



INTERNATIONAL PARTNERING INSTITUTE (IPI)  
STANDARD PARTNERING SPECIFICATION  
AVIATION CONSTRUCTION (LEVELS 1-5)

**DIVISION 1 - PARTNERING REQUIREMENT AND PROCESS**

SECTION 1 - GENERAL

The purpose of this specification is to outline a structured process designed to develop a collaborative environment for your project so that communication, coordination, and cooperation are the norm. This Collaborative Partnering approach will aid issue resolution and will lessen impacts on project budget, schedule, and quality.

(This Owner) works in a collaborative and cooperative manner with all project stakeholders including the Prime Contractor or Design/Builder (Contractor), all subcontractors, all project architects, and engineers; material suppliers, specialty consultants, vendors, representatives of other agencies and the community at large. Partnering is our way of doing business. In executing the contract associated with this specification, each stakeholder agrees that they will actively and enthusiastically participate in the Collaborative Partnering process defined here. Contractor agrees that all subcontractors, material contractors and other entities within its contractual control will participate in the Partnering process as required. Contractor will make this a specific contractual condition for all sub-contractors, material suppliers, and other entities working on this project. The Architect and/or Engineer for this project and any other consultants engaged in this project have agreed to participate in the Partnering process as defined here.

Formal Collaborative Partnering for this project will start within 30 days of the Notice to Proceed and will include these elements (defined in Section 3):

1. A mutually agreed, IPI Certified Professional Partnering Facilitator
2. A "Partnering Charter", which includes the joint development of goals
3. A periodic, joint evaluation process
4. Executive Level, Core Team, and Stakeholder Partnering
5. A Partnering Follow-up Plan to resolve potential problems at the lowest possible level
6. Key project leaders are IPI Certified Project Leaders



39 Participation in the formal Partnering process defined here will not void any contract  
40 part. All rights and remedies defined by the final contract will be preserved.

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42 SECTION 2 - DESCRIPTION

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44 A. Definitions

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46 1. Project Team: the group of people and organizations who are executing a  
47 construction project and who have influence on the outcome. The Project Team is  
48 comprised of the Owner/Owners Rep, the Owner's Consultants, the Contractor,  
49 the Designer, the sub-contractor(s), and other stakeholders including  
50 Government agencies, tenants, materials suppliers, concessionaires, and third  
51 parties affected by the construction project.

52

53 2. Partnering: an effort by the Project Team to develop joint goals and to establish a  
54 cooperative atmosphere regarding execution of the construction project,  
55 regardless of delivery method.

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57 3. Multi-Tiered Partnering: For large, complex projects, the participants in partnering  
58 workshops will be divided into subgroups: Executive Level, Core Team, and  
59 Stakeholder Level.

60 a. Executive Level Partnering: workshops involving Executive representatives  
61 from the Owner, Contractor, and key Subs who serve as a "project board of  
62 directors" to steer the project.

63 b. Core Team Partnering: workshops involving the central group responsible for  
64 the successful execution of the project as well as key individuals who are on  
65 the project throughout its duration. Typically, field-level Project Managers  
66 (PMs) and Superintendents from the owner, contractor, design, subs, key  
67 third-parties and stakeholder groups attend these sessions. Representatives  
68 from Executive Level Partnering should also attend to ensure commitments  
69 and follow through.

70 c. Stakeholder Level Partnering: workshops that include those internal and  
71 external stakeholders who own, operate or maintain the new facility and  
72 external stakeholders who can directly influence the project outcomes such  
73 as maintenance, facility operators, key suppliers, funders, utilities, and  
74 internal units (e.g. hydrology, soils, traffic, etc.)

75



76 4. Project Team Leaders: Project Managers (PMs) from both the Owner and  
77 Contractor who are accountable for the day-to-day operations of the project and  
78 are responsible for leading the partnering effort. They will also be in charge of  
79 coordinating project Partnering meeting times, selecting meeting locations and  
80 other logistics.

81

82 B. The Goals of Partnering are:

- 83 1. Use early and frequent communication with project stakeholders.
- 84 2. Develop and maintain a relationship based on shared trust, mutual respect and  
85 commitment.
- 86 3. Identify, quantify, and support attainment of co-created goals.
- 87 4. Establish strategies for implementing risk management concepts and identify  
88 potential project efficiencies.
- 89 5. Use timely communication and decision-making.
- 90 6. Resolve potential problems at the lowest possible level to avoid negative impacts  
91 on the project.
- 92 7. Hold periodic partnering meetings and workshops throughout the life of the  
93 project to maintain the benefits of a partnered relationship.
- 94 8. Establish periodic joint evaluations of the partnering process and attainment of  
95 mutual goals.

