

A Mini Guide to Partnering



Revised December 14, 2015

*“Whatever a person’s role is on our projects – from laborer to CEO and everything in between – partnering will help us work better as a team. We hope to establish and maintain a relationship of shared trust, equity and commitment.
We’re all in this together.”*

Mohammed Nuru, San Francisco Public Works

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Introduction

On December 18, 2012, San Francisco Mayor Edwin M. Lee issued an Executive Directive instructing San Francisco Public Works, San Francisco Public Utilities Commission, San Francisco Municipal Transportation Agency, Port of San Francisco, San Francisco International Airport and San Francisco Recreation and Parks Department to utilize partnering for all appropriate City public works construction projects and to include partnering language in bid specifications and contracts.

The intent of the directive and the subsequent specifications, drafted by a committee of City agency representatives and construction contractors, was to change the way we do business. We no longer operate like the photo on the cover of this guide where the contractor is just out to make a buck and the City rep is tough and inflexible. We all work together now to serve the public and achieve exceptional projects. Through partnering, we aim to establish a strong and effective working relationship among all team members that achieves mutual project goals and objectives through meaningful cooperation.

The partnering process will assist the City and our contractors to develop a collaborative environment, establish clear lines of communication and encourage conflict resolution at the lowest management level. We're excited about this new initiative and believe that partnering will help us deliver higher quality projects, reduce delays and cost overruns, increase job satisfaction and safety, and mitigate and resolve claims faster.

This document is called a "Mini Guide" because it includes the introductory concepts and steps to begin partnering on our construction projects. As our partnering program progresses, more information will be created and disseminated to help you implement and practice construction partnering.

San Francisco is the first City to adopt a citywide partnering directive. We're at the forefront of new ways to do business. We realize there may be bumps in the road as we get started, but we're looking forward to your commitment, input and expertise to make partnering a success.

Partnering – Starting the process

Pre-bid:

1. **Level of partnering** – All construction projects over \$100,000 require partnering. The Project Manager determines level of partnering based on specification Section 01.31.33 (project budget, complexity, etc.). See Attachment 1 - Specification.
2. **Allowance** – The Project Manager in coordination with Construction Manager, determine amount of allowance to put in the bid specifications. The allowance is based on the number and type of sessions plus additional tasks such as scorecards. Also figure in costs of potential room rentals, lunch and refreshments. Note that the allowance is half of the total partnering costs.

Though the specification offers the option of using an internal facilitator for levels 1 and 2 projects, our intent as we begin our partnering program is to use a professional neutral facilitator for all projects where it is financially feasible.

The objective of partnering is to develop a collaborative project culture where issues can be resolved at the lowest level. Make sure to allocate enough funding for partnering to ensure successful project outcomes. See Attachment 2 - Sample partnering costs.

3. **Pre-bid meeting** - During the pre-bid meeting, discuss the purpose and goals of partnering and the new partnering specification, requirements and timeline to the assembled contractors. Note that since the facilitator will be mutually selected by the City and Contractor, the facilitator will not be required to be listed at the time of bid.

Post bid:

4. **Offer to partner** - The Project Manager or Resident Engineer should send an invitation for partnering to the Contractor at time of award or no later than thirty (30) days after the Notice to Proceed to meet to discuss the partnering requirements and mutually select a professional neutral facilitator. This meeting should happen as early as possible.
5. **Selecting a facilitator** – The Project Manager or Resident Engineer requests a proposal from one or more facilitators. Send them the partnering specification and indicate the project's partnering level, which describes the minimum partnering requirements. Also indicate any additional sessions or elements (Specification Part 3.2) you and the Contractor feel will be

beneficial. If you are using an internal facilitator, the contractor also needs to agree to the selection. See Attachment 3 – Facilitators.

6. **Paying the facilitator** - Both the Contractor and the Resident Engineer/Project Manager evaluate proposals and costs and decide on a facilitator. The facilitator will be paid by the Contractor under terms listed in the partnering specification (Part 1.5). The City, Contractor and the facilitator will execute a Third-Party Facilitator Agreement within thirty (30) days of Notice to Proceed. See Attachment 4 – Sample Third-Party Facilitator Agreement.

7. **Setting up the Kick-off Workshop** - The Resident Engineer and the Contractor will schedule a Kick-off Workshop to be led by the facilitator. Required participants (though others may be included) are listed in the specification under the definition of Core Team Partnering (Specification Part 1.3C). Don't forget to include "critical third parties" such as other agencies, members of the public (community or merchant groups), etc.

Choose a venue suitable for a comfortable and productive meeting. There are several free City spaces available or use your allowance to rent a facility. Also, refreshments are nice.

This workshop should be scheduled as soon as possible at the start of the project. The length of the workshop depends on the size and complexity of the project and the familiarity of the teams with partnering. Kick-off workshops are typically half-day or full-day sessions. Work with your facilitator to determine the agenda for the workshop geared towards your specific project.

8. **Kickoff Partnering Workshop** - At the first workshop, the City and the Contractor, with the help of the facilitator, will develop a strategy for a successful partnering process, create a partnering charter and resolution ladder, and commit to a schedule of future partnering sessions and tasks. See Attachment 5 - Sample partnering materials.

9. **Evaluation** - After every facilitated partnering session, participants must fill out an evaluation. This will help us choose future facilitators and improve our partnering program. Confirm with your facilitator that he/she will provide evaluation forms. See Attachment 6 – Sample evaluation form.

10. **Executive sponsorship** - A key component of a successful partnering program is executive sponsorship, the commitment to and support of the partnering process from the senior most levels of the City and Contractor organizations. The Mayor and our agency directors fully support partnering. Managers should attend the Kick-off Partnering Workshop and other partnering sessions when needed during the course of the project.

11. **Filing and tracking** - File your partnering material (facilitator proposal, workshop documents, sign-in sheets, evaluations, etc.) in your project file. As we develop and evaluate our partnering program, you may be asked to provide this information.

12. **Ongoing partnering** - Partnering is a new way of doing business. It is not only done at workshops and partnering sessions. Just because you held a partnering session, it doesn't mean you've done partnering. Throughout the life of the project it is imperative that the City project team, the Contractor's team and other stakeholders practice the major elements of partnering:
 - Communicate early and regularly with involved parties;
 - Establish and maintain a relationship of shared trust, equity and commitment;
 - Identify, quantify, and support attainment of mutual goals;
 - Develop strategies for using risk management concepts and identify potential project efficiencies;
 - Implement timely communication and decision-making;
 - Resolve potential problems at the lowest possible level to avoid negative impacts; and
 - Achieve exceptional project outcomes.

