

J.M. Hammond Rick Schwach

M. M. Mohr

Carl Curb

Co mm partnership meeting notes  
Charter for Michigan Millers Mutual Insurance Addition & Renovation

August 18, 1992

1. Mission
  1. We the Project Team commit to construct a quality facility, on time and within budget, maximizing safety, communication, & cooperation so that all participants can be proud and profitable in their accomplishments.
2. Objectives - to accomplish our mission we recognize a need to work to the following goals and objectives.
  1. Submittals
    1. Clarify objectives and expectations of the submittal process
    2. Minimize submittal and approval times
    3. Provide accurate, prompt, clear, concise approvals
  2. Payments
    1. Make payments in accordance with the published flow chart process
  3. Information processing & paperwork
    1. Expedite all information and indicate desired response times
    2. Maintain open lines of communication among Project Team members
    3. Be available
    4. Attempt to offer possible solutions to questions within a proper scope
    5. Provide clear responses to requests for information
  4. Legal matters
    1. No litigation
    2. Settle disputes at originating level
  5. Abatement
    1. Establish, approve and publish a plan of abatement
    2. Abate promptly
  6. Planning and scheduling
    1. Provide, obtain, and use accurate activity information
    2. Clearly monitor the project against the plan and schedule
    3. Commit to, and fulfill man hour projections
  7. Decision making
    1. A/E team to regularly inspect work and advise compliance
    2. Define and clearly communicate quality expectations
    3. Properly empower those at all decision making levels
  8. Policies and procedures
    1. Prepare, review, approve and publish policies and procedures that will serve as guidelines to manage the project
  9. Site layout and management
    1. Formulate and publish a trash removal & parking plan
    2. Properly establish and maintain bench marks and control lines
  10. Processing revisions
    1. Provide written authorization prior to work proceeding
    2. Respond to requests for information, bulletins and change orders promptly
    3. Prepare, approve & publish a flow chart for processing revisions
  11. Be a good partnering neighbor
    1. Commit to protecting your work and the work of others
    2. Show all participants due respect and acknowledgement
    3. Maintain proper work sequences
  12. Total quality management
    1. Prepare, approve, publish, and commit to a TQM program

Ernie Hanson  
 William Beck  
 Myra B. Adams  
 J.M. Rogers  
 Carl Forcener  
 Dick Smith  
 Ronny Jantzen  
 Tom Ruschke  
 Kathy Ross  
 John Watten

Joe Sloboski  
 Marshall  
 Dennis M. Brown  
 Jim C. Sanford  
 Robert M. Kueger  
 David E. Ky  
 David Walker  
 Murray F. Hayes  
 Michael P. Schwager  
 Frank Boddie  
 Jim Moore  
 Daniel A. Oden  
 G  
 August 19, 1992

Saturday, August 1, 1992

## + Christman Partnering Discussions

## I. 10:26:03 AM - Thursday, July 16, 1992

- A. Rick Schroeder called about 9:45 am
- B. Talked to him about 40 minutes re partnering, total quality management and alternative dispute resolution.

## C. Rich Schroeder - Christman project manager

- 1. Has worked there 2 years
- 2. Worked on Battle Creek project as employee of Consoer Townsend
- 3. Worked with Christman on Battle Creek waste treatment project

D. Project characteristics — *Michigan*

- 1. Client - Miller Insurance Company?
- 2. Architect/engineer - MBDS - derived from former Warren Holmes and Kenneth Black organization.
- 3. Physical characteristics
  - a) Project delivery system
    - (1) Competitively bid
    - (2) Single prime
    - (3) Working drawings complete
    - (4) Negotiated gmp
    - (5) Major contractors
      - (a) Mechanical
      - (b) Electrical
      - (c) Dry wall
      - (d) Sprinkler
      - (e) etc.
  - b) Cost - About \$9,000,000
  - c) Time of construction - 20 months
  - d) Size
    - (1) About 45,000 square feet of new building ?
    - (2) About 95,000? square feet of remodeling (perhaps more)

## E. Referred Rick Schroeder to AGC Partnering Charter booklet

## 1. Discussion points

- a) Pages 6 and 7 - The partnering process
  - (1) Point #1 - Educate your organization
    - (a) Stressed importance of educating all involved
      - i) Owner
      - ii) General contractor
      - iii) Architect/engineer
      - iv) Major subcontractors
      - v) Major vendors
  - (2) Point #2 - Make partnering intentions clear
    - (a) Make certain all have copies of the AGC booklet

*Project 92:???*  
*Christman Michigan*  
*Miller Insurance.*

Saturday, August 1, 1992

- (b) Can include statement of intent to use the partnering concept in the contract with the subcontracts.
- (c) Must be careful not to let the charter run counter to the job contracts.
  - i) Informal signature structure on charter
  - ii) No consideration involved
  - iii) Get more points of ~~consideration~~ *advice* here
- (3) Point #3 - Commitment from top management at the start
  - (a) This is from the top management of all major parties involved
  - (b) Have top people from major participants at the charter meeting
    - i) President or chief operating officer
    - ii) Project staff
      - (1) Project manager
      - (2) Superintendent or other lead field personnel
  - (c)
- (4) Point #4 - The partnering workshop
  - (a) Suggested the early partnering workshop might be skipped as a formal session. The work to be accomplished in the early session could possibly be done in the charter session if the participants have done their homework.
  - (b) Participants could hold in house orientation meetings on the concept if desired. Need to be informed about what to cover in the orientation.
  - (c) 4a - Creation of partnering charter
    - i) Spent considerable time discussing this step
    - ii) Items covered
      - (1) Be certain the participants have thoroughly studied the partnering manual.
      - (2) Require the participants to be prepared to discuss each of the action elements under Barriers, Problems and Opportunities show on page 14.
      - (3) Insure the participants understand that the result of the day's work must be to produce a signed charter.
      - (4) Insure the participants understand the need to keep the charter from becoming a part of the contract documents.
      - (5) Tell the participants to be prepared to actively prepare to discuss and work through the three major exercises described on pages 13 and 14. We may not fully cover exercise #2 - interests, goals, and objectives, and exercise #3 - issue resolution & team evaluation - in our sessions. However they should be

Saturday, August 1, 1992

prepared to discuss these within the context of exercise #1 - barriers, problems and opportunities

- (6) The closing two actions are the key results to be obtained
  - (a) Agree on charter process and format (and produce a hard copy charter upon which there is general agreement or which will not be weakened significantly by disagreement among the parties.
  - (b) Sign charter
- (7) Be certain to award souvenirs of the meeting to the participants.
- (d) 4b - Development of an issue resolution process
  - i) Suggested this be discussed in charter meeting, but be developed at a later date soon after the charter meeting.
- (e) 4c - Development of a joint evaluation process
  - i) This might be best discussed briefly in the chartering meeting and then prepared and approved by a temporary committee of principal players (evaluation task force) at a later date soon after the charter meeting.
- (f) 4d - Discussion of individual roles/concerns
  - i) Did not review this in detail with Mr. Schroeder. Should be looked at later.
- (g) 4e - The facilitated workshop
  - i) Did not discuss this with Mr. Schroeder.
- (5) Point #6 - Periodic evaluation (where is #5?)
  - (a) Suggested this be handled as noted in (7) above at a later date.
- (6) Point #7 - Occasional escalation of an issue
  - (a) Not discussed
- (7) Point #8 - Final evaluation and celebration
  - (a) Not discussed
- b) Pages 14 and 15 - Sample facilitator's agenda
  - (1) Described how we covered the material in the one day
    - (a) Good preparation
    - (b) Good use of equipment
      - i) Overhead transparency projector
      - ii) Flip charts
      - iii) Computer - notes printed and duplicated
      - iv) Duplicating facilities
    - (c) Good meeting location
      - i) Should be off site
      - ii) Have lunch at location
    - (d) Contined driving of group toward day's objectives
  - (2) Must keep objective of the charter signing in view

## F. Fees and time

1. \$95.00 per hour
2. Will require between 10 and 20 hours of time total.

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Mt. Pleasant, Michigan  
ph 517 772 2537

August 3, 1992

Mr. Rick Schroeder  
Project Manager  
The Christman Company  
408 Kalamazoo Plaza  
Box 14120  
Lansing, Michigan 48901

Dear Mr. Schroeder:

Re: Michigan Miller Insurance Company partnering charter meeting

Below is a suggested outline and agenda for the charter preparation meeting to be held on August 19, 1992. My role and assignment in this meeting is to plan and chair the meeting to the end that a partnering charter is prepared, approved and signed by the end of the one day working session.

Key points guiding the meeting purpose, format, and content include the following:

**Those participating in the meeting**

Owner/user

- A company principal.
- Project working level staff responsible for ongoing project design and construction.
- Facilities operational staff as desired.

Designer

- A company principal.
- Project working level staff responsible for ongoing construction, administration, inspection and close out.

Christman

- A company principal
- Project working level staff responsible for ongoing project construction, turn over and close out.

Major sub contractors

- A company principal
- Project working level staff responsible for ongoing project construction, turn over and close out.
- Major vendor and supplier decision makers
- Project staff responsible for submittal preparation, fabrication, delivery, installation and turn over of major items provided by their organization.

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August 3, 1992

**Purpose of meeting**

- To develop and adopt the project charter of the partnering team

**Meeting information**

- Date - Wednesday, August 19, 1992
- Time - 08:00 am to 05:00 pm approximately - meeting to extend to completion of work, marked by signing of charter.
- Place - To be designated
- Time table

08:00 to 10:00 am - Session #1 - Introduction

10:00 to 10:15 am - Coffee break

10:00 to 12:00 noon - Session #2 - Exercise #1, goals, objectives

12:00 to 01:00 pm - Lunch

01:00 to 03:00 pm - Session #3 - Mission statement preparation

03:00 to 03:15 pm - Break

03:15 to 03:45 pm - Session #4 - Issue resolution & performance measurement

03:45 to 04:45 pm - Session #5 - Charter preparation and review

03:45 to 04:45 pm - Session #6 - Charter signing

\* \* \*

**Suggested agenda**

**08:00 to 10:00 am - Session #1**

**01. Introduction to day's work**

- a. Opening remarks by senior executives - why we are here
- b. Introduction of those present
- c. Partnering overview
- d. Introduction to exercise #1 - existing barriers, problems and opportunities

**02. Select team groupings for exercise #1 discussion break out sessions.**

Owner/user team

Design team

General contractor team

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Subcontractor team  
Vendor team - might be combined with subcontractor team

**03. Questions to answer in exercise #1 team discussion sessions.**

- a.) What actions do the other team groups often engage in that create problems for us?
- b.) What actions do we often engage in as a team group, that we think may create problems for the other team groups?
- c.) What recommendations would we make to the other team groups, and adopt ourselves, that, if followed, could improve relations and performance on this project?

**Note:** Participants should bring their own individual answers to these questions for use in the break out discussion session.

10:00 to 10:15 am - Coffee break.

During the coffee break, teams move to discussion break out areas and set up for **exercise #1** discussions.

10:15 to 12:00 noon - Session #2

**01. Teams discuss, answer, and record responses to exercise #1 questions. Suggested procedures for the exercise #1 team discussion sessions includes:**

- a. Participants move to and set up their discussion area.

Discussion areas should be supplied with materials for recording decisions.

- Flip chart easel, paper, and transparent marking pens.
- About 10 transparency blanks, and pens for marking.
- Notepaper, pencils, and erasers.

- b. Each team to appoint a chairman and a recording secretary. Recording secretary to keep notes and summarize information to be taken back to main group meeting.

- c. Team to discuss, answer, and record responses to each of the three **exercise #1** questions above as they apply to the team discussing the questions.

**02. Teams reconvene in general meeting area.**

**03. Teams report back on exercise #1.**



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**04. General meeting participants use exercise #1 material as base for draft of individual project mission statements.**

**05. Appoint task force of 5 attendees to combine individual project mission statements into a combined project mission statement that, in the task force's opinion, represents the interests and concerns of all attending.**

01:00 to 03:00 pm - Session #3

**01. The general meeting group, minus the mission task force, discusses and formulates a statement of participant interests, goals and objectives in exercise #2.**

Questions to be addressed by the general meeting participants during exercise #2 include:

- a. What direct and indirect interests do we have in the outcome of this project?
- b. Given our interest, what are reasonable, achievable goals for which we can strive?
- c. What specific, measurable objectives can we identify that move us toward our goals?

**02. The appointed task force concurrently prepares a single project mission statement and submits the draft to the general session #2 meeting. This mission statement is to be used to develop goals and objectives for the entire project.**

**03. Based upon the group discussion of questions in exercise #2 and the project mission statement drafted by the task force, the general meeting group defines specific goals and objectives for the project.**

03:00 to 03:15 pm - Coffee break

03:15 to 03:45 pm - Session #4

**01. Introduction to issue resolution and performance evaluation**

- a. What should a project issue resolution policy require and what are its components?
- b. How should an issue resolution process work?
- c. How can we evaluate the progress of the partnership in achieving our goals and objectives?

**Note:** Further consideration of issue resolution and project evaluation should be made a part of subsequent project meetings.

03:45 to 04:45 pm - Session #5

**01. Formulate draft #1 of project charter and submit to all meeting participants for review and**

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content discussion.

