

## A. Charter for Fitzhugh Retention Basin Project

### 1. Mission.

We commit to profitably construct this project within contract bid amounts in a safe and timely manner, providing for Owner requirements and quality workmanship as defined by contract, and through --

- Cooperation
- Communication
- Trust
- Respect

### 2. Objectives

- a) Maintain effective, timely, and directed communications throughout the project.
  - (1) Each organization prepare and submit a project directory and an organizational chart for this project to the General Contractor.
  - (2) Periodically review communications systems and update as required.
- b) Maintain effective, timely and accurate documentation of project activities and issues.
- c) Prepare and publish accurate long and short term work plans and schedules.
  - (1) Maintain plans and schedules so as to properly achieve mission.
- d) Make timely project payments within the requirements of the contract provisions.
- e) Maintain Owner's operations as required by contract provisions.
  - (1) Owner will communicate operational needs promptly and accurately.
- f) Maintain a clean, safe project site.
  - (1) Be a good neighbor to adjacent businesses.
- g) Close out project cleanly, quickly and effectively.
  - (1) Owner, Engineer of record, and General Contractor prepare and publish close out guidelines.
- h) Prepare, submit and process submittals accurately, fairly, and promptly.
  - (1) Provide schedule of required submittals.
- i) Be a good partner.
  - (1) Follow through on commitments.
  - (2) Be available.
  - (3) Treat each other fairly.
- j) Establish and implement an issue resolution system.
  - (1) Promptly resolve problems at the originating level of management.
  - (2) Involve affected parties in problem discussions.
  - (3) Avoid litigation.
- k) Employ intelligent and timely use of cost/benefit concepts on the project.

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August 30, 1993

Jim Spaulding, P. E., Vice President of Engineering  
Spicer Engineering  
1258 South Washington Avenue  
Saginaw, Michigan 48605-1689

Dear Mr. Spaulding

**Re: Fitzhugh Retention Basin Partnering Notes**

Enclosed is a full set of notes from the Fitzhugh partnering session held on Monday, August 16, 1993. These notes contain all comments from the transparencies prepared by the various work shop teams.

Very little editing has been done -- some misspellings have been corrected and minor changes made to help clarify a statement. For the most part, though, the comments are as they appear in the original notes.

Also in the notes are the individual team recommendations for improvement from which our final charter was derived. These are a good reference source to see how various portions of the charter were derived.

The mission statements from those attending the meeting are shown starting on page 7. These are of great interest since they convey quickly and accurately how each individual feels personally and professionally about their own and their company's goals in the project. Collectively they give an excellent picture of the overall attitude of the project team.

I strongly recommend that the full set of notes be distributed to each person who participated in writing the charter. Providing those attending with a copy of the notes tends to reinforce their feeling of being a full part of the partnering effort.

It was a pleasure being professionally involved on Fitzhugh, and I wish you and the other charter members good luck and a successful project.

Sincerely yours,



Ralph J. Stephenson, P. E.

enclosure:

8/16/93

DUANE E. BREMER

ALAN SIMANSKEY

Dennis O'Neil

TOM GNATKOWSK

Michael HLAVACEK

JACK NIEMI

JERRY ZITTERMANN

Robert Cherry

MARKSON ESAN

DELMAR NICHOLS

JIM STUART

John Goetzeluck

ANDY BARANIC

JEFF SACKETT

Cheryl McVannel

Cheryl Kehres-Dietrich

Laura Badalamenti

David J. Love

Levent SUCUOGLU

John Vasold

Gregory Bator

GERACE CONST  
496-2440

GERACE CONST.

Gerace Const

STANDARD TILE

Fisher Contracting Co.  
(517)835-7771

GEO-TEST, LTD

COMMERCE CONTROLS

R&R READY MIX, INC

SPICER ELECT

SPICER ENG.

SPICER ENGINEERING,

John E Green Co

JOHN E. GREEN CO

PECKLES, PUMP CO

Kropp Painting, Inc.

Soil & Materials Engineers

Soil & Materials Engineers

City of Saginaw

City of Saginaw

City of Saginaw

William A. Kibbe & Assoc.

PRES.

Proj. Mngn.

Supt.

Supt.

