



Canada BIM Council (CanBIM) Forum May 29, 2011

Allan Lowe Construction Partnering & Project Scorecards™ (a division of *Allan Lowe & Associates Inc.*) specializes in construction partnering and monitoring services on large, complex construction projects. The formal partnering process is proven to increase collaboration, mutual respect and trust between participating parties. It enables the team to understand each others' challenges, develop mutual project goals, proactively anticipate and resolve problems, and avoid or minimize disputes through informal conflict management procedures.

Allan Lowe Construction Partnering & Project Scorecards™ developed *Project Scorecards™* to develop and monitor *Project and Partnership Success Goals* on construction projects throughout the life of the project. *Project Scorecards™* are now mandatory on many construction projects.

CanBIM Forum Question:

"We are looking for suggestions from members on what would be the key points for a "Handover to Contractor" protocol for a BIM. The Technical Committee is planning on developing a standard that could be populated to the industry..."

Allan Lowe Construction Partnering & Project Scorecards™ Posting:

An important key point for a "Handover to Contractor" protocol for a BIM project is to ensure that everything possible is done to maximize the levels of collaboration between all project team members. BIM technologies are proven to offer almost unimaginable benefits to the architecture, engineering and construction industries in the delivery of major projects.

The ability to share detailed information through the technologies is immense – however, while the technological benefits of BIM are proven and well recognized, the people and processes side of collaboration on the project are less recognized but also very important.

It is vital that the team has a solid understanding of all key players, their issues, concerns and other key factors well beyond the "technical" part of their interactions on a BIM project.

As Paul Wilkinson (*BIW Technologies*) stated in his presentation "The Extranet Evolution – Construction Collaboration Yesterday, Today and Tomorrow" (see www.publicserviceevents.co.uk/ppt/cpm09-paul-wilkinson.pdf), successful collaboration on construction projects is 80% dependent on people and processes, and only 20% dependent on the relevant technologies.

While there have been great strides in the BIM community in the area of the technologies, it appears that there has been less time and effort spent on the “people and processes” side of the equation despite the fact that successful collaboration is 4 times more dependent on people and processes than on the technology.

Mike Whaley, Director of Preconstruction Services, J.H.Findorff & Son Inc., recently wrote in *AECbytes* (“*There Is No “I” in IPD!*”) that based on their experience there is a strong need for an organized / structured TEAM building process as part of the project plan. The elements of TEAM are:

- **Trust** – commitment that we were all working together
- **Enthusiasm** – that this was an exciting group of people to work with, and that it was a good project
- **Appreciation** – of the various skills that everyone brought to the project
- **Mutual Respect** – often based on previous project experience

At the “Handover to Contractor” phase of a construction project, the concerns of both Mr. Wilkinson and Mr. Whaley can be very successfully addressed and achieved by including a formal construction partnering process as part of the handover. Note that I list this **as a process**, and **not just a one-time event**.

The formal partnering process will start with a “Kick-off Partnering Session”. It is mandatory that the partnership items discussed and agreed upon at the initial partnering session be monitored, maintained and updated throughout the life of the project.

During the “Kick-Off Partnering Session”, the “people and processes” part of the collaboration equation will be addressed in a face-to-face meeting of the relevant stakeholders representing the owner(s), the architect/consultant(s), the contractors/subcontractors, and other relevant stakeholders that have a significant impact on the success of the project. The TEAM elements identified by Mr. Whaley will also be addressed head-on.

Typical items addressed during a well facilitated partnering session on large, complex projects include:

- Mutual respect of team members
- Trust
- Key milestones to build accountability to on-time delivery
- Understanding of team members’ backgrounds and skills
- Setting of mutual project goals
- Organizational lines of authority and reporting
- Organizational challenges and needs
- Team communications flows
- Key project challenges
- Structured problem solving to address key project challenges
- Issue resolution process / ladder
- Celebrations of achievements
- Partnering monitoring processes throughout the project
- Lessons learned from prior projects

These items can all be addressed in a single day with a professionally facilitated partnering session. This represents a good investment, and is proven successful. In **Allan Lowe Construction Partnering & Project Scorecards™** partnering sessions over the years, feedback from over 1,400 workshop participants indicates the following levels of benefit to participants achieved during a “Kick-Off Partnering Session”:

- The participant benefitted from the partnering session – 88%
- The organization benefitted from the partnering session – 90%
- The project will benefit from the partnering session – 93%
- Overall effectiveness of partnering session – 92%

The importance of following up on a successful partnering session throughout the life of the BIM project cannot be overstated. Partnering monitoring should be conducted at least bi-monthly and appropriate follow-up actions taken. (We have developed Project Scorecards™ for precisely that purpose). In some cases, a follow-up workshop will be the best way to deal with concerns. Whatever tool is used, it is vitally important to continuously monitor the state of the partnership on the project.

In summary, *while the benefits of using BIM as a method of delivery on large complex projects are significant and proven, BIM’s emphasis as stated above has been primarily to capture the many benefits of technology. However, team collaboration is also a very important part of the success equation on all large, complex projects and can be greatly enhanced by a comprehensive construction partnering program.*

Incorporating a formal construction partnering process as part of the “Handover to Contractor” should be considered on all BIM projects.

