



Typical Construction Partnering Agenda Items



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Partnering For Success...

TYPICAL CONSTRUCTION PARTNERING SESSION AGENDA ITEMS

“Three-fourths of the miseries and misunderstandings in the world will disappear if we step into the shoes of our adversaries and understand their view point.”

Gandhi

No two projects are the same! And that means that **no two Construction Partnering Sessions are the same.** While several common agenda items that are typically covered in most Partnering Sessions, the agendas will vary depending on the nature of the project, the familiarity or lack of familiarity between the key project stakeholders, the complexity and specific challenges for the project, and many other factors.

All Allan Lowe Construction Partnering & Project Scorecards™ Partnering Session Agendas are designed specifically for each Partnering Session after consultations with the key stakeholders.

We consult with the client(s) to learn details of the project, project scheduling and duration, client specific concerns about the project, any existing relationships between the construction team members / organizations, and other pertinent information. We determine what the team needs to achieve at the Partnering Session, and establish an agenda that will meet the clients' needs and can be completed within the allocated time frame of the Partnering Session.

Below is a listing of **typical agenda items** for **Executive and Team Construction Partnering Sessions**. Each potential agenda item includes an explanation of the purpose of each item and what can be achieved when the team works through the item.

Consider these as **a menu of potential agenda items to select from**, depending upon your specific project.

Executive Partnering Session Agenda Items

For many projects it is beneficial to hold an **Executive Partnering Session** in advance of the Team Partnering Session (see ***Construction Partnering Benefit Evaluation Tool*** to determine when a project can benefit most from holding an Executive Partnering Session in addition to the Team Partnering Session).

Executive Partnering Sessions are especially valuable to the project when:

- The organizations have not previously worked together on a project
- The project is very complex with significant risks
- There is the potential for major problems on the project

- The schedule is long term
- The project is politically sensitive
- The project is in the public eye

The **objectives of Executive Partnering Sessions include:**

- To develop commitment at the senior level to establishing a partnering relationship and conduct the project in a partnering environment
- To develop and use partnering tools and processes on the project
- To convey the senior level commitment to partnering to the rest of the team members
- To commit to monitoring the partnering on the project for the duration of the project and take actions as necessary to maintain partnering on the project

Executive Partnering Sessions are often held **the day or evening prior to the Team Partnering Session**. The Executive Sessions generally take between two and four hours to complete.

Executive Session Agenda Item	Purpose / Want to Achieve
Introductions	<ul style="list-style-type: none"> • Brief introductions of Executive Team members
Project Vision Development	<ul style="list-style-type: none"> • The Executive Team discusses and develops a “big picture” Vision of the what the project will be / achieve upon its successful completion
Project and Partnership Success Goals Concept	<ul style="list-style-type: none"> • The Executive Team discusses the concept of developing mutual Project and Partnership Success Goals that will benefit the project and the partnering relationships for the duration of the project • The Executive Team generally identifies the key Project and Partnership Success Goals from their perspective; however, the project team will confirm / ratify any Executive Team goals and develop additional goals in the Team Partnering Session • These goals will comprise the majority of the Partnering Charter • Allan Lowe Construction Partnering & Project Scorecards™ provides examples and information on typical Project and Partnership Success Goals proven to contribute to successful projects and partnerships. This expedites this process; however, the goals are developed and customized by the team members for each specific project

Executive Session Agenda Item	Purpose / Want to Achieve
Organizational Challenges / Concerns on Project	<ul style="list-style-type: none"> • The Executive Team members identify the greatest challenges / concerns that their organizations face on the project and ensure that all team members understand these challenges / concerns
Issue Resolution Process	<ul style="list-style-type: none"> • Discussion of planned / contractual Issue Resolution Process • Development of Issue Resolution Ladder and guidelines / rules for the team
Celebrations of Success / Achievements	<ul style="list-style-type: none"> • Discuss and develop potential celebrations to recognize successes and goal / milestone achievements on the project
Partnering Monitoring	<ul style="list-style-type: none"> • The Executive Team discusses and agrees on processes to monitor the Project and Partnership Success Goals on an ongoing basis for the duration of the project • Generally includes the use of Project Scorecards™ and other tools to use on an interim basis between Project Scorecards™
Team Session Presentation Preparation	<ul style="list-style-type: none"> • The Executive Team members prepare for their presentation to the rest of the team at the upcoming Team Partnering Session

Note: To determine **if your project would benefit from an Executive Partnering Session**, it is recommended that you complete the *Construction Partnering Benefit Evaluation Tool*, available at www.allanlowe.com - Resources Section

*“I’m not concerned with your liking or disliking me...
all I ask is that you respect me as a human being.”*

Jackie Robinson

Team Partnering Session Agenda Items

Consider the following listing of Team Partnering Session agenda items as *a menu of potential agenda items to select from*, depending upon your specific project.

