

# Partnering 101



An Introduction to Partnering by International Partnering Institute

## What is Partnering?

Partnering is a formal process that can be applied to any design and construction project. Every project must overcome issues and unique challenges. Partnering helps ensure that issues are resolved in a timely way and the team is held accountable for following through on commitments throughout the project. As mutual goals are achieved, trust accumulates, and the project generates momentum.

### Objectives:

*Successful Partnering reduces project schedules and costs and eliminates change orders and claims.*

## What is the Process?

Typically, the team convenes for a pre-construction workshop and for regularly scheduled follow-up workshops over the course of the project. A Facilitator is normally used to improve the quality and productivity of the discussions. The size and complexity of the job will help determine what Partnering principles should be applied to help ensure project success.

### In the Pre-Construction Meeting, Teams will co-create:

- Goals Statements outlining objectives (on-budget, on-time, quality, safety) and key deadlines
- Communication Plan describing how, when and what team members discuss on the project
- Issue Resolution Process to help team resolve conflicts to mutual satisfaction without litigation

### In Follow-up Workshops, participants:

- Review goals to ensure team is honoring commitments and making action plans for new issues
- Dedicate time to issue resolution and identifying upcoming issues in the project
- Update Issue Resolution Processes to ensure they are working for the entire team
- Invite key stakeholders and subcontractors to participate as they phase in and out of project

### Objectives:

*Regular and focused meetings promote accountability, open dialogue, and a project-first attitude.*

## What are the Best Practices?

In an effort to improve project outcomes, some government agencies, such as Caltrans, now include Partnering as a contract requirement. Some of their best practices include:

1. **Professional Neutral Facilitators** to improve the quality and productivity of each meeting. Neutrals bring experience from many projects and provide perspective on your toughest issues. Contact IPI for a list of Qualified Facilitators.
2. **Executive Sponsorship** is required so the team is empowered to resolve issues in the field. Partnering works when the team settles disputes in real time. If the team reaches an impasse, work continues while the specific issue moves up the Issue Resolution Ladder.
3. **Regular Project Surveys** to ensure accountability throughout project.
4. **Training in the Fundamentals of Partnering.**

### Objectives:

*Teams following Best Practices enjoy predictable project outcomes and opportunities for creative issue resolution and value engineering.*

### International Partnering Institute (IPI)

*IPI was founded in 2009 and is a 501(c) 3 non-profit charity. IPI conducts research to capture partnering concepts and techniques that develop high trust relationships and organizational cultures for the delivery of construction projects, and provides education and certification in those concepts and techniques. IPI is funded by revenue generated from member contributions, seminars and educational resources. Why reinvent the wheel? Join IPI, gather lessons learned, and support our mission to make change the culture of construction!*

## Who uses it?

IPI Owner Members working on construction culture change:  
Arizona DOT  
Caltrans  
City of Walnut Creek  
City of San Jose  
CCTA  
EBMUD  
Federal Transit Authority  
Fresno County  
Maryland SHA  
Nevada DOT  
OCTA  
ODOT  
PG&E  
SFO Int'l Airport  
SF DPW  
SF PUC  
SF P&R  
Sacramento Regional Transit District  
SANDAG  
USACE – Baltimore Dist.  
USACE – Norfolk Dist.  
Utah DOT  
Utah Transit Authority  
Ventura County  
Virginia DOT  
And many others

## Why Partner?

- Opens Communication
- Streamlines Issue Resolution
- Reduces Change Orders
- Eliminates Claims
- Improves Schedule
- Improves Safety
- Improves productivity

## For More info:

Visit  
[www.partneringinstitute.org](http://www.partneringinstitute.org)  
or call (925) 447-9100