

Idaho Transportation Department Construction Partnering Guide

Partnering for Construction Project Success



Your Safety • Your Mobility
Your Economic Opportunity

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What is Partnering?

Partnering is a commitment by at least two parties (e.g., ITD and the contractor) to utilize teamwork and foster positive relationships to ensure a successful construction project. A successful construction project is defined as being delivered with zero accidents, with high quality, on time, on budget, and profitable. The AASHTO Partnering Handbook says the purposes of partnering are for “Establishing open lines of communication, making commitments to solve problems, treating all members of the team with respect, and focusing on the ultimate project purpose. . .” (AASHTO Partnering Handbook, 2018). It takes the entire construction project team to put forth the effort to work together, to seek input from each other to find the best solution to the problems and issues at hand to ensure a successful construction project.

There is also a commitment to address and resolve issues and problems promptly and at the lowest level possible. Partnering does not guarantee that all issues will be resolved; there will be times that a resolution does not occur at the lowest level. This is not a failure of partnering, but the key reason to follow all the partnering steps outlined herein.

Why Partner?

The Idaho Transportation Department (ITD) does not build our highways and bridges; contractors do. ITD is the contract administrator for the work to ensure the work is done in accordance with the contract terms. ITD has a vested interest in ensuring contractors are also successful because without successful contractors, ITD could not deliver on its commitments to the traveling public.

Nearly every construction project has issues to work through and having a highly functioning, collaborative team working on the solutions is beneficial to everyone. Ultimately, it is a team approach that helps to ensure everyone has success and works through issues as quickly as possible, at the lowest level possible without giving up the rights or contractual responsibilities of the parties.

Objectives of Partnering

Partnering continues to be used more often in the public sector to help achieve the following objectives:

- ❖ Safer projects and work zones
- ❖ Lower total project costs
- ❖ Higher quality
- ❖ Increased job satisfaction
- ❖ Building long-term relationships
- ❖ Continuous improvement
- ❖ Reduced delays
- ❖ Profitable project
- ❖ Customer-focused results
- ❖ Claims avoided
- ❖ Innovative problem solving
- ❖ Overcoming extraordinary challenges
- ❖ Effective contract administration
- ❖ Timely completion of project
- ❖ Achieve common goals
- ❖ Issues resolved promptly
- ❖ Ensuring project success

When to Partner?

Every time. ITD includes the partnering specification subsection 104.01 in all projects.

What Level of Partnering Should I Choose?

For ITD, there are two levels of partnering: Formal and Informal.

Formal Partnering: For projects that are larger, longer, more complicated, and that are the most disruptive to the traveling public. These partnering efforts will be led by a professional partnering facilitator and will require significant participation

from ITD and the contractor.

Informal Partnering: For projects that are more routine, less complicated, shorter in duration, and less disruptive to the traveling public. Informal partnering may be led by a Department partnering facilitator or a professional partnering facilitator.

The following table makes additional suggestions on determining a project's need for formal or informal partnering:

Suggested Factors in Selecting Formal or Informal Partnering

Considerations	Formal Partnering	Informal Partnering
Project Scheduled Duration	More than 9 months	9 months or less
ADT through Project	More than 30,000	Less than 30,000
Complexity	Contract requires numerous simultaneous critical path items or simultaneous operations	Single critical path Only sequential operations required
Contract Size	More than \$20 million	Less than \$20 million
Required Traffic Control	Project bypass or detours 2-way traffic on interstate using crossovers Interchange closures	Lane closures Traffic shifts
Nature of the Work	Contract includes: Building work beyond 6 months Bridge replacement or new for more than \$2 million, especially if over railroad or water Pioneering or realignment of roads Accelerated scheduling Night Work Technology new to ITD for more than \$2 million Walls over 10' tall or 50' long	Routine road or bridge work commonly found in ITD contracts.

Who Should Attend the Partnering Meetings?