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98 **SECTION 3 – PARTNERING IMPLEMENTATION**

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100 **Partnering will be initiated and implemented in accordance with the IPI Aviation Matrix**  
101 **(see full size matrix p. 11)**  
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IPI Aviation Construction Project Partnering Scalability Matrix							
Scale your Partnering: In order to determine the level of Partnering that you should apply to your construction project, take a moment to collaboratively assess your project risk factors. The higher the risk, the more intensive your Partnering efforts should be. When in doubt, scale your Partnering efforts upward to set your project up for success; you can always scale it back down once the project is underway.							
Level	Project Value	Complexity	Risk Factors*		Desired Level of Engagement	Recommended Partnering Structure and Elements	Expected Benefits and Approximate Cost to Owner**
5	Very Large/Mega (airport terminal, hotels, parking structures, etc.) (\$250M-\$500M+)	Highly Technical and Complex Design and Construction, Public Private Partnership	High Visibility/oversight Significant strategic project	Relationships New Project Relationships including: new contractors, sub-agencies, third-parties, CM, PPP, high turnover rate of subs or other high potential for conflict (strained relationship, previous litigation, or high probability of claims)	Very High	Professional neutral facilitator Key project Leaders are IPI Certified Project Leaders (required) Project charter Multi-tiered Partnering (executive- core team - stakeholder) Monthly Partnering meetings (design through construction) Special task Forces for specific issue resolution Stakeholder on-boarding/off-boarding Subcontractor on-boarding/ off-boarding Monthly surveys Executive sponsorship Field-level decision making Dispute resolution ladder Facilitated dispute resolution	Very high accountability, Issues tracked and decisions made timely, Momentum maintained as progress continues in spite of issues that arise  Approx. \$20,000 - \$25,000/qr.
4	Large (new design, new contracting method [D/B, CMAR, or other], or challenging rehabilitation/renovation) (\$25M-\$250M)	High Complexity (short timeline/schedule constraints, uncommon materials, new supply chain, baggage handling, controls projects, aircraft bridge, etc.)	Probable - Organizational image at stake	Public Private Partnership (PPP), multi-prime contract, new contractors or CM, new subs/relationships	High	Professional neutral facilitator Key Project Leaders IPI Certified Project Leaders (required) Project charter Multi-tiered Partnering (executive- core team - stakeholder) Quarterly Partnering meetings (design through construction) Stakeholder on-boarding/off-boarding Subcontractor on-boarding/ off-boarding Monthly surveys Executive sponsorship Field-level decision making Dispute resolution ladder Facilitated dispute resolution	More timely decision-making in field, Stakeholders phased in and out, Designers involved throughout process  Approx. \$10,000-\$15,000/qr.
3	Medium (\$10M - \$25M)	Increased Complexity	Likely, depending on the size of the client and place of importance	Established relationships New CM, subs, agencies, or other key stakeholders	Moderate/High (seeking risk mitigation and project efficiencies)	Professional neutral facilitator Key project Leaders are IPI Certified Project Leaders (recommended) Quarterly partnering meetings Project charter Monthly scorecards Executive and core team Partnering Executive sponsorship Field-level decision making Inclusion of stakeholders Dispute resolution ladder Facilitated dispute resolution	Increased predictability, Reduced (zero) claims, Improved safety, Improved schedule, On or under budget  Approx. \$5,000 - \$10,000/qr.
2	Small (\$5M - \$10M)	Moderate Complexity (ongoing operations)	Unlikely, unless in a place of importance	Established relationships New subs New Agencies New Stakeholders	Moderate (seeking risk mitigation and project efficiencies)	Professional neutral facilitator for kick-off (minimum) Project charter 2 Project surveys (minimum) Executive sponsorship Field-level decision making Inclusion of stakeholders Dispute resolution ladder Facilitated dispute resolution	Increased predictability, Reduced (zero) claims, Improved Safety, Improved Schedule, On or under budget  Approx. \$5,000 - \$10,000/qr.
1	Micro/Short Duration (\$0-\$5M)	Standard Complexity	Unlikely, unless in a place of importance	Established relationships New subs New agencies New stakeholders	Low to Moderate for small budget and/or short timeline projects, Partnering can reduce risk and focus on project efficiencies	Professional neutral facilitator optional Project charter Executive sponsorship Field-level decision making Inclusion of stakeholders Dispute resolution ladder Facilitated dispute resolution	Increased predictability, Reduced (zero) claims, Improved safety, Improved schedule, On or under budget  Approx. \$1,000 - \$7,000/qr.
			*Risk factors will vary by project. Though these are the most common, additional factors should be considered if necessary.		**Cost of facilitation based on \$6,000/day and \$750 per scorecard Please note that daily rates for facilitators can vary widely		