Project Manager /  
Engineer

PROJECT CONSULTANT

PROJ. MGR

Manager

PROJECT ENG.

SITE REP.

Vice Pres, Engr.

Supt.

PROJECT MGR.

Vice Pres, Engr.

Executive Assistant

Senior Consultant

Project Hydrogeologist

Asst. Supt. WTP

Info. Sys. Manager

Supt. W.T.P.

Project Engineer

**V. Those attending charter meeting**

- A. Laura Badalamenti - Project Hydrogeologist - Soil & Material Engineers**
- B. Gregory Bator - Project Engineer - William A. Kibbe & Associates**
- C. Andy Baranic - Project Manager - John E. Green Co.**
- D. Duane E. Bremer - President - Gerace Construction**
- E. Robert Cherry - Manager - R & R Ready Mix, Inc.**
- F. Makson Esan - Project Engineer - Spicer Engineering**
- G. Tom Gnatkowski - Superintendent - Standard Tile**
- H. John Goetzeluck - Superintendent - John E. Green Co.**
- I. Michael Hlavacek - Project Manager/Engineer - Fisher Contracting Co.**
- J. Cheryl Kehres-Dietrich - Senior Consultant - Soil & Material Engineers**
- K. David L. Love - Assistant Superintendent WTP - City of Saginaw**
- L. Cheryl McVannel - Executive Assistant - Kropp Painting, Inc.**
- M. Delmar Nichols - Site Representative - Spicer Engineering**
- N. Jack Niemi - Project Consultant - Geo-Test Ltd.**
- O. Dennis O'Neil - Superintendent - Gerace Construction**
- P. Jeff Sackett - District Manager - Peerless Pump Co.**
- Q. Alan Simanskey - Project Manager - Gerace Construction**
- R. Jim Stuart - Vice President of Engineering - Spicer Engineering**
- S. Levent Sucuoglu - Information Systems Manager - City of Saginaw**
- T. John Vasold - Superintendent WWTP - City of Saginaw**
- U. Jerry Zitterman - Project Manager - Commerce Controls**

*Fitzhugh Street CSO  
Partnering Charter Meeting  
Saginaw, Michigan*

*Ralph J. Stephenson, P. E. , P. C.  
August 10, 1993*

# **PARTNERING CHARTER WORK BOOK**

*Fitzhugh Street CSO  
Saginaw, Michigan*

**Date:** Monday, August 16, 1993

**Location:** Anderson Center  
Saginaw, Michigan

**Time:** 8:00 A. M. to 12:00 noon &  
1:00 P. M. to 4:00 P. M.

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August 11, 1993

**Participant notebook outline**

**Project:** Fitzhugh Street C. S. O.  
**Location:** Saginaw, Michigan  
**Owner:** City of Saginaw, Michigan  
**General contractor:** Gerace Construction Company  
**Architect/Engineer:** Spicer Engineering Company, Saginaw, Michigan  
**Date of meeting:** Monday, August 16, 1993  
**Location of meeting:** Anderson Center, Saginaw, Michigan

**Purpose of meeting:**

To prepare and adopt a *partnering charter* for the guidance of the Fitzhugh Street C. S. O. project.

**Time of meeting**

08:00 A. M. to 12:00 noon, and 01:00 to 04:00 P. M.

**Definitions:**

Major partnering terms are defined in glossary on pages 4, 5 & 6.

**Timetable:**

07:30 to 08:00 A. M.

- Coffee

• 08:00 to 10:00 A. M. - Session #1

- Brief introductory remarks on purpose of day by principals of owner, design team, and general contractor.
- Introduction of those attending.

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- Introduction to *charter* workshops - Ralph J. Stephenson
- Break out sessions by teams. Possible team groupings include:
  - Owner/user
  - Designers of record
  - Advisory professional service contractors
  - General Contractor
  - Earthwork and related contractors
  - Structure and related contractors
  - Mechanical and electrical contractors
  - Systems and related contractors
  - Owner's equipment contractors
  - Others?
- Workshop #1 - Table discussion of the question "What actions do others take that create problems for us?" - See page 5 for examples.
- Workshop #2 - Table discussion of the question "What actions do we take that create problems for others?" - See page 5 for examples.

