

Project/Process Management and Facilitation Qualifications

Melissa Hadley, RPF, PMP, CPF

Melissa Hadley holds international certifications in project management and facilitation, and is a registered professional forester and certified teacher in British Columbia. She has a broad understanding of forest science and natural resource management issues, and has undertaken projects for communities, non-profit groups, industry, and governments.

Melissa is sensitive to the challenges in communicating clearly across functional, technical, and cultural boundaries. Her unique combination of project management, facilitation, and communication expertise are an asset in supporting high functioning groups with differing perspectives. Through careful design, and effective use of questions to build on common ground, she has helped many groups resolve complex problems, identify desired futures, and develop action plans to realize their goals.

Melissa has led teams in planning and delivering project management and communications support to several of British Columbia's key multi-stakeholder processes, such as the Coast Information Team, Conservation Investments and Incentives Initiative, and Scientific Panel for Sustainable Forest Practices in Clayoquot Sound.

She has designed and managed robust structures and processes for evaluating and advising on project selection and/or investment strategies, for groups such as the Wood First Initiative, Forest Investment Account Forest Science Program, Science and Community Environmental Knowledge (SCEK) Fund, and Minister of Forests Community Forest Advisory Committee.

Melissa has facilitated dialogue sessions, strategic and business planning workshops, and focus groups for government, First Nations, industry, non-profit organizations, and communities in the areas of terrestrial science, marine science, indigenous science, and climate change.

Key Strengths

Process Management: Designing and managing multi-stakeholder processes to establish structures and protocols for ongoing processes, such as guiding the selection of research projects to meet specific goals. Has included advising on appropriate governance structures, terms of reference, protocols; strategic and business planning; opportunity analysis; developing and implementing communications plans; eliciting values and indicators for scenario analysis; preparing backgrounders/briefing notes to guide decision-making.

Project Management: Developing and updating the project charter, scope statement, and project management plan throughout the five phases in the project lifecycle: project initiation, planning and design, execution, monitoring and controlling, and closing.



mjhadley@cortex.ca
250-686-4673

Key strengths

- process management
- project management
- facilitation
- strategic planning
- action planning
- secretariat support

Facilitation: Designing processes and employing techniques to elicit a group's collective knowledge and experience, and engage participants in collaboratively creating and selecting effective solutions. Inviting participation, while maintaining focus to keep group progressing towards agreed-to objectives.

Strategic Planning: Identifying: (i) the key elements and desired future states of an agreed-to organizational vision in consideration of internal and external forces; (ii) critical obstacles to overcome and key conditions required to achieve these states; and (iii) potential strategies to address the obstacles and achieve the conditions for success. Developing criteria to guide selection, and selecting key strategies for implementation. Defining measurable accomplishments for each key strategy.

Action Planning: Moving the strategic plan into a time-bound, agreed-to plan for implementation that will achieve the strategic measurable accomplishments. Includes identifying for each strategy: the measurable objectives (often 3-year), key audiences and behaviours needed to achieve the objectives, the actions to achieve these behaviours, the resources required, and the individuals responsible for implementation and monitoring.

Secretariat Support: Often includes developing terms of reference, organizing and documenting meetings, preparing background materials, drafting reports, financial tracking, progress reporting, and external communications.

Recent Clients

BC Ministry of Forests, Lands, Natural Resource Operations	
BC Wood Specialties Group	Interior Lumber Manufacturers Assn
Climate Action Secretariat	musica intima
Cowichan Lake Regional District	Royal Roads University
Environment Canada	University of B.C.
Fisheries and Oceans Canada	Vancouver Island University
Forestry Innovation Investment	Western Red Cedar Lumber Assn
Healthy Forests - Healthy Communities	World Wildlife Fund-Canada

Cortex Consultants

Cortex established offices in Victoria, BC in 1990. Our consultants are well known as individual experts in a range of disciplines and together we offer clients innovative and technically strong solutions to meet their needs. We are well organized, deliver on our commitments, and respond to emerging issues in a timely and professional manner.


www.cortex.ca

Example Projects

Project Management

Project: Forest Sector Climate Action Steering Committee

Assignment: Guide forest sector on appropriate policy and activities related to climate change

Cortex worked with the FSCASC and its subcommittees to develop a strategic framework that included a vision for the forest sector in a carbon-constrained future, strategic directions to achieve specific aspects of the vision, and preliminary 12-month measurable accomplishments for each of these strategic directions. The FSCASC subsequently established sector-specific teams to work with this material in developing government and industry action plans.