13. **Follow-up partnering** – To ensure that the project team maintains momentum and holds itself accountable, the facilitator can be asked to hold additional sessions. Typically, project teams require intervention when the partnering surveys are trending down; the team is sending emails stating a position prior to discussing an issue; key sub-contractors and stakeholders are not invited to weekly progress meetings; the team has a repeating pattern of conflict; or the team has an excessive number of RFI's or claims notifications. It may be necessary for the facilitator to take charge to ensure that the team is being fair, productive and resolving issues in a timely way.

14. **Awards** – Each year, the International Partnering Institute (IPI) recognizes projects and individuals who best exemplify the principals of partnering and promote the culture of partnership. The purpose of the awards is to celebrate success, share lessons learned and best practices, and to acknowledge the collaborative efforts of teams and individuals who achieve extraordinary results. Consider submitting your project for an award – applications are due no later than **February 12, 2016**. Check the IPI website for details.

15. **Resources** – We are here to help! For assistance and more information on partnering, see Attachment 7 – Partnering resources.

Attachments

Attachment 1 – Specification (Partnering requirements Section 01 31 33)

Attachment 2 - Sample partnering costs

Attachment 3 – Facilitators

Attachment 4 – Sample Third-Party Facilitator Agreement

Attachment 5 - Sample partnering materials

Attachment 6 – Sample evaluation forms

Attachment 7 – Partnering resources

SECTION 01 31 33

PARTNERING REQUIREMENTS

PART 1 - GENERAL

1.1 PARTNERING LEVEL

- A. This Project shall incorporate the required partnering elements for **Partnering Level X**.

1.2 SUMMARY

- A. This Document specifies the requirements for establishing a collaborative partnering process. The partnering process will assist the City and Contractor to develop a collaborative environment so that communication, coordination, and cooperation are the norm, and to encourage resolution of conflicts at the lowest responsible management level.
- B. The partnering process is not intended to have any legal significance or to be construed as denoting a legal relationship of agency, partnership, or joint venture between the City and Contractor.
- C. This specification does not supersede or modify any other provisions of the Contract, nor does it reduce or change the respective rights and duties of the City and Contractor under the Contract, or supersede contractual procedures for the resolution of disputes.

1.3 DEFINITIONS

- A. **Partnering Charter ("Charter"):** The Charter is the guiding focus for the Project Team. It documents the team's vision and commitment to work openly and cooperatively together toward mutual success during the life of the project. The charter helps to maintain accountability and clarity of agreements made and allows for broader communication of the team's distinct goals and partnering process. The partnering charter includes the following elements:
1. Mutual goals
 2. Partnering maintenance and close-out plan
 3. Dispute resolution plan with Escalation Resolution Ladder
 4. Team commitment statement and signatures
- B. **Collaborative Partnering:** A structured and scalable process made up of elements that develop and grow a culture (value system) of trust among the parties of a construction contract. Together, the combination of elements including the Partnering Charter, Executive Sponsorship, partnering meetings, an accountability tool for the Project Team (Scorecards), and a Facilitator, if employed, create a collaborative atmosphere on each project.
- C. **Core Team Partnering:** On Level Four or greater construction projects, a core team is identified from those Project Team members who are a part of the project for its duration, including the following (not in order of hierarchy):

City:	Contractor:
Resident Engineer	Building Superintendent
Project Manager	Project Executive
Construction Manager	Jobsite Supervisor
Engineer, Architect	Project Engineer
Division Manager	Subcontractors
Construction Engineer	Key suppliers
Inspectors	Senior Management (e.g. Area Manager, Operations Manager, VP, President, Owner)
Client Department representative	
Critical third parties: stakeholders, other agencies, utilities, etc., or anyone who could potentially stop or delay the project.	

- D. **Executive Partnering Team:** The senior leaders of the City and Contractor who may form a project board of directors and are charged with steering the project to success.
- E. **Executive Sponsorship:** Commitment to and support of the partnering process from the senior most levels of the City and Contractor organizations.
- F. **Field-Level Decision Making:** Decisions made by those who are running the day-to-day work in the field – this is typically the inspector or resident engineer.
- G. **Internal Facilitator:** A trained employee or representative of the City who provides partnering facilitation services for Level 1, 2 or 3 projects.
- H. **Kick-off Partnering Workshop:** The initial partnering session where the team develops their initial partnering Charter and officially starts the partnering process.
- I. **Multi-Tiered Partnering (Executive - Core Team - Stakeholder):** Quarterly partnering workshops can be divided into multiple sessions including an Executive Session, Core Team Session and Stakeholder Session. For very large projects, a best practice is to use the Executive Team as a “project board of directors” who provide vision and steer the project. The Core Team is the central group of key individuals who are on the project throughout the duration.
- J. **Partnering Level:** The desired level of engagement in the partnering process may vary depending on a Contract's size or a construction project's complexity, location or other risk factor. If a project encounters any of the following risk factors, the City may consider elevating the partnering process to the next higher level.

Level	Estimated Construction Amount	Complexity	Political Significance	Relationships
5	\$200 million +	Highly technical and complex design & construction	High visibility/ oversight; significant strategic project	New project relationships; high potential for conflict (strained relationship, previous litigation, or high probability of claims)
4	\$50 - \$200 million	High complexity – schedule constraints, uncommon materials, etc.	Probable	New contractors or CM, new subs
3	\$20 - \$50 million	Increased complexity	Likely, depending on the location and other project characteristics	Established relationships; new CM, subs, or other key stakeholders
2	\$5 - \$20 million	Moderate complexity	Unlikely, unless in a place of importance	Established relationships; new subs, new stakeholders
1	\$100,000 - \$5 million	Standard complexity	Unlikely, unless in a place of importance	Established relationships; new subs, new stakeholders

