, that supports the client. Its role is to contribute a vision, raise questions and make recommendations as to design quality.

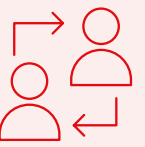
No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

5c. By implementing integrated design and value engineering processes

- The integrated design process relies on collaboration between multidisciplinary experts to develop innovative solution avenues in response to complex challenges. Participants attend themed working sessions that explore the project's design and execution challenges.
- The goal of value engineering is to compare various conceptual and financial scenarios so as to optimize the value of the project (through improvements to the capital cost or life-cycle cost). Participants attend themed working sessions that explore the challenges relative to the value/benefits vs. cost relationship.

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

Strategy 5 (cont'd)

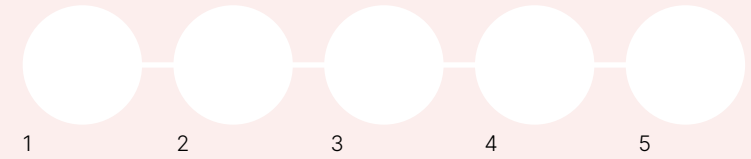


No: Not applicable to the project or impossible to implement
 Maybe: To be considered, but might be difficult to implement or is not a priority
 Yes: Important to the success of the project

How can the project be reviewed and reframed at the conceptual stage so as to optimize the solutions and enhance the quality of the project?

My ability to contribute to implementing strategy 5:

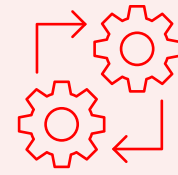
1: None 2: Low 3: Moderate
 4: High 5: Very high



How to contribute?

General notes

Strategy 6 Sustain



No: Not applicable to the project or impossible to implement
 Maybe: To be considered, but might be difficult to implement or is not a priority
 Yes: Important to the success of the project

How can project quality be sustained over the long term?

6a. By conducting a life-cycle analysis

- Specifying the quality objectives by means of observable, measurable indicators.
- Understanding the probable effects (positive or negative) of the long-term strategic objectives of the project.

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

6b. By drawing up a quality assessment plan

- Conducting quality monitoring beginning with the conceptual phase and continuing through to the post-occupancy phase, from a perspective of continuous improvement.

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

6c. By selecting a quality manager

- Engaging a management team (e.g., property management) that is interested and motivated with respect to the project's quality objectives.

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

6d. By contributing to collective learning

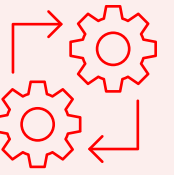
- Helping to collectively improve the working methods for achieving design and architectural quality, by sharing learnings from the project post-mortems with the community of practice.

No MB Yes Obstacles to implementing the actions, supplementary actions, etc.

Tips:

- Agree on a resource who will be in charge of post-mortems on the team, or rotation of this role among team members;
- Plan for recurrent meetings dedicated to the post-mortems (per stage) so as to document the learnings;
- Separate meeting agendas into two sections: new learnings and recap of key learnings from the previous meetings, to prevent information from being shelved;
- Target efficient communications channels to ensure wider sharing of knowledge in internal as well as external networks.

Strategy 6 (cont'd)

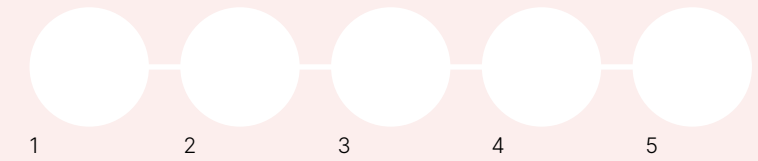


No: Not applicable to the project or impossible to implement
 Maybe: To be considered, but might be difficult to implement or is not a priority
 Yes: Important to the success of the project

How can project quality be sustained over the long term?

My ability to contribute to implementing strategy 6:

1 : None 2 : Low 3 : Moderate
 4 : High 5 : Very high



How to contribute?

General notes

Bravo, you've completed the individual exercise. Don't forget to take it with you to the group session!

