

Ralph J. Stephenson, P. E., P. C.
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July 14, 1995

Minna Panfili
Editorial Assistant
Professional, Reference, and Trade Group
John Wiley & Sons, Inc.
605 Third Avenue
New York, NY 10158-0012

Dear Ms. Minna Panfili:

Re: Author's questionnaire

Enclosed is the Author's Questionnaire response. Please note that I have referenced the main portions of the response to the page numbers in the Author's Questionnaire you sent me on April 7, 1995.

The marketing material is now as complete as I feel I can make it. Some of the information, particularly on mailing lists and organizations that might help in marketing the book, is not as comprehensive as perhaps it should be. However I've given you all the information I have at present.

As you are probably aware from my correspondence with Ms. Torres she now has the final copy edited manuscript ready for typesetting. So at present I am ready to concentrate on preparing the index.

If I can be of further help please let me know.

Sincerely yours,



Ralph J. Stephenson, P. E.

Enclosures: questionnaire
reference data
resume

Author's Questionnaire - disk 484

- I. **Author information - cover page in Author's Questionnaire**
 - A. **Your full name:**
Ralph John Stephenson, P. E.
 - B. **Your name, position, and affiliation as it should appear in advertising:**
Ralph J. Stephenson, P. E. - Principal
Ralph J. Stephenson, P. C.
Consulting Engineer
 - C. **Your preferred mailing address:**
Ralph J. Stephenson, P. E., P. C.
323 Hiawatha Drive
Mt. Pleasant, Michigan 48858
 - D. **Date this questionnaire was completed:**
July 14, 1995.
- II. **Facts about your book - cover page in Author's Questionnaire**
 - A. **Title:**
Project Partnering for the Design and Construction Industry
 - B. **Subtitle:**
A comprehensive guide to reducing the potential for expensive and wasteful conflict in design and construction programs.
or
Partnering for Design and Construction Projects - A Construction Storybook
 - C. **Author:**
Ralph J. Stephenson, P. E. - Principal
Ralph J. Stephenson, P. C.
Consulting Engineer
- III. **The market for your book - pages 2 and 3 in Author's Questionnaire**
 - A. **Primary market:**
 1. **Construction managers for all types of construction projects**
 - a) Audience.
 - (1) Chief operating officers.
 - (2) Estimators.
 - (3) Field superintendents.
 - (4) Legal counselors.
 - (5) Marketing staff
 - (6) Project directors and project managers.
 - b) Major benefits - the book provides information that is of potential value in assisting construction managers to:
 - (1) Acquire skills in using working tools that allow fair, inexpensive and rapid methods of resolving conflict.

- (2) Better integrate the efforts of other prime contractors in producing a successful project.
 - (3) Develop improved relations with other parties to the project.
 - (4) Establish and implement methods by which liable cost growth can be contained.
 - (5) Find and use management techniques that have the potential to reduce disruptive legal action.
 - (6) Keep responsibility for resolution of design and construction conflict among knowledgeable professionals active in the design and construction business.
 - (7) Learn about and use management systems that will help reduce the time spent in non construction related activities.
 - (8) Provide a workable marketing tool for the construction manager to gain the confidence and trust of clients and prospects.
 - (9) Provide a workable marketing tool in building and maintaining client relations.
 - (10) Raise the potential for improving construction quality and lowering construction costs.
- c) All chapters present subjects that are of interest to construction managers.
- 2. Construction vendors and suppliers - of all types of construction related materials, products, and equipment.**
- a) Audience.
- (1) Chief operating officers.
 - (2) Detailers.
 - (3) Estimators.
 - (4) Fabrication managers.
 - (5) Field superintendents.
 - (6) Legal counselors.
 - (7) Marketing staff.
 - (8) Project directors and project managers.
 - (9) Salesmen and saleswomen.
 - (10) Shop managers.
 - (11) Yard managers.
- b) Major benefits - the book provides information that is of potential value in assisting construction vendors and suppliers to:
- (1) Acquire skills in using working tools that allow fair, inexpensive and rapid methods of resolving conflict.
 - (2) Assist detailing and fabricating staff better understand the processing and use of shop drawings and other submittals by

those using the product or equipment being detailed and fabricated.

