

26<sup>TH</sup> ANNUAL



26<sup>TH</sup> LCI CONGRESS

OCTOBER 22-25, 2024

# Project Start-Up with Purpose and Intention

**Diane Anglin**, Partner, Carta Advisors

**Justin Maletic**, Vice President, Balfour Beatty

**Champion: Afshan Barshan**, SVP, Skender

SURFING THE WAVE OF LEAN DESIGN AND CONSTRUCTION

October 23, 2024

# Project Start-up with Purpose and Intention





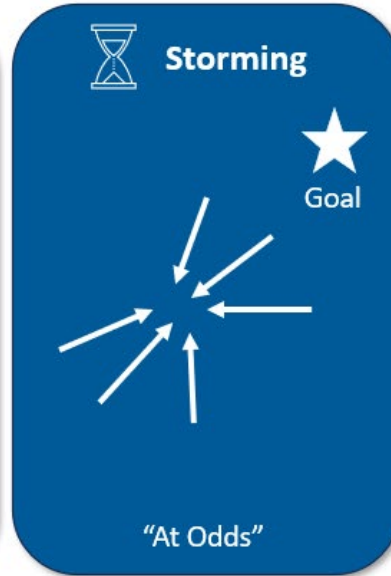
# Stages of Team Development

# Tuckman's Stages of Team Development

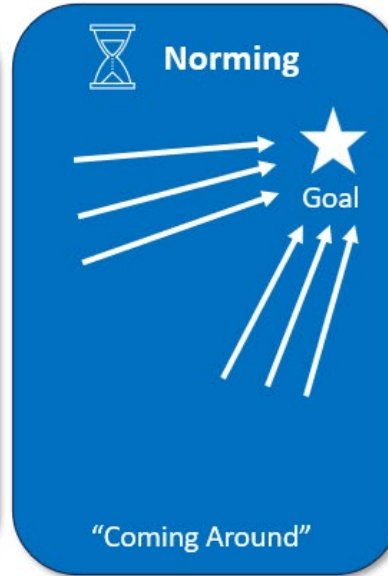
## Forming



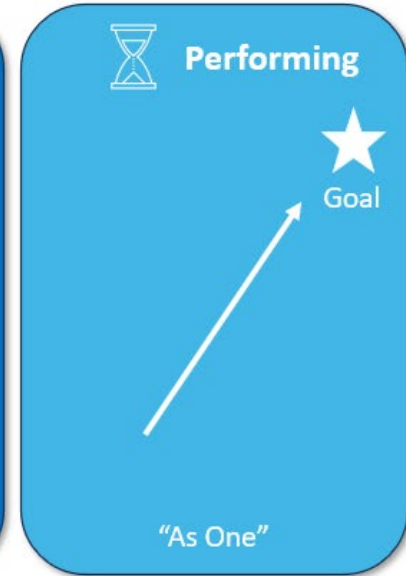
## Storming



## Norming



## Performing



Intentional Startup reduces the time needed to go from Forming to Performing

Source: Tuckman's Stages - Bruce Tuckman, 1965

# Project Startup Framework

1. Create the **foundation** of a high-performance team
1. Co-Develop a **custom project strategy** (Product, People, Process) uniquely suited the to the customer's notion of value

# Alignment Formula

What Does Alignment Mean to You?