These agenda items will also vary if there has been an Executive Partnering Session held prior to the Team Session.

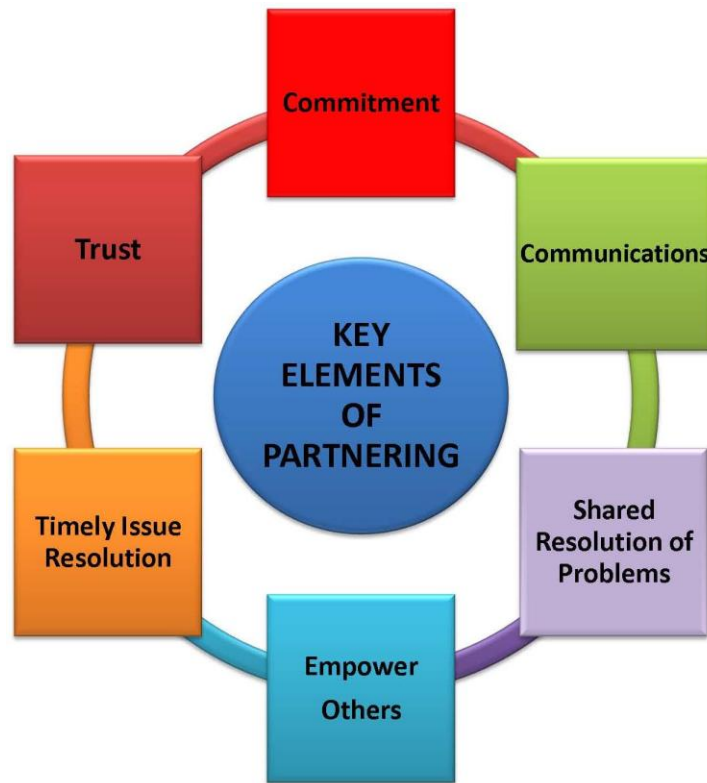
Team Session Agenda Item	Purpose / Want to Achieve
Kick-off Meal or Refreshments	<ul style="list-style-type: none"> • Start the day off on a positive note • Meetings work better with proper nutrition • Serves as a relaxing informal gathering for team members
Opening Comments	<ul style="list-style-type: none"> • Welcoming comments by senior representatives from each organization • Sets the tone for the session and demonstrates senior representatives' and organizational commitment to the partnering concept, the Partnering Session, and the intent to build the project in a partnering environment
Partnering Overview Presentation	<ul style="list-style-type: none"> • PowerPoint presentation and discussion outlining key points about partnering, the upcoming Partnering Session, and keys to having a successfully partnered project
Introductions	<ul style="list-style-type: none"> • Brief introductions of all Partnering Session participants including participant name, company, role on the project, and main interests outside of work • Gives greater understanding to all participants' role on the project • Gives insights to each person's "outside" interests, outside of the project • Starts to have people understand and relate to each other and relaxes the atmosphere for the rest of the Partnering Session and on the job • An important part of the workshop

Team Session Agenda Item	Purpose / Want to Achieve
Project Overview	<ul style="list-style-type: none"> • Brief overview of current status of project and upcoming future work • Generally given by owner, consulting engineers or architectural firm • Provides focus for all participants, regardless of their current level of involvement with the project
Group Workshop Norms	<ul style="list-style-type: none"> • Team develops and mutually agrees on group workshop norms to ensure a cordial, effective Partnering Session • Provides a mutually agreed upon atmosphere and behavior expectations for all parties
Project Vision Development	<ul style="list-style-type: none"> • The team discusses and develops a “big picture” Vision of the what the project will be / achieve upon its successful completion • Can help to expand people’s paradigms of what they are actually building and the importance of this project • Gets people’s thinking “outside of the details” of the project and looking at the “bigger picture”
Project & Partnership Success Goals Development	<ul style="list-style-type: none"> • Participant team members develop mutual Project and Partnership Success Goals that will benefit the project and the partnering relationships for the duration of the project • These goals will comprise the majority of the Partnering Charter • Later in the session Partnering Monitoring of the status of these goals for the duration of the project is discussed • Allan Lowe Construction Partnering & Project Scorecards™ provides examples and information on typical Project and Partnership Success Goals proven to contribute to successful projects and partnerships. This expedites this process; however, the goals are developed and customized by the team members for each specific project