02. Prepare and submit draft #2 of project partnering charter to all meeting participants for final review, comment, discussion and revision.

03. Prepare and print signature draft of project partnering charter.

04:45 pm to 05:00 - Session #5

01. Sign charter.

02. Distribute mementos of charter meeting to those present.

03. Summarize meeting.

04. Adjourn.

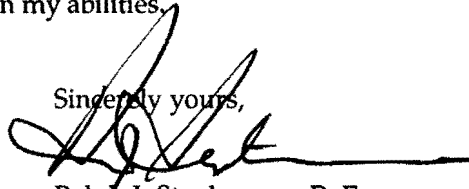
\* \* \*

The above is a basic outline of what we should plan to accomplish during our one day meeting. There obviously must be follow up meetings of the project team to carry out the full partnering implementation program. Discussion of this follow up should be introduced in session #4 and reviewed in the meeting summary after the charter is signed.

I suggest the agenda be prepared and distributed to the participants as soon as possible. This will give them all an opportunity to think about their participation before having to discuss it with others on the project team. It also will allow them to think through points to discuss with those in the meeting they may not have access to during the project.

I'm looking forward to participating in this program with you. Thank you for the opportunity to chair this meeting and for your expression of confidence in my abilities.

Sincerely yours,



Ralph J. Stephenson, P. E.

## PARTNERING MEETING

92:37

Wednesday/Actual Attendance

August 19, 1992

Company	#	Attending
✓ Christman	5 ✓	Curt Carlson / Rick Schroder Marshall Hines / Jay Townsley Rob Krueger Ralph Stevenson - Moderator
✓ Michigan Millers	② 3 ✓	Carl Powers / Ray Zillgitt
✓ MBDS Architects	3 ✓	Mike Mayotte / Paul Jacob / Kees Beukema
✓ Bezdek Associates	1 ✓	Bill Bezdek
✓ Hayes Electric	1 ✓	Mike Hayes
✓ IBM	3 ✓	Joel Sydlowski / Mike Tokai Ernie Hassell
✓ Lansing Community College	1 ✓	Ruby Ivens ✓
✓ Michigan State University	1 ✓	Dick Weaver ✓
✓ Professional Concepts Ins	2 ✓	Jeane Thomson / Kim Fricke ✓
✓ Eastland Concrete	1 ✓	Tom Canfield
✓ Schiffer Mason	2 ✓	Dan Schiffer / Mike Marher
✓ Douglas Steel	2 ✓	Mike Rogers / Mike Harris
✓ Stephenson Roofing	2 ✓	Craig Stephenson / Dennis Bronner
✓ Architectural Metals	1 ✓	John Walter
✓ Metal Bldg Specialties	2 ✓	John Sanford / Kathy Ross
✓ Bouma Interiors	2 ✓	Doug Walker / Dick Schumacher
✓ Richmond Interiors	1 ✓	Dave Kenyon
✓ B & J Painting	2 ✓	Bob LeuVoy / Kern Rushton
✓ Wolverine Fire Protection	1 ✓	Darrel Ochs
✓ Goyette Mechanical	2 ✓	Mike Schweiger / Matt Burke ✓
◆ Hammond Associates	1 ✓	Jim Hammond ✓
◆ Dee Cramer, Inc.	2 ✓	Rick White / Jim Moore ✓
✓ Lutz Electric	2 ✓	Gary Lutz / Frank Baldino

Total 43

Exercise #1 - cco mmi partnering

I. What actions do other groups engage in that create problems for us?

- A. Team #1 - Owner/ user/ architect/ engineer/ consultant
  - 1. Subs don't follow drawings resulting in conflicts/ cost overruns without previous communication & planning
  - 2. Lack of advance study of drawings/ specs resulting in untimely discovery of conflict, ambiguity, etc.
  - 3. Missed dates & not keeping schedules
  - 4. Late/ incomplete submissions
  - 5. Poor communication as root of problems. Creates hostile atmosphere.
  - 6. 2 edged sword a/e and contractors often not sympathetic (fair) to each other
  - 7. bCriticism of design without suggested alternatives
  - 8. Say/request one thing which proves unnecessary because of lack of coordinatin/ follow thru
  - 9. Lack of flexibility/ cooperation
  - 10. Individual rather than team approach
- B. Team #2 - General contractor team
  - 1. From subcontractors
    - a) Lack of manpower
    - b) Lsck of training
    - c) Unreasonale bulletin quotations
    - d) Returning bulletin quotes in a timely manner
    - e) Lack of safety on job
    - f) Lack of quality of performance
    - g) Lack of planning and follow through
    - h) Communication between field rep and his project manager
    - i) I. D. of long lead materials
  - 2. From a/e
    - a) Payment process
    - b) Incomplete design
    - c) Timely response to rfi's
    - d) Shop drawing turn around
    - e) Willingness to accept alternate materials/ methods - value engineering and constructability
  - 3. From owner
    - a) Timely payment
    - b) Selection of colors/ materials
    - c) Approval of change orders/ bulletins
    - d) Poor planning/ programming, lack of foresight
    - e) Define level of quality
  - 4. From outside agencies
    - a) Take too much time for decisions or actions (bwl)
  - 5. From general contractor
    - a) Lack of payment
    - b) Lack of planning
    - c) Commun icating to the subs the level of quality the owner expects
    - d) Anticipating problems
    - e) Lack of shop drawings review prior to sending shops to a/e
    - f) I. D. of long lead materials and supplies
    - g) Bulletin, quotation review
- C. Team #3 - Building frame & close in sub contractor
  - 1. Damage to finish roofing by other trades & owner/ arch

2. Untimely return of shop drawings submittals
3. Post contract changes
4. Complete set of design drawings and specifications listing, i.e. products, colors, materials
5. Reasonable selection of materials - e.g. match existing
6. Lack of information from other trades for work that needs close coordination
7. Sequencing of other sub's work that affects another sub's productivity (hardware and hollow metal)
8. Prompt release of changes once they are priced/quoted
9. Change made to accommodate one sub without notifying other trades that may be affected
10. Overlapping tolerances not allowed for in design (information sharing among team members)
11. Prompt decisions from owner

D. Team #4 - Building interior work sub contractor

1. From owner/ae
  - a) Delay in decision/approval of detail/materials
  - b) Change in scope
  - c) Incomplete detailing
  - d) Slow/incomplete response to rfi's
  - e) Slow payment
  - f) Not listening to sub contractors
  - g) No formal approval of shop drawings (reviewed only)
  - h) No quality check by a/e or contractor
  - i) Owner delays due to slow decisions
  - j) Repair of damage due to other subs
  - k) Several punch lists
2. From cm/gc
  - a) Slow/incomplete payment
    - (1) Change order
    - (2) G. C. doesn't pay until G. C. collects \$ from owner
    - (3) Retention
  - b) No pay for added work
  - c) Poor scheduling
  - d) Supervision/coordination of trades
  - e) No provision for central hoisting/dumpster
  - f) Double standard with subs
3. From subs
  - a) Each sub only interested in own work - area, details, scaffold, etc.
  - b) Poor workmanship
  - c) Work done out of sequence
  - d) Slow/incomplete submittals
  - e) Clean up of own materials
  - f) Slow quote of bulletins
  - g) Delay due to lack of components
  - h) Inadequate manpower for job
  - i) Older material too late
  - j) Damage work of others
  - k) Lack of equipment required for job
  - l) Lack of temp light/power

E. Team #5 - Building system sub contractor

1. Coordination of ceiling layout
2. Schedule too general
3. Prompt response to rfi's, co's, etc.

**cco mmi partnering meeting notes**

**August 18, 1992**

4. Need direct communication with a/e/o
  5. Need a/e/o regular review of installation for compliance with documents
  6. Diffent consultants for data center
  7. Provide background/ cad drawings by a/e
  8. Coordination with masonry walls for m/e penetrations
  9. Parking
  10. Laydown areas
  11. Prompt payment
  12. Immediate issuance of co's
  13. Method to reduce retainage earlier to subs and lower tier subs
- II. **What actions do we engage in that create problems for others?**
- III. **What recommendations would we make to improve performance?**

**Working outline for Christman MMI partnering charter meeting**

I. disk 325

II. Meeting information

- A. Project - Michigan Millers Mutual Life Insurance Addition and Renovation -  
Lansing, Michigan
- B. Date - Wednesday, August 19, 1992
- C. Place - Michigan Athletic Club Conference Center, East Lansing, Michigan
- D. Time - 08:00 am to 05:00 pm approximately
- E. Those invited
  - 1. MBDS, Inc. - Architect/engineer
    - a) Mike Mayotte
    - b) Paul Jacob
  - 2. Architectural Metals
    - a) John Walter
  - 3. B & J Painting
    - a) Joe Coonrad
    - b) Kern Rushton
  - 4. Bouma Interiors
    - a) Doug Walker
    - b) Dick Shoemaker
  - 5. Capitol Excavating
    - a) George Hayhoe
    - b) Marty Sekrenes
  - 6. Christman
    - a) Curt Carlson
    - b) Rick Schroeder

## CCO MMI Partnering Working Outline

Ralph J. Stephenson P. E., P. C.  
August 17, 1992

7. Douglas Steel
  - a) Mike Rogers
  - b) Mike Harris
8. Eastland Concrete
  - a) Darrell Eastlund
  - b) Tom Canfield
9. Goyette Mechanical
  - a) Mike Schweiger
  - b) Matt Burke
  - c) Del Sanborn
10. Guest observers
11. Lutz Electric
  - a) Rollie Lutz
  - b) Gary Lutz
  - c) Frank Baldino
12. Metal Building Specialties
  - a) John Sanford
  - b) Kathy Ross
13. Michigan Millers Mutual Insurance
  - a) Carl Powers
  - b) Glen Matthews
14. Moderator and consultant
  - a) Ralph J. Stephenson
15. Richmond Interiors
  - a) Dave Kenyon



16. Schiffer Masonry
  - a) Dan Schiffer
  - b) Ed Davenport
  - c) Mike Marher
  - d) Cory Torres
17. Stephenson Roofing
  - a) Craig Stephenson
  - b) Dennis Bronner
18. Wolverine Fire Protection
  - a) William Jacques
  - b) Darrel Ochs

**F. Master timetable**

1. 08:00 to 10:00 am - Session #1 - Introduction
2. 10:00 to 10:15 am - Coffee break
3. 10:00 to 12:00 noon - Session #2 - Exercise #1, goals, objectives
4. 12:00 to 01:00 pm - Lunch
5. 01:00 to 03:00 pm - Session #3 - Mission statement preparation
6. 03:00 to 03:15 pm - Break
7. 03:15 to 03:45 pm - Session #4 - Issue resolution & performance measurement
8. 03:45 to 04:45 pm - Session #5 - Charter preparation and review
9. 04:45 to 05:00 pm - Session #6 - Charter signing

**III. Agenda outline - initials in ( ) indicate who is in charge of work.**

**A. 08:00 to 10:00 am Session #1**

1. Introduction to day's work. (rjs)
  - a) Opening remarks by senior executives - why we are here

- b) Introduction of those present
  - c) Partnering overview
    - (1) The partnering process
      - (a) Insure the participants understand that the result of the day's work must be to produce a signed charter.
      - (b) Insure the participants understand the need to keep the charter from becoming a part of the contract documents.
        - i) Must not run counter to contract documents.
        - ii) Informal signature structure is to be used on charter.
        - iii) No consideration involved.
      - (c) The closing two actions are the key results to be obtained
        - i) Agree on charter process and format (and produce a hard copy charter upon which there is general agreement or which will not be weakened significantly by disagreement among the parties.
        - ii) Sign charter
  - d) Introduction to exercise #1 - existing barriers, problems and opportunities
2. Select team groupings for exercise #1 discussion break out sessions. (rjs)
- a) Owner/user team (2) - Michigan Millers Mutual Insurance
    - (1) Carl Powers
    - (2) Glen Matthews
  - b) Design team (2) - MBDS, Inc. - architect & engineer
    - (1) Mike Mayotte
    - (2) Paul Jacob

- c) General contractor team (2) - Christman Construction
  - (1) Curt Carlson
  - (2) Rick Schroeder
- d) Subcontractor teams (28)
  - (1) Building frame & close in contractors (12)
    - (a) Eastland Concrete
      - i) Darrell Eastlund
      - ii) Tom Canfield
    - (b) Capitol Excavating
      - i) George Hayhoe
      - ii) Marty Sekrenes
    - (c) Schiffer Masonry
      - i) Dan Schiffer
      - ii) Ed Davenport
      - iii) Mike Marher
      - iv) Cory Torres
    - (d) Douglas Steel
      - i) Mike Rogers
      - ii) Mike Harris
    - (e) Stephenson Roofing
      - i) Craig Stephenson
      - ii) Dennis Bronner
  - (2) Building interior work contractors (8)
    - (a) Architectural Metals
      - i) John Walter

- (b) Metal Building Specialties
  - i) John Sanford
  - ii) Kathy Ross
- (c) Bouma Interiors
  - i) Doug Walker
  - ii) Dick Shoemaker
- (d) Richmond Interiors
  - i) Dave Kenyon
- (e) B & J Painting
  - i) Joe Coonrad
  - ii) Kern Rushton
- (3) Building systems contractors (8)
  - (a) Wolverine Fire Protection
    - i) William Jacques
    - ii) Darrel Ochs
  - (b) Goyette Mechanical
    - i) Mike Schweiger
    - ii) Matt Burke
    - iii) Del Sanborn
  - (c) Lutz Electric
    - i) Rollie Lutz
    - ii) Gary Lutz
    - iii) Frank Baldino
- 3. Exercise #1 questions to answer in team discussion sessions. (rjs)
  - a) What actions do the other team groups often engage in that create problems for us?

