



# **John L. Martin Partnered Project of the Year**

**2024 Award**

## **Application Process & Guidelines**

*Contains expanded application instructions and information  
Judges are seeking when evaluating Applications.*

**Projects Completed: January 1 through December 31, 2023**

**Application Deadline: February 2, 2024, 11:59:59 pm PST**

**Submit electronically to: [internationalpartneringipi@gmail.com](mailto:internationalpartneringipi@gmail.com)**

**Subject Line: 2024 IPI Awards - \*Project Name\***

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## **PURPOSE**

The International Partnering Institute's Partnered Project of the Year Award is an annual recognition of completed projects that best exemplify the principles of partnering. The purpose of the award is to celebrate successes, share lessons learned and best practices, and to acknowledge the collaborative efforts of teams who achieve extraordinary results through Partnering.

## **BACKGROUND**

IPI is a 501(c)3 non-profit charitable organization. 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, educational resources, and certification.

## **PARTNERING DEFINITION**

Collaborative Partnering is a structured process that, through consistent application, develops a culture of collaboration through which construction project teams:

- Co-create project goals and strategies to meet them.
- Measure progress toward goals.
- Resolve issues and disputes.
- Identify barriers and opportunities for project success.
- Gather lessons learned from the project upon closeout.

Tangible deliverables of the Collaborative Partnering process include a charter (with core and project-specific goals and a signature page), an issue resolution process, action plans and commitments, and evaluation methods.

## **BENEFITS**

In addition to being honored at the IPI Awards Ceremony, winners will be recognized as leaders in Partnering excellence and for their contribution to continuous improvement and effectiveness of Partnering as a business process.

At the Conference, winners will receive information regarding strengths and opportunities that will drive continued improved effectiveness of their business, and network with peers in the industry committed to Partnering excellence.

## PARTNERED PROJECT OF THE YEAR AWARD CATEGORIES

IPI Partnered Project of the Year Awards are granted to Projects in three budget categories and two construction sectors.

### Budget Categories

- Category 1 - Project Budget less than \$25 Million
- Category 2 - Project Budget between \$25 and \$250 Million
- Category 3 - Project Budget over \$250 Million

### Construction Sectors

#### Civil Construction:

Highways/state routes, freeways, roads and streets, including reconstruction, expansion or widening of existing roadways, bridges, interchanges, overpasses, road tunnels, transit or light rails, etc.

#### Buildings/Infrastructure:

Buildings, infrastructures, new and renovation, historic restoration, renovation or other facility related construction projects.

## ELIGIBILITY REQUIREMENTS

To be eligible, the project must meet the following criteria:

- Utilized a structured Partnering process in accordance with the IPI Model.
- Been completed between January 1 and December 31 of the previous year.
- Be nominated by the Owner, Designer, Contractor, Construction Manager, Facilitator or Third-Party Stakeholder.

## AWARD PROGRAM GUIDELINES

### Award Process

The award process is led by the IPI Awards Committee. The Committee establishes standards for awarding winning projects. Judges are volunteers from all walks of the construction industry with an in-depth understanding of construction Partnering. They review applications and determine the level of recognition awarded to applicants. Submittal requirements and judging criteria is open for review by applying entities. Award recipients are recognized each year at the annual International Partnering Institute's Awards Ceremony.

### Steps

1. Award applications are reviewed for eligibility and adherence to guidelines.
2. Eligible applications are then reviewed against the criteria and scored.
3. Judges for an individual category and sector meet to discuss recipient information and results, and make final recommendations for awards.
4. Awards are presented at the IPI Awards Ceremony.

## SUBMITTAL INFORMATION

### Submittal Application

Send an electronic copy (PDF) of award application via email to:  
[internationalpartneringipi@gmail.com](mailto:internationalpartneringipi@gmail.com)

### Application Deadline

February 2, 2024, 11:59:59 pm PST

**Applications received after the deadline will not be accepted.**

## APPLICATION FEE

### Application Fee

Category 1: **\$500**

Category 2: **\$750**

Category 3: **\$1000**

The Application Fee includes admission for 2 persons (Owner and Prime Contractor) to the IPI Conference and Awards Ceremony, and 3 Project Awards (Owner, Prime Contractor, and Facilitator).

### Donations

Tax deductible donations are appreciated and help fund operations, research and bringing Partnering to all sectors of the construction industry.