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105 **A. Selecting an IPI Certified Professional Neutral Partnering Facilitator**  
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107 **For Levels 5, 4, 3, and 2 projects and high risk Level 1 (Micro) projects**

- 108  
109 1. The Contractor agrees that an IPI Certified Independent Professional Neutral  
110 Partnering Facilitator (Facilitator) will be retained to facilitate the project  
111 Partnering process. Professional Facilitation is required by the Owner for any  
112 project larger than \$10M and will be used regularly throughout this job (outlined  
113 in Section 3 - Part D).  
114



- 115 2. (Owner/Owner's Rep), Designer/Architect, and the Contractor Rep will  
116 cooperatively select a Facilitator that offers the service of a monthly partnering  
117 evaluation survey with a 5-point rating scale and agrees to follow IPI's  
118 "Partnering Facilitator Standards and Expectations" available at [The IPI](#)  
119 [Partnering Toolbox Website](#).

121 B. IPI Certified Project Leaders

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- 123 1. Key project leaders are to be IPI Certified Project Leaders. This includes:
- 124 a. For Levels 5 and 4 Projects, all Project Managers, Superintendents, and  
125 Inspectors, from the owner, contractor, designer, Construction Manager, and  
126 key Subcontractors (subs providing 10% or more of the work), are required to  
127 hold a valid IPI Project Leader Certification.
- 128 b. For Level 3 Projects, all Project Managers, Superintendents, and Inspectors,  
129 from the owner, contractor, designer, Construction Manager, and key  
130 Subcontractors (subs providing 10% or more of the work), are recommended  
131 to hold a valid IPI Project Leader Certification.
- 132 2. Certifications are valid for 3 years from the time of issuance.
- 133 a. Information and application for the IPI Project Leader Certification can be  
134 found at <https://PartneringInstitute.org/Project-Leader-Certification>.

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136 C. Partnering Initiation

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- 138 1. To initiate the Partnering arrangement, the Project Team will conduct an open  
139 discussion prior to the start of the job to select the Facilitator. It is expected that,  
140 at the conclusion of the initial discussion, the parties will express a consensus  
141 regarding, the Facilitator and, among other things, the respective goals in  
142 completing the contract.

143

144 Thereafter, the Project Team will continue discussions as necessary and will  
145 conduct periodic joint evaluations of performance throughout the life of the  
146 contract as outlined below. It is expected that the parties will use the services of  
147 the Facilitator not only at the initial partnering workshop, but also to assist in later  
148 discussions.

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- 150 2. In leading the ongoing Partnering effort, Project Team Leaders will schedule the  
151 initial partnering workshop. All relevant stakeholders will be expected to attend  
152 and participate.



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- The Project Team Leaders will also:
- a. Identify the initial suitable workshop site and duration. Note that it is typical for Level 1 and 2 projects to have between 8 and 25 attendees and for Level 3, 4, and 5 projects to include in excess of 40 to 50 individuals.
  - b. Come to consensus on other workshop administrative details.
  - c. Agree to additional partnering workshops and sessions throughout the life of the project. Frequency will be determined by (Owner/Owner's Rep) as outlined in Section 3.D.2.c. However, it is expected that there will be at least quarterly partnering workshops that will involve all relevant stakeholders.
  - d. Agree to conduct a project close-out partnering workshop.
  - e. Agree to document lessons learned as a condition of final project acceptance.