Workshops #1 & #2 comments are to be recorded on both flip charts and on transparencies.

- 10:00 to 10:15 A. M. - Coffee break
- 10:15 A. M. to 12:00 noon - Session #2
  - Workshop #3 - Table discussion of the question "Considering your team's comments in Workshops #1 and #2, what can all of us do to help promote good relations and excellent performance on this specific project?" - See page 5 for examples.

Workshops #3 comments are to be recorded on both flip charts and on transparencies.

- Workshop #4 - Individual work on the question "In light of the results of Workshops #1, 2, and 3, what do I think my organization's mission is for this project?" See pages 5 and 6 for examples.

The *mission* should state in 25 words or less, *the single most important goal to achieve by being successful through my organization's efforts on this project.*

12:00 noon to 01:00 P. M. - Lunch

- *Mission task force* work - From 12:45 to 1:30 P. M. selected individuals will meet apart

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from the main group and prepare a 25 word or less, first draft *mission* statement for the project. The draft *mission* statement will be derived from the individual *mission* statements prepared in workshop #4.

This project *mission* statement will be used as guide in writing the *charter*. It will, after editing, be incorporated into the final *charter* document.

01:00 P. M. to 02:30 P. M.          Session #3

- *Workshop #5 - Full partnering membership* discuss, revise and accept the first draft *mission* statement as revised.

This work is to be based on the project *mission* statement prepared by the *mission* task force.

- *Workshop #6 - Full partnering membership* discuss and answer the question "What specific project objectives can we now set considering the results of workshops #1, 2, 3, 4, and 5?"

These objectives should be designed to help insure excellent relations and performance for all concerned with the Fitzhugh Street C. S. O. Workshops #5 and #6 are to run concurrently with the full group participating

02:30 P. M. to 04:00 P. M.          Session #4

- *Complete workshop #6 - Set project objectives.*
- Give overview of partnering performance evaluation and *issue resolution* in relation to *charter* - Ralph J. Stephenson.
- *Workshop #7 - Full partnering membership* combine all previous discussions into a final *charter* ready for signatures.
- Print final draft of *charter*.
- Each participant sign *charter*.
- Adjourn.

**Definitions:**

- *Alternative dispute resolution*  
A method of resolving disputed construction claims outside the courtroom.



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- *Full partnering membership*

The group consisting of the entire project team attending the partnering meeting.

- *Issue resolution*

A method of reaching agreement and closing out disputes at the originating management level, in the shortest possible time, and with the lowest potential for residual hard feelings.

- *Mission*

The single most important goal to achieve by being successful in the project organization's principal efforts.

- *Objectives*

Quantified targets derived from the established *mission* and goals.

- *Partnering - Associated General Contractors*

A way of achieving an optimum relationship between a customer and a supplier. A method of doing business in which a person's word is their bond, and where people accept responsibility for their actions.

Partnering is not a business contract, but a recognition that every business contract includes an implied covenant of good faith.

- *Partnering charter*

The basic manual for operating a partnering system. Contains, at a minimum, the *mission* statement of the project team, and their objectives for the project. Usually is signed by all those writing the document.

The charter is an agreement in principle and **must not supersede or supplant the design and construction contracts in place or to be written.**

- *Partnering*

A method of conducting business in the planning, design, and construction profession without unnecessary, excessive, or disruptive external party involvement.

- *Table discussion*

A discussion at a break out table where people with a common interest can review and recommend for presentation to a larger group of which they are a part.

- *Task force*

A temporary grouping of forces and resources designed to achieve a specific objective.

- *UDM*

Ultimate decision maker - the individual or group at the lowest management level that has the authority to make a final binding decision in any job related matter.

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- *Workshop*

The meeting structure through which table or full partnering discussions are conducted. Usually participation is required of all attending.

**Working guidelines:**

- Workshops #1 and 2 - Examples of answers to the questions - "What actions do others take that create problems for us?", and "What actions do we take that create problems for others?" (sample responses from an actual charter meeting are given below.)

