



PARTNERING WORKSHOP REPORT

**PARTNERING WORKSHOP
ASSOCIATED GENERAL CONTRACTORS
and
U.S. ARMY CORPS OF ENGINEERS
11-12 OCTOBER 2007 – OLIVE BRANCH, MS**

**Prepared by
Jeanne D. Maes, Ph.D.
Robert A. Shearer
JR Consulting, LLC
P.O. Box 8884
Mobile, AL 36608**

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Agenda

Workshop Presentation Sheets (reproduced)

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TENTATIVE AGENDA

Thursday, 11 October

- 1:00 Welcome, introductions, and announcements
- Establish workshop goals & expectations
- 1:30: Why partnering?
- “Lessons learned”
 - Review & assess partnering charter
 - Reaffirm partnering commitment
- 3:00 Break
- 3:15 Examine the power of teamwork
- Characteristics of effective teams
 - Collaborative decision-making
- 3:30 Dealing with critical issues
- What the major issues confronting us as a partnering management team?
 - Short-term
 - Long-term
 - Action planning process
- 5:00 Adjourn
- 5:05 Social hour
- 6:00 Dinner

Friday, 12 October

- 7:30 Effective communications & issue resolution processes
- Conflict management strategies
 - Principled negotiation
 - Win-win decision-making
- 8:30 Action planning: Issues for improvement
- 9:30 Break
- 9:45 Report action plans

- 10:15 AI Interview with partners – strengthening the relationship
Reports to group
- 12:00 Develop follow-up plans
- 12:45 Recap and wrap-up

Facilitators:

Jeanne D. Maes, Ph.D. (jdmaes7@hotmail.com)

Bob Shearer, J.D. (rashearer@hotmail.com)

**Partnering Assessment (1=Immediate improvement needed through
4=Going well at this time)**

Items	TEAMS	1	2	3	4	5	6	7	8
Commitment		3	3	3	3	3	3	2.5	2
Leadership Effectiveness		2	2	3	3	2	2	2	2
Trust; Open communication		3	3	3		2	3	2.5	3
Training, mentoring, etc. all levels		2	2	2	3	2	2	2	2
Clear goals		2	1	3	2	2	3	3	2
Timely ID & issue resolution		2	2	3	3	2	3	3	1
Recognition of partnering success		3	1	2	2	3	2	2	3

Characteristics of an Effective Team

Group 1

End user satisfaction

Trust/respect

Speedy issue resolution

Open minded

High performance USACE/AGC

Knowledgeable team members; empowered team members

Brevity

Group 2

Competence

Right people in the right places

Effective communications

Provide benefits to others outside the team

Project kickoff meetings to discuss expectations

Common goals and objectives

Leadership

Responsive, responsible, accountable

Celebrate success – recognition

Desire to accomplish same goal

Synergy

Adaptability/flexibility

Project focused

Mutual understanding

Lessons learned

Issue resolution processes

Relationship building

Group 3

Common goals and objectives: Cost, scheduling, quality

Right players

Team integrity/mutual respect

Team resources

Team leader (clear roles and responsibilities for members)

Focused-coordinated

Commitment to success

Clear processes/outcomes/metrics

Celebrate success

Group 4

Trust

Effect team/right members

Focus on the goal

Leadership maintain the direction

Competition/the will to be successful

5.

Collaborative and common sense approach

Team culture founded on trust

Empowered individuals at lowest levels

Issue resolution process- using parallel team members

Openly communicative and honesty

Group 6

Open minded

Willing to listen

Communication

Commitment at all levels

Clear, common, defined goals

Recognizing limits

Know strengths and weaknesses

Timeliness/responsiveness

Transparency

Group 7

Leave your ego at the door

Institute good listening skills

Integrity – crucial among the team participants

Team maintains a “fair and reasonable” position

Big picture

Group 8

Team cor.