- K. **Partnering Meetings:** Formalized meetings focused on developing a collaborative culture among the Project Team. Teams use these meetings to, among other tasks, set project goals, define project commitments and attend joint training sessions.
- L. **Professional Neutral Facilitator:** The mutually agreed upon experienced professional neutral facilitator whose business is providing partnering services for construction projects.
- M. **Project Scorecards:** An accountability tool that allows project teams to measure how well they are doing at following through on commitments made to one another. Typically the scorecard is a confidential survey prepared and submitted to the team by the partnering facilitator, if any. The facilitator then compiles the responses into a report which is then sent out to the Project Team for review.
- N. **Project Stakeholders:** Any person or entity that has a stake in the outcome of a construction project. Examples include the end users, neighbors, vendors, special interest groups, those who must maintain the facility, those providing funding, and those who own one or more of the systems.
- O. **Project Team:** Key members from the City and Contractor organizations responsible for the management, implementation, and execution of the Project, and will participate in the Partnering process.
- P. **Resolution Ladder:** A stepped process that formalizes the negotiation between the parties of a construction project. While actual titles may differ, the intent of this ladder is to provide a process that elevates issues up the chain of command between the parties involved in an issue. The objective is to resolve issues at the lowest practical level and to not allow individual project issues to disrupt project momentum. When an issue is escalated one level, it is expected that a special meeting focusing on the negotiated settlement for that issue will be called with the goal of settling as quickly as possible. A Sample escalation resolution ladder is shown below. A project resolution ladder will be developed during the Kick-off Partnering Workshop.

	Level	Awarding City Department	Contractor	Time to Elevate
Sample Resolution Ladder	I	Inspector or Resident Engineer	Foreman/ Superintendent	1 day
	II	Project Manager	Project Manager	1 week
	III	Program Manager	Area Manager	1 week
	IV	Division Manager	Operations Manager	2 weeks
	V	Deputy Department Director	Owner; President	2 weeks

- Q. **Self-Directed Partnering:** The Project Team leads themselves through all of the Collaborative Partnering elements.
- R. **Special Task Forces:** A subset of the Project Team that is assigned to take on a particular issue or opportunity for the good of the overall project.
- S. **Stakeholder Team** (as in Multi-tiered Partnering): Those people who have a stake in the outcome of a construction project.
- T. **Stakeholder on-boarding/off-boarding:** As a project progresses various systems and processes will be the focus. Stakeholders will participate when the systems or processes they are involved with are the focus. The stakeholders will step back when that system or process is no longer the focus. This on-boarding and off-boarding may occur throughout the duration of the Contract.

- U. **Subcontractor on-boarding/off-boarding:** At the various stages of construction various key subcontractors (trades) as determined by City and Contractor will roll in and roll out as their work comes available and is completed.
- V. **Third-Party Facilitator Agreement:** An agreement, appended to this Specification, to which the Professional Neutral Facilitator, the City and the Contractor are parties, which establishes a budget for fees and expenses of the Facilitator and workshop site costs, if any, and the terms of the Facilitator's role for this Project consistent with the requirements of this Specification.

1.4 PURPOSE/GOALS

- A. The goals of project partnering are to:
 1. Use early and regular communication with involved parties;
 2. Establish and maintain a relationship of shared trust, equity and commitment;
 3. Identify, quantify, and support attainment of mutual goals;
 4. Develop strategies for using risk management concepts and identify potential project efficiencies;
 5. Implement timely communication and decision-making;
 6. Resolve potential problems at the lowest possible level to avoid negative impacts;
 7. Hold periodic partnering meetings and workshops throughout the life of the project to maintain the benefits of a partnered relationship;
 8. Establish periodic joint evaluations of the partnering process and attainment of mutual goals.

1.5 COSTS

- A. The fees and expenses of the Facilitator and workshop site costs, if any, shall be shared equally by the City and the Contractor as set forth in the Third Party Agreement.
- B. The Contractor shall pay the invoices of the Facilitator and/or workshop site costs after approval by both parties. Upon receipt of satisfactory evidence of payment of the invoices of the Facilitator by the Contractor, the City will then reimburse the Contractor for 50% of such invoices from a fixed cash allowance included as a bid item in the Bid Prices. No mark-up, overhead or other fees shall be added to the partnering costs. If the total cost of the partnering differs from the allowance amount, the Contract Sum shall be adjusted by Change Order for the difference between the total actual cost and the amount included in the Bid, as an additional amount due the Contractor or a credit to the City, as appropriate. If the Contractor fails or refuses to pay the Facilitator invoices, the City may pay such invoices and deduct the Contractor's portion from any amount that is due or may become due under the Contract.
- C. With the exception of the Facilitators fees and workshop site costs described in subparagraph A above, all costs associated with the Partnering workshops and sessions, partnering evaluation surveys, or partnering skills trainings are deemed to be included in the Bid Prices.

PART 2 - PRODUCTS (Not Used)

PART 3 - EXECUTION

3.1 PARTNERING INITIATION

- A. The City Representative after award of Contract, but in no case longer than 30 days following Notice to Proceed, shall send Contractor a written invitation to enter into a partnering relationship. If a Professional Neutral Facilitator will be retained, the City and Contractor shall cooperatively and in good faith select a Facilitator as specified in subparagraph 3.3 below.

3.2 PARTNERING ELEMENTS

- A. The required partnering elements for all levels of partnering include:
 - 1. **Internal or External Professional Neutral Facilitator.** City and Contractor shall retain either an Internal Facilitator or a Professional Neutral Facilitator according to the process listed in subparagraph 3.3 below for the partnering meetings or workshops. If an Internal or External Professional Neutral is employed, the Facilitator shall be mutually agreed to by the City and Contractor.
 - 2. **Kick-off Partnering Workshop.** The City, Contractor, and Facilitator if any, shall meet to mutually develop a strategy for a successful partnering process and to develop their initial partnering charter.
 - 3. **Partnering Charter and/or mission statement.** The City and Contractor shall agree to create a partnering charter that includes:
 - (a) Mutual goals, including core project goals and may also include project-specific goals and mutually-supported individual goals. The required core project goals relate to project schedule, budget, quality, and safety.
 - (b) Partnering maintenance and close-out plan, including partnering session attendees and frequency of meetings.
 - (c) Dispute resolution plan that includes an Escalation Resolution Ladder.
 - (d) Team commitment statement and signatures.
 - 4. **Minimum Two Partnering Workshops or Sessions** (including Kick-off Workshop). The partnering team may participate in additional workshops or sessions during the life of the project as they mutually agree is necessary and appropriate.
 - 5. **Executive Sponsorship.** Commitment to and support of the partnering process from the senior most levels of the City and Contractor organizations.
 - 6. **Resolution Ladder.** The City and Contractor shall mutually develop a project resolution ladder.
- B. For Level 2 Projects add the following elements:

1. **Internal or External Professional Neutral Facilitator.** City and Contractor shall retain either an Internal Facilitator or a Professional Neutral Facilitator according to the process listed in subparagraph 3.3 below for the partnering meetings or workshops. If an Internal or External Professional Neutral is employed, the Facilitator shall be mutually agreed to by the City and Contractor.
 2. **Minimum Two Project Scorecards.** City and Contractor shall participate in periodic partnering evaluation surveys to measure progress on mutual goals and short-term key issues as they arise.
- C. For Level 3 Projects add the following elements:
1. **Professional Neutral Facilitator for Kick-off and Quarterly Partnering Sessions.** City and Contractor will retain a Professional Neutral Facilitator according to the process listed in subparagraph 3.3 below for the Kick-off partnering workshop and quarterly partnering meetings. Additional meetings, workshops, or sessions may be facilitated by a mutually agreed internal facilitator or may be self-directed.
 2. **Quarterly Partnering Sessions.** The partnering team shall convene partnering sessions quarterly throughout the duration of Contract.
 3. **Quarterly Project Scorecards.** City and Contractor shall participate in minimum quarterly partnering evaluation surveys (monthly recommended).
- D. For Level 4 Projects add the following elements:
1. **Professional Neutral Facilitator.** City and Contractor will retain a Professional Neutral Facilitator according to the process listed in subparagraph 3.3 below.
 2. **Multi-tiered Partnering (Executive – Core Team – Stakeholder).** Partnering team will divide into smaller groups and convene multiple sessions including an Executive Session, Core Team Session and Stakeholder Session.
 3. **Monthly Project Scorecards.** City and Contractor shall participate in monthly partnering evaluation surveys.
 4. **Stakeholder On-Boarding/Off-Boarding.** Various key stakeholder groups will be invited to participate in partnering sessions as necessary throughout the duration of the project.
 5. **Key Subcontractor On-Boarding/Off-Boarding.** Key subcontractors will be invited to participate in the partnering sessions as necessary as determined by City and Contractor as their participation in the project work becomes relevant.
- E. For Level 5 Projects add the following elements:
1. **Monthly Partnering Sessions.** The partnering team will hold professionally facilitated monthly partnering sessions throughout the duration of project.
 2. **Special Task Forces.** The partnering team may task a subset of the team to work on a particular issue or opportunity for the good of the overall project.

3.3 SELECTION OF A PROFESSIONAL NEUTRAL FACILITATOR

- A. If a Professional Neutral Facilitator will be retained, the City and Contractor shall meet as soon as practicable after award of Contract, but in no case later than 30 days after the Notice to Proceed (NTP), to mutually select a Facilitator. The City and Contractor shall also schedule the Kick-off Workshop, determine the workshop site and duration, and agree to other administrative details.
- B. The City, the Contractor, and the selected Facilitator shall execute a Third-Party Facilitator Agreement within 30 days of NTP.
- C. The Facilitator shall lead the Kick-Off Partnering Workshop and other partnering sessions as necessary or required.

3.4 FACILITATOR QUALIFICATIONS AND REQUIREMENTS; EVALUATIONS

- A. The Facilitator shall be trained in the recognized principles of partnering.
- B. The Facilitator shall have the following professional experience and qualifications:
 - 1. At least 3 years experience in partnering facilitation with a demonstrated track record, including public sector construction for a city or other municipal agency; and,
 - 2. Skill set that may include construction management, negotiations, labor-management mediation, and/or human relations.
- C. The Facilitator shall be evaluated by the partnering team: (1) at the end of the Kick-off Partnering Workshop; and (2) at the project close-out partnering session.

END OF SECTION

Attachment 2 - Sample partnering costs

Sessions:

Most professional neutral facilitators charge between \$4,500 – \$7,000 per session depending on the length and number of total sessions and the amount of participants. This fee includes pre-partnering services (phone calls with key players and team members), the partnering session itself, materials and a follow-up report. For out-of-town facilitators there may be a charge for travel expenses.

Number of sessions:

Per the specification (Part 3.2), all projects have a minimum of two partnering workshops or sessions. For Levels 3 – 5 projects, more sessions are required.

Lunch and refreshments:

Estimate between \$10-25 per participant per session.

Scorecards:

Scorecards vary in price, but an average amount is about \$500-\$600 per scorecard.

Facility rentals:

There are many free venues for holding partnering sessions, but if you have a very large group or are planning a special session, be sure to include rental costs in your allowance.

Skill training:

Depending on the project, you may want to request specific skill training from your facilitator. Common training topics are active listening, building teams, change management, communication, conflict resolution, cultural diversity, dealing with difficult people, decision making, facilitation skills, leadership, problem solving, running effective meetings, time management and win-win negotiation. Check with your facilitator about costs for these trainings. Because skill training is something that will be discussed with the awarded Contractor, the costs will likely be covered by change order and shared between the City and the Contractor.

Allowance:

Your bid allowance should be half of the total estimated costs for partnering. If the total cost of partnering differs from the allowance amount, the costs will be adjusted by change order and shared by both the City and the Contractor.

Attachment 3 – Facilitators

1. San Francisco based construction partnering facilitators
2. International Partnering Institute (IPI) member facilitators (12/7/15)
3. Caltrans project partnering facilitator's list (3/13/15)



San Francisco based construction partnering facilitators

Name	Company	Address	Business	Email	LBE certified
Jessica Romm	JBRomm PhD	71 Stevenson St. Ste. 400 SF, CA 94105	415.203.0970	Jromm18671@aol.com	Yes
Jim Delia	JBR Partners, Inc.	1333 Evans Avenue SF, CA 94124	415.970.9051	info@jbrpartners.com	Yes
Matthew Ajiake	Sonika Corporation	850 S. Van Ness Ave., Ste. 13 SF, CA 94110	415.424.5577	majiake@sonika.com	Yes



