Phases of Addressing Project Issues & Concerns

(Pre-Workshop)

Identify issues before Partnering Workshop

Key Project participants define major issues & project concerns (pre-partnering) share relevant information to help customize Workshop.
NOTE: (See Planning for the Workshop Pre-Partnering for Success Document)

Agreements for Pre-Partnering
* Disclosure
* Consequences?
* Plans & Special Provisions
* Red Flags!

(Workshop)

Explain and define the Issue Resolution Process Rules and their importance

Review Guidelines for Issue Resolution

Discuss Team Members roles and responsibilities (what the various roles can and cannot do)

Add, categorize and prioritize issues as needed

Issue Categories:
- Tech or Spec Issues
- Policy Issues
- Admin. Issues
- Business Issues

Specifications or Technical requirements cannot be changed by a committee or by consensus. Appropriate processes must be used to achieve any needed change

Discuss & resolve as many issues as possible in the workshop

Decision makers must be in workshop

Write action plans for any unresolved issues

Action Plan Format

Complete Issue Resolution Ladder Sheet

Review Ladder Form

* Assign names & time frames to the Issue Resolution Ladder Form
* Customize Operational Level

Partnering Workshop Ends

(Post Workshop)

RE/Contractor PM carry on & communicate the Resolution Process for this Project

Resolution Process (Ongoing)
Inform all new personnel on Resolution Process

Hold daily meetings if necessary

Weekly Meetings to include, identify & review issues. Review PEP results monthly. Develop action plans to celebrate or improve

Resolve Operational Issues develop action plans and/or agree to escalate unresolved issues

- Action Plans Completed
- Escalation is in accordance with the Issue Resolution Ladder
- Project team compiles all Escalated Issues for review at Close-out

When a formally escalated issue is resolved, a copy of the results are sent to the Partnering Office for distribution

If appropriate, conduct facilitated problem solving; mediation; field level Partnering Workshops or conduct "How to make Partnering Work in the Field" Class

- Evaluate health of Partnering
- Reinforce Partnering Principles

The Project Close-Out Workshop reports includes comments about the overall Partnering on the project, success stories; lessons learned

- Project Team reviews successes, challenges, lessons learned, escalated issues, Supplemental Agreement Tracking System (SAT's) reports; Plans & Specs Review forms
- Celebration of Team/Individual(s)

The Partnering Office distributes the Close-Out Report to the appropriate offices