

## **Construction Partnering Guidelines:**

### **WHAT IS PARTNERING? PARTNERING CONTENT, APPLICATIONS AND RESULTS**

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**Excerpted from Chapter 1,  
William Ronco and Jean Ronco,  
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Construction*  
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## **Core Partnering Tasks**

Partnering is a formal program to improve communications among the people and organizations working on a design and construction project. Key project team members convene for a pre-construction workshop and for regularly scheduled follow-up workshops over the course of the project. They often work with a facilitator to improve the quality and productivity of their discussions.

At the pre-construction workshop participants write, agree on and plan to implement three documents:

1. *Goals Statement* describing their hopes for the project.
2. *Communications Procedures* specifying in detail how, when, and what people will communicate with one another on the project.
3. *Conflict Resolution Process* which anticipates that people on the project will differ and maps out steps to help them resolve their conflicts to mutual satisfaction.

In follow-up workshops, participants:

- Address current concerns that have arisen on the project, using the workshop as a forum for resolving the inevitable conflicts and miscommunications that arise on a project.
- Review their performance according to the goals they set previously and develop action plans as needed.
- Tune and refine the Communications Procedures and Conflict Resolution Processes they initially formulated in order to keep them effective.

## **Improving Partnering Effectiveness: Two Additional Tasks**

It is one thing to meet in a workshop and write inspirational documents, something else again to use those documents to guide everyday project communications. Many Partnering programs stop at the conclusion of the Partnering documents and procedures. In order to improve Partnering impacts and effectiveness, it is important to go beyond these initial steps to include two additional tasks: communications skills training and direct involvement with the infrastructure of communications on the job site.

Without some work with improving communications skills, project team members will likely find it difficult to implement the Partnering procedures they have devised. In addition, the procedures often imply a style of everyday communications that project team members may aspire to but in which they lack experience and skill.

Thus to ensure that project team members have the communications skills necessary to implement Partnering and to set a tone that supports the quality of the work, facilitators often provide project team members with communications skills training, focusing especially on:

- Conflict resolution skills
- Listening skills

- Valuing differences and diversity
- Creative problem-solving
- Running effective meetings and group communications

Design and construction projects must effectively manage a complex flow of information and communications among project team members. To improve Partnering effectiveness it is very useful for Partnering problem-solving to examine the infrastructure of project communications. Partnering can provide a forum and skills for project team members to make the infrastructure of communications on their project optimally effective.

On the cutting edge of communications infrastructure, some projects are beginning to use groupware communications software. As computers and computer networks become more widely available and less expensive, Partnering is beginning to include the development and implementation of "groupware." Groupware enhances Partnering by providing an electronic means for carrying out many of the Communications Procedures project team members attempt to address manually.

Overall, it is possible to categorize Partnering activities into three categories: Strategies, Skills and Infrastructure:

<b>Core Partnering Tasks</b>		
<b>Strategies</b>	<b>Skills</b>	<b>Infrastructure</b>
<p><i>Goals Statement</i></p> <ul style="list-style-type: none"> <li>- What are project team members hopes for the project?</li> <li>- How do they want to communicate with one another?</li> </ul> <p><i>Communications Procedures</i></p> <ul style="list-style-type: none"> <li>- What procedures are necessary to attain the Goals?</li> </ul> <p><i>Conflict Resolution Process</i></p> <ul style="list-style-type: none"> <li>- How, specifically, will people resolve inevitable conflicts?</li> </ul>	<p><i>Training to improve:</i></p> <ul style="list-style-type: none"> <li>- Trust and mutual understanding, Valuing differences</li> <li>- 1-on-1 communications to               <ul style="list-style-type: none"> <li>- set a tone in everyday communications</li> <li>- enable people to resolve issues on their own</li> </ul> </li> <li>- Group communications skills               <ul style="list-style-type: none"> <li>- for running meetings</li> <li>- for problem-solving</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>- <i>Methods for organizing and documenting communications including:</i> <ul style="list-style-type: none"> <li>- RFI management</li> <li>- RFI logs</li> <li>- meeting minutes</li> <li>- meeting agendas</li> <li>- daily on-site meetings</li> <li>- senior organizational meetings</li> <li>- documentation methods</li> <li>- everyday project methods and tools</li> </ul> </li> <li>- <i>Groupware computer software</i></li> </ul>