IPI Member Facilitators

Full Name	Company	Certification and verified # of sessions	ST	Business	Mobile	Email
Larry Anderson, MIPI	Anderson Partnering	Master Level IPI (MIPI) 300+ Sessions	MI	(703) 994-0038	(703) 994-0038	larry@andersonpartnering.com
Paul Crotty, MIPI	Ventura Consulting Group	Master Level (MIPI) 250+ Sessions	TX	(832) 623-6856	(805) 701-4599	paul@venturaconsulting.com
Sue Dyer, MIPI	OrgMetrics LLC	Master Level IPI (MIPI) 2,000+ Sessions	CA	(925) 449-8300	(510) 504-5877	suedyer@orgmet.com
Jim Eisenhart, MIPI	Ventura Consulting Group	Master Level IPI (MIPI) 800+ Sessions	CA	(805) 650-8040		jim@venturaconsulting.com
Neal Flesner, MIPI	Ventura Consulting Group	Master Level (MIPI) 250+ Sessions	CA	(805) 650-8040	(310) 597-0403	neal@venturaconsulting.com
Larry Miller, MIPI	Productivity Through People	Master Level (MIPI) 300+ Sessions	AZ	(602) 996-6054		ptpldm@aol.com
Eric Sanderson, MIPI	Red Rocks Advisors, LLC.	Master Level (MIPI) 250+ Sessions	AZ	(303) 904-9520	(970)-215-6340	ejs@redrocksadvisors.com
Cinda Bond, SIPI	OrgMetrics LLC	Senior Level (SIPI) 150+ Sessions	CA	(925) 484-4007		cindabond@orgmet.com
Sydne Jacques, SIPI	Jacques & Associates	Senior Level IPI (SIPI) 100+ Sessions	UT	(801) 358-8923		sydne@ja-today.com
Kurt Dettman, IPI	KDR Partnering Associates	Certified (IPI) 25+ Sessions	MA	(781) 749-2990	(781) 985-2944	kdettman@c-adr.com
Clare Singleton, IPI	OrgMetrics LLC	Certified (IPI) 25+ Sessions	CA	(925) 449-8300	(916) 747-6003	claresingleton@orgmet.com
Blasé Reardon	KDR Partnering Associates		MA	(617) 851-3913	(617) 851-3913	reardon@bostonsolv.com
Erik Kerness	KDR Partnering Associates		MA	(781) 749-2990		eric@kerness.com
Jessica B. Romm	JB Romm PhD	100+ Sessions	CA	(415) 281-0970	(415) 203-0970	jromm18671@aol.com
Steve Sanders	S2 Construction Management Consultants, LLC		SC	(864) 551-2479	(864) 551-2479	steve.sanders@s2cmc.com
Leonard Steinberg	Creative Alliance Group L.L.C.		CA	(760) 445-7835	(760) 445-7835	leonard@creativealliancegroup.com
Mike Vallez	Mike Vallez International		UT	(801) 502-0951	(801) 502-0951	mvallez@mikevallez.com



Caltrans Project Partnering Facilitator's List

list sorted by attendance at the Annual facilitators meeting and then # of CT project facilitated

Name	Company / Contact info	Dist's served (1-12, All)	Fund' of Partnering Training (Yes/ No)	Total # of Projects Facilitated	Tot # of CT Projects Facilitated	Attended Annual Facilitators Meeting (year)	Professions / Credentials/ Certifications
Sam Hassoun	Global Leadership Alliance 13405 Folsom Blvd, Suite 750 Folsom, CA 95630 www.gla-net.com (916) 374-0455 shassoun@glapartnering.com	All	yes	150	120	Nov , 2011 Nov , 2012 Nov , 2013	PE
Renee L. Hoekstra	RH A LLC 2255 N 44th Street, Suite 170 phoenix, AZ 85008 (800) 480-1401 rhpartnering@earthlink.net	All	no		100	Nov , 2012 Nov , 2013	Certified Value Specialist
Dennis Eriksen	ATI Systems 8540 Moorcroft Avenue West Hills, CA 91304 www.ati-sys.com (818) 347-3280 eriksen@ati-sys.com	All but 9	yes		100	Nov , 2012 Nov , 2013	PE, MS engineering SAME Engineer of the Year for Partnering Achievement
Bob Dorn	Advanced Management Systems Interactive 723 East Victoria Street Suite A Santa Barbara, CA 93103 (805)564-2432 bdorn82282@aol.com	All	no	600	65	Nov , 2013	Master's degree in Communications Professional Baseball Los Angeles Dodgers (1968-71) Statewide director of training AGC (1990-94)
Phil George	Global Leadership Alliance 13405 Folsom Blvd, Suite 750 Folsom, CA 95630 www.gla-net.com (530) 949-8768 pgeorge@glapartnering.com	All	yes	40	30	Nov , 2011 Nov , 2012 Nov , 2013	PE- CA. & OR. CSLB (963039)
Larry Miller	Productivity Through People PO Box 22180 Phoenix, Arizona 85028 (602) 996-6054 PTPLDM@aol.com	1,6,10,11	no		20	Nov , 2013	
Cinda Bond	OrgMetrics 291 McLeod Street Livermore, CA 94550 www.orgmet.com (925) 484-4007 (925) 449-8300 CindaBond@orgmet.com	all	yes		10	Nov , 2012 Nov , 2013	certified
Kelly Hall	The Pinnacle Leadership Group 7155 E. Oakmont Drive Paradise Valley, AZ 85253 www.pinnacleleadership.com (480) 747-1110 kelly@plginc.org	All	no	30	5	Nov , 2011 Nov , 2012 Nov , 2013	MA, Management
William McCleish	W.E. McCleish Associates 1420 10th Street Manhattan Beach, CA 90266 (310) 849-1227 wmcclleish@aol.com	5-9,11,12	yes		5	Nov , 2013	