#### D. Developing the Partnering Charter (All Levels)

In implementing project partnering, the project team will agree to create a "Partnering Charter" that includes the agreed-on mutual goals, the Partnering Follow-up Plan, the Partnering Dispute Resolution Plan, and the signed Team Commitment signature page, explained in detail below:

- 1. Agreed-on mutual goals, which will include the core project goals and may also include project-specific goals and mutually supported individual goals.
  - a. The mandatory core goals are that the Project is constructed (at minimum):
    - i. On time
    - ii. On budget
    - iii. Safely
    - iv. Quality Met
  - b. Optional project-specific goals include – win a Partnering Award, team trust, excellent communication with local community (zero complaints), effective communication with Media, mitigation of project risks (e.g. environmental requirements met, stakeholder interests understood and managed, etc.).
- 2. The Partnering Follow-up Plan
  - a. Attendees:

For Levels 5 and 4 Projects, Partnering will be established in three groups:

    - i. Executive Level: Executive Representatives from Owner, Prime, and key Subs - role is to steer the project.



- 191           ii. Core Team: Project Managers and Superintendents working at the field-  
192           level from owner, contractor, design, subs and key third-parties and  
193           stakeholder groups.
- 194           iii. Stakeholder Level: Identifying key trades, staged subcontractors and  
195           tenants prepared for scheduling work and later, building activation  
196           (concessionaires, security, IT, external stakeholders, etc.).  
197
- 198           b. For Levels 3, 2, and 1 Projects, Partnering will be established in two groups:  
199           i. Executive Level: Executive Representatives from Owner, Prime, and key  
200           Subs – role is to steer the project.  
201           ii. Core Team: Project Managers and Superintendents working at the field-  
202           level from owner, contractor, design, subs and key third-parties and  
203           stakeholder groups.  
204
- 205           c. Frequency of Partnering Sessions:  
206           For Levels 5 and 4 Projects, the team will conduct joint Partnering Meetings  
207           at these intervals:  
208           i. Through Design: Quarterly or at key milestones (e.g. Schematic Design,  
209           Design Documents, and Construction Documents).  
210           ii. Through Construction and Building Activation: Monthly Partnering  
211           Sessions with the Executive, Core Team, and Stakeholder Level.  
212           iii. For Design/Build, CM at Risk, or other delivery methods, frequency may  
213           increase over the course of the project.  
214
- 215           For Level 3, 2, and 1 Projects, the team will conduct joint Partnering Meetings  
216           at these intervals:  
217           i. Through Design: Quarterly or at key milestones (e.g. Schematic Design,  
218           Design Documents, and Construction Documents).  
219           ii. Through Construction and Building Activation: Quarterly Partnering  
220           Sessions with the Executive and Core Teams as needed.  
221
- 222           3. Partnering Dispute Resolution Plan (All Levels)  
223
- 224           The goal of the project Dispute Resolution process is to prevent conflicts from  
225           hindering project momentum and causing slowing the project down. It is the  
226           Owner's expectation that issues not effectively settled at the Field Level will  
227           elevate according to the Dispute Resolution Ladder (sample below). The goal is  
228           that project momentum can be maintained while a decision is reached by the



229 next layer of Project Management, who can rely on a broader project perspective  
230 in decision making.

231  
232 The Dispute Resolution process is bisected into two-sections, Project Team-  
233 driven Dispute Resolution and 3rd party Driven Dispute Resolution. As the  
234 Project Team progresses from less formal to more formal dispute resolution  
235 processes, it is important to understand that decision-making shifts from the  
236 project team, to 3rd party experts. The team will be expected to select and  
237 document planned Dispute Resolution processes during the kick-off Partnering  
238 session. (Please visit the IPI Partnering Field Guide for a detailed explanation of  
239 the various forms of Alternative Dispute Resolution).

- 240  
241 a. Project Team Dispute Resolution
- 242 i. Field-Level Negotiation
  - 243 ii. Dispute Resolution Ladder
  - 244 iii. Facilitated Dispute Resolution (FDR) is a meditative process where the IPI  
245 Certified Construction Partnering Facilitator (Facilitator) helps the team  
246 negotiate disputed issues. In FDR, the Project Team discusses project  
247 issues and the Facilitator serves as a Neutral, offering opinions and  
248 providing settlement options. Often, Project Teams are provided 20 days  
249 to conduct this process.(Please refer to Section 5 for details).