- b) What actions do we often engage in as a team group, that we think may create problems for the other team groups?
  - c) What recommendations would we make to the other team groups, and adopt ourselves, that, if followed, could improve relations and performance on this project?
4. Examples of answers that could be discussed and brought the full group for consideration in preparing the charter.
- a) What actions do the other groups engage in that create problems for us as?
    - (1) Making design errors that result in disruptive and costly changes.
    - (2) Delaying shop drawing processing.
    - (3) Giving tardy responses to requests for information.
    - (4) Issuing changes informally in descriptive or sketch form.
    - (5) Engaging in cost information fishing trips for info only.
    - (6) Etc.
  - b) What actions do we as ? engage in that create problems for the other groups?
    - (1) Providing incomplete submittals and transmittals.
    - (2) Delays in identifying long lead material suppliers.
    - (3) Failure to exercise proper quality control in the field.
    - (4) Demanding rush reviews & approvals on later than promised submittals.
    - (5) Leaving others out of the problem solving loop.
    - (6) Etc.
  - c) What recommendations would we as ? make to improve the situation?
    - (1) Make better reviews of submittals before submission.

- (2) Provide suggested solutions on requests for information.
- (3) Provide submittal schedules in advance of submission.
- (4) Provide priorities of submittals
- (5) State questions to others clearly and thoroughly
- (6) All contractors provide list of subcontractors and major equipment/material suppliers
- (7) Etc.

**B. 10:00 to 10:15 am Coffee break.**

1. During the coffee break, teams move to discussion break out areas and set up for exercise #1 discussions. (secy)

**C. 10:15 to 12:00 noon Session #2**

1. Teams discuss, answer, and record responses to exercise #1 questions. (lead by chair and secretary selected by team) (secy)

a) Suggested procedure for team discussion session:

- (1) Participants move to and set up their discussion area.
- (2) Each team appoint a chairman and a recording secretary.
  - (a) Chairman to manager meeting to insure even discussion coverage of questions.
  - (b) Recording secretary to keep notes and summarize information to be taken back to main group meeting.
- (3) Teams to discuss, answer, and record responses to each exercise #1 questions.
  - (a) Flip charts
  - (b) Transparencies
  - (c) Individual notes

2. Teams reconvene in general meeting area. (secy)

3. Teams report back on exercise #1. (rjs)  
*Try to transcribe notes for duplication as completely as possible.*
  - a) The answers from each team should be displayed as they report.
    - (1) Flip charts
    - (2) Transparencies
  - b) Participants to begin identifying the major classifications of points discussed.
  - c) Examples of major classes of discussion points.
    - (1) Submittal processing
    - (2) Payments
    - (3) Information transmittal
    - (4) Paperwork
    - (5) Red tape
    - (6) Case building
    - (7) Legal threats
    - (8) Etc.
4. Each participant prepares and submits a draft of the project mission as they wish it to be - individual exercise. (rjs)
  - a) Guidelines for preparing mission statements.
    - (1) Should be derived from exercise #1 discussion
    - (2) Should be the individual's feeling of the project mission.
    - (3) Should be 25 words or less.
    - (4) Should be explicit.
    - (5) Can be signed or unsigned.
  - b) Examples of mission statements that might be prepared by individuals.
    - (1) To design and construct a high quality, usable facility in a timely, safe & cost effective manner without lawyers & to have a good time

doing it.

- (2) To add value to the project and to make a profit for me and my organization in these areas of performance:
    - (a) Financial
    - (b) Social
    - (c) Educational
    - (d) Training
    - (e) Professional
  - (3) To be able to proudly say that I was a part of this project and the services it is going to provide.
  - (4) To work as a team and produce a quality project through a program of trust, integrity and cooperation.
  - (5) To build a quality facility with benefit to all participants, without legal disputes, and in a manner that is enjoyable to all.
5. Collect mission statements. (secy)
  6. Appoint project mission statement task force. (rjs)
    - a) Should consist of one person from each team
      - (1) Owner/user team (2) - Michigan Millers
        - (a) Carl Powers
        - (b) Glen Matthews
      - (2) Design team (2) - architect & engineer
        - (a) Mike Mayotte
        - (b) Paul Jacob
      - (3) General contractor team (2) - Christman
        - (a) Curt Carlson
        - (b) Rick Schroeder



- (4) Subcontractor teams (28)
  - (a) Building frame & close in contractors (12)
    - i) Eastland Concrete
      - (1) Darrell Eastlund
      - (2) Tom Canfield
    - ii) Capitol Excavating
      - (1) George Hayhoe
      - (2) Marty Sekrenes
    - iii) Schiffer Masonry
      - (1) Dan Schiffer
      - (2) Ed Davenport
      - (3) Mike Marher
      - (4) Cory Torres
    - iv) Douglas Steel
      - (1) Mike Rogers
      - (2) Mike Harris
    - v) Stephenson Roofing
      - (1) Craig Stephenson
      - (2) Dennis Bronner
  - (b) Building interior work contractors (8)
    - i) Architectural Metals
      - (1) John Walter
    - ii) Metal Building Specialties
      - (1) John Sanford
      - (2) Kathy Ross

- iii) Bouma Interiors
  - (1) Doug Walker
  - (2) Dick Shoemaker
- iv) Richmond Interiors
  - (1) Dave Kenyon
- v) B & J Painting
  - (1) Joe Coonrad
  - (2) Kern Rushton
- (c) Building systems contractors (8)
  - i) Wolverine Fire Protection
    - (1) William Jacques
    - (2) Darrel Ochs
  - ii) Goyette Mechanical
    - (1) Mike Schweiger
    - (2) Matt Burke
    - (3) Del Sanborn
  - iii) Lutz Electric
    - (1) Rollie Lutz
    - (2) Gary Lutz
    - (3) Frank Baldino

**D. 12:00 n to 01:00 pm Lunch**

1. During lunch type and reproduce project mission statements from individuals. (rjs & secy)

2. Have task force return from lunch as early as possible and give them their assignment by 01:00 pm. (rjs)
3. Provide separate area for mission task force & let them get to work on mission statement. (secy)

**E. 01:00 to 03:00 pm Session #3**

1. Mission task force (secy) - 12:45 pm to 01:30 pm
  - a) Task force assignment - to combine the individual mission statements into single project mission statement
    - (1) Should represent the interests and concerns of all participants.
    - (2) Should be 25 words or less.
    - (3) Should be explicit.
    - (4) Should represent the combined best judgement of the task force as to what is desired by the project team.
  - b) Mission task force is to work separately to draft project mission statement from individual mission statements.
    - (1) Have draft mission statement typed and duplicated for entire group. Make transparency if possible.
    - (2) Submit draft of mission statement to general session #2 meeting.
  - c) Example of a mission statement prepared by small task force from the individual mission statements.
    - Recognizing our common objectives, we agree to strive together to safely construct, on time and within budget the Ajax laundry building project to the highest quality standards commensurate with its mission of serving the owner, his customers, and the community.



2. Exercise #2 (rjs) - Part of this meeting concurrent with mission task force meeting.
  - a) Questions to be addressed in exercise #2
    - (1) What direct interests do we have in the outcome of this project?
    - (2) What indirect interests do we have in the outcome of this project?
    - (3) Given our interests, what are reasonable, achievable goals for which we can strive?
    - (4) What specific, measurable objectives can we identify that move us toward our goals?
  - b) Discuss project interests, goals & objectives. (rjs)
    - (1) Interests, goals and objectives are to be used to define how to achieve the project mission.
    - (2) By entire group from exercise #1, #2, and mission discussions.
    - (3) To be recorded on overhead transparencies (rjs & secy)
3. General meeting group defines specific goals and objectives for the project. (rjs)
  - a) To be recorded on overhead transparencies (rjs & secy)
  - b) Sample goals & objectives statements
    - (1) Samples of early goal and objective statements.
      - (a) Keep an open line of communication
      - (b) Develop cost saving measures
      - (c) Promptly resolve conflicts at lowest possible level
      - (d) Minimize paper work
      - (e) Minimize submittal and response times in all matters
      - (f) Maintain an objective attitude toward constructability

- (g) Promote partnering attitudes at all levels of contract administration
- (h) Lose no job time due to accidents
  - (i) Have fun
  - (j) Meet design intent
- (k) Recognize value of information
  - (l) Take pride in the product we produce
- (m) Maintain a clean, efficient, secure work site
- (n) Fairly interpret ambiguities
- (o) Limit cost growth
- (p) Have empathy in all matters
- (q) Use proactive (not reactive) approach to problem solving
- (r) Accept responsibility for your actions or inactions
- (s) Properly staff project
- (t) Maintain proper work sequence
- (u) Close out the job promptly
- (v) Clearly describe proposed and approved contract changes
- (w) Do it right the first time
- (x) Be a good neighbor
- (y) Etc.

**F. 03:00 to 03:15 pm Coffee break**

1. Use this break to collect notes and material prepared to date for duplication (secy)

**G. 03:15 to 03:45 pm Session #4**

1. Introduction to conflict issue resolution and performance evaluation.  
Note: A full consideration of issue resolution and project evaluation methods should be made a part of subsequent project meetings.

- a) Methods of resolving or avoiding contested disputes
  - (1) Litigation - bench or jury trials
  - (2) Arbitration - AAA or other
  - (3) Mediation - formal or informal
  - (4) Alternative dispute resolution board - has promise
  - (5) Administrative settlement - generally the best of all methods
    - (a) Where possible
      - i) Settle job disputes at job site.
      - ii) Settle job disputes at originating level.
      - iii) Settle job disputes within project staff
- b) What is the channel of conflict issue resolution?
  - (1) What should a project conflict issue resolution policy require and what are its components?
  - (2) How should a conflict issue resolution process work?
  - (3) To be discussed & decided upon by a project team task force.
- c) How is the performance of the partnering team to be measured?
  - (1) How can we evaluate the progress of the partnership in achieving its goals and objectives?
  - (2) To be discussed & decided upon by a project team task force.

**H. 03:45 to 04:45 pm Session #5**

1. Sample charter draft

- a) The participants in this charter meeting accept the following project mission statement for the project.
  - Recognizing our common objectives, we agree to strive together to safely construct, on time and within budget the Ajax laundry building project to the highest quality standards commensurate with its mission of serving the owner, his customers, and the community.

To achieve our mission we reaffirm our belief in the principles of commitment, mutual trust, integrity and personal pride

- b) The intent of this charter is to help achieve the following project objectives.
- (1) Maintain open lines of communications
    - (a) Recognize the need for quality information
    - (b) Minimize submittal and response times in all matters
  - (2) Keep paper and administrative work to a minimum
  - (3) Develop and implement an alternative conflict resolution system using the following guidelines
    - (a) Promptly resolve conflicts at the lowest possible level.
    - (b) Fairly interpret ambiguities.
    - (c) Be proactive (not reactive) in problem solving.
    - (d) Maintain objective attitude toward constructability and practicality
    - (e) Accept responsibility for our actions or inactions
    - (f) Have empathy in all matters
    - (g) Clearly describe changes to contract work
  - (4) Limit cost growth
    - (a) Develop cost effective measures
  - (5) Maintain clean, safe, secure work site
    - (a) Experience no lost time due to accidents



- (b) Properly staff project
  - (c) Be a good neighbor
  - (6) Seek to maintain good job morale and attitudes
    - (a) Promote partnering attitudes at all levels of contract administration
    - (b) Have fun
    - (c) Have pride in our product
  - (7) 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
  - (8) Close out job in proper and timely manner
  - (9) Prepare, maintain and implement a partnering evaluation system
  - (10) Prepare, maintain and implement a contested issue resolution system.
2. Formulate draft #1 of project charter and submit to all meeting participants for review and content discussion.
  3. Prepare and submit draft #2 of project partnering charter to all meeting participants for final review, comment, discussion and revision.
  4. Prepare and print signature draft of project partnering charter.
- I. 04:45 pm to 05:00 Session #6**
1. Sign charter.
  2. Distribute mementos of charter meeting to those present.

3. Summarize meeting.
4. Adjourn.

**IV. Definitions - cco mmi partnering meeting**

**A. Mission**

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

**B. Commitment**

The state of giving a tangible or intangible benefit in a trusting and honorable manner. The act of pledging oneself.

**C. Effective**

Of a nature that achieves identifiable goals and objectives in accordance with an action plan, and achieves worthwhile peripheral goals through intermediate accomplishments.

**D. Goals**

The unquantified desires of an organization or individual expressed without time or other resources assigned. (See objectives for related definitions.)

**E. Objectives**

Quantified targets derived from established goals (see goals). The most commonly used resources in converting goals to objectives are money, time, human abilities, human actions, equipment, and space.