Name	Company / Contact info	Dist's served (1-12, All)	Fund' of Partnering Training (Yes/ No)	Total # of Projects Facilitated	Tot # of CT Projects Facilitated	Attended Annual Facilitators Meeting (year)	Professions / Credentials/ Certifications
Bruce Wiggs	OrgMetrics 291 McLeod Street Livermore, CA 94550 www.orgmet.com (510) 504-5877 (925) 449-8300					Nov , 2013	
Sue Dyer	OrgMetrics 291 McLeod Street Livermore, CA 94550 www.orgmet.com (510) 504-5877 (925) 449-8300 SueDyer@orgmet.com	All	yes	2000	200	Nov , 2011 Nov , 2012	MPF MDR
Holly Parrish Bezner	Global Leadership Alliance 13405 Folsom Blvd, Suite 750 Folsom, CA 95630 www.gla-net.com (916) 374-0455 hparrish@glapartnering.com	All	yes yes	40	25	Nov , 2011 Nov , 2012	Juris Doctorate
Dennis Green	Green Com Inc. 5069 Auburn ave San Bernardino, 92407 (909) 800-0451 Greencommunications2@verizon.net					Nov , 2012	
Neal Flesner	Ventura Consulting Group 3764 Meier St. Los Angeles, CA 90066 (310) 597-0403 neal@venturaconsulting.com	All		150	50	Nov , 2011	MBA / LEED Certified
Jeanette Belz	Global Leadership Alliance 13405 Folsom Blvd, Suite 750 Folsom, CA 95630 www.gla-net.com (916) 374-0455 jbelz@glapartnering.com	All	no	9	5	Nov , 2011	MBA
Jim Eisenhart	Ventura Consulting Group 996 Peninsula Street Ventura, CA 93001 (805) 650-8040 jim@venturaconsulting.com	All	yes	800	125		MBA
Paul Crotty	Ventura Consulting Group 996 Peninsula Street Ventura, CA 93001 (805)701-4599 paul@venturaconsulting.com	All	yes	300	75		
Dan Fauchier	The ReAlignment Group 16748 E Smoky Hill Rd. 9C PMB296 Centennial, CO 80015 (858) 454-4354 1-877-REALIGN www.projectrealign.com info@projectrealign.com	All	yes	Six			Certified Master Facilitator
Larry Bonine	The Pinnacle Leadership Group 7155 E. Oakmont Drive Paradise Valley, AZ 85253 www.pinnacleleadership.com www.larrybonine.com (602) 625-9800 larry@plginc.org	All	yes	100+			
Richard Bayer	The ReAlignment Group 16748 E Smoky Hill Rd. 9C PMB296 Centennial, CO 80015 (858) 454-4354 1-877-REALIGN www.projectrealign.com info@projectrealign.com	All	yes	Four			Credentialed Mediator, AAA Arbitrator

Name	Company / Contact info	Dist's served (1-12, All)	Fund' of Partnering Training (Yes/ No)	Total # of Projects Facilitated	Tot # of CT Projects Facilitated	Attended Annual Facilitators Meeting (year)	Professions / Credentials/ Certifications
Stephen Miller	Jahriah Group LLC 5725 Lonsdale Dr. Sacramento, CA 95822 (916) 992-3138 smiller1984@comcast.net	All	Yes	0	0		Master Facilitator Trainer in Partnering District 3 8 sessions
Jessica Romm	JBRomm PhD 71 Stevenson St. Ste. 400 San Francisco, CA 94105 (415) 203-0970 jromm18671@aol.com	All	yes	40			PhD Public Adm. mediation conflict resolution
Leonard Steinberg	Creative Alliance Group 1042 N. El Camino Real, Suite B411 Encinitas, CA 92024 760-363-5505 Office, 760-479-1644 Fax leonard@creativealliancegroup.com	All	yes	300+			GC, AGC, IPI
Catherine Sim	SimTanzer, LLC 10590 La Vita Court San Diego, CA 92131 www.simtanzer.com (858) 603-6329 (858) 413-7462 catherine@simtanzer.com www.simtanzer.com	All	Yes	1			MBA, PhD in Organizational Psychology
Doris Kovic	Blue Cove Partnering 121 Broadway, Suite 609 San Diego, CA 92101 619-261-7663 / 949-429-8137 doris@bluecovepartnering.com	All	no		0		CCUI, DISC,MSCEIT, Myers Briggs, Member of ASTD, SHRM
Dr. Barbara Gannon	Executive Consultation LLC 30 Western Avenue, suite 209 Glouster,MA 01930 (978)281-6512 (978) 290-2538 bkgannon@bkgannon.com		no		1		
Marsha Brascher	Team Tech, Inc. P O Box 14277 Tumwater, WA 98511 (360) 754-8326 (360) 888-4549 teamtech2@worldnet.att.net	All			1		Author: Train the Trainer
Michael D. Norman	Win Win Resolution 105 Mercer St. # 308 Seattle, WA 98109 www.winwinresolution.com (206) 282-7895 (206) 285-2057 mediators@winwinresolution.com						
Rich Fisher	Win Win Resolution 105 Mercer St. # 308 Seattle, WA 98109 www.winwinresolution.com (206) 282-7895 mediators@winwinresolution.com						
Stephen Clarke	Employee Involvement Systems PO Box 10866 Scottsdale, AZ 85271 www.leaders-view.com (480) 946-5390 eispro@worldnet.att.net						
Tom Brascher	Team Tech, Inc. P O Box 14277 Tumwater, WA 98511 (360) 754-8326 (360) 888-4549 teamtech@worldnet.att.net	all			1		Author: Train the Trainer

Name	Company / Contact info	Dist's served (1-12, All)	Fund' of Partnering Training (Yes/ No)	Total # of Projects Facilitated	Tot # of CT Projects Facilitated	Attended Annual Facilitators Meeting (year)	Professions / Credentials/ Certifications
Wayne Moloznik	The ReAlignment Group 16748 E Smoky Hill Rd. 9C PMB296 Centennial, CO 80015 (858) 454-4354 1-877-REALIGN www.projectrealign.com info@projectrealign.com						



SECTION 01 31 34

APPENDIX A: THREE-PARTY FACILITATOR AGREEMENT

THIS AGREEMENT, dated for convenience as of the _____ day of _____, 20____, is between the City and County of San Francisco (the "City"), acting by and through its Department of Public Works, _____ (the "Contractor"), and the following individual: _____ (the "Facilitator").

Recitals

A. The City, by and through its Department of Public Works, has awarded to the Contractor public work Contract No. _____ (the "Contract") for the construction of a public work known as _____ (the "Project").

B. Included as part of the Contract is Section 01 31 33, Partnering Requirements, implementing a Partnering Facilitation procedure for the Project (the "Partnering Specification").