## BILLING AND PAYMENT INFORMATION

### Billing

Applicant will be billed the Entry Fee plus additional donation if indicated. An invoice will be sent electronically to the identified person at the email address shown on the Application Form.

### Payment

Payments may be made by ACH, credit card or check. Submit payment after invoice is received. Make checks payable to: **International Partnering Institute**

### Questions

Contact IPI at 925-447-9100, or [ed@partneringinstitute.org](mailto:ed@partneringinstitute.org)

## AWARD STATUS

Project teams will be notified in April as to whether their project team has won an award. However, the specific level of the award will not be disclosed until the IPI Awards Ceremony.

## ADDITIONAL AWARDS FOR TEAM MEMBERS

Members of winning teams may purchase additional awards for their team members. Details will be provided in the Award Status notification.

## APPLICATION PREPARATION GUIDELINES

Applicants are required to complete the IPI Application Form following these guidelines and application process. Applicants shall use only the electronic IPI Application Form provided and follow the format for the additional pages. Since each project presents unique challenges and resulting solutions, emphasis on certain aspects in the application may differ for each project. To allow each team adequate space to tell their story, large form fields (spaces) in the application have been provided for written responses. Applicants are encouraged to answer each question with clear, complete and concise information while relating their project story. Scoring is based on content and not on length of reply.

The Judges' Scoresheets parallel the application format, aiding the Judges in reviewing and scoring the applications. Judges will carefully score the application based on the responses given, weighing it against the established criteria, and select the winning Projects based on the completeness, quality and clarity of the application.

### Project Summary

The purpose of the Project Summary is to allow teams to tell their story and to familiarize the Judges with the project before commencing their evaluations for an award. It also provides a project overview suitable for future publication. Number of sentences is a suggestion. However, maximum length is 2-page. Include the following information as it applies to your project.

- General Scope of Work for the Project (1-3 sentences)
- Project delivery method (1 sentence)
- Frequency of partnering sessions (3 sentences)
- Major challenge, outcome and lessons learned
- Innovations implemented
- Savings in schedule, budget, and labor
- Role partnering played in overcoming obstacles
- Project champions and their contributions

## Partnering Results Questions

The purpose of the following is to expand on the questions shown on the Application Form, and to guide the Applicant in providing information Judges will be seeking when Applications are reviewed and scored.

### 1. How Did You Partner This Project? (15 points)

- a. Did you use a Professional Neutral Facilitator?

*If the project did not use a neutral facilitator or was self-facilitated, submit for a Collaborative Award. See IPI website for Collaborative Project Application information and form.*

- 1) Number of sessions?
  - 2) Specify if a kick-off session, interim follow-up sessions, and a closeout lessons learned session were held. Were these sessions facilitated?
- b. Did the project use Surveys?
- 1) If so, how many did your team use?
- c. How did your team follow-up on survey findings?
- 1) If applicable, include an example of a change the team made based on survey findings.

### 2. Partnering Goals and Outcomes (35 points)

- a. What were the team's project-specific goals relative to scope, schedule, quality, safety and budget?
- b. Were partnership's goals updated or amended throughout the project?
- 1) Provide details and explain why.
- c. What were the outcomes of your goals?
- 1) Did the project exceed expectations in terms of scope, schedule, budget, safety, quality, personal fulfillment, etc.?
  - 2) If the project exceeded expectations, provide details.
  - 3) Provide your Partnering Charter or Agreement in the appendix. Include signature page, core goals, project-specific goals, etc.

### 3. Issue Resolution Process (25 points)

- a. Describe issues your team overcame through Partnering.
- b. What was your team's issue resolution procedure? Provide examples.
- 1) In addition to Partnering, did you use a DRA/DRB, Facilitated Dispute Resolution, or other form of ADR to resolve a disputed issue? If yes, provide details.
- c. Estimate the value of issues resolved in terms of cost and schedule.

### 4. Partnering and Teamwork (15 points)

- a. Did partnering help you create a team environment and build relationships?
- 1) Describe those relationships and how you maintained them.
  - 2) Examples: BBQ, bowling, volunteering, and other activities.

- b. Where were the public, third parties and other stakeholders engaged and how?
  - 1) Did Partnering help you create a strategy to inform, educate and engage the public, third parties, and other project stakeholders?
  - 2) Describe those relationships and how they were maintained.
- c. Provide specific examples of how Partnering added value for the team and stakeholders, including end-users.

