

Partner up for successful projects

■ *Partnering allows project teams to anticipate potential problems and develop solutions to handle them.*

With complex projects involving multiple partners — designers, contractors, project/program managers, subcontractors and users — partnering has never been more needed. Savvy owners and teams know that partnering can help them balance the multiple needs of users and stakeholders with the realities of budgets and schedules.

Simply put, partnering is a process whereby teams “negotiate” project coordination, communication, decision making and dispute resolution. Effective partnering reveals potential pitfalls and defines how project teams will work together to achieve project deliverables.

When done correctly, teams come out of partnering sessions knowing where they’re going and how to get there using solid agreements. If members feel good about each other, that’s an added benefit that typically results from working through tough issues together.

By **MEG WINCH**

—
Communication
Resources
Northwest



The case for partnering

Partnering brings together diverse stakeholders and team members in a collaborative environment that forces the discussion of tough issues. An inclusive invitation list with a meaty agenda can result in real benefits for the team and the project. While there are standard agenda items for the partnering process, how the team talks about the issues should be anything but standard.

For example, on a recent \$300 million fast-track health-care project, the design and construction teams helped the owner understand the problems associated with late decision making. Users wanted to

delay the decisions on large, expensive equipment to the last minute; the contractor wanted those decisions early enough to avoid construction impacts. In partnering, rather than focusing on feeling good about each other, the team identified critical decisions and developed a decision process to meet the needs of both groups of team members.

The pre-partnering process

Prior to a partnering session, the facilitator should interview

key project team members to determine what issues or concerns there are. Conducting the investigations prepares the facilitator to work with the team and not have to be educated about the project.

In addition, if there are sensitive issues to be discussed, the facilitator can insulate participants and yet still facilitate discussion. For example, in a recent partnering process, the contractor was concerned about the owner’s ability to meet schedule commitments. The facilitator articulated this concern, encouraging conversation without putting anyone on the spot.

It’s also important to plan for documentation. A common complaint about partnering is that the process is not followed up with process documentation. Partnering generates a lot of deliverables, including a communication plan, decision diagram, conflict hierarchy, and partnering agreements. These should be carefully documented so the team can review them as the project moves forward. For complex partnering sessions and/or fast-track projects, notes can be generated in real time, allowing team members to sign agreements and review deliverables before they leave the session.

Delivering value

To be effective, a partnering session must be fast-paced and focused on reaching consensus on key issues. Teams should plan for six to eight hours per session (up to a day and a half for larger projects). Partnering processes can also be shortened to cover only part of the agenda, or to split the agenda across several team meetings.

Partnering is most effective when it’s focused on specific project outcomes. Here are some typical deliverables of a partnering session:

Specific team mission. First, the team works together to develop a specifically worded mission statement that reflects the team’s goals, shows how the goals will be met, defines the partners in the process and identifies the affected parties. This statement serves as a guide for making decisions as the team moves forward.

Working through a mission statement gets all team members on the same page relative to where the team is going and defines what’s important to the owner and key stakeholders. It can also help orient the entire team around the client’s culture and expectations.

Developing a mission statement can be a powerful exercise in focusing the team’s energy around the work at hand and for integrating new team members into the project process. For example, a recent winner of the AGC’s Marvin M. Black Excellence in Partnering Award revisited the mission statement at each key project milestone: start of design, start of

construction, involvement of key subcontractors and during move planning.

Communication plan. The communication plan is perhaps the most valuable partnering deliverable, since many project problems are later traced to communication issues. Teams that talk about communication structure and function during partnering tend to be more focused and typically work together more effectively.

To develop a communication plan, team members outline the means and methods by which they will communicate with each other throughout the project duration. This includes establishing formal and informal lines of communication and documentation responsibilities. Some teams establish rules for the use of e-mail and how (or if) late input can be considered during construction.

Decision plan and schedule. As any project moves forward, key decisions are required at different levels of the project hierarchy. During a partnering session, teams identify critical decisions and decision makers throughout the early project schedule. They also determine the process and key time frames by which decisions need to be made.

Knowing who makes which decisions can be critical to ensuring decisions are made in a timely manner, and that they aren't overturned late in the process. This is particularly important when strong personalities and multiple decision-makers are involved.

Dispute resolution structure. The test of a good team is not in the quality of people assigned to the project, but in how that team works together to overcome adversity. During partnering, teams identify how conflicts will be resolved using the approved team hierarchy. Team members then commit to following this chain of command in resolving issues. The payoff from a dispute structure is faster resolution and more collaborative problem solving.

Roadblocks. In this process, the team produces a list of potential roadblocks to achieving the team's goals. From a design or construction standpoint, roadblocks may include site issues (such as selection), team relationships, design changes, construction claims, approvals, user issues, and/or permits.

During this process, team members brainstorm a full range

of potential situations that can impede project success. This is a very non-threatening opportunity to deal with issues or concerns team members foresee, given the diverse nature of the team and the need for moving quickly on schedule.

In one memorable partnering session for a large public project built over a pioneer homestead, the team brainstormed ways to deal with the real possibility of encountering the graves of the previous owners. On a tight site with an even tighter schedule, this was a real (and fortunately unrealized) potential problem. The plan: First call 911, then the ME, then the county architect, and so on.

Agreements. The team works collaboratively to develop resolutions to roadblocks in the form of policy statements (how the team wants to "be" with each other), action items (identifying responsible parties and time lines) and contingencies (actions that only go into effect under specifically identified circumstances).

Team members also identify any roadblocks they will be unable to resolve. Most problems can be identified and planned for by project teams, but this involves a detailed discussion of real risks and opportunities. Partnering provides a non-threatening environment in which to discuss both.

Partnering pays off

Given the growing focus on the need for improved team coordination and communication on projects, partnering is a wise investment. Having anticipated roadblocks and gained new communication and conflict resolution skills, team members are better equipped to deal with issues that come their way.

In the end, everyone wins. Projects are high quality and get done on time and within budget. Team members are committed to the project's success, all firms make a reasonable profit and team members typically communicate with each other long after the project is completed.

Meg Winch is president of Communication Resources Northwest, a Mill Creek-based management consulting firm. She has facilitated partnering processes for the U.S. Postal Service, U.S. Army Corps of Engineers, U.S. Courts, numerous corporate campuses, major hospitals and judicial buildings.