Charter/goals/objectives

Correct team members - qualified

Roles and responsibilities defined

Issue resolution process- lowest level resolution – elevate when required

Verify progress

Success toward goals through metrics

Need transparent communication

Need trusting relationships

Partnering approach with team – all stakeholders

Regular follow-up

Recognize accomplishments/celebrate success

Tradition/expectation of success

Build the bench

Face the hard issues

Not afraid to make mistakes – learn from mistakes

Demonstrate commitment; follow-through

Opportunities for Improvement

- 1. Incorporate right people at right level into partnering process**
- 2. Educate: what partnering is and is not; reinvigorate and promote partnering process; mentoring and coaching through/to lowest level**
- 3. Share lessons learned**
- 4. Pre-bid opportunities**
- 5. Better consistencies between districts; metrics and actions to measure partnering effectiveness**
- 6. Safety**

ACTION PLANS

Educate on Partnering

Paul Tuccio
Harold Thibodaux
Allen Lantz
Jean Todd
Tom Smith
Tom Hurley
Bruce Terrell
Tony Zelenlca
Phyllis Adams

Identify/Analyze issue

What is partnering? Definition

Inclusive framework – mechanism – process – formal

Facilitates communication, honest and open.

All parties at table – Key Players. PM/Design Eng.

Am I on the bus?

Authority

Why?

Chain of command

Personalities/style

Local sponsors

Obstructions

Both/and

NOT: changing K/Comm. facilit.

ACQ strategy

Brainstorm:

Methods of partnering communication process – filtering it down

Mirror process down

Levels of partnering - cascading

1. Principles

2. Strategies – QM

3. Operational

Consistent message: what it is; what it is not

Ownership/buy-in

All on same page

Impediments:

Contract scope

Legal impacts

Preconceptions

Customer expectations

What: Mission success
Follow-up strategy

Series meetings
Formal agreements
Pre-bid conferences forecast

When: How

Who: stakeholders in lead

Metrics: length of partnering meeting
Surveys – stakeholders
Mission measurements

Right People

Denny Lundbert
 Michael Bart
 Jon Nieman
 Bob Fitzgerald
 Mike Mayeux
 John Meador
 Walter Baummy

End state – having right people at right levels engaged

- School /training for team members
- Ground rules or rules of engagement
- Measure effectiveness
- Monitor attendance/participation
- Template
- Government/contractor team leads
- Routine partnering check

ID/Analyze Problem

- Decision-makers
- Timing
- Include stakeholders
- Teams should be “sized” appropriately
- ‘one size’ doesn’t fit all
- Stakeholders should have ‘vested interest’
- PM involvement

Partnering Definition: cooperative process to achieve an agreed-upon end state. End state defined differently and we understand each other’s definitions. Continuous partnering dialogue.

- Template (participants)
- Meeting schedule
- Access to team members
- Begins after contract award
- Design-bid-build
- Rules of engagement with levels of authority
- Government/contractor team leads (pre-meetings)

Recommendation = BOB FITZ

PDT ? Min 3 Corps/Min 3 contractors representing various MVK (volunteers), MVN, MVR, MVP, TFH

Proposal at Destin

Share Lessons Learned/Successes
 Co-Group leaders=Perry Hubert; Tim Shows
 Rhonda Johnanson
 Dan Fordice
 Dennis Seibel
 Josh Layton

Problem: *How to Identify and capture and share best practices

Share Best Practices, lessons learned/successes

- *1. Establish 'best practices' tab on MVD and/or AGC website or link to each other.
- 2. MVR uses website for pre-bid Qs and A's (Rhonda Johanson MVR)
- 3. Share list of formal + informal partnering facilitators.
- 4. MVR creates and distributes an 'award CD' to include:
 - Latest plans and specs
 - Original award letter
 - NTP acknowledgement (via email)
 - Performance and payment bonds
 - ACO and COR appointment letters
- 5. Yolanda Arthur is owner of web-based 'best practices' site. Need way to vet items before they become 'official'; 'pending' category.
- *5 A. Freddie Rush, AGC POC
- 6. Create post-construction performance survey for contractor to provide constructive criticism (Tim Shows).
- 7. Include jobsite personnel as part of project Partnering meetings to participate in training and help Get partnering happening at lowest levels.
- 8. Dan Renfro annual MVD-AGC Partnering Award.
- *9. Set up task force to identify best practices. TF to include:
 - Corps contracting rep
 - Corps design rep
 - Corps construction rep
 - Corps operations rep
 - Corps small business rep
 - Contractor/AGC rep
 - Contractor/AGC rep
- 10. Continue "Safety Now" awards

Better recognition of success
 -Awards

** *

- Database
- Task force to manage
- Routine submissions-how
- Post completion surveys
- Communication/sharing
- Initial data request

Next – complete for Feb. 2008 meeting:

1. ID task force (10/12/07 Team 4). US + Yolanda and Freddie
2. database: set up to facilitate web based collection
3. Initial collection: request issued.

