

Sample Kick-off Partnering Workshop Agenda

Your facilitator is responsible for designing your partnering workshop agenda. The agenda should be developed to meet the specific needs of your project. Here are sample half-day and one-day agendas.

Sample Half-Day Kick-off Partnering Workshop Agenda

8:00 am	Welcome (RE and PM) Introductions Partnering overview Projects goals Dispute resolution plan Quarterly partnering evaluation survey Partnering maintenance and close-out plan
Break	Potential project issues Key issues/risks to our success Problem solving/commitments for key issues Signing of the partnering charter Closing remarks
Noon	Workshop ends Facilitator evaluation

Sample One-Day Partnering Kick-off Workshop Agenda

8:00 am	Welcome (RE and PM) Introductions Your commitment to partner this project Projects goals Dispute resolution plan Quarterly partnering evaluation survey Partnering maintenance and close-out plan
10:30 am	Partnering overview Project organizations Project overview (RE and PM)
Lunch Break	Potential project issues Key issues/risks to our success Problem solving/commitments for key issues Signing of the partnering charter Closing remarks (RE and PM)
4:00 pm	Workshop ends Facilitator evaluation

Deciding Who Needs to Attend

One of the most important contributors to the success of your partnering workshop is the invitation and attendance of all the stakeholders who can impact your project. The following list is provided as a guideline. It is important to include subcontractors who are on your critical path or who are doing a significant portion of the work.

<u>Caltrans</u>		<u>Contractor</u>	
Resident Engineer	Project Engineer	Project Manager	Key suppliers
Construction Engineer	Area Maintenance Sup	Jobsite Supervisor	Lab (QC/QA jobs)
Construction Manager	Chief of Construction	Project Engineer	Local management
Structures Rep.	Senior Structures Rep.	Subcontractors	
Project Manager	Surveys	Senior Management (e.g. Area Manager,	
Lab (QC/QA rep)	Traffic Manager	Operations Manager, VP, President, Owner)	
Designer			

Critical third parties: stakeholders, other agencies, utilities, railroads, etc., or anyone who could potentially stop or delay the project

The RE and PM should sit down together and develop a list of who needs to attend the partnering workshop given the challenges they are facing and the nature of the project. A “notice of meeting” or invitation should be sent out two-to-four weeks in advance of the partnering session. The invitation should come from both the RE and PM, and request that each invitee confirm their attendance. Here is a sample letter of invitation:

Date

To: XXX
XXX

From: Resident Engineer
Project Manager

Subject: Partnering Workshop for XYZ Project

As partners, Caltrans and the construction industry work together on projects to openly and cooperatively address issues, prevent disputes and work toward mutual goals. This is called partnering, and it is our way of doing business.

You are cordially invited to attend our partnering workshop for the XYZ Project. Caltrans and Contractor are committed to working together and your involvement is extremely valuable to the success of this project. We are looking forward to leading the partnering effort and want to start it off with a XX-day partnering workshop. The workshop has been scheduled as follows:

Date:

Time:

Location:

Please confirm, by email, phone or fax, that you will be attending our workshop. We can be reached at:

RE [mobile number]

PM [mobile number]

RE [office phone number]

PM [office phone number]

RE [fax number]

PM [fax number]

RE e-mail address

PM e-mail address

Sincerely,

RE
PM

Preparing for Your Kick-off Partnering Workshop

The RE and PM should meet to discuss and prepare for the partnering workshop. This will involve selecting the facilitator and potential dates and locations for the session. Once the facilitator is selected, with his/her assistance, a list of attendees will be developed, making sure that the session date(s) work for the key participants—at which time the date is finalized and the facilitator sends out invitations.

The RE and PM should discuss their objectives for partnering the project – what does each hope to gain/accomplish? This information should be given to the facilitator for use in designing the session to meet the objectives.

A second meeting between the RE and PM should be scheduled to prepare presentations. The RE and PM will be taking a leadership role during the partnering workshop. They will welcome everyone to their workshop, be prepared to present an overview of the project, have a list of potential/actual project issues, and may have even developed a mission statement for the project. If they so choose, they can take the lead on any of the exercises. All of this should be discussed with the facilitator, so she/he can assist.

Experience has shown that preparation is key to feeling comfortable with a leadership role. The RE and PM should bring along charts, graphs, photos, graphics, and anything else that they feel will help them explain their project.