**F. Organization**

The arrangement of resources (talent, skill, money, time, space, people, et al) that has evolved, or been selected, to accomplish the functions, activities, and management, and goals and achieve the objectives of a business or institution.

**G. Partnering - from AGC booklet on partnering - paraphrased**

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.

**H. Partnering - from Construction Industry Institute**

A long term commitment between two or more organizations for the purpose of achieving specific business objectives by maximizing the effectiveness of each participant's resources. This requires changing traditional relationships to a shared culture without regard to organizational boundaries. The relationship is based upon trust, dedication to common goals, and an understanding of each other's individual expectations and values. Expected benefits include improved efficiency and cost effectiveness, increased opportunity for innovation, and the continuous improvement of quality products and services.

**I. Charter**

A document outlining the guidelines by which a group of people agree, in principle, to perform their duties and responsibilities on a defined project.

**J. Alternative dispute resolution**

Methods of clearing construction conflicts by the use of settlements methods other than litigation. Usually involves the use of peer group judgement and pressure to decide, recommend and implement a settlement arrangement.

**V. Handout material for participant notebook**

**A. Master timetable.**

1. 08:00 to 10:00 am - Session #1 - Introduction
2. 10:00 to 10:15 am - Coffee break
3. 10:00 to 12:00 noon - Session #2 - Exercise #1, goals, objectives
4. 12:00 to 01:00 pm - Lunch
5. 01:00 to 03:00 pm - Session #3 - Mission statement preparation
6. 03:00 to 03:15 pm - Break
7. 03:15 to 03:45 pm - Session #4 - Issue resolution & performance measurement
8. 03:45 to 04:45 pm - Session #5 - Charter preparation and review
9. 04:45 to 05:00 pm - Session #6 - Charter signing

**B. Exercise #1 questions to answer in team discussion sessions.**

1. What actions do the other team groups often engage in that create problems for us?
2. What actions do we often engage in as a team group, that we think may create problems for the other team groups?
3. What recommendations would we make to the other team groups, and adopt ourselves, that, if followed, could improve relations and performance on this project?

**C. Teams discuss, answer, and record responses to exercise #1 questions. (lead by chair and secretary selected by team) (secy)**

1. Suggested procedure for team discussion session:
  - a) Participants move to and set up their discussion area.
  - b) Each team appoint a chairman and a recording secretary.
    - (1) Chairman to manager meeting to insure even discussion coverage of questions.
    - (2) Recording secretary to keep notes and summarize information to be taken back to main group meeting.
  - c) Teams to discuss, answer, and record responses to each exercise #1 questions.
    - (1) Flip charts
    - (2) Transparencies
    - (3) Individual notes

**D. Examples of exercise #1 answers that could be discussed and brought the full group for consideration in preparing the charter.**

1. What actions do the other groups engage in that create problems for us as?
  - a) Making design errors that result in disruptive and costly changes.

- b) Delaying shop drawing processing.
  - c) Giving tardy responses to requests for information.
  - d) Issuing changes informally in descriptive or sketch form.
  - e) Engaging in cost information fishing trips for info only.
  - f) Etc.
2. What actions do we as ? engage in that create problems for the other groups?
- a) Providing incomplete submittals and transmittals.
  - b) Delays in identifying long lead material suppliers.
  - c) Failure to exercise proper quality control in the field.
  - d) Demanding rush reviews & approvals on later than promised submittals.
  - e) Leaving others out of the problem solving loop.
  - f) Etc.
3. What recommendations would we as ? make to improve the situation?
- a) Make better reviews of submittals before submission.
  - b) Provide suggested solutions on requests for information.
  - c) Provide submittal schedules in advance of submission.
  - d) Provide priorities of submittals
  - e) State questions to others clearly and thoroughly
  - f) All contractors provide list of subcontractors and major equipment/material suppliers
  - g) Etc.
- E. Examples of major classes of discussion points.**
- 1. Submittal processing
  - 2. Payments

3. Information transmittal
4. Paperwork
5. Red tape
6. Case building
7. Legal theats
8. Etc.

**F. Guidelines for preparing mission statements.**

1. Should be derived from exercise #1 discussion
2. Should be the individual's feeling of the project mission.
3. Should be 25 words or less.
4. Should be explicit.
5. Can be signed or unsigned.

**G. Examples of mission statements that might be prepared by individuals.**

1. To design and construct a high quality, usable facility in a timely, safe & cost effective manner without lawyers & to have a good time doing it.
2. To add value to the project and to make a profit for me and my organization in these areas of performance:
  - a) Financial
  - b) Social
  - c) Educational
  - d) Training
  - e) Professional
3. To be able to proudly say that I was a part of this project and the services it is going to provide.

4. To work as a team and produce a quality project through a program of trust, integrity and cooperation.
5. To build a quality facility with benefit to all participants, without legal disputes, and in a manner that is enjoyable to all.

**H. Samples of early goal and objective statements.**

1. Keep an open line of communication
2. Develop cost saving measures
3. Promptly resolve conflicts at lowest possible level
4. Minimize paper work
5. Minimize submittal and response times in all matters
6. Maintain an objective attitude toward constructability
7. Promote partnering attitudes at all levels of contract administration
8. Lose no job time due to accidents
9. Have fun
10. Meet design intent
11. Recognize value of information
12. Take pride in the product we produce
13. Maintain a clean, efficient, secure work site
14. Fairly interpret ambiguities
15. Limit cost growth
16. Have empathy in all matters
17. Use proactive (not reactive) approach to problem solving
18. Accept responsibility for your actions or inactions
19. Properly staff project
20. Maintain proper work sequence
21. Close out the job promptly

22. Clearly describe proposed and approved contract changes
23. Do it right the first time
24. Be a good neighbor
25. Etc.

**I. Introduction to conflict issue resolution and performance evaluation.**

1. Methods of resolving or avoiding contested disputes
  - a) Litigation - bench or jury trials
  - b) Arbitration - AAA or other
  - c) Mediation - formal or informal
  - d) Alternative dispute resolution board - has promise
  - e) Administrative settlement - generally the best of all methods
    - (1) Where possible
      - (a) Settle job disputes at job site.
      - (b) Settle job disputes at originating level.
      - (c) Settle job disputes within project staff
2. How are conflict issues to be resolved?
  - a) What should a project conflict issue resolution policy require?
  - b) What are the components of a project conflict issue resolution policy?
  - c) How should a project conflict issue resolution process work?
  - d) What are the roles and responsibilities for all levels of the project management in project conflict issue resolution?
  - e) To be discussed & decided upon by a project team task force.
3. How is the performance of the partnering team to be measured?
  - a) How can we evaluate the progress of the partnership in achieving its goals and objectives?
  - b) Who initiates the evaluations?



- c) Who has input to the evaluation?
- d) Who sees the evaluation?
- e) What actions should the evaluation trigger?
- f) Sample evaluation items
  - (1) Safety attitudes
  - (2) Cost growth
  - (3) Schedule adherence
  - (4) Teamwork effectiveness
  - (5) Quality of workmanship
  - (6) Meeting design intent
  - (7) Making and keeping commitments
  - (8) Loyalty to those present and absent
  - (9) Provision of constructive opposition
  - (10) Fun level
  - (11) Etc.

g) To be discussed & decided upon by a project team task force.

**J. Sample charter #1 - a current project charter with the names changed.**

1. The participants in this charter meeting accept , in principal, the following project mission statement for the project.
  - Recognizing our common objectives, we agree to strive together to safely construct, on time and within budget the Ajax laundry building project to the highest quality standards commensurate with its mission of serving the owner, his customers, and the community.

To achieve our mission we reaffirm our belief in the principles of commitment, mutual trust, integrity and personal pride

2. The intent of this charter is to help achieve the following project objectives.
- a) Maintain open lines of communications
    - (1) Recognize the need for quality information
    - (2) Minimize submittal and response times in all matters
  - b) Keep paper and administrative work to a minimum
  - c) Develop and implement an alternative conflict resolution system using the following guidelines
    - (1) Promptly resolve conflicts at the lowest possible level.
    - (2) Fairly interpret ambiguities.
    - (3) Be proactive (not reactive) in problem solving.
    - (4) Maintain objective attitude toward constructability and practicality
    - (5) Accept responsibility for our actions or inactions
    - (6) Have empathy in all matters
    - (7) Clearly describe changes to contract work
  - d) Limit cost growth
    - (1) Develop cost effective measures
  - e) Maintain clean, safe, secure work site
    - (1) Experience no lost time due to accidents
    - (2) Properly staff project
    - (3) Be a good neighbor
  - f) Seek to maintain good job morale and attitudes
    - (1) Promote partnering attitudes at all levels of contract administration
    - (2) Have fun
    - (3) Have pride in our product

- g) Commit to quality control in all project related matters
    - (1) Do it right the first time
    - (2) Maintain proper work sequence
    - (3) Meet design intent
    - (4) Recognize owner's needs in occupation and operation of the facility
  - h) Close out job in proper and timely manner
  - i) Prepare, maintain and implement a partnering evaluation system
  - j) Prepare, maintain and implement a contested issue resolution system.
- K. Sample charter #2 - Portland District U. S. Corps of Engineers/David Evans and Associates, Inc. - August, 1990**
- 1. Mission Statement: We seek to work together as a team, producing valuable, accurate, high quality hydrographic surveys at a fairly negotiated price.
  - 2. Objectives
    - a) Involve both partners in the scoping of the work tasks to assure accurate pricing.
    - b) Maintain a steady, uniform work flow.
    - c) Minimize administrative time spent in finalizing delivery orders.
    - d) Encourage information sharing at all levels Both partners will stress the importance of timely, positive, and ongoing communications.
    - e) Safety is a primary concern. Our goal will be to complete all work without accident.
    - f) Eliminate the need for litigation by producing high-quality hydrographic surveys that are worthy of an "exceptional" rating.
    - g) Encourage both partners to respond swiftly to concerns, deadlines, and requests.

- h) Mutually explore and utilize new technologies and applications to produce technically excellent products and advance the field of surveying.
- i) Increase the resources available to the government of the U. S. through the U. S. Corps of Engineers by effective, friendly, knowledgeable teaming with private enterprise.
- j) Signed
  - (1) Colonel Charles E. Cowen
  - (2) Jurtz Jurisons
  - (3) David F. Evans, P. E., P. L. S.
  - (4) Kenneth M. Weightman, P. E., P. L. S.

**L. Sample charter #3 - Kiewit/Al Johnson, a JV - U. S. Army Corps of Engineers  
Portland District - May 16, 1990 - \$140,000,000 contract**

1. We the Partners for construction of the Bonneville Navigation Lock, commit to trust, cooperation and excellence for the benefit of all stakeholders.
2. Excellence in Safety Performance by completing the Project with the following results:
  - a) No fatalities
  - b) Lost time incident rate less than 1.0
  - c) No general public liability claims over \$500
3. Commitment to a quality project by:
  - a) Meeting the design intent
  - b) Joint quality management program
  - c) Building it right the first time
4. Maintain Integrity of Fish Hatchery

## CCO MMI Partnering Working Outline

Ralph J. Stephenson P. E., P. C.  
August 17, 1992

5. V. E. J. P. goal of \$10 million total project savings
6. No litigation
7. Maximize cooperation to:
  - a) Limit total cost growth to less than 5 percent
  - b) Minimize contractor and subcontractor costs
  - c) Minimize paperwork
8. Make the project enjoyable through:
  - a) Partnering at all levels
  - b) Communication
  - c) Having fun
9. Signed by 36 people

92:37

**Master Note file for Christman/Michigan Millers Charter Meeting**

**1. General information**

- 1.1. Project - Michigan Millers Mutual Life Insurance Addition and Renovation, Lansing, Michigan
- 1.2. Date of meeting - Wednesday, August 19, 1992
- 1.3. Place - Michigan Athletic Club Conference Center, East Lansing, Michigan
- 1.4. Time - 08:00 am to 05:00 pm
- 1.5. Those attending
  - 1.5.1. Architectural Metals
    - 1.5.1.1. John Walter
  - 1.5.2. B & J Painting
    - 1.5.2.1. Bob LeuVoy
    - 1.5.2.2. Kern Rushton
  - 1.5.3. Bezdek Associates
    - 1.5.3.1. Bill Bezdek
  - 1.5.4. Bouma Interiors
    - 1.5.4.1. Dick Shumacher
    - 1.5.4.2. Doug Walker
  - 1.5.5. Christman Construction Services
    - 1.5.5.1. Curt Carlson
    - 1.5.5.2. Marshall Hines
    - 1.5.5.3. Rob Krueger
    - 1.5.5.4. Rick Schroeder
    - 1.5.5.5. Jay Townsley
  - 1.5.6. Douglas Steel
    - 1.5.6.1. Mike Harris
    - 1.5.6.2. Mike Rogers
  - 1.5.7. Eastland Concrete
    - 1.5.7.1. Tom Canfield
  - 1.5.8. Goyette Mechanical, Hammond Associates, Dee Cramer, Inc.
    - 1.5.8.1. Matt Burke - Goyette
    - 1.5.8.2. Jim Hammond - Hammond
    - 1.5.8.3. Rick White - Dee Cramer
    - 1.5.8.4. Jim Moore - Dee Cramer
    - 1.5.8.5. Mike Schweiger - Goyette
  - 1.5.9. Hayes Electric
    - 1.5.9.1. Mike Hayes
  - 1.5.10. IBM
    - 1.5.10.1. Ernie Hassell
    - 1.5.10.2. Joel Sydlowski
    - 1.5.10.3. Mike Tokai
  - 1.5.11. Lutz Electric
    - 1.5.11.1. Frank Baldino
    - 1.5.11.2. Gary Lutz
  - 1.5.12. MBDS, Inc. - Architect/engineer
    - 1.5.12.1. Kees Beukema