Team Session Agenda Item	Purpose / Want to Achieve
Organizational Lines of Authority and Reporting	<ul style="list-style-type: none"> • Each organization identifies their lines of authority and reporting for this project. • Questions and discussions as required • <i>Pre-Work is completed to expedite this portion of the Partnering Session</i>
Organizational Challenges / Concerns on Project	<ul style="list-style-type: none"> • Each organization reports on the greatest challenges / concerns that their organization faces on this project • Very important part of the Partnering Session; this helps each other organization AND individual better understand each other organizations' challenges / concerns • Questions and discussions as required • <i>Pre-Work is completed to expedite this portion of the Partnering Session</i>
Key Project Challenges / Project Risk Analysis	<p>This is a very important component of the Partnering Session!</p> <ul style="list-style-type: none"> • Key Project Challenges are identified and agreed upon by the organizations • Facilitated discussions on each challenge with participation by the whole group <p>OR use of a Structured Problem Solving process...</p> <ul style="list-style-type: none"> • In groups developed to address specific challenges, the team members clarify the challenges, identify potential strategies and action plans to eliminate / reduce / mitigate the challenges • Presentation of recommended strategies and action plans to the overall team and discuss / refine / agree upon <p>OR development of a Project Risk Registry...</p> <ul style="list-style-type: none"> • A Project Risk Registry is developed with input from all team members. This process includes identifying potential risks, the probability of each risk occurring, a scaled rating on the impact of each risk on the project (e.g. cost, schedule, etc.), and a numerical ranking of each potential risk. Mitigation strategies are then developed by the team members, and a lead organization / person identified to monitor and minimize each risk

Team Session Agenda Item	Purpose / Want to Achieve
Team Communications Flow	<ul style="list-style-type: none"> • Discussions and diagramming of overall communications protocols and linkages between the different organizations on the project.
Trust	<ul style="list-style-type: none"> • The team identifies what trust means to them and key factors to develop and maintain trust for the duration of the project
Issue Resolution Process / Ladder	<ul style="list-style-type: none"> • Discussion of planned / contractual Issue Resolution Process • Development of Issue Resolution Ladder and guidelines / rules for the team • Discussions and questions as required
Team Communications Matrix	<ul style="list-style-type: none"> • Development of a Team Communications Matrix, outlining which individuals talk to other individuals from each organization, on a hierarchical level • May be associated with the Issue Resolution Ladder • May be assigned \$ values or types of issues for each level
Roles and Responsibilities	<ul style="list-style-type: none"> • Discussions of the roles and responsibilities for each organization, and in some cases individuals within the organizations • <i>Pre-Work is completed to expedite this portion of the Partnering Session</i>
This Time Next Year	<ul style="list-style-type: none"> • Each organization gathers together and is asked to envision one year into the future, when the project and partnership has been hugely successful • Each organization is asked to identify, for each other organization, actions that they are glad the other organization DID do, and actions they're glad the other organization DIDN'T do that contributed to the success of the project and the partnership • This process provides very good guidelines for each organizations' actions in the upcoming year that will benefit the project and the partnership
Holding Successful Project Meetings	<ul style="list-style-type: none"> • The team identifies actions / processes / behaviours that will contribute to successful Project Meetings

Team Session Agenda Item	Purpose / Want to Achieve
Partnering Monitoring	<ul style="list-style-type: none"> • The team agrees on processes to monitor the Project and Partnership Success Goals on an ongoing basis for the duration of the project • Monitoring is VERY important to measure the pulse of the project and the partnership on an ongoing basis. • Generally includes the use of Project Scorecards™ and other tools to use on an interim basis between Project Scorecards™
Celebrations of Success / Achievements	<ul style="list-style-type: none"> • Discuss and develop potential celebrations to recognize successes and goal / milestone achievements on the project • Key process to maintaining good morale for the duration of the project • Important to establish at Partnering Session, as celebrations are very important and are often overlooked once the team gets immersed in the busy day-to-day project demands
Partnering Champions	<ul style="list-style-type: none"> • Identify key individuals from each organization to ensure that the partnering relationship is carried forward and monitored for the duration of the project
Lessons Learned from Prior Projects	<ul style="list-style-type: none"> • Gather wisdom from team members on practices / processes that have contributed to prior successfully partnered projects
Team Commitment to Partnering	<ul style="list-style-type: none"> • Final agreement among team members on their commitment to completing the project in a partnered environment
Signing of the Partnering Agreement	<ul style="list-style-type: none"> • Formal recognition of agreement to achieve the Project and Partnership Success Goals and other commitments made during the Partnering Session • The signatures are included in the Partnering Charter
Final Thoughts and Thanks	<ul style="list-style-type: none"> • Each organization and key players summarize their thoughts of the Partnering Session and the project and partnership moving forward



"I don't like that man. I must get to know him better."

Abraham Lincoln

Allan Lowe Construction Partnering & Project Scorecards™ is committed to providing construction owners, architects, engineers and contractors of large complex construction projects with Construction Partnering information, tools, processes, and services to improve their projects and their project teams' effectiveness and enjoyment of working on these projects.

*For additional information on Construction Partnering and Project Scorecards™, contact **Allan Lowe Construction Partnering & Project Scorecards™**:*

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