

# Partnering Tips & Tricks

## MONTANA PARTNERING PROGRAM

### What is Partnering?

Partnering is a formal commitment to set and reach mutual goals of the project team through collaboration. The results of Partnering include safer projects, efficient issue resolution, claims avoidance, reduction in project costs, reduction in project delays, and increased job satisfaction.

### Kick-Off Meetings:

#### General best practices:

- Both the prime contractor's PM and the EPM lead in project discussion.
- Prime Contractor should invite key subcontractors and suppliers.
- MDT should invite key project stakeholders such as design staff, consultants, public relations firm, materials personnel, and other key project members.
- Use a roundtable style to solicit input and participation from all attendees.
- Document the discussions that take place to recall in future meetings.
- Document attendees with company and contact information.

#### Making conversations project specific:

Prepare visuals of interest (project schedule, specific pages from plans, map of area, photos of area, table of contents from the Special Provisions, etc.

#### Question-of-the-day:

- Cat or Griz?
- What is your ideal steak dinner?
- What did you do this past winter?
- How many years have you worked in Montana?
- What memorable wildlife have you seen on your jobs?
- Who's going to win the Super Bowl?
- What is your favorite candy bar (but of course no bribes allowed)?
- What is the scariest thing you've ever done for fun?
- If you could only eat one thing for the rest of your life, what would it be?
- If you were stranded on an island, what 3 things would you bring with you?

**Weekly Meetings:**

Review weekly goals and risks:

With common/individual goals, values, risks, and more discussed at the kick-off meeting, address how those items apply at this point in the project (safety, change orders, schedule, estimates, environment, etc.).

How is the team doing? Do these items need to be updated?

Group communication:

What will occur this week that requires extra communication? Ensure those who need to contact each other are prepared to do so.

How is the team doing? Do any changes to communication methods need to be made?

**Issue Resolution Ladder:**

Definition and intended use:

The role of the issue resolution ladder is to ensure all project challenges/disagreements are solved at the lowest level possible. If an issue is escalated for resolution, abide by the levels and timeline agreed upon at the meeting. This should look something like the following:

| Ladder Level | Response Time | MDT Contact (Position)   | Prime Contractor Contact (Position) |
|--------------|---------------|--|-------------------------------------|
| 1            | 1 day         | Lead Inspector   | Superintendent/Foreman              |
| 2            | 1 day         | Engineering Project Manager                                    | Project Manager                     |
| 3            | 2 days        | District Construction Engineer or District Operations Engineer | Project Manager                     |
| 4            | 5 days        | Construction Engineer or District Administrator                | Owner or President                  |

**Partnering Surveys/Evaluations:**

When should they be used?

Partnering surveys should be used with each Level 1 Partnering project with a weekly, monthly, or bi-monthly frequency. The partnering program managers will generally be responsible for initiating and compiling surveys from the owner, prime contractor, and subcontractor crews. This may be achieved by email, on-site computers, or with paper handouts. The managers will aid in the discussion of areas of achievement and concern regarding project partnering. Additionally, a project closeout survey will be utilized to gather data regarding the team’s entire project experience.

Partnering surveys are recommended for Level 2 Partnering projects with a monthly or bi-monthly frequency. The project manager and prime contractor’s project manager, with the help of the partnering program managers, will be responsible for initiating and compiling surveys from the owner, prime contractor, and subcontractor crews. This may be achieved by email, on-site computers, or with paper handouts. The managers will aid in the discussion of areas of achievement and concern regarding project partnering, with an objective of improved teamwork and job satisfaction.

Visible Support of Leadership:

The visible support of leadership regarding self/team evaluations is necessary for surveys to be utilized and motivate change over time.

Support by leadership can be shown by:

- Summary emails sent to the project team highlighting areas of success, improvement, or need change. This could include (1) charts or graphs displaying survey information, (2) a statement regarding leadership's goals for Partnering on the project, (3) celebration and recognition of team achievements, or (4) other methods of award/motivation.
- Physical awards for positive improvements during the project.
- Verbal support, asking team members if they filled out their survey this week/month.
- Participating in the survey each week/month.
- Utilize training opportunities that may aid project teams with areas of concern.

Apply the lessons learned:

Partnering surveys are compiled of the agreed upon goals, objectives, and values discussed at the project's kick-off meeting. Acting upon these goals and learning from survey statistics is essential for effective and enjoyable Partnering. It is recommended each crew member and manager approach areas of concern with creative solutions. How can we benefit the project?

For examples of adjustments made in response to survey data, contact MDT's Partnering Program Managers. Information regarding lessons learned and best Partnering practices applied to Montana projects will readily be shared.

**Contact the Partnering Program Managers with any questions/feedback!**

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