C. The Partnering Facilitator has been selected in conformance with the Partnering Specification.

Agreement

NOW THEREFORE, the City, the Contractor, and the Facilitator hereby agree as follows:

1. Compliance with Specification. The Facilitator agrees to be bound by the terms of the Partnering Specification and to perform the required duties strictly as set forth in the Partnering Specification. The Partnering Specification is incorporated here by reference as if fully set forth.

2. Compensation. The City and the Contractor agree that the Facilitator shall be compensated for his/her individual services as Facilitator at a billing rate of \$ _____ per hour. Compensation shall be paid at the stated billing rate, applied to travel time and reasonable study/consultation time and time spent in Partnering Workshops. Included in the billable rate shall be routine office expenses, such as secretarial, administrative, report preparation, telephone, computer, and internet connections.

3. Additional Compensation. Not included in the billable rate, and considered additional compensation, shall be any travel expenses, outside reproduction costs, and postage costs. Travel expenses must be approved in writing by both the City and the Contractor prior to being incurred. Outside reproduction and postage expenses may be billed at cost.

4. Invoices. The Facilitator shall submit to the Contractor invoices for work completed (a) not more often than once per month; (b) based on the agreed billing rate and conditions and on the number of hours expended, together with direct, non-salary expenses including an itemized listing supported by copies of original bills, invoices, and expense accounts; and (c) accompanied by a description of activities performed daily during the invoice period.

5. Confidentiality. The Facilitator shall not divulge any information acquired during Partnering activities without obtaining prior written approval from the City and the Contractor.

6. Recordkeeping. The Facilitator shall maintain cost records pertaining to this Agreement for inspection by the City or the Contractor for a period of three years following the end or termination of this Agreement.

7. Assignment. No party to this Agreement shall assign any duty established under this Agreement or the Partnering Specification.

8. Termination. This Agreement may be terminated only by mutual agreement of the City and the Contractor at any time upon not less than 10 days written notice to the Facilitator. If the Facilitator resigns, is unable to serve or is terminated, he/she will be replaced within four weeks in the same manner as he/she was originally selected under the Partnering Specification. This Agreement shall be amended to indicate the member replacement.

9. Legal Relations. The parties to this Agreement expressly acknowledge that the Facilitator, in the performance of his or her duties under this Agreement and the Partnering Specification, is acting in the capacity of an independent agent and not as an employee of the City or the Contractor. The Facilitator shall not participate in any dispute proceedings relating to the Contract or the Project. The City and Contractor release the Facilitator from any and all liability, claims, demands, actions and causes of action arising out of or resulting from partnering for the project. The release set forth above excludes any and all liability, claims, demands, actions and causes of action arising out of or resulting from fraud or willful misconduct by the Facilitator.

10. Jurisdiction and Venue. Disputes among the City, the Contractor, and the Facilitator arising out of this Agreement shall be brought in the California Superior Court, County of San Francisco. The Agreement shall be interpreted in accordance with the laws of the State of California. The Facilitator hereby consents to the personal jurisdiction of the California Superior Court, County of San Francisco.

CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF PUBLIC WORKS

[CONTRACTOR]

BY: _____
Name:
Title:

FACILITATOR

BY: _____

Approved as to form:
DENNIS J. HERRERA
City Attorney

BY: _____
Deputy City Attorney

END OF SECTION

Attachment 5 – Sample partnering materials

1. Pre-project interview questions conducted by the facilitator
2. Partnering kickoff session agenda
3. Issue Resolution Ladder
4. Scorecard
5. Elevation of a Dispute Memorandum

Sample

Partnering Pre-Project Questionnaire

GSA Training and Development

Project:

Interview date:

1. When does the project begin?
2. What is the project duration?
3. What is the contract value?
4. Who are the key stakeholders?
5. Are there subcontractors that should be involved in partnering?
6. How complex is the project? For example: high profile i.e. the Mayor is involved, heavily publicized, challenges with contractor on other projects, and/or potential push backs from advocacy groups.
7. What are your goals for the project?
8. What are the current challenges?
9. What are some potential project challenges?
10. Have you participated in partnering before? If so, please share good/bad experiences.
11. What do you want as a result of the partnering session?
12. What is your level of commitment to this partnership?
13. What might be some roadblocks to effectively partnering this project?
14. What type of communication (ex: informal, formal, single point of contact) and in what format (email, phone calls, in person) is preferred?
15. Do you have a location for the Partnering sessions?
16. Who will be your contact person for: logistics, sending out the invitation for the partnering sessions, and reserving a room?
17. Is there anything you want to add?
18. Any questions?

Sample

Partnering Kickoff Session agenda

- Introductions
- Partnering Overview
- Project Goals
- Project Challenges
- Issue Resolution Ladder
- Communication Objectives
- Partnering Charter
- Follow up

Sample

Issue Resolution Ladder

The Issue Resolution Ladder is intended to assign delegated authority to negotiate issues when there is a disagreement within the team as to how to resolve it. The City Department will negotiate in behalf of the owner, designer, materials testing, etc. The Contractor will negotiate on behalf of the contractor, subcontractors, materials suppliers, etc. The Issue Resolution Ladder is specific to each project and will be agreed upon by the team at the kick-off partnering session.

Below are two examples of Issue Resolution Ladders that have been used in the San Francisco Partnering Program.

Example 1: Sample Issue Resolution Ladder

Team Level	Awarding City Department	Contractor	Time to Elevate
I	Inspector or Resident Engineer	Foreman/ Superintendent	1 day
II	Project Manager	Project Manager	1 week
III	Program Manager	Area Manager	1 week
IV	Division Manager	Operations Manager	2 weeks
V	Deputy Department Director	Owner; President	1 week

Example II: Issue Resolution Ladder with Guidance

Team Level	Time to Escalate*	Types of Issues	Escalate to
Level 1	1 day	-General construction: traffic control, safety, excavation, etc.	CCSF Inspector/RE Contractor – Foreman/Superintendent
Level 2	2 Days	-More complex construction -Design -Unforeseen conditions	CCSF RE/CM Contractor - Superintendent/PM
Level 3	1 week	-Major impacts: scope, schedule, and/or budget implications	CCSF PM Contractor – Owner/President

*Note – these are time guidelines only – critical items should be escalated ASAP. If either side thinks an item is critical or needs to be escalated, it should be escalated.

Sample

**Partnering Project
Score Card
date**

Three Key Project Goals

Rate the progress being made toward each of the projects goals.