## Why Partnering Is Necessary

To many, the need for and benefits of Partnering are obvious. Others wonder why, after so many years of getting along without it, Partnering is necessary now. Partnering is necessary because it addresses a number of serious, complex problems that have become more pressing in recent years.

- *Litigation.* As in many businesses, costly litigation plagues many design and construction projects. Partnering can provide the structure, skills and a forum to resolve conflicts easily, before they get serious enough to become lawsuits.
- *Project costs.* Ineffective project communications directly impacts project costs and the profitability of the firms working on the project. Few architecture firms make a profit on the construction phases of a project, usually because of ineffective communications. Engineering and contracting firms and the client also frequently lost money because of ineffective project communications resulting in re-work, mistakes, low quality and lack of coordination. Partnering provides tools to improve the communications aspects of a job and reduce the resulting costs.
- *Fragmentation of the design and construction industry.* The design and construction industry has traditionally been rigidly divided into different trades and professions. In recent years these divisions have become even stronger and more finely delineated as some firms find economic rewards in specialization. New technologies have further fueled this trend. Dividing tasks into small pieces results in some efficiencies but also can pit the pieces against each other. The design and construction industry has worked much more at dividing itself than in putting itself back together. Every project faces problems whose solutions could best come from concerted, coordinated efforts of the divided trades and professions. Partnering can provide a forum for that coordination, bringing the different players together to address project-wide problems.
- *Complex, changing client organizations.* In their own efforts to trim costs and improve productivity, many client organizations are undergoing far-reaching cutbacks and changes. These changes, particularly striking in large corporations and government agencies, make for a problematic client for design and construction. People and responsibilities change, continuity breaks, momentum stops. Partnering does not eliminate client change but it does help the project team manage client involvement by creating procedures, policies and practices that can weather client organizational turmoil.
- *Design, construction, engineering and real estate organizations face new challenges.* As clients become more productive, design, construction and real organizations must keep up if not stay ahead. This is a real challenge for firms

and organizations that historically have lagged in using effective cost management and productivity tools.

Partnering provides participating firms with in-depth exposure to new management ideas and methods. Partnering also can bring to light internal issues in participating firms, thus providing some insight into key internal issues to address.

<b>Why Partnering Is Necessary</b>	
<b>Issue</b>	<b>Partnering Impacts</b>
- Litigation	- Partnering provides strategies, skills and forum to address and manage conflicts before they become serious enough for litigation
- Costs of poor communications: <ul style="list-style-type: none"> <li>- re-work</li> <li>- coordination</li> <li>- poor quality</li> </ul>	- Partnering provides tools for to improve communications effectiveness
- Task fragmentation in the design and construction industry. Some project problems cross trade and professional lines	- Partnering provides forum, structure and skills to address project-wide problems and issues
- Changing, complex client organizations, especially large corporations and government agencies	- In its methods, procedures, policies and documents, Partnering provides continuity to weather client organizational change
- Design, engineering, construction and real estate organizations face new challenges	- Partnering can shed light on important internal issues, and provide in-depth exposure to new ideas and practices

## **What Partnering Does: Clarifying And Managing Communications**

Two subsequent chapters of this text explore in detail the benefits and impacts of Partnering for the project, the project team members and the client. Here it is important to more briefly describe how Partnering works, what Partnering does.