- Giving directions to proceed without a timely change order.
- Failing to establish clear chain of command.
- Lack of timely acceptance of work.
- Lack of timely responses
- Improper passing of general conditions responsibility to subs.
- Slow submittal turn around.
- Unreasonable punch lists.
- Failure to recognize impact of changes on ongoing work.
- Late submission of proposals.
- Failure to maintain clean efficient, safe working conditions.
- Untimely delivery of owner equipment.
- Slow payment.
- Resistance to solving problems perceived as contractor problems.
- Changes issued in incomplete form
- Slow owner response to concurrent reviews & changes.
- Pass through attitude by general contractor.

Workshop #3 - Example of responses to the question - "Considering your team's comments in Workshops #1 and #2, what can all of us do to help promote good relations and excellent performance on this specific project?" (below are listed some edited samples from an actual charter meeting)

- Maintain better communications.
- Exhibit less defensiveness/more openness.
- Resolve disputes fast.
- Don't take issues personally.
- Review requests for information & submittals before processing.
- Be willing to propose/suggest solutions.
- Prioritize submittals.
- Recognize owner's need to eventually occupy, operate and maintain facility/systems.
- Recognize the importance of paper work.
- Allow necessary contract time for training.

Workshop #4 - Example of responses to the question - " In light of the results of Workshops #1, 2, and 3, what do I think my organization's mission is for this project?" (edited samples from an actual charter

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meeting)

- All involved parties agree to solve problems quickly and fairly so a quality product can be produced that is profitable, and functionally pleasing to all
- To build a quality project with the total commitment of all involved from owner to tradesperson, and finish the project with pride and satisfaction to all.
- To complete the project within budget, on time, to the quality standards desired by the owners. To develop a prequalified team that can be used on future projects.
- Our *mission* is to complete the project safely, on time, and within budget, working in a spirit of cooperativeness & respect for all parties involved.
- 4 C's - Cooperate, & Coordinate, & Communicate with team members to Complete a successful & profitable project.
- The *mission* of this group is to properly coordinate all construction to obtain the best building for the owner without causing undue hardships to those involved.
- We seek to work together as a team to produce a quality project on time, safely, and within budget, with a fair profit realized by all parties involved.
- We recognize the common goal to finish this project with the highest quality, on time, and within budget, & agree to work together safely, as a team with trust and cooperation.
- Complete the project with the highest level of quality, on time, and within the budget so that all of the team members want to do the next project together.
- To provide a quality building within the budgeted time & cost - earning a fair profit & having fun doing it.
- To work in harmony with all team players to provide a project that everyone can be proud of.
- Work together as a team to build a quality building in a safe and cost effective way.
- To furnish to the owner a quality installed system in a timely manner, considering all people involved, at a profit.
- *Mission* of this project
  1. Profitable
  2. Fun
  3. Efficient
  4. Cooperative
  5. Quality
  6. Innovative
  7. Proud
- To have the customer delighted with the project at its completion.
- To achieve the highest quality building possible for the owner that satisfies their needs and objectives, within budget and schedule parameters.
- The cooperative, respectful and safe construction of a new facility exhibiting our pride of workmanship, participation and team work.

**A working charter - courtesy of those noted**

*Veteran's Administration Medical Center Replacement Hospital*  
*Detroit, Michigan*

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*August 11, 1993*

Mission statement

- We the undersigned recognize that we all have common objectives. We therefore agree to strive together to construct the Detroit VAMC safely, on time and within budget to the highest quality standards commensurate with its mission of serving veterans and the community.
- To achieve our mission we believe in the following principles
  - Commitment
  - Mutual trust
  - Integrity
  - Personal pride

Charter objectives

01. Maintain open lines of communications.
  - a. Recognize the need for quality information
  - b. Minimize submittal and response times in all matters
02. Keep paper and administrative work to a minimum.
03. Develop and implement an alternative conflict resolution system.
  - a. Prompt resolution of conflicts at lowest possible level
  - b. Eliminate need for Contracting Officer decisions
  - c. Fair interpretation of ambiguities
  - d. Be proactive (not reactive) in problem solving
  - e. Maintain objective attitude toward constructibility and practicality
  - f. Accept responsibility for your actions or inactions
  - g. Have empathy in all matters
  - h. Clearly describe changes to contract work
04. Limit cost growth.
  - a. Develop cost effective measures
05. Maintain clean, efficient, secure work site.
  - a. No lost time due to accidents
  - b. Properly staff project
  - c. Be a good neighbor
06. Seek to maintain good job morale and attitudes.
  - a. Promotion of partnering attitudes at all levels of contract administration
  - b. Have fun
  - c. Have pride in your product
07. Commit to quality control in all project related matters.
  - a. Do it right the first time
  - b. Maintain proper work sequence
  - c. Meet design intent
  - d. Recognize owner's needs in occupation and operation of the facility
08. Close out job in proper and timely manner.