Pre-Bid

Roberts
Starkel
Tucker
Thomas
McGeorge
Johnson
Valentine
Quinn
Nancy Tullis
Kenny Hill
Willere Cross
Brenda
Bill Gardner
Shirley Reed

Pre-Bid Issues:

1. Some districts not posting on FBO 8(A) sole source jobs.
2. Archive files (?) how long left online post bid.
3. 'ProjNet'.org utilization
 - a. its own website
 - b. needs password (imbedded in SOL)
 - c. question and answer bulletin
4. Pre-Design comm. (SOL)
5. Pre-Bid Comm.

Consistency Metrics

Jimmy Waddle
 Mark Games
 Ken Williams
 Mel Baldus
 Tom Minyard
 Bob Sinkler
 Yolanda Arthur
 Rich Johnson
 Rick Kendrick
 Rich Hancock

1. Lack of Consistency of Partnering Practices between Districts (attitudes vary among all partners)

Actions:

A. Develop Regional SOP (Yolanda and Jimmy to form team. Tom Minyard, Dennis Siebel)

B. Encourage partnering for all projects (formal or informal)

-Formal vs. informal:

- \$ size of project
- Complexity
- Stakeholder involvement
- New contractor

C. Draft SOP by Feb. 6

D. Brief status in Destin.

Metrics

No metrics to measure effectiveness of partnering.

Actions:

A. Develop metrics to be included in Regional SOP

Examples:

- Number of claims
- Number of total projects being partnered
- Change of CCASS for partnered vs. non-partnered projects
- Cost and time growth
- Partnering award nominations
- Effect on safety
- Customer/Ktr/COE satisfaction

B. Team should include Ktrs that have worked in several districts.

C. lack of Consistency in Contract Administration between Districts.

Action:

- A. Establish issue resolution committee. (Col. Sinkley, Yolanda, Freddie Rush, Mark Games, Bill Gardner Tom Minyard, Dennis Sibel....TBD)
- B. Ditto: Ktrs from several districts
- C. Establish team and meet or teleconference in Jan.
- D. Report on status in Destin.

Safety
(Gambrell/Hannon)

TS Gambrell
Jonathan Kernion
Al Lee
Ken Jacob
Jim Hannon
John Roques

We are dedicated to safety education, accident prevention, and ensuring a safe working environment.

Share lessons learned/best practices.

- List resources on AGC and other sites, Corps Website
- Meetings; videos; papers; apps/AHA=Best practice plans (models)

Part of QC Training = Freddie Forum Safety Tips and Resource Area. AGC and Corps submit items!

Prevention

Champions

Prevention at every meeting

Safe environment- a part of every meeting emphasis.

Discuss at AGC meeting.

Ed McNamara, Corps

Jim Psverg (???) AGC

Recap/Follow up

- Complete action plans for Destin
- Overview of meeting and committee reports to spec com at Destin.

Power Point Slide Information

Introductions

- Name and organization
- From your perspective, what would be the most important outcome for this workshop?

Overview of Session

- Workshop goals
- Overview of partnering
- Power of teams
- Critical issues
- Communications and issue resolution
- Appreciative interview with partners
- Follow up plans and wrap-up
- Workshop goals

- Overview of partnering
 - **Assess partnering charter**
 - **Lessons learned**
 - **Identify new goals & reaffirm commitment**

Partnering is...

- A win-win process for building collaborative relationships.
- An opportunity to design an effective problem-solving team representing all stakeholders.

Principles of Partnering

- Common/compatible goals
- Open communication
- Innovation
- Principled negotiation
- Win-win problem-solving
- Synergy
- Trust

Steps in Partnering Process

- Top management commitment

- Selection of facilitator(s)
- Workshop for key players
- Setting project goals
- Team building
- Honing communication skills
- Management team profile
- Issue identification/resolution process
- Action planning
- Evaluation process
- Partnering agreement
- Follow-up planning

Lessons Learned

- What has worked well in the partnering relationship between the Corps of Engineers and the Associated General Contractors and should be continued?
- What are specific opportunities for improvement in the relationship?

