

MICHIGAN
DEPARTMENT OF TRANSPORTATION

SPECIAL PROVISION
FOR
FACILITATED PARTNERING

CFS:BJO

1 of 3

APPR:JYG:RJC:02-11-16

a. Description. Facilitated partnering sessions are required for this project. The purpose of partnering is to develop a proactive effort and spirit of trust, respect, and cooperation among all stakeholders in a project. Partnering does not affect the terms and conditions of the Contract.

The demonstrated outcomes of the partnering program include improved team building and decision making skills; sound business relationships; open communications; a reduction in the number of disagreements and claims; and improved project quality.

b. Initial Facilitated Partnering Session. Participate in a one day initial facilitated partnering session. The Engineer in cooperation with the Contractor will select a trained facilitator to conduct a one day initial facilitated partnering session. The selected facilitator must have one of the following certifications:

- International Association of Facilitators (IAF) Certified™ Professional Facilitator
- International Partnering Institute (IPI) Certification, Master Level Facilitator (MIPI)
- International Partnering Institute (IPI) Certification, Senior Level Facilitator (SIPI)
- International Partnering Institute (IPI) Certification, Certified Facilitator (IPI)

The initial facilitated partnering session will be held after award and within 30 days prior to commencing work. The Engineer will coordinate and secure a meeting location for the initial facilitated partnering session and all following partnering (update and post construction project review) sessions. Jointly with the Engineer and Facilitator, identify all stakeholders necessary to make the project successful including utility companies, consultants, subcontractors, key suppliers, other transportation entities (i.e., railroads, local agencies), key project participants, and any other critical stakeholders. A representative of each subcontractor with work totaling more than 10 percent of the original contract amount or \$100,000.00 is expected to attend. The prime contractor foreman/superintendent and project manager are required to attend the facilitated partnering session. For projects greater than \$25,000,000.00 the TSC Manager and the prime contractor's vice president or higher representative are required to attend the initial facilitated partnering session. Provide input to the Engineer and the facilitator to develop the agenda before the initial facilitated partnering session. The Engineer will send out the invitations for the initial facilitated partnering session.

During the initial facilitated partnering session jointly with the Engineer and the Facilitator:

1. Identify partnering teams consisting of Department and Contractor senior personnel and project personnel. It is anticipated that several teams will be formed to represent the different levels of responsibility within the Department and Contractor organizations, including project management, senior inspection/superintendence, environmental compliance, design, inspection/labor, reporting/documentation, technical submittals and review, and Quality Control/Quality Assurance.

2. Identify and work to achieve a consensus on project goals consistent with the contractual obligations, including specific goals concerning safety, quality, schedule, and budget.

3. Decide on how the teams will measure and report progress on project goals. Identify the measures, frequency of measures, reporting, and how the results will be evaluated.

4. Assist in identification of potential risks to the project's success, mitigation strategies and an implementation plan for appropriate strategies.

A. Define key issues, project concerns, joint expectations, roles of key partnership leaders, lines of decision making authority, and share relevant information to help determine the scope of the Partnering efforts.

B. Identify any opportunities for project enhancement, enhancement strategies, and a specific action plan for implementing strategies.

5. Develop a communication protocol to enhance communication on the project.

6. Develop an issue identification and resolution process that identifies and attempts to resolve issues at the level closest to the work. The issue identification and resolution process will develop all the necessary steps for issue elevation including the provisions of subsection 103.03 Contractor-Engineer Communication of the Standard Specifications for Construction.

7. The Facilitator, with assistance from the Engineer and Contractor, will document the meeting minutes. The initial facilitated partnering session minutes will include, the signed charter, an issue resolution ladder, roster of participants, list of priorities (Engineer and Contractor), problem identification, decisions and resolutions, and any other information from the initial facilitated partnering session.

c. Partnering Update Sessions. Participate in half day facilitated partnering update sessions every three months, unless the frequency is otherwise determined by the Engineer and Contractor, to maintain open communication and evaluate the partnering relationship on the project. Identify partnering successes and possible areas of improvement. Identify and invite any applicable initial facilitated partnering session stakeholders and any new stakeholders as identified during construction activities. The Facilitator will issue meeting minutes. The Facilitator will monitor the progress of the partnering relationship based on the goals and measures decided during the initial facilitated partnering session and any scheduled partnering meetings.

d. Post Construction Project Review. The Engineer will schedule a final meeting of the partnering team(s) prior to final acceptance of the project. The half day facilitated meeting will serve as the post construction project review meeting. Topics will include improvements to contract documents and other items that may influence the quality of future projects. The Facilitator will distribute minutes of the meeting to all partnering members as well as the Region Construction Engineer. A key component of the meeting minutes will be a section for lessons learned on the project and with the partnering process. The Facilitator will provide all attendees with a final copy of the post construction project review meeting minutes.

f. Measurement and Payment. The completed work, as described, will be measured and paid for at the contract unit price for the following pay items:

Pay Item	Pay Unit
Facilitated Partnering	Dollar
Facilitated Partnering, Facilitator Travel Costs	Dollar

1. **Facilitated Partnering** will be measured in dollars. Pay the Facilitator at a maximum rate of \$4,000 for the initial facilitated partnering session, limited to the actual invoiced costs. Pay the Facilitator at a maximum rate per meeting of \$2,000 for the partnering update sessions and the post construction project review meeting, limited to the actual invoiced costs, excluding travel costs.

A. Submission for Compensation. The Facilitator must submit to the Contractor actual invoice costs.

B. Facilitator Compensation. Review, approve and obtain Engineer concurrence of the Facilitator's submission for compensation. Upon approval of both parties pay the Facilitator for invoiced costs.

C. Contractor Reimbursement. The Contractor will be reimbursed for 50 percent of the approved invoiced costs, up to the maximum amounts noted previously.

The submitted and reimbursed costs will be considered full compensation for preparation time, on-site time, documentation time, actual documentation, and follow up time after meetings.

2. **Facilitated Partnering, Facilitator Travel Costs** will be measured in dollars. Pay the Facilitator travel expenses including, transportation, lodging, meals, and incidentals, or any portions thereof that the Facilitator incurs from or due to attendance at an authorized facilitated partnering meeting. The Facilitator travel expenses will be reimbursed per the submitted invoice up to the maximum allowable rate per the United States General Services Administration per diem rates as effective at the time of travel. Reimburse the Facilitator after review and approval of the travel expense invoice by the Engineer. These costs will be fully reimbursed to the Contractor after proof of payment to the Facilitator is provided to the Engineer.