- 1.5.12.2. Paul Jacob
- 1.5.12.3. Mike Mayotte
- 1.5.13. Metal Building Specialties
  - 1.5.13.1. Kathy Ross
  - 1.5.13.2. John Sanford
- 1.5.14. Michigan Millers Mutual Insurance
  - 1.5.14.1. Carl Powers
  - 1.5.14.2. Ray Zillgitt
- 1.5.15. Moderator and consultant
  - 1.5.15.1. Ralph J. Stephenson
- 1.5.16. Richmond Interiors
  - 1.5.16.1. Dave Kenyon
- 1.5.17. Schiffer Masonry
  - 1.5.17.1. Mike Marher
  - 1.5.17.2. Dan Schiffer
- 1.5.18. Stephenson Roofing
  - 1.5.18.1. Dennis Bronner
  - 1.5.18.2. Craig Stephenson
- 1.5.19. Visitors
  - 1.5.19.1. Kim Fricke - Professional Concepts Insurance
  - 1.5.19.2. Ruby Ivens - Lansing Community College
  - 1.5.19.3. Jeane Thompson - Professional Concepts Insurance
  - 1.5.19.4. Dick Wever - Michigan State University
- 1.5.20. Wolverine Fire Protection
  - 1.5.20.1. Darrel Ochs
- 1.6. **Master timetable**
  - 1.6.1. 08:00 to 10:00 am Session #1 - Introduction
  - 1.6.2. 10:00 to 10:15 am Coffee break
  - 1.6.3. 10:00 to 12:00 n Session #2 - Exercise #1, goals, objectives
  - 1.6.4. 12:00 to 01:00 pm Lunch
  - 1.6.5. 01:00 to 03:00 pm Session #3 - Mission statement preparation
  - 1.6.6. 03:00 to 03:15 pm Break
  - 1.6.7. 03:15 to 03:45 pm Session #4 - Issue resolution & performance measurement
  - 1.6.8. 03:45 to 04:45 pm Session #5 - Charter preparation and review
  - 1.6.9. 04:45 to 05:00 pm Session #6 - Charter signing
- 2. **Exercise #1**

Note: The material transcribed from flip charts was duplicated generally as written with minor spelling and punctuation as required for clarity. Generally the wording was left as originally written.

  - 2.1. **What actions do other groups engage in that create problems for us?**
    - 2.1.1. Team #1 - Owner/user/architect/engineer/consultant
      - 2.1.1.1. Subs don't follow drawings resulting in conflicts/cost overruns without previous communication & planning
      - 2.1.1.2. Lack of advance study of drawings/specs resulting in untimely discovery of conflict, ambiguity, etc.
      - 2.1.1.3. Missed dates & not keeping schedules
      - 2.1.1.4. Late/incomplete submissions

- 2.1.1.5. Poor communication as root of problems. Creates hostile atmosphere.
- 2.1.1.6. 2 edged sword a/e and contractors often not sympathetic (fair) to each other
- 2.1.1.7. Criticism of design without suggested alternatives
- 2.1.1.8. Say/request one thing which proves unnecessary because of lack of coordination/follow thru
- 2.1.1.9. Lack of flexibility/cooperation
- 2.1.1.10. Individual rather than team approach
- 2.1.2. Team #2 - General contractor team
  - 2.1.2.1. From subcontractors
    - 2.1.2.1.1. Lack of manpower
    - 2.1.2.1.2. Lack of training
    - 2.1.2.1.3. Unreasonable bulletin quotations
    - 2.1.2.1.4. Returning bulletin quotes in a timely manner
    - 2.1.2.1.5. Lack of safety on job
    - 2.1.2.1.6. Lack of quality of performance
    - 2.1.2.1.7. Lack of planning and follow through
    - 2.1.2.1.8. Communication between field rep and his project manager
    - 2.1.2.1.9. I. D. of long lead materials
  - 2.1.2.2. From a/e
    - 2.1.2.2.1. Payment process
    - 2.1.2.2.2. Incomplete design
    - 2.1.2.2.3. Timely response to rfi's
    - 2.1.2.2.4. Shop drawing turn around
    - 2.1.2.2.5. Willingness to accept alternate materials/methods - value engineering and constructability
  - 2.1.2.3. From owner
    - 2.1.2.3.1. Timely payment
    - 2.1.2.3.2. Selection of colors/materials
    - 2.1.2.3.3. Approval of change orders/bulletins
    - 2.1.2.3.4. Poor planning/programming, lack of foresight
    - 2.1.2.3.5. Define level of quality
  - 2.1.2.4. From outside agencies
    - 2.1.2.4.1. Take too much time for decisions or actions (bwl)
- 2.1.3. Team #3 - Building frame & close in sub contractor
  - 2.1.3.1. Damage to finish roofing by other trades & owner/arch
  - 2.1.3.2. Untimely return of shop drawings submittals
  - 2.1.3.3. Post contract changes
  - 2.1.3.4. Complete set of design drawings and specifications listing, i.e. products, colors, materials
  - 2.1.3.5. Reasonable selection of materials - e.g. match existing
  - 2.1.3.6. Lack of information from other trades for work that needs close coordination
  - 2.1.3.7. Sequencing of other sub's work thee mat affects another sub's productivity (hardware and hollow metal)
  - 2.1.3.8. Prompt release of changes once they are priced/quoted
  - 2.1.3.9. Change made to accommodate one sub without notifying other trades that may be affected



- 2.1.3.10. Overlapping tolerances not allowed for in design (information sharing among team members)
- 2.1.3.11. Prompt decisions from owner
- 2.1.4. Team #4 - Building interior work sub contractor
  - 2.1.4.1. From owner/ae
    - 2.1.4.1.1. Delay in decision/approval of detail/materials
    - 2.1.4.1.2. Change in scope
    - 2.1.4.1.3. Incomplete detailing
    - 2.1.4.1.4. Slow/incomplete response to rfi's
    - 2.1.4.1.5. Slow payment
    - 2.1.4.1.6. Not listening to sub contractors
    - 2.1.4.1.7. No formal approval of shop drawings (reviewed only)
    - 2.1.4.1.8. No quality check by a/e or contractor
    - 2.1.4.1.9. Owner delays due to slow decisions
    - 2.1.4.1.10. Repair of damage due to other subs
    - 2.1.4.1.11. Several punch lists
  - 2.1.4.2. From cm/gc
    - 2.1.4.2.1. Slow/incomplete payment
      - 2.1.4.2.1.1. Change order
      - 2.1.4.2.1.2. G. C. doesn't pay until G. C. collects \$ from owner
      - 2.1.4.2.1.3. Retention
    - 2.1.4.2.2. No pay for added work
    - 2.1.4.2.3. Poor scheduling
    - 2.1.4.2.4. Supervision/coordination of trades
    - 2.1.4.2.5. No provision for central hoisting/dumpster
    - 2.1.4.2.6. Double standard with subs
  - 2.1.4.3. From subs
    - 2.1.4.3.1. Each sub only interested in own work - area, details, scaffold, etc.
    - 2.1.4.3.2. Poor workmanship
    - 2.1.4.3.3. Work done out of sequence
    - 2.1.4.3.4. Slow/incomplete submittals
    - 2.1.4.3.5. Clean up of own materials
    - 2.1.4.3.6. Slow quote of bulletins
    - 2.1.4.3.7. Delay due to lack of components
    - 2.1.4.3.8. Inadequate manpower for job
    - 2.1.4.3.9. Older material too late
    - 2.1.4.3.10. Damage work of others
    - 2.1.4.3.11. Lack of equipment required for job
    - 2.1.4.3.12. Lack of temp light/power
- 2.1.5. Team #5 - Building system sub contractor
  - 2.1.5.1. Coordination of ceiling layout
  - 2.1.5.2. Schedule too general
  - 2.1.5.3. Prompt response to rfi's, co's, etc.
  - 2.1.5.4. Need a/e/o at job meetings
  - 2.1.5.5. Need direct communication with a/e/o
  - 2.1.5.6. Need a/e/o regular review of installation for compliance with documents

- 2.1.5.7. Different consultants for data center
- 2.1.5.8. Provide background/cad drawings by a/e
- 2.1.5.9. Coordination with masonry walls for m/e penetrations
- 2.1.5.10. Parking
- 2.1.5.11. Laydown areas
- 2.1.5.12. Prompt payment
- 2.1.5.13. Immediate issuance of co's
- 2.1.5.14. Method to reduce retainage earlier to subs and lower tier subs
- 2.1.5.15. Schedule compaction
- 2.1.5.16. Backcharges by force
- 2.1.5.17. Trash removal & clean up
- 2.2. What actions do we engage in that create problems for others?**
  - 2.2.1. Team #1 - Owner/user/architect/engineer/consultant**
    - 2.2.1.1. Inconsistencies between/within documents
    - 2.2.1.2. Turnaround times
    - 2.2.1.3. Restrictions placed on a/e via liability, etc. i.e. shop drawing review is limited
    - 2.2.1.4. Delay caused by owner decision process
    - 2.2.1.5. Lack of timely access to decision makers
    - 2.2.1.6. Perceived aloofness/authoritative stance creating barriers to working relationships
    - 2.2.1.7. Our individual us team approach
    - 2.2.1.8. Egos "Don't tell us how it's going to be done"
    - 2.2.1.9. Lack of openness to new technologies/products/applications
    - 2.2.1.10. Lack of communication/poor communication
    - 2.2.1.11. Incomplete punch lists
    - 2.2.1.12. Lack of enthusiastic support of contractor & his work - "give credit where credit is due"
    - 2.2.1.13. Unrealistic expectations
  - 2.2.2. Team #2 - General contractor team**
    - 2.2.2.1. Lack of payment
    - 2.2.2.2. Lack of planning
    - 2.2.2.3. Communicating to the subs the level of quality the owner expects
    - 2.2.2.4. Anticipating problems
    - 2.2.2.5. Lack of shop drawings review prior to sending shops to a/e
    - 2.2.2.6. I. D. of long lead materials and supplies
    - 2.2.2.7. Bulletin, quotation review
  - 2.2.3. Team #3 - Building frame & close in sub contractor**
    - 2.2.3.1. Material storage limits access for other trades
    - 2.2.3.2. Lack of team cooperation
    - 2.2.3.3. As subs, we do not give each other realistic delivery dates or updates on changing delivery dates
    - 2.2.3.4. Communications between subs regarding potential problems
    - 2.2.3.5. Lack of proper manpower (qualified & skilled people)
    - 2.2.3.6. Lack of proper supervision
    - 2.2.3.7. Lack of proper planning
  - 2.2.4. Team #4 - Building interior work sub contractor**
    - None recorded. Were any prepared?