# Team Alignment | Optimizing the Whole



# People Alignment





# People Alignment



# Making Connections



# Making Connections



# Making Connections



Personal Connection - primes the brain  
for **willingness**

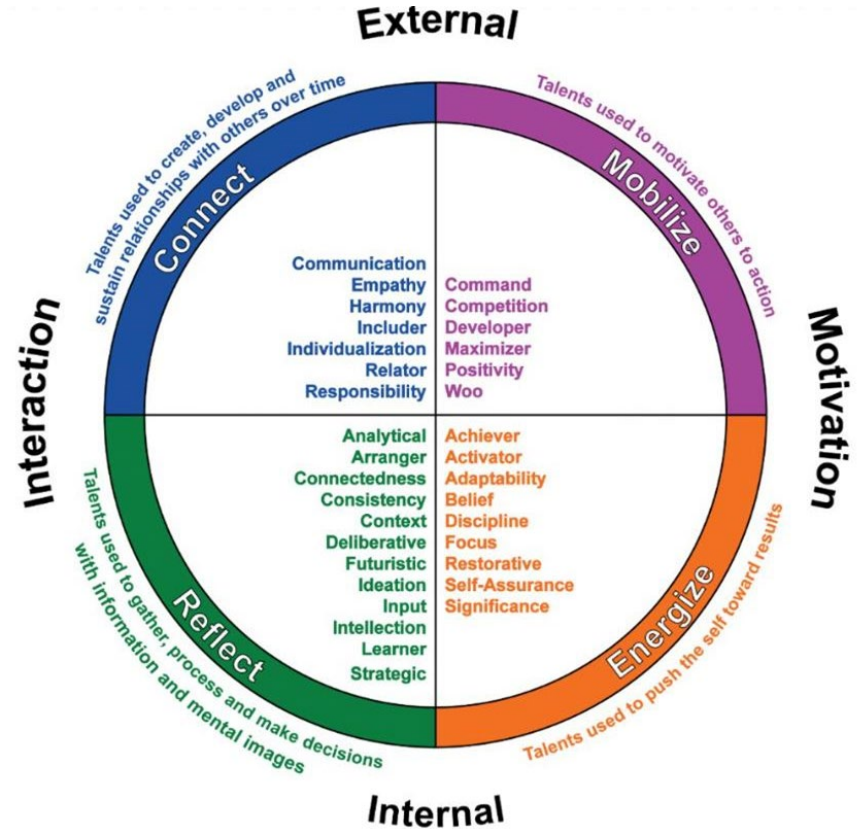
# Alignment | Understanding Others

## Gallup Strength-Based Behavioral Assessment

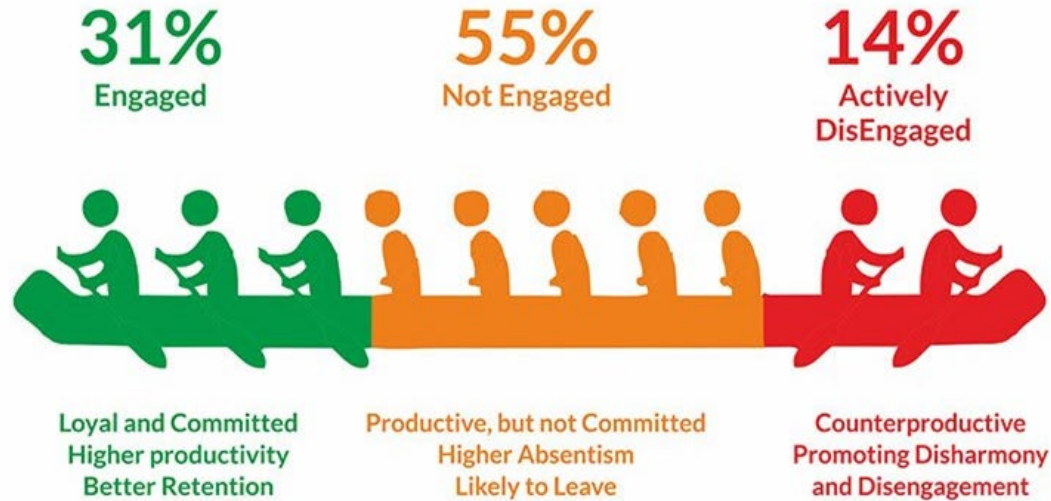
### CoreClarity® System

Organizes 34 Strengths into four types:

- **Connect**
- **Reflect**
- **Energize**
- **Mobilize**



# Importance of People Engagement



Same Boat, Different Engagement

Some Drive it   Some Ride it   Some Slow it



# Understanding Behaviors

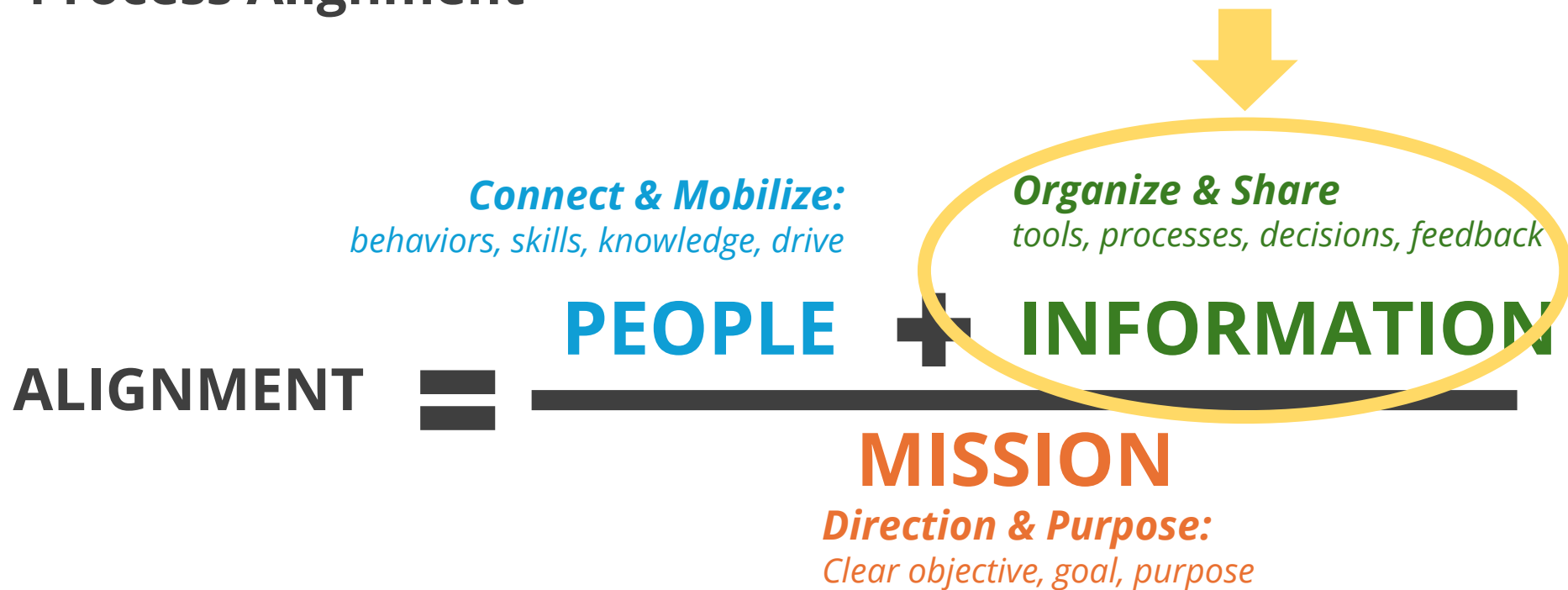


Why doesn't **she** climb harder!?

Why doesn't **he** use more strength to pull me up!?

# Process Alignment

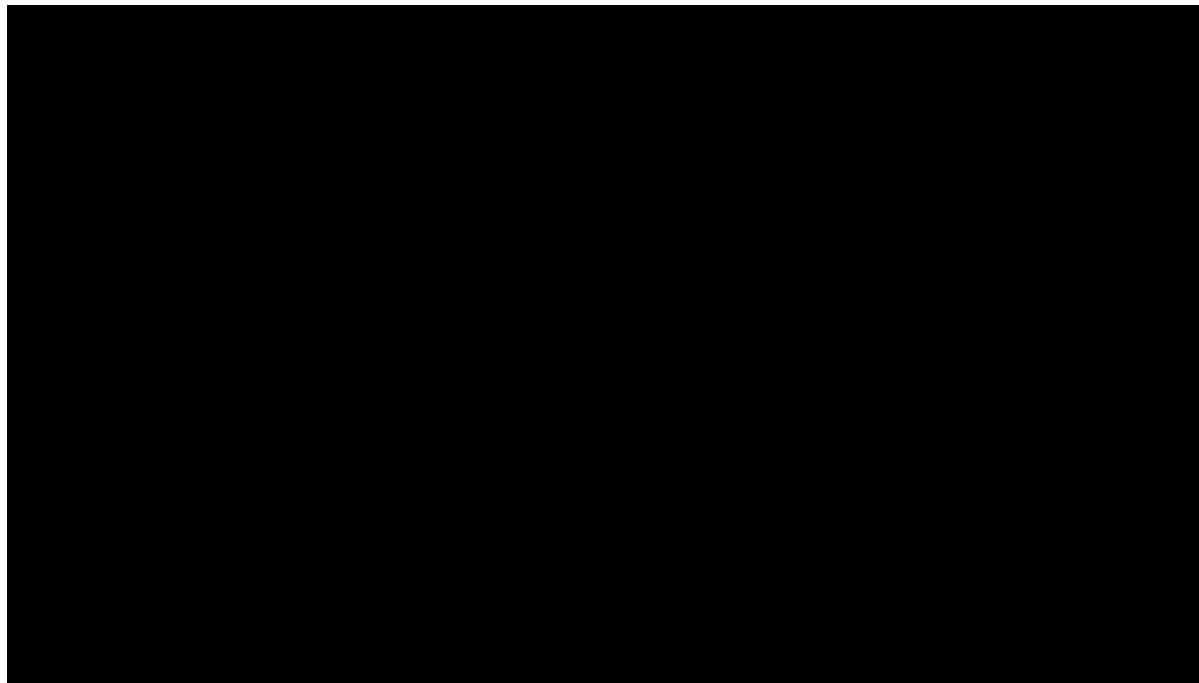
# Process Alignment



# Process Alignment

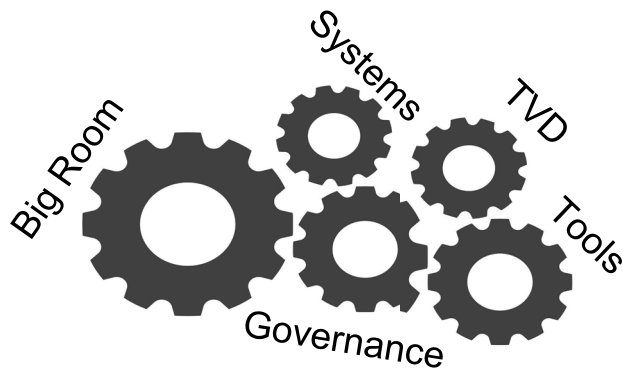
What should a Kickoff Include?

**Jose Felsmann**  
Southland  
Industries  
 **Southland**™

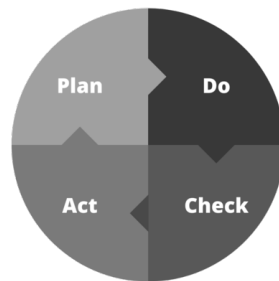


# Process Alignment

What do all stakeholders need to know  
to most effectively do their work?