The meetings must be attended by the contractor's and sub-contractor's key personnel such as the construction manager, project superintendent, project manager and foreman. ITD will be represented by District contract administration personnel such as the design construction engineer, project manager, materials engineer, and project inspectors. Attendees will include subject matter experts such as environmental, geotechnical, or other critical personnel as warranted by project complexity or potential concerns. The facilitator will provide meeting notes from each meeting documenting the issues under review, the issues that have been resolved and agreements made. The meeting notes will be reviewed and accepted by the Engineer.

Kick-off Meeting

Regardless of the level of partnering selected, a kick-off meeting must occur. For formal partnering, this meeting will be separate from the pre-construction meeting, whereas the informal partnering effort may have the kick-off meeting as a precursor to the pre-construction meeting.

A kick-off meeting must at a minimum address the following information:

- ❖ Charter (mission, goals, and guidelines)
- ❖ Communication plan (e.g., frequency, methods)
- ❖ How will success be measured? (e.g., partnering in excellence award)
- ❖ Will a dispute review board (DRB) be used in the partnering process and how will the DRB be used in the process?
- ❖ Contact information (ITD, contractor, subcontractors, facilitator, DRB members if appropriate)
- ❖ Escalation/resolution process
- ❖ Action plans

Interim Partnering Meetings

Throughout the duration of the project, interim partnering meetings will be held. The frequency and estimated number of partnering meetings will be determined at the kick-off meeting. For formal partnering, a minimum of 3 interim meetings per year are expected. Each project will vary, but some considerations are:

- ❖ Daily “stand-up/huddle” meetings the first thing every morning between the inspector(s) and the contractor
- ❖ Regular meetings
- ❖ Each meeting will be documented with the issues under review, the issues that have been resolved, and the agreements made.
- ❖ Additional partnering meetings may be necessary if there have been significant personnel changes, unresolved issues, or when the project is entering a new phase.

Close-Out Partnering Meeting

A close-out partnering meeting is required. At the end of each project, the team will meet to discuss lessons learned, examine ways in which the next project could be improved, and take time to celebrate project successes. With continuous improvement as a focal point, take time to forward suggestions to improve specifications, manuals, and guidance documents on to the appropriate ITD contact.

This is also a perfect time to celebrate the teamwork and consider applying for an excellence in partnering award while the project details are still fresh in the team member’s minds.

Escalation/Issue Resolution Ladder

A successful partnering program has an escalation ladder created to work through and get beyond any issues as they arise. The escalation process will be discussed at the kick-off meeting. The escalation ladder is used to solve issues by partnering and does not relieve either party of contractual obligations or remove either party’s rights.

If the issue regards a subcontractor, the subcontractor is required to attend with the contractor throughout the escalation process.

Each party in this process must understand the other side’s position well enough to be able to explain it to the other party’s satisfaction. This starts at the lowest level and works its way up the escalation process.

An issue is escalated to the next higher level when an agreement cannot be reached at the current level and within the agreed-upon timeline, if the agreed-upon time has been exceeded without resolution, or by request of one or both of the parties at the current level (after first informing the other party).

Level	Days*	ITD	Contractor
1	1	Project Manager/Inspector	Superintendent/Project Manager
2	3	Design Construction Engineer	Construction Manager/Project Manager
3	7	District Engineer	Owner or General Manager

* Recommend time durations. Number of days can be adjusted as determined in the kick-off meeting or as mutually agreed otherwise throughout the project.

If the issue is elevated, the lower levels will be kept involved on an as needed basis. It is important that any resolutions made are communicated down to the originating level, including rationale behind the decision made.

ITD/AGC Excellence in Partnering Awards

Recognizing and awarding successful partnering construction projects is important and will promote the culture of partnering throughout Idaho. The annual ITD/AGC Excellence in Partnering awards is one way we are recognizing the important efforts in Partnering. Award application and submittal process information can be found at this link <https://itd.idaho.gov/itd/?target=excellence-awards>.

This 2023 guide is a product of an AGC member and ITD employee task force to update Idaho partnering.