- 2.2.5. Team #5 - Building system sub contractor
  - 2.2.5.1. Lack of continual input from m/e trades for coordination
  - 2.2.5.2. Expediting submittals
  - 2.2.5.3. Expediting deliveries
  - 2.2.5.4. Protection of other's work
- 2.3. **What recommendations would we make to improve performance?**
  - 2.3.1. Team #1 - Owner/user/architect/engineer/consultant
    - 2.3.1.1. Possible solutions/recommendations. Numbers in [ ] refer to classes of objectives as described in section #4 below
      - 2.3.1.1.1. Listen, ensure understanding of points of view other than your own, be flexible, open & team oriented [11]
      - 2.3.1.1.2. Be available [3/11]
      - 2.3.1.1.3. Complete & clear submittal reviews, rfi responses, etc. [1/10]
      - 2.3.1.1.4. Clarify objectives concerning submittals & A/E role in their processing - timely turnaround & decision making [1/3]
      - 2.3.1.1.5. Improve methods of communication [11]
      - 2.3.1.1.6. Empower all participants with at least some decision making ability. Eliminate second guessing of decisions properly made by others.
      - 2.3.1.1.7. Show all participants due respect & acknowledgement. Identify closely with all individuals with whom you are working on the project.
      - 2.3.1.1.8. Forethought & preplanning & coordination before beginning tasks.
      - 2.3.1.1.9. Be realistic
      - 2.3.1.1.10. Base designs, expectations, etc. on a practical & realistic basis.
    - 2.3.1.2. No identification - probably owner/architect/engineer/consultant team - these appeared to be the summary for charter statements of goals & objectives. Numbers in [ ] refer to classes of objectives as described in section #5 below.
      - 2.3.1.2.1. Submittals [1]
        - 2.3.1.2.1.1. Complete, clear, timely reviews and turnaround
        - 2.3.1.2.1.2. Clarify objectives & expectations, A/E role
      - 2.3.1.2.2. Info processing [3]
        - 2.3.1.2.2.1. Be available
        - 2.3.1.2.2.2. Turnaround time
      - 2.3.1.2.3. Planning & scheduling [6]
        - 2.3.1.2.3.1. Forethought & preplanning
        - 2.3.1.2.3.2. Be realistic
      - 2.3.1.2.4. Decision making [7]
        - 2.3.1.2.4.1. Empower all level of participants w/decision making authority
          - 2.3.1.2.4.1.1. Respect those decisions
        - 2.3.1.2.4.2. Timely turnaround - be available
      - 2.3.1.2.5. Policies & procedures [8]
        - 2.3.1.2.5.1. Flow chart communications channels
        - 2.3.1.2.5.2. Decision making at all levels
      - 2.3.1.2.6. Processing revisions [10]
        - 2.3.1.2.6.1. Complete & clear bulletins, expediently
      - 2.3.1.2.7. Partnering [11]
        - 2.3.1.2.7.1. Listen, be flexible & open

- 2.3.1.2.7.2. Team oriented
- 2.3.1.2.7.3. Be available
- 2.3.1.2.7.4. Be realistic
- 2.3.1.2.7.5. Open channels of communication
- 2.3.1.2.7.6. Show all participants due respect & acknowledgement
- 2.3.2. Team #2 - General contractor team
  - 2.3.2.1. Recommendations made by unidentified team (probably prepared by Christman)
    - 2.3.2.1.1. Owner and a/e solutions to resolve problems
      - 2.3.2.1.1.1. Payment flow chart - all involved stick to flow chart
      - 2.3.2.1.1.2. Very prompt response to design issues (rfi's to include suggestions) - Consider contractor input.
      - 2.3.2.1.1.3. Provide flow chart change order process
      - 2.3.2.1.1.4. Signing authority of \$20,000 for owner rep without Board approval
      - 2.3.2.1.1.5. Line item approval of bulletins
      - 2.3.2.1.1.6. TQM
    - 2.3.2.1.2. Subcontractor to resolve problems
      - 2.3.2.1.2.1. Have subcontractors write p.o.'s in timely manner
      - 2.3.2.1.2.2. Submit realistic manpower loading schedule with a commitment
      - 2.3.2.1.2.3. Stress importance of training for each man on job (TQM)
      - 2.3.2.1.2.4. Make commitment to sub to expedite & approve fair priced bulletins
      - 2.3.2.1.2.5. Critical issues and submittals should be discussed during progress meetings among team participants (PEERS)
      - 2.3.2.1.2.6. Follow through via training sessions
    - 2.3.2.1.3. No title
      - 2.3.2.1.3.1. Define (10) and clearly communicate quality expectations
      - 2.3.2.1.3.2. Total commitment to payment flow chart
      - 2.3.2.1.3.3. Timely response to request for information, change orders
  - 2.3.3. Team #3 - Building frame & close in sub contractor
    - 2.3.3.1. Be more careful when working around other sub's work
    - 2.3.3.2. Need to maintain an awareness of the partnering concept
    - 2.3.3.3. Keep communications channels open (honest communication)
    - 2.3.3.4. Trust a belief in the partnering concept
    - 2.3.3.5. GC needs to assemble a quality team based on prequalified subcontractor demonstrating a commitment to total quality management
    - 2.3.3.6. Need good design fast
    - 2.3.3.7. Eliminate AGC cleanup - Owner should provide dumpster & clean up crew
    - 2.3.3.8. Community equipment/man hoist provided by owner
    - 2.3.3.9. Proper access and utilities
    - 2.3.3.10. Owner to provide field layout (full time) engineer to provide & maintain bench marks & control points
    - 2.3.3.11. Owner needs to distribute complete sets of bid documents to all bidders (drawings, specs, addendum, general conditions)
  - 2.3.4. Team #4 - Building interior work sub contractor - Numbers in [ ] refer to class of solution as defined in section #4 below.
    - 2.3.4.1. Prequalified - subs and suppliers [8]
    - 2.3.4.2. Prompt decisions, submittals [3/7]

- 2.3.4.3. Better prep/review of submittals by all [3]
- 2.3.4.4. Well prepared r. f. i. with possible solution [3]
- 2.3.4.5. Payment & C. O. within 30 days [2/10]
- 2.3.4.6. Keep open mind for best solution even if you didn't think of it [11]
- 2.3.4.7. Owner/cm committed to "smooth" work flow (delta dental - yes, hagadorn - no) [8/11]
- 2.3.5. Team #5 - Building system sub contractor - Numbers in ( ) refer to items identified in problem statements. Numbers in [ ] refer to class of solution as defined in section #4 below.
  - 2.3.5.1. Provide all dimension changes to all trades (2.1.5.1)(IE1) [3]
  - 2.3.5.2. Meet with all trades to develop realistic & specific activities (2.1.5.2) [6]
  - 2.3.5.3. Response of directive/authorization needed within a week (2.1.5.3) [3]
  - 2.3.5.4. Each week review open items (2.1.5.3) [3]
  - 2.3.5.5. Need mechanical & electrical decision makers to meet with us weekly (2.1.5.4) [7]
  - 2.3.5.6. Permission to contact m/e engineer directly (2.1.5.5) [3/8]
  - 2.3.5.7. m/e engineer to continually inspect installation & advise immediately if not per documents (2.1.5.5) [3/8]
  - 2.3.5.8. Provide ID and access to all key people (2.1.5.7) [3/8]
  - 2.3.5.9. A/E to provide CAD drawings (2.1.5.8) [3/8]
  - 2.3.5.10. Sign-off sheet/foreman's meetings (2.1.5.9) [3/8]
  - 2.3.5.11. Look for economical solutions (2.1.5.10) [9]
  - 2.3.5.12. Provide location drawings as soon as possible (2.1.5.11) [9]
  - 2.3.5.13. Develop prompt schedule of payments (2.1.5.12) [2]
  - 2.3.5.14. Issue written directive in field prior to proceeding (2.1.5.13) [10]
  - 2.3.5.15. Review requirements (2.1.5.14) [3]
  - 2.3.5.16. Follow schedule/advise of conflicts (2.1.5.14) [3/6]
  - 2.3.5.17. Eliminate them (2.1.5.16) [8/9]
  - 2.3.5.18. Clean up & hoisting (2.1.5.17) [8/9]
  - 2.3.5.19. Between foremen daily (2.2.5.1) [8]
  - 2.3.5.20. Expedite (2.1.5.2) [1]
  - 2.3.5.21. Rush (2.1.5.3) [1]
  - 2.3.5.22. Commitment (2.1.5.4) [11]
- 3. **Mission definition**
  - 3.1. **Mission statements prepared by individual participants during meeting**
    - 3.1.1. 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
    - 3.1.2. On time, safety, profit, quality, nob, team project
    - 3.1.3. I would be most gratified if the mission of the team was to accomplish a smooth well thought our construction of the building by planning and reacting to the needs of the project and resolving any problems with the Owner's interest first and all others second to the best and fairest for all. My goal would be a project built by all that is unquestionably the best we can all do.
    - 3.1.4. To build a quality project with the total commitment of all involved from owner to tradesperson and finish the project with pride and satisfaction of all.
    - 3.1.5. Keep the lines of communication open, being objective and receptive e to everyone's concerns, offering solutions that benefit everyone involved, while constructing the project consistent with the design intent.

- 3.1.6. 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.
- 3.1.7. A commitment from all parties involved to construct a quality project in a timely manner.
- 3.1.8. All parties to communicate/work to solve problems and build this addition to the quality specified in a safe & timely manner.
- 3.1.9. To realize the best success for all involved we pledge to each do our part in the timely, accurate & professional manner of our particular tasks.
- 3.1.10. Our mission is to complete the Miller project safely, on time, and within budget, working in a spirit of cooperativeness & respect for all parties involved.
- 3.1.11. Work together for safe functional, profitable project.
- 3.1.12. 4 C's - Cooperate & Coordinate & Communicate with team members to Complete a successful & profitable project.
- 3.1.13. The mission of this group is to properly coordinate all construction to obtain the best building for the owner without causing undue hardships to all involved.
- 3.1.14. 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.
- 3.1.15. 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.
- 3.1.16. To assist in constructing the most functional and esthetically pleasing building within the constraints of the contracted price.
- 3.1.17. Complete the project with the highest level of quality in Lansing, on time, and within the budget so that all of the team members want to do the next project together.
- 3.1.18. To provide a quality building within the budgeted time & cost - earning a fair profit & having fun doing it.
- 3.1.19. Work in harmony with all team players to provide a project that everyone can be proud of.
- 3.1.20. To provide an ? to complete & build a top quality project complete building project with good communication and excellence.
- 3.1.21. To commit to a coordinated effort by all parties involved, a finished building of quality that owners and all contractors will be proud of.
- 3.1.22. Work together as a team to recognize problems, answers, and agree to build the project in a timely manner and build within budget. Producing a safe project site. Properly serving the owner to build the project re plans and specifications.
- 3.1.23. Work together as a team to build a quality building in a safe and cost effective way.
- 3.1.24. We are able to communicate honestly & with all parties interested in mine & (not just our own) to safely build a quality project on time & within budget & make a reasonable profit for our efforts.
- 3.1.25. To construct a quality facility in a timely, safe and cost effective and profitable way through communication & cooperation from all involved.
- 3.1.26. To furnish to the owner a quality installed system in a timely manner, considering all people involved, at a profit.
- 3.1.27. Mission of this project
  - 3.1.27.1. Profitable
  - 3.1.27.2. Fun
  - 3.1.27.3. Efficient
  - 3.1.27.4. Cooperative
  - 3.1.27.5. Quality

- 3.1.27.6. Innovative
- 3.1.27.7. Proud
- 3.1.27.8. To be constructed in complete compliance with the Owner & A/E's expectation of quality. This project should be run in an innovative way to meet the quality expectations of the owner and a/e, be managed with top efficiency in a cooperative manner so that all participants can be proud o these accomplishments.
- 3.1.28. To have the customer (Michigan Millers) delighted with the project at its completion.
- 3.1.29. To achieve the highest quality building possible for the owner that satisfies their needs and objectives, within budget and schedule parameters.
- 3.1.30. The cooperative, respectful and safe construction of a new facility exhibiting our pride of workmanship, participation and team work.
- 3.1.31. To build and construct a building that is well suited and functionally to the Owner and Community.
- 3.1.32. To work together in the completion of this project to give the customer a quality project within budget. A project constructed safely, without litigation in a timely fashion of which we are all proud to be associated.
- 3.1.33. Have a complete SATISFACTION that the PROJECT was completed to the highest possible quality standards, on time and under budget. To provide problem resolution at the lowest possible level. No litigation.
  - 3.1.33.1. Goals - That the project be completed with good spirit by all involved. That the project be looked back on as a good job. Complete team involvement is established and carried out throughout the project.
  - 3.1.33.2. Objectives - Provide timely cost updates, schedules, updates to gage the project goals and mission.
- 3.2. Operative words derived from individual mission statements**
  - 3.2.1. Quality (20 mentions)
  - 3.2.2. Safety (11 mentions)
  - 3.2.3. On time (11 mentions)
  - 3.2.4. Agreement, team, harmony, commitment (9 mentions)
  - 3.2.5. Profitability (7 mentions)
  - 3.2.6. Communication (6 mentions)
  - 3.2.7. Cooperation (4 mentions)
  - 3.2.8. Coordination (3 mentions)
  - 3.2.9. On budget (3 mentions)
  - 3.2.10. Respect (1 mentions)
- 4. Classes of solutions used in final selection of charter goals and objectives**
  - 4.1. Submittals
  - 4.2. Payments
  - 4.3. Information processing & paperwork
  - 4.4. Legal threats
  - 4.5. Abatement
  - 4.6. Planning and scheduling
  - 4.7. Decision making
  - 4.8. Policies & procedures
  - 4.9. Site layout & management
  - 4.10. Processing revisions

4.11. Being a good partnering neighbor

4.12. Total quality management

4.13. Safety

5. Charter for Michigan Millers Mutual Insurance Addition and Renovation project

5.1. Mission

5.1.1. We the Project Team commit to construct a quality facility, on time and within budget, maximizing safety, communication, & cooperation so that all participants can be proud and profitable in their accomplishments.

