

# Partnering Community of Practice

## Quarterly Meeting Notes

April 14, 2022 @ 1:00 PM Arizona Time

Facilitator: Nichole Jenks, ADOT Partnering Facilitator

### MEETING PURPOSE:

- Partnering Community of Practice (PCoP) members share ideas, best practices and engage in open discussions to develop and enhance partnering efforts to improve the successful delivery of transportation projects.

### Welcome New Partnering Community Members:

#### Montana Department of Transportation

- Clarissa Martin, Partnering Program Manager:  
Clarissa has been with MTDOT for 9 years, has worked in materials for 4.5 years and construction for almost 5 years.  
Clarissa pointed out the reason Montana has 2 Partnering Program Managers is the size of the state and travel lane miles served by MTDOT. It takes approximately 11 hours to drive border to border.
- Matney Juntunen, Partnering Program Manager:  
Matney has a background in Facility Engineering and is excited to be part of the revitalization of the MTDOT Partnering Program.

#### Wyoming Department of Transportation

- Kent Ketterling, State Construction Engineer:  
Kent is currently working on developing a new partnering program outline. The current requirement for awarded contracts is a voluntary program with approximately 2 projects conducting partnering workshops each year.
- Katherine “Kadi” Bradfield, Construction Staff Engineer:  
Kadi is a staff engineer working with Kent to develop a partnering program. The desired outcome is to take away valuable information from the PCoP group to apply to their program.

Members of the committee introduced themselves, described their role within their agency and partnering programs and shared background about state specific dynamics, challenges and opportunities to improve transportation projects through partnering efforts.

Today's attendees included:

- Chris Goins, [Alaska Southcoast Regional](#) Construction Engineer
- Mike Carter, [Arizona Partnering](#) Administrator
- Mrudang Shah, [CalTrans Partnering Program](#) Manager (\$4-5 Billion Annual Budget)
- Jerry P. Valdez, [New Mexico DOT](#) Executive Director
- Chase Wells, [Ohio DOT](#) Claims and Statewide Partnering Coordinator
- Jason Duncan, [Texas DOT](#), Deputy Director Construction Division (FY21 \$6.5 Billion Budget)
- Jace Mecham, [Utah DOT](#), State Construction Engineer, PCoP Chairman

(Live links provided for your reference)

## Jace Mecham:

Report on the annual WASHTO conference in Long Beach California on March 25, 2022. Jace presented information on the recently approved WASHTO subcommittee resulting from the efforts of this group.

- **What was the response overall regarding partnering?**
  - Most states view partnering as positive and were receptive to the presentation.
- **Did other states share any information about their partnering efforts?**
  - Bill Fay, ADOT - Partnering conversations are looking at changing the paradigm in Arizona.
- **New states implementing partnering into their construction projects?**
  - There are states that are forming new programs or rebuilding old programs and identifying areas of improvement.
- **What was your greatest takeaway from the conference?**
  - Bill F., ADOT- Apply the small town, bowling alley concept;  
Treat everyone on the project as though you will see them at town functions often.
  - Project team “mindsets” of what partnering is.
  - Owners and contractors view partnering differently.
  - Non-negotiables (i.e. material specifications, safety protocol, etc.) cannot be negotiated under the purview of partnering.
  - Items that affect contractors cost, schedule, profits, etc. negatively are viewed as a lack of partnering

## Sharing Partnering Program Information - Established programs vs. newer programs:

As a WASHTO sub-committee, this team committed to specific objectives which hinge on open, transparent communications and cooperation of all community partners.

A copy of the WASHTO presentation is attached for your reference.

- **What similarities exist between newer and established programs?**
  - Ongoing conversations to quantify the value attached to partnering programs.
  - Gaining leadership support of partnering programs.
  - Varied levels of experience and outcomes in partnered projects.
    - ➔ Sometimes partnering is viewed as one sided.
  - The need for training in partnering principles to change the mindset from “finding problems” to “identifying opportunities.”
  - The desire to create a **culture** of partnering, not just a box to check or a concept.
- **What opportunities for improvement have been identified or applied in existing programs?**
  - Re-establish partnering steering committees to strengthen relationships industry wide.
  - Increased/improved partnering training in communication, negotiation and teamwork.
  - Training for internal staff to facilitate partnering workshops on lower tier/risk projects.
    - ➔ CalTrans- Mrudang S. conducts “train the trainer” style training for 40-50 staff.  
Those people then go out and train hundreds of other staff/project team members.
    - ➔ TXDOT- Jason D. Texas provides partnering training through virtual meetings.
    - ➔ MT- Level 2 projects (lower risk) use RE/CM to facilitate partnering. MT finds staff who engage in the partnering process remain more engaged throughout the project life.
  - Focus on issue resolution: Owner and contractors understanding of “everyone gives, the project takes” vs. an “us against you” mentality.
  - Contractors prequalification considered when reviewing bids (NM).
  - Contractor evaluations are reviewed upon project completion (WA., UT. and TX.).
    - ➔ Contractor CEO/Management are provided the evaluations and scores.

- **How can agencies share information effectively?**
  - Share lessons learned, celebrate successes and document positive project outcomes. (This goes back to quantitative data vs. qualitative data)
  - Nichole J. will package documents received over time from this group and disburse to new members and work to develop a means to create a shared drive/repository where documents can be housed and viewed (IT support will be needed).

**OPEN DISCUSSION - Questions, comments or suggestions for the team:**

- **Chase W. Ohio DOT: Currently reviewing a method/mechanism to track low level resolutions:**
  - Ohio uses a Step 1, 2 and 3 phased approach to issue resolution. (Comparable to field, RE, DE, Sr. Management)
  - Track step 1 issue resolution including RFI's at the lowest level.
  - Determine what effect partnering played in the resolution process/teamwork.
    - ➔ Define cost and time associated with RFI's approval.
    - ➔ Document source of dispute (i.e. contractual language, local ordinance, environmental, field conditions, etc.).
    - ➔ Track consistent issues to review specifications and make possible improvements.
- **Mrudang S. CalTrans: How this information may create a means to track quantitative data supporting the benefits and value of partnering:**
  - Track all initial claims and disputes from the RFI including cause, suggested solution and cost.
  - Track RFI's through the escalation process and document the level where resolution occurred.
  - Track change orders resulting from RFI's including cost and time variables.
    - ➔ What was the difference between estimated and actual cost and time?
  - Document whether the RFI resulted in a claim including cost and time.
  - Track how many RFI's are escalated to higher levels vs. resolved at the lower level.
  - This may reflect partnering efforts but not a defining measurement of partnering benefit.
- **Suggested agenda item for the July meeting:**
  - Chase W. Ohio: "Partnering through inflation"
  - Please submit any other ideas you may have for agenda items.

**Thank you all for attending today's meeting.**

**Welcome to our new members from Montana and Wyoming.**

**Please let me know if you have any questions or need any assistance.**

**NEXT MEETING:** July 2022 (Nichole will send a date and time poll)