**5. Innovations and Lessons Learned (10 points)**

- a. Did your team amend or innovate the partnering process as the project advanced, and if so, how?
- b. Did your team develop an innovation that could be considered a “best practice” to other collaborative partnering teams and may be worthy for consideration of an Innovation Award by the Judges?
- c. What were your Lessons Learned related to the Partnering process and how will you use them to improve future projects?

**6. Member Participation (3 points)**

- a. If application is signed by the Owner, Prime Contractor, CM, Designer, and Neutral Facilitator; and for each IPI member in good standing, an additional point (3 maximum) may be awarded.
- b. Digital signatures are acceptable.

**Project Outcomes**

The purpose of Project Outcomes is to gather information for research to increase the body of knowledge on Construction Partnering and develop tools the industry can use to improve project delivery. Research and development are critical for innovation, and to identify trends in construction, in collaboration, and in how these intersect. More information may be found on the IPI website: <https://partneringinstitute.org/research/>

**SUBMITTAL FORMAT**

- Cover Page:
  - Photo and graphics may be used.
- Table of Contents:
  - Follow Order of Information. Limited to 1 page.
- Section Dividing Page:
  - A dividing page separating sections is encouraged.
- Application Form:
  - Fill-in information; both drop-down boxes and fill-in fields are provided.
  - Fill-in fields include “Rich Text Formatting” (Bolding, Italics and Underline), regular text, numbers and dates.
  - Length of fields is limited.
    - Project Summary allows 2 pages.



- Answers to questions allows space appropriate for responses.
- Attachments:
  - Project Stakeholders (no limit on number of pages). Delete unused pages.
    - Applicant may use the attached list, or the list developed for the project.
  - Exhibits (maximum of 5 pages) such as press clippings, related special event material, photos, charts, graphs or tables to highlight results and a glossary of terms as needed.
  - Copy of the Charter/Partnering Agreement attached including signature page (if applicable), core and project-specific goals.
  - Copy of the Partnership Survey Form/Evaluation Tool.
- Layout:
  - Font: Arial, 10 pt., excluding Headings and Titles
  - Line Spacing: 1.0
  - Margins: ½ inch
- Organization of Information and Maximum Number of Pages Allowed:

○ Cover Page	1
○ Table of Contents	1
○ Application Form	
▪ Application Information	
▪ Project Summary	
▪ Team Members	
▪ Partnering Results	
▪ Project Outcomes	
○ Attachments	
▪ Project Stakeholders	No limit
▪ Exhibits	5
▪ Partnering Charter or Agreement	No limit
▪ Partnership Survey Form/Evaluation Tool	No limit

## DOWNLOADING FILL-IN AWARD APPLICATION FORM

Use Adobe Acrobat Reader program to facilitate downloading and filling-in the Application Form. Adobe Acrobat Reader is available at no cost from the Adobe website.

### • **Step 1: Get Adobe Acrobat Reader**

If you don't already have it, download and install Adobe Acrobat Reader from Adobe.com. If you already own a paid version of Acrobat, that version should work as well. There are known issues with non-adobe PDF viewer programs in internet browsers, therefore it's best not to use a browser like Firefox, Chrome, etc. (or Preview on the Mac) to fill, save or view Adobe forms. Please note that the free version of Acrobat Reader often comes bundled with free one-month trial software such as McAfee Anti-Virus. If you already have an anti-virus program, installing a second one

on top of it may cause your computer's performance to slow noticeably. You do not have to install the free trial software; un-check the boxes next to those items during the installation of Acrobat.

- **Step 2: Download and rename form**

Download the Application Form and rename it.

- **Step 3: Open and fill the form with Adobe Acrobat**

Your computer might be set up to use another program as the default for opening PDFs. Right-clicking and selecting “open with” or “open with another program” will usually get you to where you can choose Acrobat as the program to open the form. If you like, you can change the preferences in your operating system to use Acrobat as default, but it's not necessary at this time. Fill out the form fields first, and leave the signing for last.

- **Step 4: Sign your form**

After filling out the required information on your Application form using the “Submittal Format” instructions, your signature is required as the Preparer. Click on the signature box and follow the prompts that Acrobat provides. If you do not already have an Adobe Digital Signature, you will need to configure one at this time. Acrobat will prompt you for the necessary information and you will need to create a password for your signature. We recommend saving your signature (Digital ID) as a file to your personal computer for later use.