		Poor			Excellent		
1.	(Goal 1) <i>Comments:</i> BUDGET	1 ○	2 ○	3 ○	4 ○	5 ○	n/a ○
2.	(Goal 2) <i>Comments:</i> SAFETY	1 ○	2 ○	3 ○	4 ○	5 ○	n/a ○
3.	(Goal 3) <i>Comments:</i> QUALITY	1 ○	2 ○	3 ○	4 ○	5 ○	n/a ○

Project Challenges

Rate the progress being made toward each of the challenges.

		Poor			Excellent		
1.	(Challenge 1) <i>Comments:</i>	1 ○	2 ○	3 ○	4 ○	5 ○	n/a ○
2.	(Challenge 2) <i>Comments:</i>	1 ○	2 ○	3 ○	4 ○	5 ○	n/a ○
3.	(Challenge 3) <i>Comments:</i>	1 ○	2 ○	3 ○	4 ○	5 ○	n/a ○

Attachment 6 – Sample evaluation forms

After every facilitated partnering session, all participants should fill out an evaluation. The intent of the evaluation is to:

- gauge whether or not the partnering facilitator is meeting the objectives of the entire project team including the owner, contractor, designer, subcontractors and stakeholders
- help us choose future facilitators
- strengthen our partnering program through your comments and ideas

PARTNERING FACILITATOR EVALUATION - KICK-OFF WORKSHOP

Project name:	Date of partnering session:
Partnering facilitator name:	Your organization:
Your name:	Your project position:

As a project team member, please check the appropriate box to indicate your reaction to the following statements.

		Strongly agree	Agree	Not sure	Disagree	Strongly disagree
1	The partnering facilitator appeared neutral to all parties.					
2	The partnering facilitator worked with team members before the kick-off to better understand the dynamics of the team and the project.					
3	The partnering facilitator encouraged participation of key stakeholders, such as subcontractors, design staff, multiple City department project staff, community members, and/or outside agencies, in the partnering process.					
4	The partnering facilitator was effective in helping us build our team.					
5	The partnering facilitator was knowledgeable about partnering on San Francisco City and County projects.					
6	The partnering facilitator was knowledgeable about the construction process.					
7	The partnering facilitator communicated the importance of ongoing partnering throughout the life of the project and provided tools for doing so.					
8	The partnering facilitator helped the team set up the initial monthly partnering evaluation survey and established the process and objective criteria for success of mutual goals.					
9	The partnering facilitator was effective in assisting the project team to develop a charter with the following elements: a) mutual goals defined for the specific job, b) partnering maintenance & close-out plan, c) dispute resolution plan including an escalation resolution ladder, and d) team commitment statement and signatures.					
10	Overall, I was satisfied with the performance of the partnering facilitator.					
As a result of today's session, I am able to:						
11	Understand the concept of partnering					
12	Communicate to others what partnering is					
13	Carry out the partnering agreements made at the session					
14	Utilize the Issues Resolution Ladder					
15	Communicate with my team members more effectively					

PARTNERING FACILITATOR EVALUATION - KICK-OFF WORKSHOP

Please add any additional comments:



PARTNERING FACILITATOR EVALUATION - CLOSE OUT SESSION

Project name:	Date of partnering session:
Partnering facilitator name:	Your organization:
Your name:	Your project position:

As a project team member, please check the appropriate box to indicate your reaction to the following statements.

		Strongly agree	Agree	Not sure	Disagree	Strongly disagree
1	The partnering facilitator appeared neutral to all parties.					
2	The partnering facilitator encouraged participation of key stakeholders, such as subcontractors, design staff, multiple City department project staff, community members, and/or outside agencies, in the partnering process.					
3	The partnering facilitator was effective in helping us build our team.					
4	The partnering facilitator was knowledgeable about partnering on San Francisco City and County projects.					
5	The partnering facilitator was knowledgeable about the construction process.					
6	The partnering facilitator communicated the importance of ongoing partnering throughout the life of the project and provided tools for doing so.					
7	The partnering facilitator offered an effective monthly partnering evaluation survey service and encouraged team members to participate.					
8	The partnering facilitator stayed connected to the team and the project throughout the life of the project.					
9	The partnering facilitator added value to the partnering process.					
10	The partnering facilitator was effective in assisting the team with issue or dispute resolution.					
11	Overall, I was satisfied with the performance of the partnering facilitator.					
12	I would recommend using this facilitator for future projects.					

As a result of partnering on this project, I was able to:

11	Communicate with my team members more effectively					
12	Utilize tools to resolve issues more efficiently					
13	Resolve issues at the lowest management level					
14	Deliver a higher quality project					

PARTNERING FACILITATOR EVALUATION - CLOSE OUT SESSION

Please add any additional comments:

Attachment 7 – Partnering resources

San Francisco partnering champions

If you have any questions about implementing partnering on your projects, contact the following City and County of San Francisco staff. If they don't know the answer, they'll find it out!

Mindy Linetzky San Francisco Public Works	mindy.linetzky@sfdpw.org	415.554.4829
Mario Valdez San Francisco Public Utilities Commission	MValdez@sfgwater.org	415.554.3464
Toks Ajike San Francisco Recreation and Park Department	toks.ajike@sfgov.org	415.581.2543
Betsy Huigens San Francisco International Airport	betsy.huigens@flysfo.com	650.821.7893
Shahnam Farhangi San Francisco Municipal Transportation Agency	shahnam.farhangi@sfmta.com	415.701.4284
Tim Leung Port of San Francisco	tim.y.leung@sfport.com	415.274.0566
Nancy Chin General Services Agency	nancy.chin@sfdpw.org	415.554.3301

Training

Public Works University - Public Works University periodically brings Rob Reaugh of the International Partnering Institute to San Francisco to conduct Collaborative Partnering Orientation trainings. The sessions are open to City construction managers, inspectors, resident engineers, project managers, public information officers, architects and engineers as well as their private construction company counterparts.

Caltrans – Caltrans offers a free one-day training called Fundamentals of Partnering. Team taught by both Caltrans and construction industry instructors, the trainers have used the principles they teach and will provide tools and practical tips on making them effective. Classes are taught usually in the winter months throughout California. For more information, go to www.CaltransPartnering.com.

Websites

www.sfdpw.org/index.aspx?page=1778 – Partnering Summit 2014

www.partneringinstitute.org – International Partnering Institute