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09. Maintain and implement a partnering evaluation system.

## **A. M. AGENDA**

7:30 A. M to 8:00 A. M. - Coffee

8:00 A. M. to 10:00 A. M. - Session #1

- Opening remarks
- Introductions
- Partnering overview
- Principles of alternative dispute resolution
- Workshop #1 - Problems others cause us

10:00 A. M. to 10: 15 A. M. - Coffee break

10:00 A. M. to 12:00 noon - Session #2

- Workshop #2 - Problems we cause others
- Workshop #3 - Improvement recommendations
- Workshop #4 - Definition of missions

12:00 noon to 1:00 P. M - Lunch

## **P. M. AGENDA**

12:45 P. M. to 1:30 P. M.

- Task force prepare project mission statement

1:00 P. M. to 2:30 P. M. - Session #3

- Workshop #5 - Complete project mission statement
- Workshop #6 - Set project goals & objectives

2:30 P. M. to 4:00 P. M. - Session #4

- Complete Workshop #6 - Set project goals & objectives
- Review principles of partnering performance evaluation
- Workshop #7 - Full group write project charter
- Print final draft of charter
- Participants sign charter
- Adjourn

## ***PARTNERING - A. G. C.***

**A way of achieving an optimum relationship between a customer and a supplier. A method of doing business in which a person's word is their bond, and where people accept responsibility for their actions.**

**Partnering is not a business contract, but a recognition that every business contract includes an implied covenant of good faith.**



## ***PARTNERING***

**A method of conducting  
business in the planning, design,  
and construction profession  
without unnecessary, excessive,  
or disruptive external party  
involvement.**

## Team groupings for break out sessions.

*Those that have similar sets of interest relative to the performance of others on the project*

- **Owner/user.**
- **Designers of record.**
- **Advisory professional services contractors.**
- **General contractor.**
- **Earthwork & related contractors.**
- **Structure & related contractors.**
- **Mechanical & electrical contractors.**
- **Systems & related contractors.**
- **Others?**

