

Submittals

All required Program submittals should be emailed to: partnering_program@dot.ca.gov. In the subject line, please indicate the district and expenditure authorization (EA) number of the associated project. If this information is not known to you, request it from the RE.

Forms, files, and standard formats are posted and available for download from the Caltrans Partnering website at www.

- Submit Facilitator Registration Form to Caltrans Partnering Program
- Facilitate kick-off partnering workshop
- Develop partnering charter:
 - Mutual goals
 - Include core project goals (safe, on time, on budget, quality met, Fundamentals of Partnering training, communication)
 - Include project-specific definitions of all mutual goals
 - Partnering maintenance and close-out plan
 - Dispute resolution plan
 - Include dispute resolution ladder
 - Commitment statement and signatures
- Submit partnering charter to Caltrans Partnering Program
- Set-up monthly partnering evaluation survey:
 - Get email addresses of survey participants and report recipients
 - Mutual goals
 - Includes core project goals and the associated objective criteria of success
 - Includes any project-specific goals and mutually supported individual goals and the associated objective criteria of success
 - Optional - key issues/risks (update as needed quarterly)
- Facilitate close-out partnering workshop, if requested
 - Document lessons learned (no standard format required)
 - Send lessons learned to project team
 - Send lessons learned to project executives
 - Submit lessons learned to Caltrans Partnering Program
- Submit final partnering evaluation survey results on core project goals to Caltrans Partnering Program using standardize submittal format to Caltrans Partnering Program

Monthly Reminders

Review survey results

- Take action as appropriate

Submit survey participation-levels to Caltrans Partnering Program

- # team members invited to take survey

- # team members that submitted a completed survey

Quarterly / Periodical Reminders

Update key issues on monthly partnering survey

Hold follow-up partnering sessions and/or facilitated dispute resolution sessions

Check in with the RE, PM, and other team members as appropriate to keep informed on project progress