

Partnering Community of Practice

Meeting Notes

Google Meet Virtual Meeting

January 12, 2022 @ 9:00 AM Mountain Time

Facilitator: Nichole Jenks, ADOT

- **Welcome and Introductions:** 2 new members attended for Texas and Idaho.
 - Jason Duncan, PE
Texas Deputy Director Construction Division with 15 years of field experience. Jason oversees the claims process resulting from escalated project issues unresolved at lower levels.
 - Chad Clawson
Idaho State Materials and Construction Engineer and Lab Manager. Idaho has presented new specifications to the AGC for review to be included in a new specifications guidebook.
 - California - Mrudang Shah
 - Arizona - Mike Carter
 - Nevada - Tonia Andree
 - Utah - Jace Mecham
 - Washington - Jon Keeth
- **How to encourage team partnering when there is no facilitator:**
 - Agencies without a formal partnering program or facilitator conduct staff training.
 - Training includes soft skills, understanding what partnering is and isn't, processing change orders (design, quantities, etc.), following the escalation process and developing "project first" behaviors. Click [HERE](#) for Technology of Participation (ToP) facilitation skills training.
 - Partnering elements do not supersede contract specifications.
 - Training is most often facilitated through the local AGC partners or consultant trainers.

CalTrans: Training provided using a consultant trainer and includes senior leaders, project managers, inspectors, senior engineers, resident engineers (RE) and superintendents. Each district has a project team member who is the designated Partnering Champion. Click [HERE](#) for partnering program information and a list of consultant facilitators.

Nevada: Training is accomplished through a consultant and AGC partnership which includes a 1 day training course focused on soft skills. Partnering is required on every project The RE and Contractor agree as to formal or informal format and whether to hire a consultant or self-facilitate with trained personnel. Click [HERE](#) for Nevada partnering program information.

Utah: The Partnering Certification course is required. Failure to comply results in a portion of the first mobilization payment being withheld. The 1.5 day course is provided by a consultant trainer in the AGC facility. Click [HERE](#) for Utah partnering program information.

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Washington: We have trained about 600 contractors and WSDOT staff since 2016, including field staff, Project Managers, Project Engineers, etc. It's open to everyone including local agencies. Part of the workshop is a negotiation session that is designed to create win-win situations. There's also a lot of discussion about what partnering is and isn't. We also have a Contractor's Creed and Owner's Creed in our Partnering Field Guide.

Texas: Provides training in dispute resolution once per month. There is also training on claims and use of the escalation process for district staff and the contractor PM.

Arizona: Uses in house facilitators who are trained in facilitation practices and soft skill applications. Consultant facilitators are procured and available at the request of the project team.

- **Partnering Value:**

- **Quantitative** - Data collected based on contract performance (contract time, budget, quantities, specifications, etc).

Texas: Contractor evaluations are required to be completed at project completion by the TxDOT Engineer. Evaluation results are tracked. Evaluations are based more on contract requirements with only 1 of 9 questions referring to partnering. Evaluations can be used to put the contractor on a performance plan, apply to all contracts statewide and can be used to reduce contractor bidding capacity. (See attached)

Washington: The RE is required to complete a Prime Contractor Evaluation which is considered in contractor pre-qualification. The contractor is provided a Resident Engineer Evaluation but completion of the document is voluntary. (See attached).

Utah: Provides a Partnering Evaluation for both the RE and contractor and evaluates specific aspects of the project overall. (See attached). The results of the contractor evaluation may affect future bidding opportunities.

California: Surveys are completed at project close out. Data from the surveys are available on an internal dashboard allowing CalTrans staff to evaluate outcomes and participation of the partnering project team.

- **Qualitative** - Data based on customer satisfaction responses.

- ★ Activities that promote behavior consistent with partnering principles.

Most states have an award program allowing contractors to apply for partnering awards.

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