Strategic framework for forest sector in carbon-constrained future

Project: Coast Information Team (Government, Industry, ENGO)

Assignment: Develop information and analyses in support of ecosystem-based management in north and central coast of BC

Cortex provided financial tracking, accounts management, contract development, workplan and invoice monitoring, fundraising, management committee support, and external communications (public, decision-makers) on this complex \$3.3 million project.

Independent science and analysis in support of ecosystem-based management

Project: Conservation Investments and Incentives Initiative

Assignment: Investigate conditions and arrangements to attract funds to BC to support conservation-based economic development

Cortex provided financial tracking and accounts management of the \$1.5 million phase I budget, support to the CIII Steering Committee, organized project working sessions with stakeholders, and developed background and presentation materials. The project led to the establishment of a \$120 million fund to support conservation management and sustainable economic development in the north and central coasts of BC and Haida Gwaii.

Conditions to support conservation-based economic development

Project: Scientific Panel for Sustainable Forest Practices in Clayoquot Sound

Assignment: Develop recommendations for world-class sustainable forest practices based on current science and traditional ecological knowledge

Cortex provided financial tracking and accounts management, organized and documented all meetings, and designed, edited, and published the Panel's reports. This project introduced the notion of "independent science" to issues of land use and resource management planning, and was the hallmark of ecosystem-based management in British Columbia.

Recommendations for sustainable forest practices

Process Management

Project: Forest Investment Account Forest Science Board

Assignment: Advise on priorities for investments in forest science

Cortex facilitated strategic and business planning; oversaw analysis to support the establishment of annual research priorities; provided meeting facilitation and support to the Board and its committees; and delivered program-level communications, including website, display, brochure, reports, and articles. This project established a robust and transparent mechanism for annually allocating approximately \$14 million to applied research in support of sustainable forest management in BC.



Structures and processes for selecting investments in forest science

Project: Science and Community Environmental Knowledge Fund

Assignment: Support and facilitate research to avoid, minimize, or mitigate environmental effects related to oil and gas exploration and development

Cortex established a robust, transparent, and integrated strategic and business planning framework with supporting structures and processes for managing the SCEK Fund. It developed a clear identity for the SCEK Fund, organized project information for efficient access and tracking, and improved systems supporting governance. These developments made it possible for Fund activities to increase or decrease in response to available funds, and enabled administration to be carried out by Oil and Gas Commission staff with consultant expertise, as needed, to support specific functions such as strategic planning, communications, and extension services.



Structures and processes for selecting investments in research and education

Project: Ministry of Forests Community Forest Advisory Committee

Assignment: Recommendations on design and implementation of a community forest tenure

Cortex developed background papers for the committee, organized and documented committee meetings, drafted committee recommendations regarding tenure structure and terms (legislation), and helped design the process by which the draft tenure would be piloted (e.g., proposal call, scoring, selection) and evaluated. This project led to establishment of the Community Forest Tenure and program. Cortex subsequently developed a framework and recommendations for collaboratively monitoring community forest tenures.



Recommended design and implementation of a new community forest tenure

Facilitation

Client: Community Groups and Provincial and Municipal Government Agencies

Assignment: Strategic Framework for Managing Cowichan Lake Shorelines

Design, development, and facilitation of a 2-day multi-stakeholder workshop (50 participants) to develop a strategic framework (vision, goals, strategies), collect map-based information, and commit to specific actions related to managing Cowichan Lake Shorelines to 2023.