5.2. Objectives - to accomplish our mission we recognize a need to work to the following goals and objectives.

5.2.1. Submittals

5.2.1.1. Clarify objectives and expectations of the submittal process

5.2.1.2. Minimize submittal and approval times

5.2.1.3. Provide accurate, prompt, clear, concise approvals

5.2.2. Payments

5.2.2.1. Make payments in accordance with the published flow chart process

5.2.3. Information processing & paperwork

5.2.3.1. Expedite all information and indicate desired response times

5.2.3.2. Maintain open lines of communication among Project Team members

5.2.3.3. Be available

5.2.3.4. Attempt to offer possible solutions to questions within a proper scope

5.2.3.5. Provide clear responses to requests for information

5.2.4. Legal matters

5.2.4.1. No litigation

5.2.4.2. Settle disputes at originating level

5.2.5. Abatement

5.2.5.1. Establish, approve and publish a plan of abatement

5.2.5.2. Abate promptly

5.2.6. Planning and scheduling

5.2.6.1. Provide, obtain, and use accurate activity information

5.2.6.2. Clearly monitor the project against the plan and schedule

5.2.6.3. Commit to, and fulfill man hour projections

5.2.7. Decision making

5.2.7.1. A/E team to regularly inspect work and advise compliance

5.2.7.2. Define and clearly communicate quality expectations

5.2.7.3. Properly empower those at all decision making levels

5.2.8. Policies and procedures

5.2.8.1. Prepare, review, approve and publish policies and procedures that will serve as guidelines to manage the project

5.2.9. Site layout and management

5.2.9.1. Formulate and publish a trash removal & parking plan

5.2.9.2. Properly establish and maintain bench marks and control lines

5.2.10. Processing revisions

5.2.10.1. Provide written authorization prior to work proceeding

5.2.10.2. Respond to requests for information, bulletins and change orders promptly

5.2.10.3. Prepare, approve & publish a flow chart for processing revisions



- 5.2.11. Be a good partnering neighbor
  - 5.2.11.1. Commit to protecting your work and the work of others
  - 5.2.11.2. Show all participants due respect and acknowledgement
  - 5.2.11.3. Maintain proper work sequences
- 5.2.12. Total quality management
  - 5.2.12.1. Prepare, approve, publish, and commit to a TQM program

**General information . . . . . 1**  
    Project - Michigan Millers Mutual Life Insurance Addition and Renovation, Lansing,, 1  
    Date of meeting - Wednesday, August 19, 1992, 1  
    Place - Michigan Athletic Club Conference Center, East Lansing, Michigan, 1  
    Time - 08:00 am to 05:00 pm, 1  
    Those attending, 1  
    Master timetable, 2

**Exercise #1 . . . . . 2**  
    What actions do other groups engage in that create problems for us?, 2  
    What actions do we engage in that create problems for others?, 5  
    What recommendations would we make to improve performance?, 6

**Mission definition . . . . . 8**  
    Mission statements prepared by individual participants during meeting, 8  
    Operative words derived from individual mission statements, 10

**Classes of solutions used in final selection of charter goals and objectives . . . . .10**  
    Submittals, 10  
    Payments, 10  
    Information processing & paperwork, 10  
    Legal threats, 10  
    Abatement, 10  
    Planning and scheduling, 10  
    Decision making, 10  
    Policies & procedures, 10  
    Site layout & management, 10  
    Processing revisions, 10  
    Being a good partnering neighbor, 11  
    Total quality management, 11  
    Safety, 11

**Charter for Michigan Millers Mutual Insurance Addition and Renovation project . . . . .11**  
    Mission, 11  
    Objectives - to accomplish our mission we recognize a need to work to the following goals, 11

# MEMORANDUM

92:37

**CHRISTMAN**  
CONSTRUCTION SERVICES

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TO: Ralph Stevenson  
FROM: Rick Schroder *RS*  
DATE: August 6, 1992  
RE: MICHIGAN MILLER MUTUAL INSURANCE  
SUBJECT: "PARTNERING AGREEMENT"

Attached are all of the documents that we have forwarded to our subcontractors as of this date.

We will be forwarding your agenda as soon as it is available.

We have sent the AGC Partnering Brochure all contractors listed on the log sheet.

RS:sgm/MEMO.4

Attachments

July 21, 1992

1~

RE: PRE-CONSTRUCTION CONFERENCE  
" PARTNERING "

Dear Sirs:

Congratulations! I was pleased to find your company the successful bidder on the Michigan Millers Mutual Insurance Company project. Your company has a very good reputation and we look forward to a rewarding relationship.

We will have a Pre-construction Conference on Tuesday August 11, 1992, at 1:30 p.m., at Christman's main office, 408 Kalamazoo Plaza, Lansing.

It is my intention to establish a formal "Partnering" Agreement and Program with all subcontractors, architect, engineer and owner.

Partnering is a process promoting teamwork, minimizing confrontation and hopefully eliminating the need for litigation, where all stake holders finish the job a winner. It is a challenging endeavor that requires the commitment of senior management. We will want the principal of your company and a person in senior management or the project superintendent for the Michigan Millers project to attend this meeting. This will be an all day seminar, please indicate below which of these dates will be convenient:

- Tuesday - August 18, 1992
- Wednesday - August 19, 1992
- Thursday - August 20, 1992

I will present the details of Partnering during the Pre-Construction Conference scheduled for August 11, 1992, at 1:30 p.m.

Please feel free to contact me if you have any questions at 517-482-1488.

Very truly yours,  
**THE CHRISTMAN COMPANY**

Rick Schroder  
Project Manager  
RS:sgm/ltr.3  
cc: C. Carlson



TO: Participating Subcontractors

FROM: Rick Schroder, Project Manager *RS*

DATE: August 5, 1992

RE: Michigan Millers Mutual Insurance  
Addition & Renovation

SUBJECT: PARTNERING MEETING

The date of the Partnering meeting has been set for Wednesday, August 19, 1992. This will be an all day session starting promptly at 8:00 a.m., and ending at 5:00 p.m., we expect everyone to attend for the full day. We will be meeting at the Michigan Athletic Club Conference Center, behind the USA Cafe. (Map Enclosed) Coffee will be served in the morning followed by lunch at noon.

Please take time to look over the enclosed brochure so you will be more familiar with the Partnering concept when we meet. The goal of this meeting is to jointly sign a Partnering Charter at the end of the day.

Mr. Ralph Stevenson will be our Facilitator for the day. We will be sending you an agenda of the days meeting in the near future.

Please read pages 6 & 7 of the Brochure and be prepared to discuss the following issues which are listed on page 14.

Barriers, Problems and Opportunities

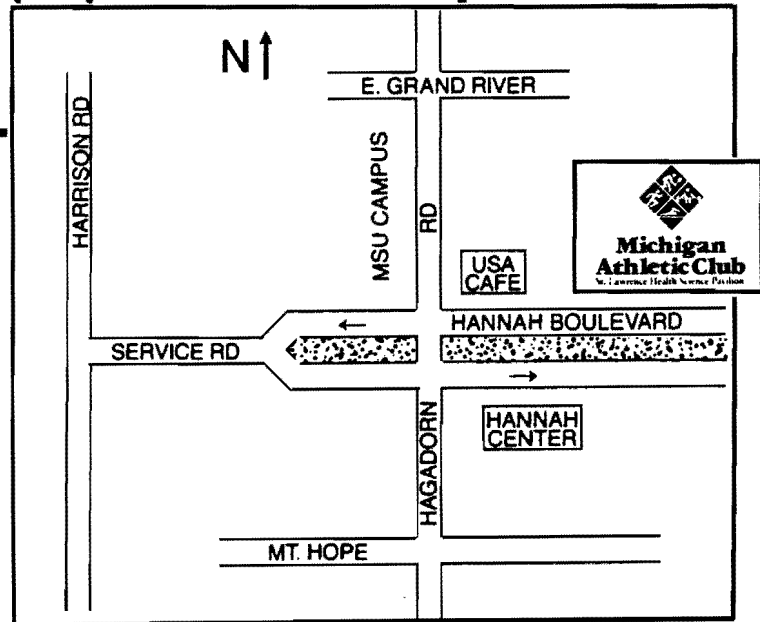
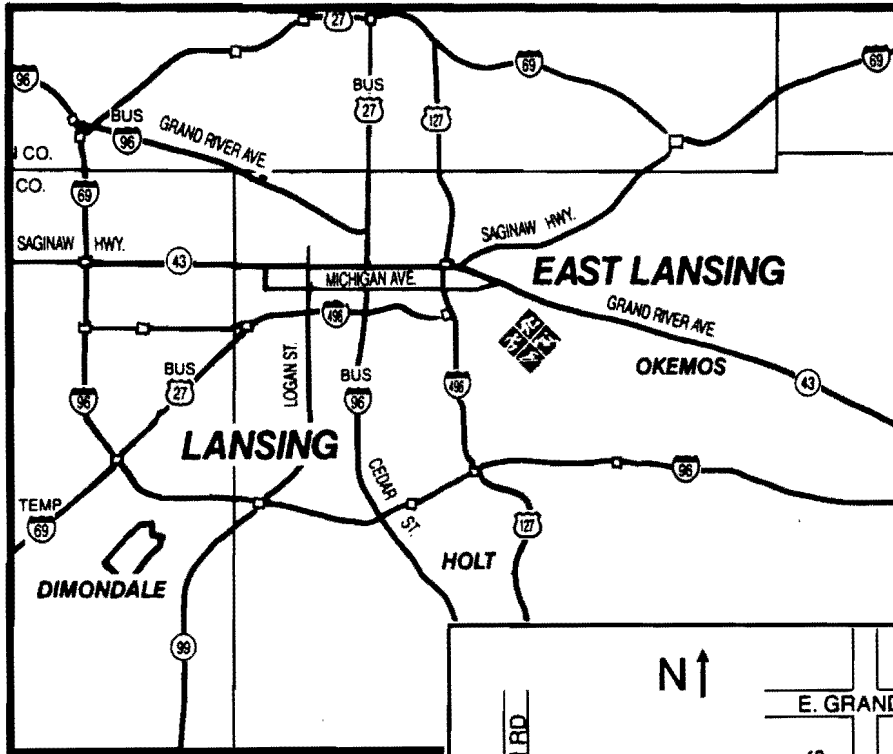
- ◆ What actions does the other group engage in that create problems for us?
- ◆ What actions do we engage in that we think may create problems for them?
- ◆ What recommendations would we make to improve the situation?

If you have any questions regarding the meeting, or the Partnering concept, contact me at the Lansing office.

RS:sgm/memo.2

Enclosures

cc: Carl Powers, Glenn Mathews - Michigan Millers (Memo Only)  
MBDS, Inc. Architects (Memo Only)  
Bezkek Associates Engineers (Memo Only)



**Michigan  
Athletic Club**  
St. Lawrence Health Science Pavilion

2900 Hannah Boulevard, East Lansing, MI 48823 • (517) 337-0002

## PARTNERING MEETING

Wednesday

August 19, 1992

Company	#	Attending
Christman	3	Curt Carlson Rick Schroder Ralph Stevenson/Moderator
Michigan Millers	2	Carl Powers Glen Mathews
Architect/Engineer	④ 2?	Mike Mayotte Paul Jacob
Eastland Concrete	2	Darrell Eastlund Tom Canfield
Capitol Excavating	2	George Hayhoe Marty Sekrenes
Schiffer Mason	4	Dan Schiffer Ed Davenport Mike Marher Cory Torres
Douglas Steel	2	Mike Rogers Mike Harris
Stephenson Roofing	2	Craig Stephenson Dennis Bronner
Architectural Metals	1	John Walter
Metal Bldg Specialties	2	John Sanford Kathy Ross
Bouma Interiors	2	Doug Walker Dick Shoemaker
Richmond Interiors	1	Dave Kenyon
B & J Painting	2	Joe Coonrad Kern Rushton
Wolverine Fire Protection	③	William Jacques Darrel Ochs ?
Goyette Mechanical	3	Mike Schweiger Matt Burke Del Sanborn
Lutz Electric	④ 3?	Rollie Lutz Gary Lutz Frank Baldino

39 Total

R. A. DINKEL & ASSOCIATES, INC.

2916 S. LOGAN, LANSING, MICHIGAN 48910 (517) 882-2488 • FAX: 517-882-0505



FAX MESSAGE

DATE 7-29-92 FROM DICK DINKEL NO. PAGES 3  
(incl. this pg.)  
TO STACY-CHRISTMAN FAX NO. 482-3520

Hi -  
THIS IS THE CORPORATE MUG. BLACK  
W/ GOLD LOGO & GOLD LIP, IN GIFT  
BOX. @ .22 each 48 PLUS SCREEN  
OF 43.00.