- (3) Better integrate the efforts of other contractors in producing a successful project.
 - (4) Develop improved relations with other parties to the project.
 - (5) Directly convey the operational needs and of subcontractors to the owner, conceiver, and designers
 - (6) Directly discuss the special problems of specialty contractors with tiers of contractor management above them.
 - (7) Establish and implement methods by which liable cost growth can be contained.
 - (8) Find and use management techniques that have the potential to reduce disruptive legal action.
 - (9) Gain a voice in active project management from the lower tiers of the job contracting forces.
 - (10) Keep responsibility for resolution of design and construction conflict among knowledgeable professionals active in the design and construction business.
 - (11) Learn about and use management systems that will help reduce the time spent in non construction related activities.
 - (12) Provide a workable marketing tool for the constructor to gain the confidence and trust of clients and prospects.
 - (13) Provide a workable marketing tool in building and maintaining client relations.
 - (14) Raise the potential for improving construction quality and lowering construction costs.
- c) Of special interest to construction vendors and suppliers would be chapters 1, 2, 3, 4, 5, 6, 7, 8, 14 and 15.
- 3. General contractors for all types of construction projects.**
- a) Audience within the general contractor organization.
 - (1) Chief operating officers.
 - (2) Estimators.
 - (3) Expeditors
 - (4) Field superintendents.
 - (5) Legal counselors.
 - (6) Marketing staff.
 - (7) Project directors.
 - (8) Project managers.

- b) Major benefits - the book provides information that is of potential value in assisting general contractors to:
 - (1) Establish and implement methods by which liable cost growth can be contained.
 - (2) Acquire skills in using working tools that allow fair, inexpensive and rapid methods of resolving conflict.
 - (3) Find and use management techniques that have the potential to reduce disruptive legal action.
 - (4) Keep responsibility for resolution of design and construction conflict among knowledgeable professionals active in the design and construction business.
 - (5) Provide a workable marketing tool for the constructor to gain the confidence and trust of clients and prospects.
 - (6) Learn about and use management systems that will help reduce the time spent in non construction related activities.
 - (7) Develop improved relations with other parties to the project.
 - (8) Provide a workable marketing tool in building and maintaining client relations.
 - (9) Raise the potential for improving construction quality and lowering construction costs.
 - (10) Better integrate the efforts of other prime contractors in producing a successful project.
 - c) All chapters present subjects that are of interest to general contractors.
- 4. Land and urban planners**
- a) Audience.
 - (1) Administrative staff.
 - (2) Associates
 - (3) Facilities planners.
 - (4) Land planners
 - (5) Partners.
 - (6) Principals.
 - (7) Urban planners.
 - b) Major benefits - the book provides information that is of potential value in assisting land and urban planners to:
 - (1) Employ management techniques that reduce the potential for disruptive and damaging legal action.
 - (2) Encourage better interaction and understanding among other members of the project team.
 - (3) Encourage individual, group, and community participation in their projects.

- (4) Help improve relations among their client, the public, and their staff.
 - (5) Keep resolution of design and construction conflict among knowledgeable professionals active in the business.
 - (6) Learn about and use management systems that will help reduce the time spent in non design related activities.
 - (7) Learn how to use design and construction management tools that allow fair, inexpensive and rapid methods of resolving conflict.
 - (8) Provide a workable marketing tool in building and maintaining client relations.
 - (9) Set operating ground rules for situations not covered by the legal contract documents.
- c) Most chapters present subjects that are of interest to land and urban planners. Of special interest would be chapters 1, 2, 3, 4, 5, 6, 7, 8, 14 and 15.

5. Land developers.

- a) Market and audience.
 - (1) Industrial facilities.
 - (a) Facilities managers.
 - (b) In-house staff planners, architects and engineers.
 - (c) Leasing managers.
 - (d) Maintenance managers.
 - (2) Commercial facilities.
 - (a) Facilities managers.
 - (b) In-house staff planners, architects and engineers.
 - (c) Leasing managers.
 - (d) Maintenance managers.
 - (3) Transient residential (hotels, motels, conference centers, resorts)
 - (a) Facilities managers.
 - (b) In-house staff planners, architects and engineers.
 - (c) Leasing managers.
 - (d) Maintenance managers.
 - (4) Recreational facilities (parks, casinos, camp grounds, water recreation facilities, golf courses).
 - (a) Facilities managers.
 - (b) In-house staff planners, architects and engineers.
- b) Major benefits - the book offers information that is of potential value in assisting land developers to:
 - (1) Assist to reach agreement on common goals and objectives for the planning, design, and construction program.