Partnering clarifies and manages project communications. Partnering manages project communications in much the same way that people already manage project scheduling, technical, craft and professional tasks:

- *Surface and clarify.* Project management involves getting project team members to surface and clarify what they are going to do and when they are going to do it so that others can plan and schedule their own work. Partnering involves getting people to surface and clarify their information needs and requirements.
- *Commit.* Project management involves getting people to commit to task completion dates and levels of quality and effort. Partnering asks project team members to commit to carrying out tasks of communication.
- *Coordinate.* Project management involves coordinating the task efforts of different members of the project team. Partnering involves coordinating their communications.
- *Control.* Project management is an effort to control the overall progress and quality of the project. Partnering attempts to exert some control over project communications. Partnering also differs from project management in some very important ways stemming from the fact that Partnering involves managing communications:
- *Intangible.* While project management results in products that are tangible, communications is an intangible. One of the things Partnering does is to make communications more tangible in the form of procedures, processes and documents.
- *Subjective.* In project management it is clear whether a task has been completed on time or not. The quality of communications, however, is much more subject to individual interpretations and differences. Partnering does not eliminate subjectivity but attempts to get people to be clearer and more specific in their use of terms that can be interpreted in different ways.
- *Group control.* While one person or one firm often has the responsibility for coordinating tasks and scheduling in project management, the project team as a group functions as the decisionmaker in Partnering. Project team members take responsibility and decide for themselves how they want communications to take shape on the project.

<b>What Partnering Does: Managing Project Communications</b>	
<b>Similarities To Project Management/ Both Partnering And Project Management:</b>	<b>Differences From Project Management</b>
- Surface and clarify information	- Partnering works with intangibles and subjective issues
- Elicit and clarify individual commitments	- Partnering commitments are voluntary
- Coordinate individual action	- Partnering involves the group in coordinating itself
- Exert more overall control on the project	- Partnering controls come from the project team

## **Is Partnering Really Necessary/ When Is Partnering Useful?**

The American Institute Of Architects, the Association Of General Contractors and the American Consulting Engineers Council all endorse Partnering. Some federal, state and city agencies include Partnering as part of the standard requirements in bid package on large projects. Several state legislatures are considering requiring Partnering as a part of any new projects. Clearly, then, many people think Partnering is worthwhile.

Instead of attempting to answer the more ideological question of whether Partnering is necessary, we address the more specific issue of when partnering is beneficial. Conditions that make Partnering especially beneficial follow from the preceding section.

"When is Partnering Useful?" is really a cost-benefit question. In other words, when do the benefits of Partnering justify the costs? It may also be more productive to ask "How much and what kinds of Partnering will be useful?" rather than the more general question of when Partnering is useful. The more specific question can help design Partnering to meet the needs of a specific project.

Two previous sections of this chapter, on What Partnering Does: Clarifying And Managing Communications and Types Of Partnering, provide the foundations for answering the question about when Partnering is useful. Knowing what Partnering does and about the various kinds of Partnering efforts make it more possible to determine when it will be worthwhile to initiate a Partnering program.

In addition, it is important to ask the question as it is here, "When Is Partnering Useful?" Some people begin with the questions "Will Partnering solve all of the project's problems?" or "Can Partnering change the personality of the people on the project team?" or "Will Partnering eliminate problems?"

While the answers to these more global questions is a resounding "No," the answer to the question "When is Partnering useful?" is "Most of the time." After all, determining whether Partnering is useful really reduces to a simple time-and-effort calculation:

-Does the time and effort spent on Partnering pay for itself in improvements in the project?

When project budgets get up into the hundreds of thousands of thousands of dollars, and the potential costs of conflict, delays and miscommunications keep pace, the cost of a few workshops is minuscule in comparison.

A final factor in determining the cost-benefit ratio of Partnering involves understanding what Partnering actually costs. Two factors contribute to the costs of Partnering:

- Direct costs of workshops. These costs include a conference room, the cost of materials (from \$0 to \$20 per person) and a facilitator. Professional facilitators charge between \$500 and \$3,500 per day depending on their level of experience and skill. A typical fee

for facilitators with extensive experience and skill is usually in the \$1,500 to \$2,500 range per day. (Many facilitators also conduct and charge for between a half-day and a day of preparation/ interviewing.)

