

Knowledge sharing project guidance for submitting ideas

The purpose of this document is to provide advice for Evidence Coordinators (ECs) about the process for the knowledge sharing project and covers the:

- The process to submit an idea for verification;
- the requirement to regularly review the knowledge bank to ensure every opportunity available is taken to re-use the approved ideas;
- how to navigate around the Knowledge Bank:
- to report the re-use of ideas as required by the 'Value Opportunities and Decision Register' product in the Project Control Framework (PCF);
- the ultimate aim being that an idea that is re-used many times becomes part of business as usual and is included in the Way we Work (WwW) as a formal process.

Please note that ideas are shared with other project teams in good faith, with an assurance that they have been successful and have demonstrated good value.

When ideas are considered for use on other projects, it is the responsibility of the appropriate project team to assess if they are applicable to their scheme (including risks, departures, costs and benefits).

Idea/Lesson Learnt Submission Process

1. The Evidence Coordinator (EC) identifies (in collaboration with project teams) a good idea or lesson learnt that has proved to bring added value to their scheme and has sufficient merit to be made available to other projects.
2. The EC assesses the rating of the idea or lesson learnt against the selectivity criteria that must be met as set out within [the Ground Rules and Selectivity Criteria Matrix](#). Place a tick in the relevant boxes in the Selectivity Criteria section of the ideas form to indicate the impact it has.
3. Please note that an idea **should** be put forward for consideration by the Verification Group if:
 - a tick can be placed in one 'High' or more boxes, irrespective of any neutral/adverse impact;
 - there are more moderates than neutral/adverse impact;
 - where an idea has low initial cost value, but could bring greater benefits if re-used across a programme of schemes.
 - Discount **any** combinations of 'Low' and/or 'adverse impact'.
4. **Information about the selectivity criteria**
 - The ground rules and selectivity criteria have been based around the goals in the Highways Agency's Strategic Plan 2010-15 and measures from the Highways Agency Business Plan 2011-12.
 - The categories to be considered are as follows:
 - **Cost savings** – please indicate how much the idea has saved against the scheme budget.

- **Delivery** – please indicate the time savings achieved towards the agreed schedule of programme and the % cost savings achieved towards the 20% efficiencies against scheme budget.
- **Journey reliability** – please indicate the improvement to journey time. The measure used, which is an average of 3 minutes improvement during peak time is based on the 2011 meta- analysis from post opening project evaluation (POPE), which states that schemes improve journey times on average by three minutes during peak time.
- **Health and Safety** – please indicate the improvement to the accident frequency rate based on Major Projects target of 0.10.
- **Reputation/Diversity and Integration** – please indicate how the idea has enhanced both the supplier's and Agency's reputation and the level of consideration that has been given towards diversity and integration. Diversity and integration has been included because the public sector equality duty requires the Agency, and those delivering services on it's behalf, to have due regard of the need to advance equality of opportunity, eliminate unlawful discrimination and, foster good relations between those with a protected characteristic and those that do not. Ultimately the Agency needs to demonstrate how decision making processes contribute to the evolution of a fairer society.
- **Sustainability/Environment** – please indicate the enhancement towards the reduction in carbon and waste, protection of SPAs (Special Protection Areas), SSSIs (Sites of Special Scientific Interest) etc, improvement to air quality and noise quality. The Agency does not currently have a base line to measure against for sustainability. This should be available from 2012 onwards.

5. How to complete the form

- **Lesson reference number** – Please leave this box blank as the reference number is allocated by the Major Projects (MP) Knowledge and Capability Team.
- **Idea/Lesson Learnt Title** – Please enter a meaningful short title for the idea/lesson learnt.
- **Project Information Section**
 - **Scheme** – enter the title of the scheme.
 - **Approximate Scheme Works Value (£M)** – enter the total value for the scheme.
 - To assist others to find the idea in the Knowledge Bank please provide an indication of which stage of the Project Control Framework (PCF) the idea relates to, which PCF stage the idea should be considered at, whether the scheme is in design or construction and key words/phrases. This box has been included so that we can start to collect information on key words in order to build a search facility at some point in the future.
 - **Evidence Coordinator name** – Please enter details.
 - **Date of Submission** – please enter the date the idea is put forward for consideration.
- **Selectivity Criteria Section**
 - Please rate the idea/lesson using the selectivity criteria and place ticks in the relevant boxes within the matrix to indicate the impact it has.