## **MISSION**

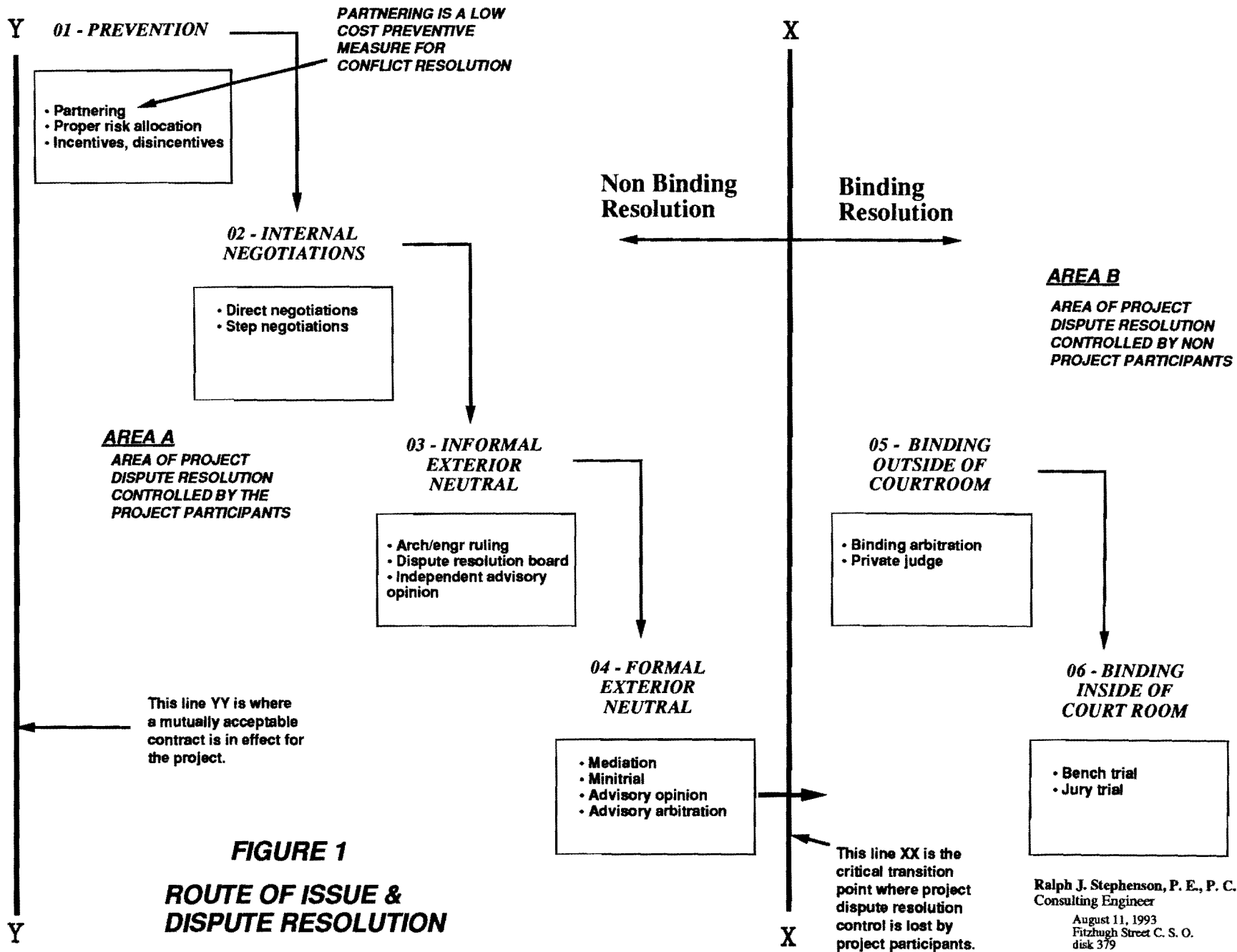
**The most important result to be achieved  
by this project being successfully  
completed?**

## **GOALS**

**Unquantified desires of individuals or an  
organizations expressed without time or  
other resources assigned.**

## **OBJECTIVES**

**Quantified targets derived from  
established goals.**



**FIGURE 1**  
**ROUTE OF ISSUE & DISPUTE RESOLUTION**

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disk 379

## Sample Charter

### I. Charter for new Detroit, Michigan Post Office, Area P

#### A. Mission

This partnering team commits to deliver a quality project on time, within budget, safely, profitably for all, and of the intended quality, through mutual cooperation among the participants.

#### B. Objectives

1. Maintain a clean and well maintained work site
  - a) Experience no lost time from accidents.
  - b) Be a good neighbor.
  - c) Use good construction site housekeeping practices.
2. Effectively administer the project
  - a) Prepare & publish an acceptable payment procedure.
  - b) All parties submit complete, accurate & timely billings.
  - c) Prepare & publish an acceptable submittal processing procedure.
  - d) Treat each other fairly
3. Close out the project in a proper & timely fashion
  - a) Prepare & publish acceptable close out guidelines.
  - b) Establish clearly defined punch out procedures and standards early in the project.
4. Maintain effective lines of communication.
  - a) Recognize the need for quality information.
  - b) Minimize response times in all matters.
  - c) Maintain an appropriate level of documentation.
  - d) Be available.
5. Resolve problems effectively
  - a) Develop, approve, and implement a responsive conflict resolution system
  - b) Resolve disputes and conflicts at the originating level if at all possible.
  - c) Resolve disputes and conflicts as quickly as possible.
  - d) Eliminate the need for third party legal involvement
6. Limit cost growth
  - a) Maintain objective attitude toward constructability.
  - b) Develop cost effective measures to apply to all job related activities.
  - c) Recognize owner's needs in occupation and operation of project.
7. Maintain technical excellence in all program, design & construction work.
  - a) Owner abate promptly as required
  - b) Define and clearly communicate quality standards expected
  - c) Maintain constructability of the project.
  - d) Properly plan and schedule the work.
  - e) Do it right the first time.
8. Maintain good job morale & attitudes
  - a) Promote partnering attitudes at all levels of contract administration.
  - b) Have pride in your work.
  - c) Have fun.
9. Maintain partnering effectiveness
  - a) Prepare and publish a partnering effectiveness measurement system.

