



Special Projects: Exercise Description

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Special Projects

Background

This exercise has been designed to investigate how participants behave in a group discussion to decide how to spend a 'Special Projects' budget given a range of different proposals. It is suitable for graduate to middle managers. This is an 'assigned role' group exercise where each of the participants has a specific brief to present and argue for one of the proposals. The exercise tests the capacity of candidates to quickly get to grips with a brief, construct and communicate good arguments and work cooperatively with others to achieve an agreed consensus. The exercise is set in a manufacturing context, but the issues are relevant to any organisation where there are competing claims for budgets.

The competencies that are relevant to this exercise and can be used as rating dimensions are as follows:

Analysis & Problem Solving Skills

Communication Skills

Organisation

Team Orientation

Users may substitute versions of the competencies above from their own existing competency framework as desired.

A five minute briefing is required in which candidates are provided with their materials and assigned their role to present and argue the case for one of the options. This is followed by a 10 minute 'silent reading' period. Following this the discussion is started with a 35 minute time limit within which participants must agree which of the projects to fund. Participants are required to provide a brief verbal description of the outcome at the end of the exercise. There are 6 project options and we recommend that the exercise is run with between 4 and 6 participants.

Exercise Content

The 13-page participant brief provides all of the background information including the company's Mission Statement, a statement from the Board of what is required and 1 page synopses of each of the 6 projects. The instructions to participants outline the scenario as follows:

"In this exercise you are asked to arrive at a group consensus on the rank ordering (for funding purposes) of a set of applications for support from a "Special Projects" fund set up by the multinational organisation Portland Glass.

Each individual in your group (including yourself) represents one of the divisions responsible for putting forward a proposal, and each would clearly prefer to have their own division's project supported.

Although the fund was agreed at Board level, the Board has left it to you as representatives of the proposing divisions to deliver an agreed rank ordering of the projects which they can then approve for funding. The Board has made it clear that failure to arrive at a consensus ranking will lead to them shelving the allocation for the forthcoming year.”

The Mission Statement includes:

2. To employ leading edge technology in all aspects of the organisation's operations.
5. To serve as a responsible member of the Community by providing opportunities for local people to benefit from the resources and facilities the organisation can provide.

The options provided range from: sponsoring events; providing facilities to improve employee welfare; revenue earning opportunities. All of the details of each project are available to all participants. Each project is associated with initial capital costs and running costs, although these are not presented in detail. The available budget is between a third and one half of that required to support all projects, and so typically no more than 2 of the options can be funded.

Assessor Brief

The Assessor Brief provides background information (i.e. an Overview, Relevant Competencies, Timing, Exercise Materials and Key Issues). A separate full set of Administration Instructions is provided. General advice is provided on observing and rating the exercises, along with rating guidelines, and details of how to conduct a Post Exercise Review.

A series of 12 key issues are listed including:

- The Mission Statement should be considered in relation to each proposal
- The 6 proposals together would require a budget of around £2m to deliver in their current form. As the actual budget is only £0.5m, it would appear that only 2 or 3 proposals can be supported at best
- Many of the proposals contain ‘hidden’ costs, where salaries, maintenance, etc. have not been clearly identified

Brief summaries of each of the 6 project proposals are provided covering both explicit and implicit budget implications and the extent to which each maps on to the Mission Statement.

Quantities

The Administration Pack contains the following items:

- 12 Participant Briefs
- 2 sets of Admin Instructions
- 12 Observation Sheets
- 12 Rating Forms
- 4 Assessor Briefs

After initial purchase of the Admin Pack, a Refill Pack may be purchased which contains the following consumable items:

- 12 Participant Briefs
- 12 Observation Sheets
- 12 Rating Forms

Current pricing can be determined by reference to <http://www.sr-associates.com/pricing.html>

If desired, further queries as to the exercise demands and content can be made to:

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