

Hire a Facilitator through the Contract Change Order (CCO) Process

It seems that there are two priorities when it comes to contracting for your professional partnering facilitators. The first is to make the process as easy as possible. The second is for the process to allow the team flexibility in selecting their professional partnering facilitator.

Use the Contract Change Order (CCO) Process

Over the past twenty years, CCO's have become the traditional way of paying for facilitators by most public agencies. We believe that this is the best vehicle as it is both the easiest method and allows the team flexibility. The CCO process is easy because it already exists in virtually every contract. The team already knows how to execute a CCO and so there is little learning curve. The CCO process also provides flexibility for the team to select the facilitator they desire and pay them as they use them. There is no cumbersome additional contract for the facilitator that has to be managed by the team. And the scope of work really does not warrant a separate new contract with the agency. (To the right is some sample language for what you might include in your contracts.)

Sample – Partnering Payment

- A. (Owner) will pay contractor 100% of the costs of facilitation and workshop site costs **through a contract change order**.
This includes:
1. 100% of partnering workshops and sessions based on facilitator and workshop site costs.
 2. 100% of periodic partnering evaluation survey service cost.
 3. 100% percent of Partnering skills development trainer and training site costs.
 4. Rental for an offsite location if determined to be necessary by the parties who selected that partnering facilitator.
- B. Payment amount will be based on invoice prices minus any available or offered discounts. (Owner) will not pay markup on these costs.
- C. (Owner) does not pay for wages, travel expenses, or other costs associated with the Partnering workshops and sessions, monthly partnering evaluation surveys, and training in partnering skills development.

- IPI Partnering Specification

Lessons Learned

We have seen that owners who use a Request for Proposal (RFP) or Request for Qualification (RFQ) process for selecting their facilitator(s) struggle.

Typically teams want to quickly find a single facilitator for a particular project. Some Owners trying to develop a pool of facilitators, or to select a facilitator for a project, have used an RFP or RFQ process. The problems are two-fold: First, both RFP and RFQ require a lot of administration on the part of the owner in order to select facilitators - and second, it often occurs without the contractor's input. The contracting process is typically cumbersome and time consuming for both the owner and facilitator, creating many hurdles for getting the facilitator on board (i.e. additional insurance requirements, several interviews, etc.). You may find that the busiest and most qualified facilitators may choose not to respond. And, the contractor is not there when you are developing your facilitator pool, which means your team may not have access to the facilitator they really want. We have seen Owners who have used RFP's or RFQ's abandon this process for a Change Order process to pay their facilitators.

Get a Proposal from Your Facilitator

As a part of your CCO process we also encourage you to make sure that you get a proposal from your Professional Partnering Facilitator to make sure that everyone is on the same page (cost, scope, process, etc.).

So, take it from the lessons learned by IPI Owner Members-- using a simple Contract Change Order process will allow your team the greatest flexibility to choose the best facilitator for your project.

<https://www.linkedin.com/in/robreaugh/>