- (2) Better understand the design and construction processes needed to make their project successful.
 - (3) Employ design and construction management that allow fair, inexpensive and rapid methods of resolving conflict.
 - (4) Employ management techniques that reduce the potential for disruptive and damaging legal action.
 - (5) Gain a strong voice in the design and construction process through proper design and implementation of a partnering system.
 - (6) Improve the awareness of all partnering members of the goals, objectives and desires of the ownership group.
 - (7) Improve the public image of the owner as a responsible, concerned participant in the community, and among their customers and clients.
 - (8) Provide regular and continuous evaluation of project health measured against the partnering charter.
 - (9) Provide the architect, engineer, planner, and constructor a definable set of non contract performance standards to help in turning over the project to the operator.
 - (10) Raise the potential for improving construction quality and lowering design and construction costs.
 - (11) Set operating ground rules not covered by the legal contract documents.
 - (12) Utilize methods by which cost growth can be best contained.
- c) All chapters present subjects that are of interest to land developers.
- 6. Private owners of facilities.**
- a) Market and audience.
 - (1) Industrial and manufacturing businesses
 - (a) Facilities directors and managers.
 - (b) Operations managers.
 - (c) Plant managers.
 - (d) Project managers.
 - (e) Purchasing directors.
 - (2) Commercial businesses
 - (a) Facilities managers.
 - (b) In-house architects and engineers.
 - (c) In-house store planners.
 - (d) Staff interior designers.
 - (3) Transient residential (hotels, motels, conference centers, resorts)
 - (a) Facilities managers.

- (b) In-house interior designers.
 - (c) In-house staff planners, architects and engineers.
 - (4) Recreational businesses (parks, casinos, camp grounds. water recreation facilities, golf courses).
 - (a) Facilities managers.
 - (b) Features, ride, and set designers.
 - (c) In-house interior designers.
 - (d) In-house staff planners, architects and engineers.
 - b) Major benefits - the book offers information that is of potential value in assisting private owners of facilities to:
 - (1) Assist to reach agreement on common goals and objectives for their planning, design, and construction programs.
 - (2) Better understand the design and construction processes needed to make their projects successful.
 - (3) Better utilize methods by which cost growth can be contained by improved relations on the project.
 - (4) Employ design and construction management that allow fair, inexpensive and rapid methods of resolving conflict.
 - (5) Employ management techniques that reduce the potential for disruptive and damaging legal action.
 - (6) Improve the awareness of all project team members of the goals, objectives and desires of the ownership group.
 - (7) Improve the public image of the owner with their customers and clients. as a responsible, concerned participant in the community.
 - (8) Make regular and continuous evaluations of project health measured against the partnering charter.
 - (9) Raise the potential for improving construction quality while lowering design and construction costs.
 - (10) Set operating ground rules not covered by the legal contract documents.
 - c) All chapters present subjects that are of interest to private owners of facilities.
- 7. Professional architects for all types of building and facility construction projects.**
- a) Audience - for architects specializing in all fields of architectural design and document production:
 - (1) Administrative staff.
 - (2) Architectural field inspectors.
 - (3) Associates.
 - (4) Design architects.
 - (5) Design project managers.

- (6) Facilities programmers.
 - (7) Legal advisors.
 - (8) Marketing managers.
 - (9) Partners.
 - (10) Principals.
 - (11) Production architects.
 - b) Major benefits - the book provides information that is of potential value in assisting architects to:
 - (1) Employ management techniques that reduce the potential for disruptive and damaging legal action.
 - (2) Encourage better interaction and understanding among other members of the project team.
 - (3) Keep resolution of design and construction conflict among knowledgeable professionals active in the business.
 - (4) Learn about and use management systems that will help reduce the time spent in non design related activities.
 - (5) Learn how to use design and construction management tools that allow fair, inexpensive and rapid methods of resolving conflict.
 - (6) Provide a workable marketing tool in building and maintaining client relations.
 - (7) Set operating ground rules for situations not covered by the legal contract documents.
 - c) All chapters present subjects that are of interest to architects.
- 8. Professional engineers for all types of building and facility construction projects.**
- a) Types of engineers.
 - (1) Civil engineers.
 - (2) Electrical engineers.
 - (3) Industrial engineers.
 - (4) Mechanical engineers.
 - (5) Power engineers.
 - (6) Structural engineers.
 - b) Audience - for engineers specializing in all fields of technical design and document production:
 - (1) Administrative staff.
 - (2) Associates.
 - (3) Design architects.
 - (4) Design project managers.
 - (5) Engineering field inspectors.
 - (6) Facilities programmers.
 - (7) Legal advisors.