**Foundational**



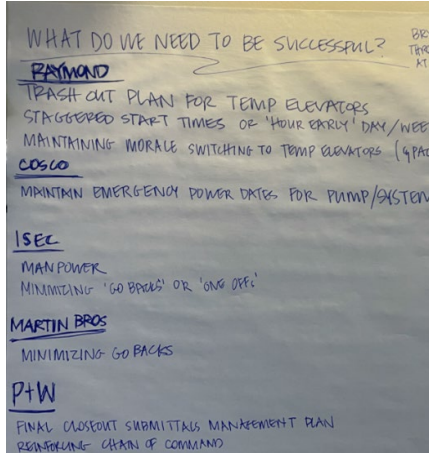
**Learning Mechanisms**



**Team Building**

# Process Alignment

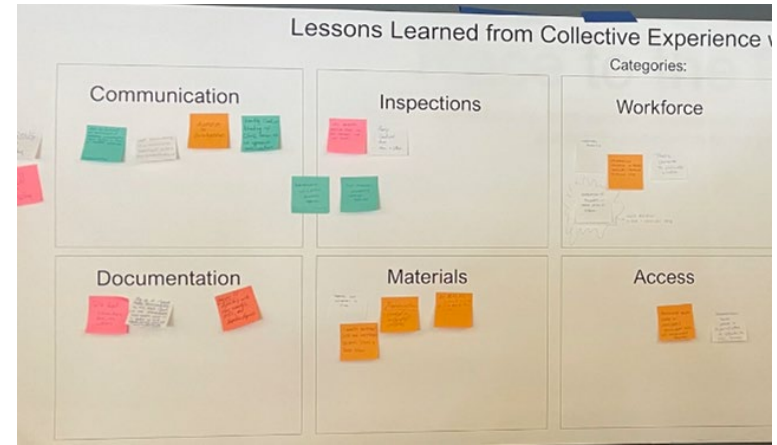
## Milestone Planning



**Realistic? What do you need to be successful?**

What keeps you up at night?

## Knowledge Sharing



Uncertainty

=



Contingency



# Purpose/Mission Alignment & Team Charters



# Purpose / Mission Alignment

**Connect & Mobilize:**  
*behaviors, skills, knowledge, drive*

**Organize & Share**  
*tools, processes, decisions, feedback*

**ALIGNMENT = PEOPLE + INFORMATION**

**MISSION**

**Direction & Purpose:**  
*Clear objective, goal, purpose*

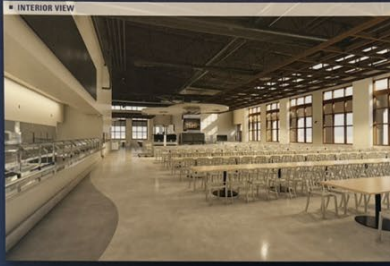


# TEAM CHARTER | P-315 MCRD MESS HALL REPLACEMENT

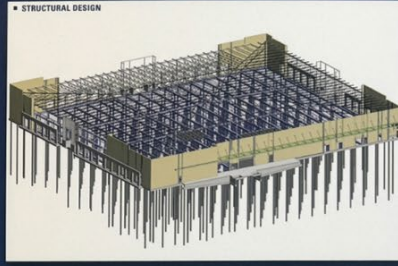
EXTERIOR VIEW NORTHWEST CORNER



INTERIOR VIEW



STRUCTURAL DESIGN



**Balfour Beatty**



**Michael Baker  
INTERNATIONAL**

**PRODUCT**  
Rebuilding our Future Warriors

Our mission is to provide a state of the art dining experience at the P-315 Marine Recruit Mess Hall, with the capacity to serve 20,000 meals daily while ensuring quality of life and wellness for our future Marines. We prioritize sustainability, reliability, and functionality, ensuring unparalleled service and ease of maintenance.

- Capacity:** Seamlessly manage up to 20,000 daily meals
- Alignment with MCRD Mission:** Recruiting quality young men and women and transitioning them to the basic training lifestyle
- Quality of Life:** Provide wellness through attractive facilities and nourishing meals
- Reliability:** Redundant power and equipment readiness for 24-hour operations (continuous responsibility)
- Rebuilding Edge:** Concepts for large-scale projects
- Center of Gravity:** Offer a magnet for recruits, fostering camaraderie and culture
- Reliability:** Ensure durable, low-maintenance infrastructure

Army Civil's March on an Empty Stomach - Reagan  
Don't Eat, Don't Fight - Moltke (Socrates)

**PEOPLE**  
Commitment to Denmark

Our commitment is to foster a dynamic team united by a job as attitude and bound by a willingness to service. We understand the significance we play in the lives of our recruits and staff, and we carry the spirit of the Corps in our daily actions. We will work to ensure the customers at the forefront of our thinking. Facing our service of defense will ensure an outstanding dining experience that is a decade ahead.