- b) Meet on a scheduled, regular bases and formally evaluate the partnering effectiveness.
- c) Take prompt steps to correct any deterioration of partnering effectiveness on the project.

## II. Issue resolution

### A. Policy

It is the objective of the Area P Post Office project team management to first and foremost avoid unnecessary disputes and conflict on the job. It is the intent to do this by achieving the objectives of the charter, particularly to resolve an issue promptly and at the level at which it originates. If this is not possible the issue will be referred promptly to the next highest level for resolution.

In all cases, individuals who are involved in a difference should be businesslike and not resort to personal attack. The principles outlined in the Partnering Charter mission and charter should be followed at all times in resolving differences.

Upon request, site meetings will be convened to discuss any unresolved issue and to attempt to reach resolution. Any issue presented should be clearly defined and alternative solutions suggested. The resolution process is to work through open communication and looking at the other side's point of view. In addition, issues are to be kept in the forefront to ensure resolution in a timely manner. A log of unresolved issues will be maintained from meeting to meeting.

if resolution cannot be reached at the job site, the principals of the involved firms or agencies should attempt to reach resolution through informal discussion before the formal process outlined in the contract documents is used.

In seeking resolution to an issue, involved parties will attempt to:

- Thoroughly understand the issues.
- Maintain empathy for the other point of view.
- Communicate thoughts openly and clearly.
- Clearly document the issue resolution.

### B. Methodology

Goal - To encourage and provide a forum for resolution of issues at the lowest possible level, but to provide a mechanism to elevate the issue if needed.

If resolution is not achieved at the lowest level forum, the principals in the firms in conflict will attempt to reach resolution thorough informal discussion.

## III. Partnering evaluation

Each objective in the Charter is to initially be given a par weight as indicated below. The par weight indicates how important the item is in relation to achieving the project mission. Weights are assigned from 1 to 5. A weight of 5 indicates that the objective is of critical importance in achieving the project mission. A weight of 1 indicates that the objective is of least importance when evaluated against the highest weighted objectives.

The weight of the objectives remains constant throughout the project. Therefore care must be taken in assigning them properly at the onset of the evaluation process.

The quality of the project performance in relation to the Partnering Charter objectives is to be measured once per month by representatives of all organizations participating in writing the Charter. Partnering performance quality ratings are to be from 1 to 5.

A quality rating of 1 indicates very poor performance and little adherence to the standards set out by the objective. A quality rating of 5 indicates high and excellent adherence to standards set by the objectives.

The total evaluation of the objective is the constant weight multiplied by the quality for each objective for each evaluation. The total partnering performance is measured at each evaluation.

Total partnering performance = total of the (objective weights x the objective quality) for the period.

Partnering evaluation for current period

<b>1 - objective</b>	<b>2 - par weight (w)</b>	<b>3 - par quality (q)</b>	<b>4 - par (w) x (q)</b>	<b>current quality</b>	<b>current (w) x (q)</b>
01. Maintain a clean and well arranged work site	3.00	2.50	7.50	2.25	6.75
02. Effectively administer the project	4.50	3.75	16.88	3.50	15.75
03. Close out project in a proper and timely fashion	4.00	3.50	14.00	2.00	8.00
04. Maintain effective lines of communication	4.25	3.75	15.94	3.00	12.75
05. Resolve problems effectively	4.50	4.00	18.00	4.00	18.00
06. Limit cost growth	2.50	2.25	5.63	2.25	5.63
07. Maintain technical excellence in all program, design and construction work	3.50	3.00	10.50	3.25	11.38
08. Maintain good job morale and attitudes	2.50	2.25	5.63	2.00	5.00
09. Maintain partnering effectiveness	4.00	3.75	15.00	3.25	13.00
<b>Average:</b>	3.64	3.19	12.12	2.83	10.69