- (8) Marketing managers.
 - (9) Partners.
 - (10) Principals.
 - (11) Production architects.
 - c) Major benefits - the book provides information that is of potential value in assisting engineers to:
 - (1) Employ management techniques that reduce the potential for disruptive and damaging legal action.
 - (2) Encourage better interaction and understanding among other members of the project team.
 - (3) Keep resolution of design and construction conflict among knowledgeable professionals active in the business.
 - (4) Learn about and use management systems that will help reduce the time spent in non design related activities.
 - (5) Learn how to use design and construction management tools that allow fair, inexpensive and rapid methods of resolving conflict.
 - (6) Provide a workable marketing tool in building and maintaining client relations.
 - (7) Set operating ground rules for situations not covered by the legal contract documents.
 - d) All chapters present subjects that are of interest to engineers.
9. **Public owners of facilities.**
- a) Market and audience.
 - (1) Government used facilities (offices, data centers, laboratories, courts,, and other single or multiple purpose buildings and public works).
 - (a) Agencies - representative examples.
 - i) City Building Inspection Departments
 - ii) City Engineering Departments.
 - iii) City Planning Departments.
 - iv) County Engineering
 - v) County Water and Waste Treatment
 - vi) Federal - Corps of Engineers.
 - vii) Federal - General Services Administration.
 - viii) Federal - United States Postal Services.
 - ix) Federal - Veteran's Administration.
 - x) State Building Inspection Divisions
 - xi) State Departments of Budget.
 - xii) State Departments of Natural Resources.
 - (b) Staff personnel.
 - i) Architects.

- ii) Contract officers.
 - iii) Engineers.
 - iv) Facility managers and on site staff.
 - v) Field inspectors.
 - vi) Field superintendents.
 - vii) Planners.
 - viii) Programmers.
 - ix) Purchasing and procurement staff.
- (2) Schools, colleges, and universities.
- (a) Agencies - representative examples.
 - i) Boards of Directors.
 - ii) Boards of Education.
 - iii) Boards of Regents.
 - iv) Regional Educational Districts.
 - (b) Staff personnel.
 - i) Architects.
 - ii) Engineers.
 - iii) Facility managers and on site staff.
 - iv) Field representatives.
 - v) Planners.
 - vi) Programmers.
 - vii) Purchasing and procurement staff.
- (3) Museums, libraries, and similar institutional buildings.
- (a) Agencies
 - i) Authorities.
 - ii) Foundations
 - iii) Boards of Directors.
 - (b) Staff personnel
 - i) Architects.
 - ii) Engineers.
 - iii) Facility managers and on site staff.
 - iv) Field inspectors.
 - v) Planners.
 - vi) Programmers.
 - vii) Purchasing and procurement staff.
- (4) Jails, prisons, fire houses, and other public safety facilities.
- (a) Agencies - representative examples
 - i) City Police and Fire Departments
 - ii) County Police, Sheriffs, and Fire Departments.
 - iii) Federal Corrections Institutions.
 - iv) State Departments of Corrections.

- (b) Staff personnel.
 - i) Architects.
 - ii) Contract officers.
 - iii) Engineers.
 - iv) Facility managers and on site staff.
 - v) Field inspectors.
 - vi) Field superintendents.
 - vii) Planners.
 - viii) Programmers.
 - ix) Purchasing and procurement staff.
- (5) Water and waste treatment facilities.
 - (a) Agencies - representative examples.
 - i) City Water and Waste Treatment Facilities.
 - ii) County Water and Waste Treatment Facilities.
 - iii) Departments of Natural Resources.
 - (b) Staff personnel.
 - i) Architects.
 - ii) Contract officers.
 - iii) Engineers.
 - iv) Facility managers and on site staff.
 - v) Field inspectors.
 - vi) Field superintendents.
 - vii) Planners.
 - viii) Programmers.
 - ix) Purchasing and procurement staff.
- (6) Recreational and park facilities.
 - (a) Agencies - representative examples.
 - i) City Departments of Public Works.
 - ii) County Departments of Public Works.
 - iii) Department of Natural Resources.
 - iv) Parks Departments.
 - v) Recreation Departments.
 - (b) Staff personnel.
 - i) Architects.
 - ii) Contract officers.
 - iii) Engineers.
 - iv) Facility managers and on site staff.
 - v) Field inspectors.
 - vi) Field superintendents.
 - vii) Planners.