- Go the Distance:** Approach challenges with a positive mindset, working towards solutions and taking "yes" to possibilities
- Support Master Expertise:** Value each other's competencies, knowledge, and expertise
- Empowerment:** Acknowledge and foster the critical impact we each have on the mission and well-being of every person we serve at the mess hall
- Customer in Mind:** Each member of the team commits to welcoming the MCRD Color Guard and ensuring a seamless dining experience for every recruit and staff member
- Sense of Urgency:** Recognize that a state of the art mess hall was needed 10 years ago
- Be the Best:** Craft a team that operates at the highest level of excellence by ensuring an environment where accountability is a culture and where learning their mistakes is encouraged, leading to growth, problem-solving, and continuous improvement

**PROCESS**  
Collaborative Excellence in Service

Demonstrate that Early Contractor Involvement (ECI) is a preferred delivery method for MCRD, ensuring a team that is not just meeting the day-to-day challenges but is actively seeking out and engineering solutions to ensure the highest standards of service are met. The team takes a proactive stance on problem-solving, values the feedback loop for continuous improvement, and understands the importance of their roles in providing quality service.

- Selection:** Develop - Encourage sharing best practices early and remember "recruits don't get better with time"
- Implementation:** Meet frequently, maintaining meals at the correct temperatures are required by military daily
- Feedback:** Listen - Gather and incorporate insights from recruits throughout the dining experience (implement ECI delivery method in support of MCRD's mission)
- Communication:** Foster open, honest, and transparent communication to support

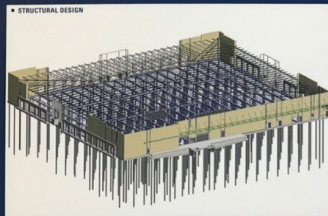
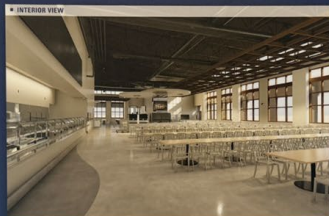
## MISSION

## PEOPLE

## INFORMATION (Process)



# TEAM CHARTER | P-315 MCRD MESS HALL REPLACEMENT



**Balfour Beatty**

**NAVFAC**  
Naval Facilities Engineering Command



**Michael Baker**  
INTERNATIONAL

**MISSION**

## MISSION (PRODUCT)

*Nourishing our Future Warriors*

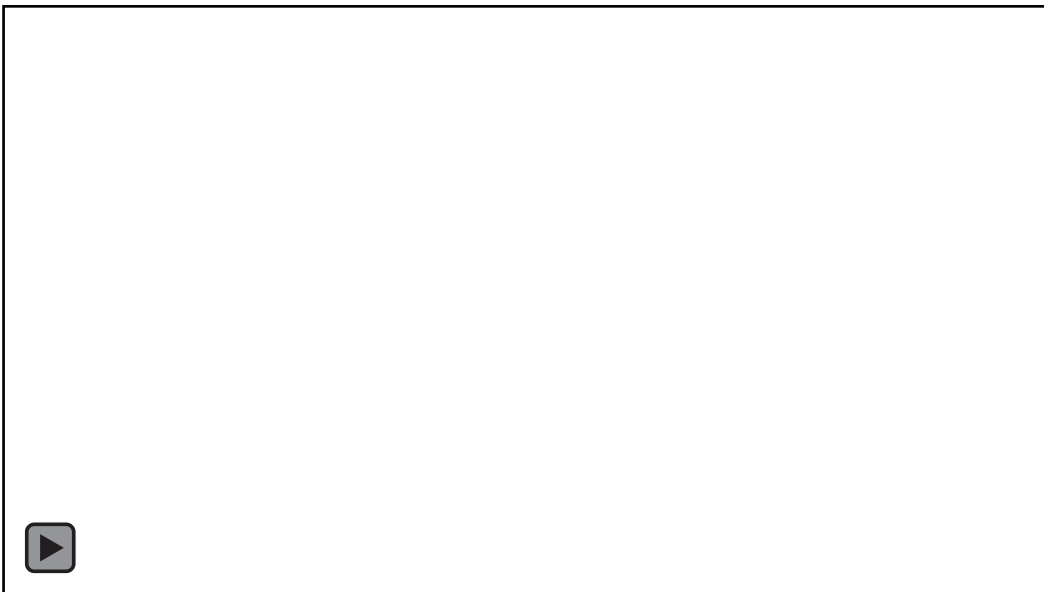
- **Capability** - Manage up to 20,000 daily meals
- **MCRD Mission Alignment** – Recruiting & transforming young men and women into basic trained Marines
- **Quality of Life**: Wellness through attractive facilities and nourishing meals
- **Redundancy** - Power and equipment readiness for 24-hour operations (concurrent maintainability)
- **Recruiting Edge**: Compete for top college recruits
- **Center of Gravity** - Respite for recruits, camaraderie and culture
- **Reliability** - Ensure durable, low-maintenance infrastructure



**CARTA**


**Balfour Beatty**

# Team Charters



University of California San Diego  
Bryan Macias, Project Manager

**UCSD Pepper Canyon West Housing**  
*Creating an Iconic Addition to UCSD's Campus Neighborhoods*



**MISSION**

**Program Impact**

Make a Positive Difference in the Lives of Students. The project will deliver an iconic and functional addition to the UCSD campus and provide high-quality living and learning environments for students.