- **Commercial Sensitivity** – Please place an X in either the ‘yes/no’ box to indicate if the idea has commercial sensitivity. There may be cases where some of the information being provided is commercially sensitive for the company and therefore should not be widely distributed. This option gives the opportunity to state this.

- **Details of Idea/Lesson Learnt Section**
In this section please provide as much information about the idea/lesson as possible. An idea that is well defined, easy to understand, has good justification of its benefits, has a proven track record with good evidence to back it up is more likely to be looked upon favourably.

The questions within the boxes have been included to provide prompts to make it easier to complete each part of this section of the form.

- **Key Issue/Executive summary** – please explain what prompted the initiative and describe the circumstances that led to the issue.
 - **Short overview of initiative to solve the issue** – please explain how the initiative works and how it was put into practice.
 - **Associated risks, issues and departures** – please state whether departures from standards were required, what approvals were sought and whether they are likely to be given (if known). What difficulties (if any) were encountered when requesting departures? What needed to be considered and overcome?
 - **Justification of Selectivity Criteria** – Please ensure the justification is robust and that the idea has a proven track record. If the idea is new ensure it is reliable. Provide your reasoning why any of the categories have been assessed as highly beneficial. Then explain the benefits for each of the categories individually.
 - **Repeatability** – please indicate whether the idea is a one-off for the scheme or if there is potential for wider cost benefits if used on successive projects. Please provide an indication of the possible cost benefits if the idea was used many times across the programme of schemes. Explain how the conclusion was reached and ensure it is quantifiable. If possible please indicate how many times the idea could be re-used.
 - **Does this idea have any links to any other ideas already on the Knowledge Bank or the Agency’s Toolkits** – If your answer is ‘yes’ please give details of the links. If your answer is ‘no’ please say so to show that possible links to other initiatives have been considered.
 - **Please provide any supporting evidence** in the form of pictures, graphs, figures, documents or other evidence. Provide examples that clearly demonstrate the issue, new way of working and how it is making a difference.
 - **Verification Group Decision** – the conclusions the Verification Group reach are recorded in this section once their discussions have been completed.
6. Once the form is completed please forward it to this e-mail address:
MPPprincipalsgroup@highways.gsi.gov.uk
7. The Major Projects (MP) Knowledge and Capability team will collate and forward submitted forms to the Verification Group (VG) for consideration at least 10

working days before each verification group meeting. These meetings take place every two to three months depending on the number of submitted ideas and VG members' availability. The MP Knowledge and Capability Team will inform ECs by e-mail about the date of the next meeting and the deadline for submissions.

8. The ideas are forwarded to the VG members in advance to give them the opportunity to seek advice from technical experts on the suitability of an idea if this is considered necessary.
9. The VG hold a telephone conference to discuss and decide which ideas show sufficient merit to be shared across all schemes and placed on the Knowledge Bank (KB). The VG may invite an appropriate Evidence Coordinator (EC) to take part in the discussion. This is so that the EC can explain their submission/s in more detail and answer any questions.
10. The MP Knowledge and Capability Team draft minutes following the VG meeting and these record which ideas have met the criteria for approval and those that have not. At this point further information may be requested from the EC or technical experts before final approval is/is not given.
11. Notification is sent to the EC informing them whether their idea has been approved or not and the reason why.
12. All approved ideas forms are linked to the Knowledge Bank (KB) page within the Major Projects Knowledge Sharing area of the Our Partners section of the HA website. The KB page lists ideas by route number and then scheme on that route.
13. ECs are provided with a copy of the VG minutes for their records and notified via e-mail when the KB page has been updated with approved ideas for consideration and re-use on their scheme where appropriate.
14. EC disseminates this information to project teams to ensure approved ideas are reused where applicable.
15. On the KB page in the HA website (see Figure 1 below) there is a document entitled 'Knowledge Bank Summary/Overview' which lists all the ideas that have been submitted and verified by the VG. This document also includes information about those ideas that did not meet the group's approval and these are highlighted in grey. This document provides a summary for each approved idea and can be used as a quick reference to help in the decision process to explore ideas in more detail from the list on the KB page.
16. To interrogate the databank open the Knowledge Bank/Summary/Overview document, select Edit from the toolbar at the top of the page. Select 'Find' towards the bottom of the drop down box, as shown in Figure 2 below. On the top right hand side corner of the page a box appears in which you can enter a keyword and then click one of the arrows to the left and the system will search the document for that word (see Figure 3 below). Continue searching by clicking