- viii) Programmers.
- ix) Purchasing and procurement staff.
- (7) Highways, bridges, roads, dams, locks, channels, flood control systems, irrigation systems.
 - (a) Agencies - representative examples.
 - i) City Engineering Departments.
 - ii) City Traffic Departments.
 - iii) County Engineering Departments.
 - iv) Federal - Department of Transportation.
 - v) Federal - Corps of Engineers.
 - vi) Federal - Department of Interior.
 - vii) State Departments of Transportation.
 - (b) Staff personnel.
 - i) Architects.
 - ii) Contract officers.
 - iii) Engineers.
 - iv) Facility managers and on site staff.
 - v) Field inspectors.
 - vi) Field superintendents.
 - vii) Planners.
 - viii) Programmers.
 - ix) Purchasing and procurement staff.
- b) Major benefits - the book offers information that is of potential value in assisting private owners of facilities to:
 - (1) Assist to reach agreement on common goals and objectives for their planning, design, and construction programs.
 - (2) Better understand the design and construction processes needed to make their projects successful.
 - (3) Better utilize methods by which cost growth can be contained by improved relations on the project.
 - (4) Employ design and construction management that allow fair, inexpensive and rapid methods of resolving conflict.
 - (5) Employ management techniques that reduce the potential for disruptive and damaging legal action.
 - (6) Improve public confidence in the agency and their concern with public health and safety.
 - (7) Improve the awareness of all project team members of the goals, objectives and desires of the ownership group.
 - (8) Improve the public image of the owner with their customers and clients. as a responsible, concerned participant in the community.

- (9) Make regular and continuous evaluations of project health measured against the partnering charter.
 - (10) Raise the potential for improving construction quality while lowering design and construction costs.
 - (11) Set operating ground rules not covered by the legal contract documents.
 - c) All chapters present subjects that are of interest to public owners of facilities.
10. **Specialty contractors for all types of construction projects.**
- a) Audience.
 - (1) Chief operating officers.
 - (2) Detailers.
 - (3) Estimators.
 - (4) Fabrication managers.
 - (5) Field superintendents.
 - (6) Legal counselors.
 - (7) Marketing staff.
 - (8) Project directors and project managers.
 - (9) Shop managers.
 - (10) Yard managers.
 - b) Major benefits - the book provides information that is of potential value in assisting specialty contractors to:
 - (1) Acquire skills in using working tools that allow fair, inexpensive and rapid methods of resolving conflict.
 - (2) Assist detailing and fabricating staff better understand the processing and use of shop drawings and other submittals by those using the product or equipment being detailed and fabricated.
 - (3) Better integrate the efforts of other contractors in producing a successful project.
 - (4) Develop improved relations with other parties to the project.
 - (5) Directly convey the operational needs of specialty contractors to the owner, conceiver, and designers
 - (6) Directly discuss the special problems of specialty contractors with tiers of contractor management above them.
 - (7) Establish and implement methods by which liable cost growth can be better contained.
 - (8) Find and use management techniques that have the potential to reduce disruptive legal action.
 - (9) Gain a voice in active project management from the lower tiers of the job contracting forces.