**Team Principles**

- **Project First Mentality** – Center decision-making on what is in the best interest of the project.
- **See Something, Say Something Approach** – Encourage team members to speak up when they see something, say something" mentality to problems that we do.
- **Positive Work Environment** – Maintain a safe and inclusive work environment that embodies team successes, and lifts each other up.
- **Effective Listening and Communication** – Understand others' perspectives, communicate respectfully, and avoid retreating to our comfort zone.
- **Team Accountability** – Ensure all team members are fully committed to the project and hold each other accountable.

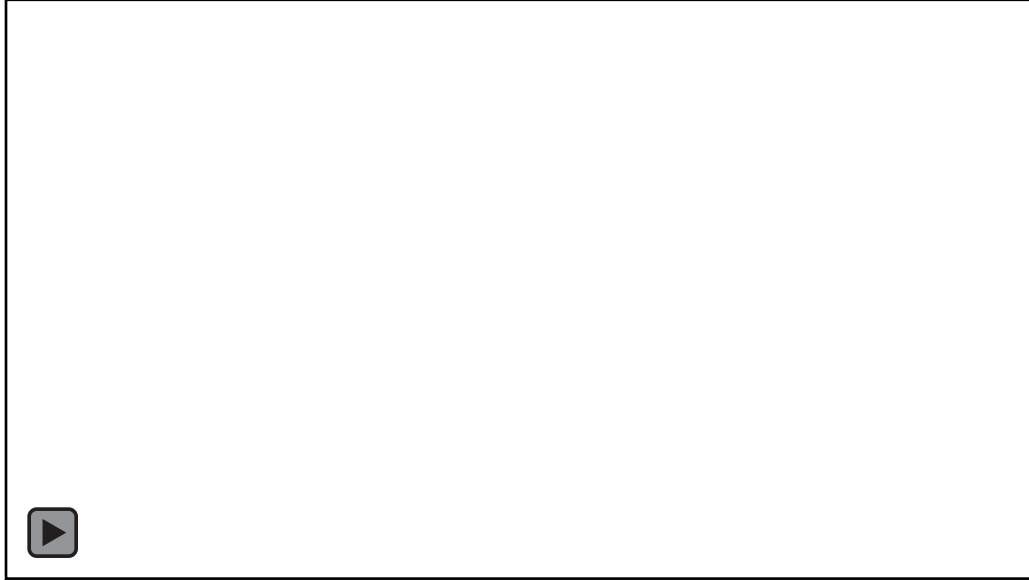
**Project Success**

1. **Ensure Safety of the Team and Campus.** Keep crews, students, and faculty safe both inside and outside of the fence and avoid lost time incidents.
2. **Keep Schedule Commitments.** Reach all critical milestones and complete the project in time for a smooth move-in for UCSD and its students in fall of 2024.
3. **Expertly Manage Scope and Cost.** Deliver the project within the allocated budget while ensuring on-time payments; finish with all stakeholders viewing the job as a success.
4. **Create the "Pride of Our Portfolios".** Deliver a project that meets the highest standards of quality and creates a lasting legacy.
5. **Engage and Empower the Community.** Foster a sense of ownership and pride among the community and ensure that the project is a positive addition to the campus.
6. **Contracting to small and diverse local businesses.**
7. **Foster Long Lasting Relationships.** Finish the project excited to work on future projects together.