How is our partnering agreement working?

Are these still our goals and values?

Are there new goals that should be incorporated into the partnering agreement?

Add to the Partnering Agreement:

- Safety: We are dedicated to safety education, accident prevention, and ensuring a safe working environment.

Revitalization Strategies

- Build partnering into the contract
- Active participation of top managers
- Select professional neutrals
- Devote adequate time to workshops
- Refocus on team-building
- Designate “champions”
- Regular assessment, follow-up

Working well.....

- Resolution committee
- Team work during disaster/emergency
- Willingness to participate in partnering
- Partnering in the field during construction

- AGC/USACE is a REAL working group with results
- Commitment at management levels to partnering
- Resolution of issues
- Annual meeting/issue resolution process
- Katrina and Rita response
- Katrina and Rita recovery
- Upper management communication
- Increase in formal partnering agreements
- Recognition of partnering successes
- High level recognition of the value of partnering
- Issue resolution committees to work on concerns
- Annual meeting between MVD/AGC
- Trust
- Communications
- Commitment
- Formal structure
- Communications at higher levels
- Process for large/project level
- Relationships are better
- We do talk
- Spec/ AGC meeting/ produce saving to Corps/improve specs
- Has established good working relationship

Opportunities for Improvement

- Inclusion of stakeholders in partnering processes
- Early resolution at creek bank
- Reinforce mentoring and coaching to lowest management level
- Pushing partnering down to lower levels by training mentoring partnering concepts
- Establish metrics and action items to execute to measure partnering effectiveness
- Share lessons learned
- Continual involvement in planning process
- Build on long term relations
- How can we help each other be successful
- Safety
- Engaging the right players
- Metrics
- Pre-award opportunities
- Drive procedures, mutual goal, expectations to small business/subs/vendors
- Build consistency of partnering process in project design/bid phase
- AGC/Industry/COE forums

- Submittals – safety, schedule need tracking – timeliness
- Reinvigorate and promote process
- Staff train/communicate lessons learned/emphasize lowest level buy-in
- Institute/promote partnering culture
- Contracts
- Better consistencies between districts
- Involve construction contractors earlier in the process
- Push partnering to working level
- Improve communications; standardize between MVD District

What are the characteristics of an effective management team for USACE/AGC projects?

Effective Teams . . .

- Clear Purpose
- Informality
- Participation
- Listening
- Civilized Disagreement
- Consensus Decisions
- Open Communication
- Clear Roles & Responsibilities
- Shared Leadership
- External Relations
- Diverse Styles
- Self-Assessment

**What are the overarching issues confronting us as a project management team?
What do we need to do to achieve these improvements?**

Opportunities...

- Incorporate right people at right level into partnering process
- Educate: what partnering is and is not; reinvigorate and promote partnering process; mentoring and coaching through/to lowest level
- Share lessons learned
- Pre-bid opportunities
- Better consistencies between districts; metrics and actions to measure partnering effectiveness
- Safety

Action Plan

- Identify and analyze the problem/issue, etc.
- Brainstorm possible solutions

- Recommend a solution
 - **What needs to be done?**
 - **What is the time frame?**
 - **Who is responsible?**
 - **How will you measure the effectiveness?**

Resolving Issues

- Draw organizational decision-trees
- Clarify issues
- Get right people involved
- Set realistic timetables

Principled Negotiation

- Separate the people from the problem
- Focus on interests, not positions
- Seek creative, win-win options
- Use objective criteria to resolve differences

Source: Ury & Fisher, *Getting to Yes*

Vulnerabilities

- Skepticism
- Resistance to change
- Top management commitment
- Changing business conditions
- Failure to share risks
- Lack of open communication
- Unilateral decision-making
- Personality conflicts
- Changes of key personnel
- Failure to implement action plans
- Failure to resolve issues quickly
- Failure to follow-up

What follow-up activities do we need to consider?

- _____
- _____
- _____
- _____

- _____

For more information, or to share comments . . .

- Bob Shearer

P.O. Box 8884

Mobile, AL 36689

rshearer@usouthal.edu

- Jeanne Maes

126 Wild Oak Drive

Daphne, AL 36526

jmaes@usouthal.edu