DELIVERY ON THE 17<sup>TH</sup> 18<sup>TH</sup> OR 19<sup>TH</sup>  
DICK





**Michigan Millers**  
Mutual Insurance Company

**PARTNERING**

**CHARTER**

**MEETING**

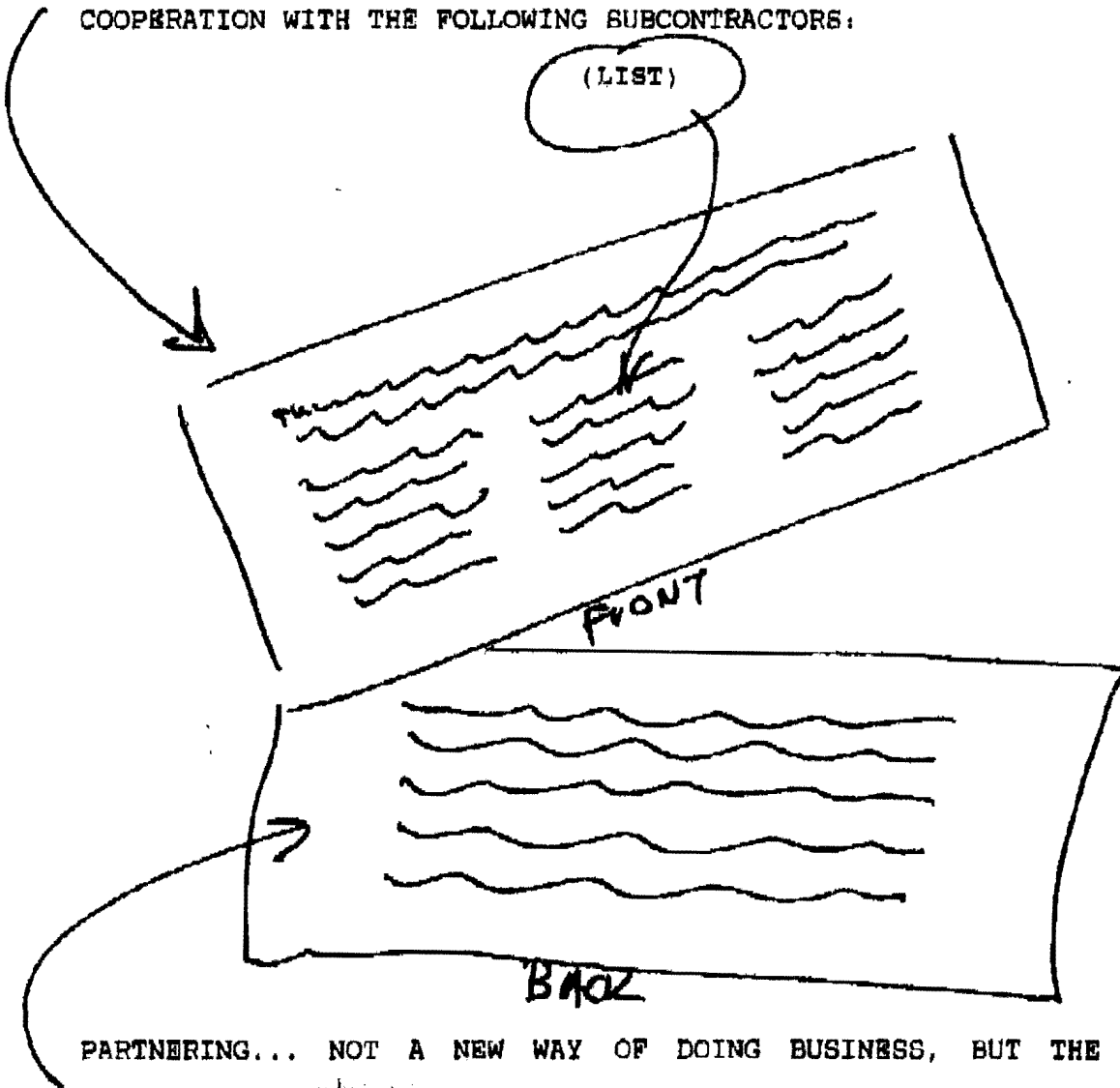
**WRITING**

**AUGUST**  
**1992**

This is suggested copy to be printed  
on a nice card to fit into the mug.

THE CHRISTMAN COMPANY IS PROUD TO BE A "PARTNERING" BUSINESS IN  
COOPERATION WITH THE FOLLOWING SUBCONTRACTORS:

(LIST)



PARTNERING... NOT A NEW WAY OF DOING BUSINESS, BUT THE OLD  
FASHIONED WAY, WHERE WORKING TOGETHER WAS A MUTUAL RELATIONSHIP;  
WHERE BUSINESSMEN OPERATED ON THE PREMISE THAT A COMPANY'S WORD WAS  
THEIR BOND AND THE ACCEPTANCE OF ONE'S RESPONSIBILITY. PARTNERING  
IS NOT A CONTRACT BUT THE RECOGNITION OF THE AGE OLD COVENANT OF  
"GOOD FAITH."

# CHRISTMAN

CONSTRUCTION SERVICES

9237

August 28, 1992

Dear Partner:

Enclosed is your copy of the Michigan Millers Mutual Insurance Partnering Charter. I felt it was a tremendous success and if communicated to the working craftsmen as a serious commitment to one another, it should result in a project we all can be proud of. Please make copies for all your employees on the MMMIC project and post it at your job site office. I would also like to get written comments back on your impressions of the Partnering meeting.

To further assure that we keep the momentum going from our Partnering Conference, we will be establishing a "Partnering Task Force" made up of various project team personnel. The responsibility of this "Task Force" will be to meet monthly throughout the construction period and to make assessment of the project team towards meeting our "Charter Objectives". The "Task Force" will then report back to all team members as to our progress with recommendations on how to improve. Copies of the "Joint Partnering Evaluation Form" are included with this letter and should be completed and turned in each month with your rough draft penciled-in copy of your invoice. As work progresses, we may find it beneficial to hold additional workshops to address specific issues and solutions.

On another closely related matter, we will be conducting our TQM Training Session in the next month. However, in order to be effective, we need input back from each of you as to what "your" expectations of quality are. This doesn't just mean to "meet the specifications" or "do it right the first time" but rather a clear, understandable means of measuring quality. Without a measure of quality, you can't define quality and consequently the craftsmen are at best left to guessing what we expect from them. We will be discussing this matter as well as the training requirements for the crafts at the TQM meeting to be held on September 25, 1992 from 8:00 a.m. to 5:00 p.m. at Room 150, Gannon Vocational Technical Building on the Lansing Community College Campus. MMMIC has agreed to pay for this training which will include lunch and written course materials. Mandatory attendance by one of your firm's executive management as well as the project manager for the project are required. Please confirm and forward the names of who will be attending from your company in writing by September 3, 1992 to Shirley Morey at The Christman Company.

August 28, 1992  
Page Two

Please give thought and identify some quantitative means of measuring quality for your specific work category and send it to me along with the attendees names. You should also begin gathering, assembling and formulating the training materials you intend to use for your crafts. The customization of training videos, workbooks, manuals, etc. should be started well in advance of when they will be needed on the job. Remember, we want to preview what you intend to use and each of your employees must have the training before working on the project.

Although we didn't have time to discuss an "Issue Resolution Policy", we have included a copy of what we intend to follow for your information and files.

Signed,

**Your Partner in Quality**



Curt D. Carlson, P.E.  
Vice President

CDC/slw

Enclosures

- Partnering Charter
- MMMIC Conflict Resolution System
- Joint Partnering Evaluation System "Rating Form"

MICHIGAN MILLERS MUTUAL INSURANCE COMPANY  
PARTNERING RATING FORM

PARTNERING FACTORS

DATE \_\_\_\_\_

1. Adversarial/Forcing/Avoidance/Self Interest/Not Meeting Objective
2. \_\_\_\_\_
3. Accommodating/Compromising/Moderate Posturing/Meeting Objective
4. \_\_\_\_\_
5. Synergistic/Collaborative/Win-Win/Team Interest/Exceeding Objective

**FACTOR**

1. QUALITY OF THE PROJECT \_\_\_\_\_
  
2. COMMUNICATION  
(PROGRESS MEETINGS, LETTERS, ORAL)
  - A. OPEN, HONEST, TIMELY \_\_\_\_\_
  
  - B. ACTIVE, EMPATHETIC LISTENING \_\_\_\_\_
  
  - C. NUMBER & TONE OF LETTERS \_\_\_\_\_

**3. PROBLEM SOLVING**

A. WIN-WIN SYNERGISTIC

---

B. SOLVED AT LOWEST LEVEL

---

C. IMMEDIATE ESCALATION WHEN NOT RESPONSIBLE

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**4. OVERALL TRUST/CANDOR**

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**5. SAFETY**

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**6. PROGRESS ON GOALS  
(12 CHARTER OBJECTIVES)**

**A. SUBMITTALS**

- 1. Clarify objectives and expectations of the submittal process.
- 2. Minimize submittal and approval times.
- 3. Provide accurate, prompt, clear, concise approvals.

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**B. PAYMENTS**

- 1. Make payments in accordance with the published flow chart process.

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**C. INFORMATION PROCESSING & PAPERWORK**

- 1. Expedite all information and indicate desired response times.
- 2. Maintain open lines of communication among Project Team members.

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3. Be available.
4. Attempt to offer possible solutions to questions within a proper scope.
5. Provide clear responses to requests for information.

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**D. LEGAL MATTERS**

1. No litigation.
2. Settle disputes at originating level.

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**E. ABATEMENT**

1. Establish, approve and publish a plan of abatement.
2. Abate promptly.

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**F. PLANNING AND SCHEDULING**

1. Provide, obtain, and use accurate activity information.
2. Clearly monitor the project against the plan and schedule.
3. Commit to, and fulfill man hour projections.

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**G. DECISION MAKING**

1. A/E team to regularly inspect work and advise compliance.
2. Define and clearly communicate quality expectations.
3. Properly empower those at all decision making levels.

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**H. POLICIES AND PROCEDURES**

1. Prepare, review, approve and publish policies and procedures that will serve as guidelines to manage the project.

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**I. SITE LAYOUT AND MANAGEMENT**

1. Formulate and publish a trash removal and parking plan.
2. Properly establish and maintain bench marks and control lines.

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**J. PROCESSING REVISIONS**

1. Provide written authorization prior to work proceeding.

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2. Respond to requests for information, bulletins and change orders promptly. \_\_\_\_\_
3. Prepare, approve and publish a flow chart for processing revisions. \_\_\_\_\_

**K. BE A GOOD PARTNERING NEIGHBOR**

1. Commit to protecting your work and the work of others. \_\_\_\_\_
2. Show all participants due respect and acknowledgement. \_\_\_\_\_
3. Maintain proper work sequences. \_\_\_\_\_

**L. TOTAL QUALITY MANAGEMENT**

1. Prepare, approve, publish, and commit to a TQM program. \_\_\_\_\_

**OVERALL TOTAL** \_\_\_\_\_

**7. WHAT HAS BEEN OUR GREATEST ACCOMPLISHMENT SO FAR**

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**8. KEY ISSUES TO BE IMPROVED**

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**9. SPECIAL REPORTS OR ACTION ITEMS TO BE ASSIGNED**

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SIGNED: \_\_\_\_\_



**MICHIGAN MILLERS MUTUAL INSURANCE COMPANY**  
**CONFLICT RESOLUTION SYSTEM**

- Step 1:** It is preferred that conflict be discussed and resolved at the level at which it originates.
- Step 2:** When conflict is not resolved at the originating level, it will be taken to the next level of supervisor.
- Step 3:** When conflict is not resolved at Step 2, then it will be taken to the Project Manager and Project Engineer.
- Step 4:** If conflict cannot be resolved at Step 3, then it will be taken to the Project Director.
- Step 5:** If it cannot be resolved at Step 4, then it will be handled according to contract specifications.

# OPERATIVE WORDS

- ① QUALITY (20)
- ② SAFETY (21)
- ③ ON TIME (11)
- ④ AGREEMENT (9)  
TEAM  
HARMONY  
COMMITMENT
- ⑤ PROFITABILITY (7)
- ⑥ COMMUNICATION (6)
- ⑦ COOPERATION (4)
- ⑧ COORDINATION (3)
- ⑨
- ⑩

# MISSION

THE PROJECT TEAM'S  
COMMITMENT IS TO  
CONSTRUCT A QUALITY  
~~BUILDING~~ → ON TIME,  
FACILITY

WITHIN BUDGET, MAXIMIZING  
SAFETY, COMMUNICATIONS,  
~~AND~~ ~~QUALITY~~  
~~AND~~ & COOPERATION

SO THAT ALL PARTICIPANTS  
CAN BE PROUD &  
PROFITABLE IN THEIR  
ACCOMPLISHMENTS

MAJOR CLASSES  
OF OBJECTIVES

①

SUBMITTALS

# MISSION

## GOALS & OBJECTIVES

- ① Minimize approval & submittal time in all matters. (estimate)
- ② Prompt, clear concise approvals
- ③ Clarify objectives & expectations of the submittal process.
- ④ Payments made in accordance to flow chart
- ⑤ Expect changes, RFI's, CD's, FO's
- ⑥ Maintain open lines of communication
- ⑦ Recognize the need for prompt  
Indicate response time/confirmation.
- ⑧ Be available.
- ⑨ R.F.I. - offer possible solutions  
clear response

## Legal Threats

- No Litigation
- Settle disputes at original level.

## ABATEMENT

(Purish)

- ~~EXPEDITE~~ ESTABLISH & APPROVE ABATEMENT PLAN  
EXPIDITE ABATEMENT

## PLANNING/SCHEDULING

- OBTAIN Realistic activity info & clearly monitor
- Anticipate performing task
- Commit to man hour projections.

## Decision Making

- A/E team to inspect weekly & advise of non-compliance
- Define & clearly communicate quality expectations
- Properly empower those at all decision making levels

- Review approve & publish policies & procedures that will serve as guidelines to bldg. project

9. Six L.O. & Ugit.

- Define parking plan
  - Track removal plan
  - bench marks (establish/maintain)
- 

10. Processing revisions

- written directives prior to proceeding
- respond to RFI in 5 days.
- approve CO's within 15 days
- execute E.O's " in 30 "
- Flow chart for CO's procedure

11.

- Commit to protecting your work & work of others.
- show all participants <sup>due</sup> respect & acknowledgment.
- Maintain proper work sequence
- 

12. Commit to TQM.

### 13. Safety

- No injuries/no deaths.
- If you create unsafe condition  
— barricade it.