Strategic planning

Client: Choral Group

Assignment: Strategic Plan

Designed and facilitated a 2.5-day workshop to develop a strategic planning framework (vision, goals, strategies, actions) for a Vancouver-based choral group.


Strategic planning

Client: Marine Non-Governmental Organization

Assignment: Environmental Scan, Analysis of Opportunities, Strategic Actions

Designed and facilitated a 1-day workshop for non-profit organization in marine sector. This was a review and realignment of work opportunities with a strategic framework developed in 2009.


Business planning

Client: BC Crown Corporation

Assignment: Committee Recommendations on Annual Investments

Annually design and facilitate workshops and meetings with Advisory Committee to prepare recommendations to Forestry Innovation Investment on the allocation of Wood First investments (~ \$2.4 million). In 2011, provided strategic advice on governance model, developed client-focused approach to strategic planning, and conducted surveys and interviews with advisory committee and service delivery organizations.


Investment
planning

Client: Vancouver Island University

Assignment: Workshop on BC's Seafood Economy and Marine Ecosystems

Designed and facilitated a 1-day workshop for over 80 participants representing academic, association, environmental, First Nations, government, industry, and public interests in marine ecosystems and resources. Working in five theme areas, participants identified characteristics of the desired future state; key strategies to pursue in the next three years; and key milestones, collaborators, and next steps in pursuing these strategies.


Dialogue sessions
Collaborative
strategies

Client: BC Government

Assignment: Cumulative Effects Analysis related to First Nations Interests


Designed and facilitated a 1-day internal workshop for ministries working on issues related to development of a provincial framework for cumulative effects analysis.


Issues and
opportunities
analysis

Client: Local communities

Assignment: Dialogue Sessions

Designed and facilitated dialogue sessions for local communities, collecting input on the vision, use, and issues related to management of public forests.


Dialogue sessions
Issue identification

Client: Value-Added Wood Products Associations

Assignment: Strategic Planning

Designed and facilitated workshops to develop a strategic framework (vision, strategies, measurable accomplishments), draft vision and mission statements for an association that delivers services to the value-added wood products industry.


Strategic planning

Client: Coastal First Nation
Assignment: Strategic Planning

Designed and facilitated a 3-day workshop with board, staff, and representatives from a First Nations Tribal Council, to identify elements of a vision, key strategies, and 1-year, 3-year, 5-year measurable accomplishments for integrated resource management.



Strategic planning

Client: Marine Industries and ENGOs
Assignment: Investigating a Business Case for Integrated Marine Planning

Designed and facilitated workshop discussions with leaders from marine-based businesses and ENGOs to determine the elements of a business case for industry involvement in integrated marine planning in the Pacific North Coast Integrated Marine Area.

Assessing a business case

Client: Marine Non-Government Organization
Assignment: Business Analysis and Strategic Planning

Designed and facilitated interviews with international ENGOs and held subsequent workshops with board and staff of a grass roots non-profit association to develop models and a strategic plan to transition to a formally constituted NGO with charitable status.

Business analysis
Strategic planning

Client: BC Government and Forest Industry Associations
Assignment: Strategic and Action Planning Related to Climate Change

Designed and facilitated workshops and meetings with senior executives in industry and government to develop a strategic framework and associated action plans to guide both organization's activities related to climate change in British Columbia's forest sector.

Collaborative strategic framework

Client: BC Government and First Nations Organizations
Assignment: Concept Development for Aboriginal Science Funding Stream

Brought together aboriginal elders, community leaders, and researchers with non-aboriginal researchers to solicit advice on the purpose, structure, governance, and content of an Aboriginal Science Funding Stream within the FIA-Forest Science Program.

Purpose, structure, governance, and focus of potential new funding stream

Client: Academic Institution Federal Research Project
Assignment: Focus Testing Regarding Genomics

Solicited input from diverse interests on reasons for and against using genomics to select, propagate, and deploy naturally-occurring weevil-resistant spruce trees, and advice on how BC might proceed on issues related to this use of genomics.

Focus group input