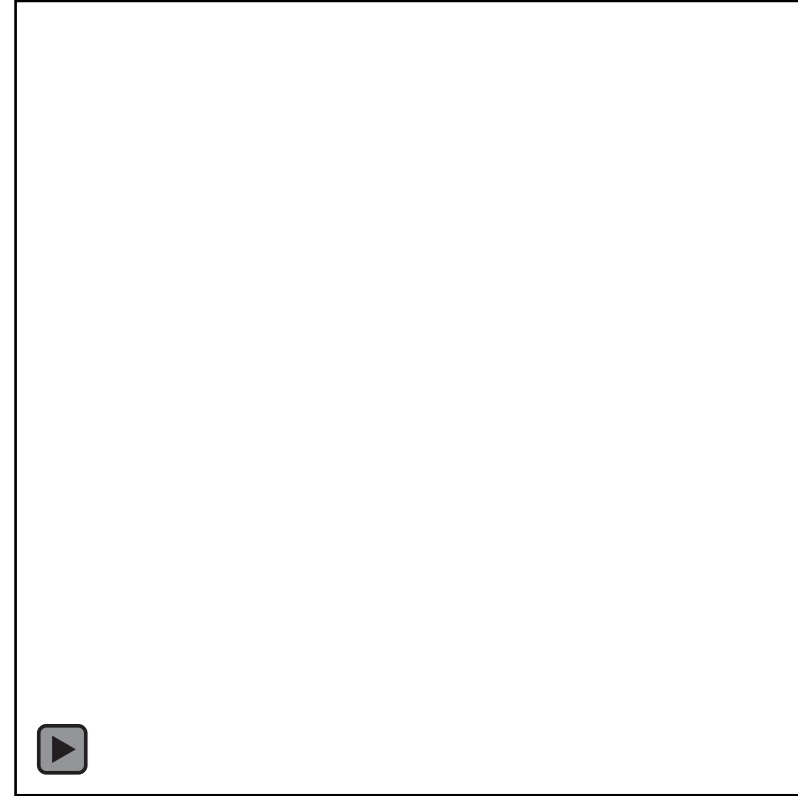
**INFORMATION (Process)**

**PEOPLE**

# Mission: Clear Priorities



Weighing Exercise





# Team Charters

## TEAM CHARTER



### PROJECT GOALS

1. Zero Lost-Time incidents
2. Zero Recordable incidents
3. Zero contractor caused accidents
4. Minimize the interface between work and traveling public
5. Zero rework or concrete removal
6. Always hold preliminary and initial quality meetings
7. Control the budget
8. Explore opportunities for cost savings
9. Communicate any bid item quantity overruns
10. Achieve early completion – Dec. 2025
11. Reduce or eliminate 55-hour weekend closures
12. Team follows the Values, Behaviors, and Attitudes set in the charter
13. Proactively communicate major closures
14. Win a partnering award
15. Celebrate successes with a team activity for completing major milestones
  - a. Stage 1
  - b. Stage 2
  - c. Finishing the crossover

### MINDSETS

#### VALUES

- Safety
- Teamwork
- Integrity
- Honesty
- Trust
- Fairness
- Details Matter
- Open-minded
- Follow the Golden Rule – *Treat others as you would like to be treated*

#### ATTITUDES

- Cooperative
- Receptive
- Collaborative
- Can do
- Be straight no matter what
- Positive attitude
- Forward looking
- End in mind
- Grateful to be on this job
- Respectful
- Team Player
- Empathetic

#### BEHAVIORS

- Remain Calm
- Understand
- Present your true self
- Open communication
- Be respectful
- Be Approachable
- Friendly but firm
- See others' perspectives
- Enthusiastic and High Energy
- Resourceful
- Have Class
- Beware of language in emails
- "Sleep on it" before emailing

PEOPLE

## PEOPLE

### BEHAVIORS

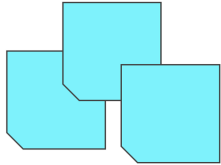
- Remain Calm
- Present your true self
- Open communication
- Be respectful
- Friendly but firm
- See others' perspectives
- Resourceful
- "Sleep on it" before emailing



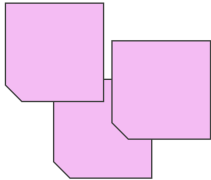
# Continuous Improvement

# Continuous Improvement | Retrospectives

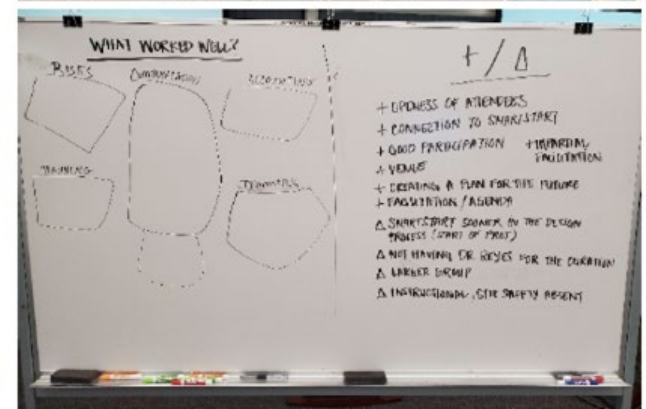
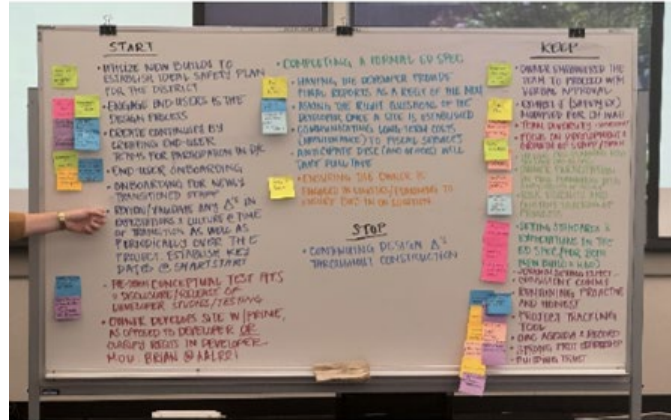
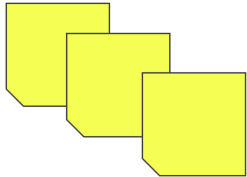
**START**