250  
251 **Sample Dispute Resolution Ladder**

	Architect/Engineer	Suppliers/Subs	
	<b>Owner</b>	<b>Contractor</b>	<b>Time to Elevate</b>
<b>Level I</b>	Assistant Supervisor or Engineer	Foreman	End of shift
<b>Level II</b>	Project Superintendent or Project Engineer	Superintendent, General Foreman, or Project Manager	Up to 1 day
<b>Level III</b>	Construction Manager	Project Manager Area Manager	1 week
<b>Level IV</b>	Project Director or Program Manager	Area Manager Owner	2 weeks
<b>Level V</b>	Director of Facilities Department or Manager of Capital Programs	Owner	2 weeks
<b>Level IV</b>	Board of Directors or Supervisors	Owner	<b>Select next form of Alternative Dispute Resolution (Typically FDR followed by the DRA/DRB)</b>

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- 253           b. 3rd Party-Driven Dispute Resolution
- 254           i. Dispute Review Board or Dispute Resolution Advisor – a panel of
- 255           construction experts review a claim and render a non-binding, 3rd party
- 256           decision to the Project Team. Additional time is granted to the team to
- 257           engage in this process and make final decision.
- 258           ii. Mediation – Prior to Litigation, a Project Team may elect to attempt
- 259           Mediation, a voluntary, consensual, and confidential process involving
- 260           attorneys and a 3rd Party Neutral with expertise in Dispute Resolution
- 261           and/or Construction Litigation.
- 262           iii. Arbitration – Prior to litigation, a Project Team may elect Arbitration, a
- 263           short-form, contracted, dispute resolution option, where Parties in dispute
- 264           present to a panel of 3 subject matter experts who render a final decision
- 265           with limited appeal options.
- 266           c. Litigation
- 267           i. Mini-Trials: short form Court Preceding for claims litigation that attempts to
- 268           reduce cost of full civil trial.
- 269           ii. Traditional Civil Trial.
- 270
- 271           2. Team commitment statement and signature document.
- 272
- 273   E. Partnering Evaluation
- 274
- 275           1. Owner, contractor, major sub-contractors, architects and engineers, and major
- 276           stakeholders will participate in monthly partnering evaluation surveys to measure
- 277           progress on mutual goals and short-term key issues as they arise.
- 278           a. Partnering Evaluations will be collected by Facilitator.
- 279           b. Results will be shared with project team (best practice is on a monthly basis).
- 280
- 281           2. Owner, Contractor, major sub-contractors, and major stakeholders will evaluate
- 282           the partnering facilitator using IPI Forms (IPI-E1 and IPI-E2). The
- 283           (Owner/Owner’s Rep) will provide the evaluation forms to the project team and
- 284           collect the results.
- 285
- 286           3. (Owner/Owner’s Rep) will make evaluation results available upon request.
- 287
- 288           4. Facilitator evaluations must be completed twice:
- 289           a. At the end of the **initial partnering workshop** on Form IPI-E1.



290 b. At the end of the **project close-out partnering workshop** on Form IPI-E2.

291

292 SECTION 4 – PARTNERING PAYMENT

293

294 A. The (Owner/Owner’s Rep) agrees to pay:

295 1. 100% of cost for:

296 a. Facilitator workshop and session-based costs

297 b. Monthly partnering evaluation survey service cost

298

299 B. Payment amount will be based on invoice prices minus any available or offered  
300 discounts. Owner/Owner’s Rep will not pay markup on these costs.

301

302 C. (Owner/Owner’s Rep) does not pay for wages, travel expenses, or other costs  
303 associated with the Partnering workshops and sessions, monthly partnering  
304 evaluation surveys, and IPI Project Leader Certification.

305

306 SECTION 5 – PARTNERING DISPUTE RESOLUTION

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308 A. (Owner/Owner Rep) will encourage the project team to use all forms of Project  
309 Team-Driven Dispute Resolution prior to engaging a neutral 3rd party. When the  
310 Project-Team is unable to resolve the issue, a Facilitated Dispute Resolution (FDR)  
311 session may be an effective method for clarifying issues and resolving all or part of a  
312 dispute.

313

314 B. In order to ensure the project team has sufficient time to plan and hold an FDR  
315 session, a maximum of 20 days may be added to the Dispute Review Board (DRB)  
316 referral time following the Owner’s written response to a supplemental notice of  
317 potential claim.

318

319 C. In order to be granted this additional referral time, the project team must document  
320 its intention in to use FDR in the Dispute Resolution Plan of the Partnering Charter.  
321 The team may also document agreements for other associated criteria to be met in  
322 order to access the additional referral time in the Dispute Resolution Plan. If no  
323 session is held, the DRB referral time will remain in effect as specified in the Dispute  
324 Resolution Plan (See Section 3- part C for details).

325

**End of Specification**

Standard Partnering Specification  
Aviation Construction (Levels 1-5)



IPI Aviation Construction Project Partnering Scalability Matrix							
Scale your Partnering:							
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