the arrow to view all entries for the keyword. The system will inform you when the search is complete.

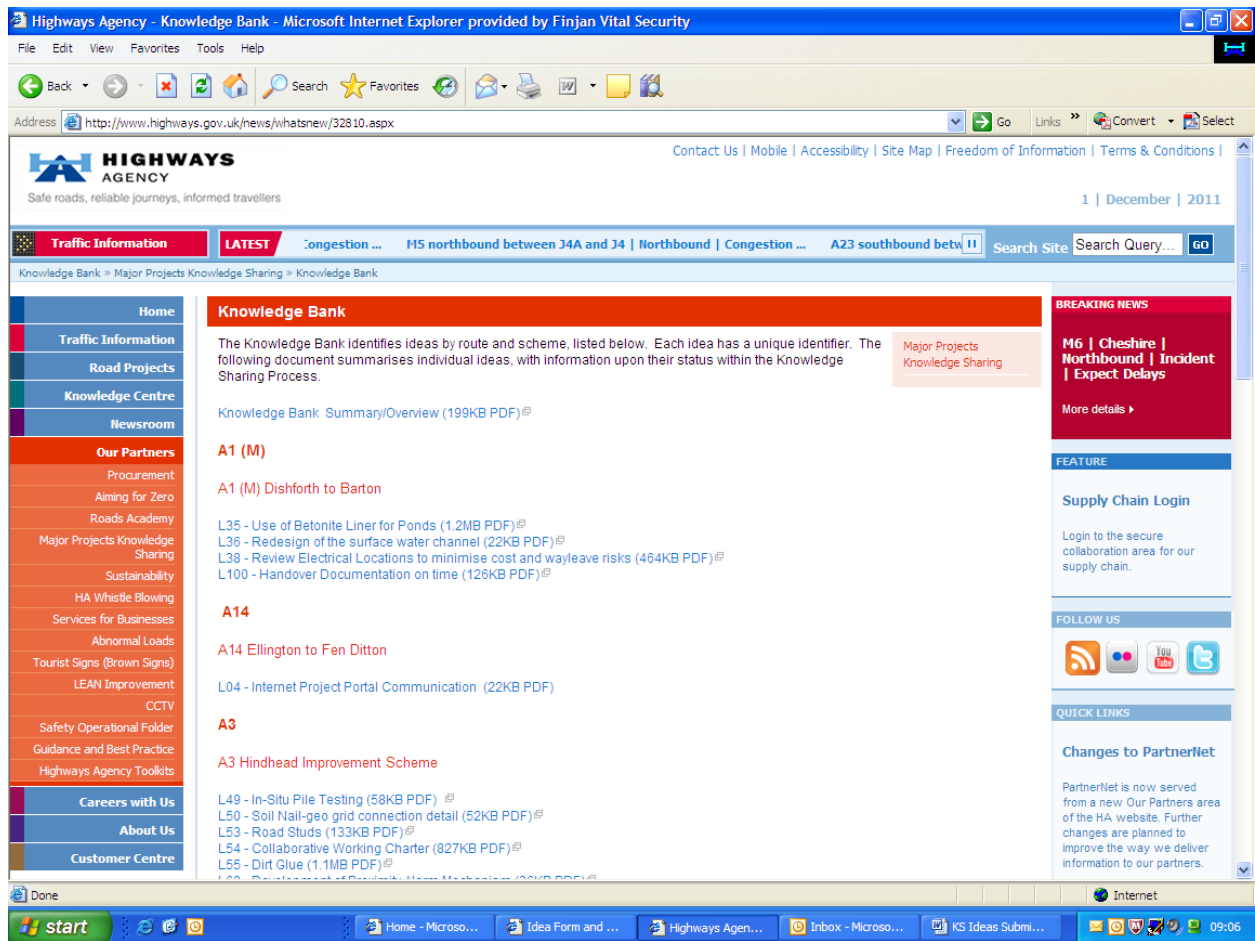


Figure 1: Screen print of Knowledge Bank page in the HA Website

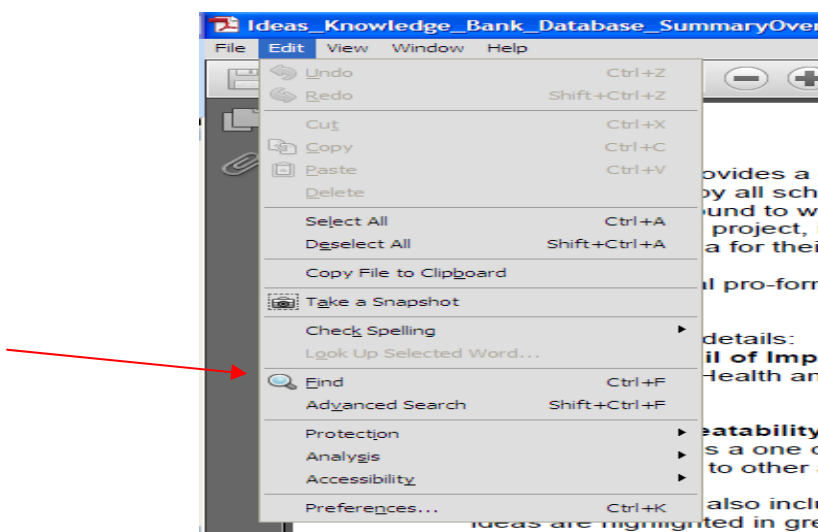


Figure 2: Screen print showing the 'Find' facility in an adobe document

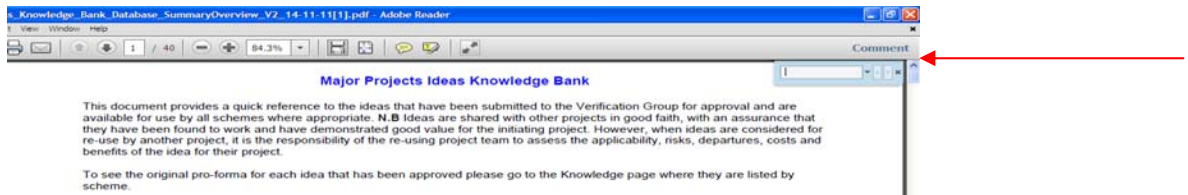


Figure 3: Screen print showing the search box in an adobe document

17. There is also a requirement for scheme teams to record that they have made reference to and re-used ideas from the knowledge bank as part of the 'Value Opportunities and Decision Register' product in the Project Control Framework (PCF).
18. Periodically the MP Knowledge and Capability Team will request that ECs provide a return on the ideas that have been re-used. These returns will be used to prepare a report.
19. The idea re-use report will be forwarded to the VG to decide whether ideas that have been re-used several times should be incorporated into standard processes and procedures.
20. VG make recommendations to the MP Principals Group - Knowledge Transfer Sub-group.
21. MP Principals Group- Knowledge Transfer Sub-group approves or declines VG recommendations.
22. Approved ideas forwarded to MP Knowledge and Capability team and PCF team to investigate how the process can be incorporated into the Project Control Framework and provide appropriate guidance.
23. Notify the EC that their idea is to become part of the Agency's Way we Work (WwW) system.
24. MP Knowledge and Capability Team to record details on KB.
25. Process end – idea is embedded and becomes part of the WwW.
26. VG and MP Principals Group – Knowledge Transfer Sub-group consider how original EC and their project team should be rewarded for putting forward the idea.