**STOP**



**KEEP / IMPROVE**



# Team Performance | Assessments

## Assessment Rating Scale

1 – Strongly Disagree

2 - Disagree

3 – Neutral

4 – Agree

5 – Strongly Agree

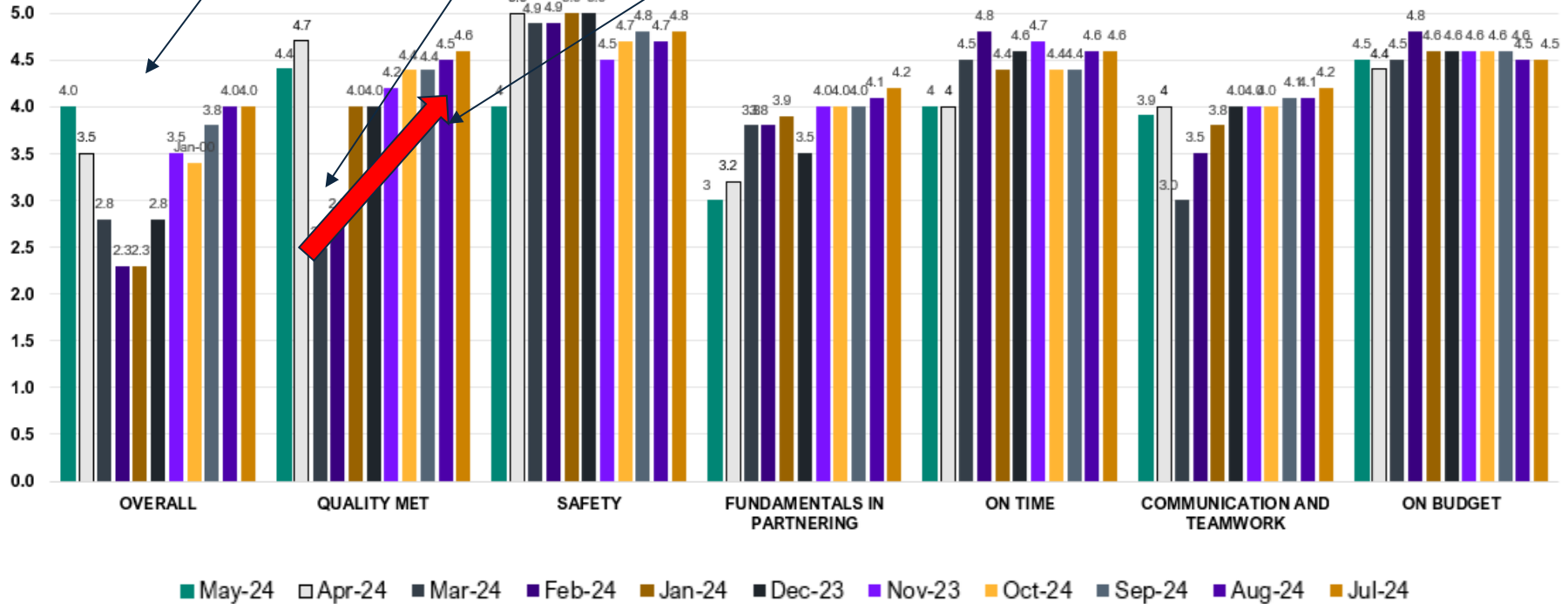
Team Charter Objective	Average Feedback
<b>ACCOUNTABILITY</b> - Clarity of team member roles and ownership of responsibilities.	5-75% / 4-25%
<b>ACCOUNTABILITY</b> - The team was solution/mission-oriented with no finger-pointing.	5-78% / 4-22%
<b>COMMUNICATION</b> - Communication was both proactive and abundant.	5-67% / 4-33%
<b>COMMUNICATION</b> - The team encouraged a "bad news early" approach to communication.	5-89% / 4-11%
<b>TRUST</b> - The team acted with integrity by "doing the right thing".	5-100%
<b>TRUST</b> - Team behaved with honesty.	5-100%
<b>OUTCOMES</b> - The community "loved" the project.	5-56% / 4-44%
<b>OUTCOMES</b> - Satisfied Client and Board.	5-78% / 4-22%
<b>OUTCOMES</b> - Schedule certainty with project finishing on time with kids in classroom on time.	5-100%

# Team Performance

Constructive Conflict

Issues

Recovery



# Facilitator Mastery

**What is the role of a facilitator?**

# Facilitator Roles

Guide | Taskmaster | Set the Tone

Isn't a Participant | Suggests Ways to Move Forward

Bridge Builder | Read the Room | Gain Consensus

Praiser | Foster Safe Environment

# Co-Facilitation Best Practices

## Lead Facilitator (Captain)

- Lead discussion
- Engage Participants
- Set Clear Expectations
- Set Tone
- Pacesetter
- Model Energy & Tone
- Manage Conflict

## Co-Facilitator (First Officer)

- Support discussion
- Provide Input
- Timekeeper
- Note Taker (Action Items)
- Observe (non-verbal)
- Tend to Participants' Comfort
- Prepare Report



# Facilitator Best Practices | Placemaking Checklist

## PLACEMAKING ITEM

**Actual Space** - Adequate Size, Acoustics, AV

**Arrival/Parking** - Detailed Instructions

**Food/Beverage Offerings** - Variety, Dietary Needs

**Name Tents** - Card Stock, Utilize Underside

**Agenda** - Copies Furnished

**Wifi** - Tested with Instructions Posted

**Visual Aids** - Writing Surfaces, Markers, Sticky Notes

**Ambiance** - Music, Cleanliness, Lighting, Temperature

**Backup** - Gear Bag (Cords, Batteries, etc.)



“When the pressure is on, you don’t rise to the occasion—you fall to your highest level of preparation.”

— Chris Voss



# Q&A

**Enter to win**  
a Kickoff Session  
Facilitated by  
Diane and Justin!