- **Step 5: Route your form for individual signatures one-at-a-time**

If team members will be signing the form, you must send the form as an email attachment to each of these people one at a time. After receiving the signed version of the form from the first person, save it to your computer and then attach that signed version to the email for the next signature. There's no method to combine separately signed forms, so do not send the form to everyone at once. Every person in the chain must use Adobe Acrobat for each step. Help them by including the instructions below under “Signing Using Digital Signatures” in your email.

- **Final Step: Return the completed application form**

Send the completed version of the form to the email provided on the Award Application Process & Guidelines.

## **SIGNING USING DIGITAL SIGNATURES**

You will use Adobe Acrobat Reader program to sign the attached Application form. Before downloading the attachment, following the steps below. Adobe Acrobat Reader is available at no cost from the Adobe website.

- **Step 1: Get Adobe Acrobat Reader**

If you don't already have it, download and install Adobe Acrobat Reader from Adobe.com. If you already own a paid version of Acrobat, that version should work as well. There are known issues with non-adobe PDF viewer programs in internet browsers, therefore it's best not to use a browser like Firefox, Chrome, etc. (or Preview on the Mac) to fill, save or view Adobe forms. Please note that the free version of Acrobat Reader often comes bundled with free one-month trial software such as McAfee Anti-Virus. If you already have an anti-virus program, installing a second one on top of it may cause your computer's performance to slow noticeably. You do not have to install the free trial software; un-check the boxes next to those items during the installation of Acrobat.

- **Step 2: Download and rename Application Form**

Download the Application form and rename adding your name to the form filename to make it easily recognizable as yours.

- **Step 3: Open and fill the form with Adobe Acrobat**

Your computer might be set up to use another program as the default for opening PDFs. Right-clicking and selecting "open with" or "open with another program" will usually get you to where you can choose Acrobat as the program to open the form. If you like, you can change the preferences in your operating system to use Acrobat as default, but it's not necessary at this time.

- **Step 4: Sign your form**

Click on the signature box and follow the prompts that Acrobat provides. If you do not already have an Adobe Digital Signature, you will need to Configure one at this time. Acrobat will prompt you for the necessary information and you will need to create a password for your signature. We recommend saving your signature (Digital ID) as a file to your personal computer for later use.

- **Final Step: Return the completed application form**

Make sure you have saved the signed form using your name as part of the filename. Send the signed form back to the Preparer.

## **DISCLOSURE**

All submitted material becomes the property of the International Partnering Institute's Partnered Project of the Year Awards Committee and may be used in education, marketing and promotion for the awards program. Project information and materials may be used by IPI in future publications.

## APPLICATION TIPS

- Submit the application by the deadline.
- Start the application early and complete it before going back to review and polish it.
- The fill-in application has formatted text, numbers and dates. The fill-in fields have “Rich Text Formatting” (Bold, Italics and Underline available) and limited length.
- You may find it easier to prepare the information using a Word document, and copying the final information into the application’s fill-in fields. Note that the fill-in fields have formatting limitations. You will not be able to change the font size or color. Additionally, tables and columns will lose formatting when copied over from another document. For paragraph breaks, use a hard return.
- Charts, tables, figures, etc. may be inserted in the Exhibits. Provide a reference to it in the response.
- Prior to beginning the application process, review the criteria and possible number of points for each response.
- The application must include all the elements requested above to be considered. In cases where scores are close, the quality of detail within the application may be the deciding factor. The information included should be concise, well-articulated and with sufficient detail to describe how partnering made a difference in the outcomes of the project. If a question does not apply to your project, state so in the reply.
- Provide examples throughout the application. Examples are a descriptive and concrete way to demonstrate how your project was exceptional.
- Before and after pictures are a great way to showcase specific elements of your project. Keep in mind that pictures must be supported by the write-up you provide.
- Have your partners look over the materials you prepare for additional comments or insights. Buy-in from principal stakeholders may strengthen your application.
- A panel of judges who may have no previous exposure to your project will review and evaluate your project write-up. The judging panel for each project category is made up of experienced and qualified professionals who can only evaluate what you present.
- Any inconsistencies between your description and other project elements may lead to lower scores. IPI staff may follow up with you prior to judging your application to clear up any confusing elements of the application. We strongly encourage you to take that opportunity to clarify and give your project the best possible chance at winning!

**Good luck!**