- "Contributed costs" of participants' billable time. Usually these costs add up to a sum considerably larger than the direct costs of the workshop.

Overall, then, the total direct costs of typical workshop can be in the range of \$2,000 to \$3,000, a sum that is minuscule when compared to project budgets or to the potential costs of conflict or miscommunications.

Beyond these general considerations, we have identified nine different situations in which we have found Partnering to be worthwhile:

- *Large client organization.* A large client organization, e.g. a large corporation or a government agency often means different players will be involved in design and construction. Partnering can clarify who has responsibility for what and provide procedures for occasions when people contradict one another.
- *Multiple clients.* Projects have multiple clients when one organization pays the bills but another organization occupies the building, or when several organizations pay and occupy. Government work often involves multiple clients, and often with unclear authority and responsibilities. Whenever a project has multiple clients, Partnering provides a forum in which communications tangles and overlaps can be resolved.
- *Client in transition.* Client organizations that are getting reorganized, re-engineered, downsized or otherwise changed pose several communications challenges Partnering can address. Partnering helps clear up some of the client's internal ambiguity and provides continuity of procedures even individuals change jobs and responsibilities.
- *Politicized client.* If people in the client organization are jockeying for position, status and power, their battles will be reflected in project communications. Partnering helps clarify the battles and declare a truce around the project. Whenever any of the other members of the project team (architect, engineer, contractor, subcontractors, etc.) are organizations that are large, politicized or in transition.
- *Government involvement.* Government design and construction personnel have wrongly earned a bad reputation. The real villain in government involvement in design and construction is usually not the people but the legacy of unwieldy procedures and rules they must live with. If government agencies are involved in a project in any way (as potential regulators, funders, tenants, clients) Partnering can help clarify the ambiguity and soften the inflexibility they often (are forced to) represent.
- *"Forced marriages."* Many projects bring together firms that are unfamiliar with working with one another, and many of these "forced marriages work out well. Some, however, bring together firms whose work methods, people or styles of

- doing business are incompatible. Partnering can help the parties in these to hammer out the specifics of a working relationship.
- *Complex design/ new technologies/ difficult project.* Sometimes even a small project becomes a candidate for Partnering if the work of the project is difficult or complex. These projects demand more communications and more problem-solving in order to translate the design into a building. Partnering can help provide the strategies and skills to strengthen the communications necessary for effective problems-solving and information sharing among firms involved with the project.
  - *Highly visible projects.* Some people like an audience, others find that being watched increases the pressure of work that is already difficult and causes them to make mistakes they would not otherwise make. When construction projects are watched, either by the public or by a corporate client, things often go the same way. If the public or the client organization has a high level of interest in a project, Partnering can help in two ways
    - Provide a means to make internal communications and problem-solving on the project as effective as possible.
    - Manage the flow of information outside project team members. Partnering can help the team sort out who communicates what, and when, to the outside constituent. If the project team thinks it would be useful, Partnering also provides an organized, controlled forum to bring the outside constituent into the project so they can see for themselves what is going on and participate in a manageable way.

## When Is Partnering Useful?

Wherever Partnering provides a forum to surface and clarify ambiguity and confusion in client organizations:

- Large client organizations, e.g. corporations and government agencies
- Multiple clients
- Client organizations in transition, going through downsizing, rightsizing, reorganizations, culture change, etc.
- Politicized client organizations
- When any other member of the project team (architecture, engineering, contracting firms) fit any of the above descriptions
- When government agencies are involved (as client, builder or regulator)
- When the contract creates forced (and unlikely) marriages of firms on the project team
- When the design is difficult. Complicated design/ New technologies/ Difficult project
- When the project is highly visible in the community professions, or trades