- (10) Keep responsibility for resolution of design and construction conflict among knowledgeable professionals active in the design and construction business.
 - (11) Learn about and use management systems that will help reduce the time spent in non construction related activities.
 - (12) Provide a workable marketing tool for the specialty contractor to gain the confidence and trust of clients and prospects.
 - (13) Provide a workable marketing tool in building and maintaining client relations.
 - (14) Raise the potential for improving construction quality and lowering construction costs.
 - c) Most chapters present subjects that are of general interest to specialty contractors. Of special interest would be chapters 1, 2, 3, 4, 5, 6, 7, 8, 14 and 15.
11. **Staff and students of universities and colleges**
- a) Market and audience - students and faculty of:
 - (1) Schools of architecture.
 - (2) Schools of business management.
 - (3) Schools of construction management.
 - (4) Schools of construction technology.
 - (5) Schools of engineering.
 - (6) Schools of law.
 - (7) Schools of planning.
 - b) Major benefits - the book provides information that is of potential value in assisting university staff and students to:
 - (1) Better apply the specialized knowledge they have to the actual use of their technical and professional tools being taught and learned.
 - (2) Decide how to set operating ground rules for situations not covered by the legal contract documents.
 - (3) Learn about and use management systems that will help reduce the time spent in non design related activities.
 - (4) Learn how to encourage better interaction and understanding among other members of the project team.
 - (5) Learn how to use design and construction management tools that allow fair, inexpensive and rapid methods of resolving conflict.
 - (6) Provide a workable marketing tool in building and maintaining client relations.
 - (7) Teach and learn management techniques that reduce the potential for disruptive and damaging legal action.

- c) All chapters present subjects that are of interest to the staff and students of universities and colleges teaching technical, management, and legal subjects.

B. Secondary market:

1. Construction financing sources.

- a) Market and audience
 - (1) Banks and other lending institutions.
 - (a) Account officers.
 - (b) Boards of directors.
 - (c) Construction loan officers.
 - (2) Pension funds
 - (a) Account officers
 - (b) Boards of directors.
- b) Major benefit
 - (1) To improve the general knowledge of financing sources about how to improve project construction performance.
- c) Chapters of most interest to construction financing sources would probably be 1, 2, 3, 4, 5, 6, 7, 8, 12, 13, 14, and 15.

2. Design and construction related associations.

- a) A representative sample of associations that will probably be interested in the book includes:
 - (1) Air Conditioning Contractors of America
 - (2) American Arbitration Association.
 - (3) American Bar Association.
 - (4) American Institute of Architects.
 - (5) American Society of Civil Engineers.
 - (6) American Society of Mechanical Engineers.
 - (7) American Subcontractors Association
 - (8) Associated Builders and Contractors.
 - (9) Associated General Contractors.
 - (10) Associated Underground Contractors
 - (11) Association of Builders Exchange Executives.
 - (12) Construction Specifications Institute.
 - (13) Engineering Societies of various cities - most major cities have an engineering society.
 - (14) Mason Contractors' Association
 - (15) Mechanical Contractors Association of America
 - (16) National Association of Women in Construction.
 - (17) National Electrical Contractors Association.
 - (18) National Society of Professional Engineers.
 - (19) Plumbing, Heating, and Cooling Contractors' Association

- (20) Sheet Metal and Air Conditioning Contractors' National Association
 - (21) Society of America Military Engineers.
 - b) Audience.
 - (1) Members and association staff
 - c) Major benefits.
 - (1) Provide the members of the association helpful information about new management tools for the planning, design, and construction industry.
 - (2) Used to help train and educate their members in current management techniques of help in design and construction.
 - d) All chapters of the book would be of interest to the various design and construction related associations.
- 3. Economic development organizations.**
- a) A sample of economic development organizations and audience that will probably be interested in the book includes:
 - (1) Economic development consultants - management staff.
 - (2) Chambers of Commerce - management staff and selected members.
 - (3) Economic development corporations - management staff.
 - b) Major benefits.
 - (1) To inform members of the organization who are in the planning, design, and construction business of new management techniques to improve business practices.
 - (2) To guide economic development groups in effectively planning, designing, and constructing their facilities with the help of partnering techniques.
 - c) Most chapters in the book could be of interest to specific audiences involved in economic development. Because of the diversity of this market I cannot define who would constitute these audiences.
- 4. Legal professionals.**
- a) Market and audience
 - (1) Consultant attorneys.
 - (2) Private sector employed attorneys.
 - (3) Public sector employed attorneys.
 - (4) Paralegals
 - b) Major benefits.
 - (1) To inform legal practitioners of the current dispute resolution techniques being used by planning, design, and construction personnel and organizations.

- (2) To help convey the essential elements of partnering techniques to legal practitioners.
- c) All chapters of the book would be of interest to the legal profession.
- 5. Manufacturers of construction related materials and equipment.**
 - a) Market and audience within such firms.
 - (1) Industrial engineers.
 - (2) Marketing and sales staff.
 - (3) Product maintenance and warranty staff.
 - b) Major benefits.
 - (1) To keep suppliers to the construction industry informed of new techniques for increasing productivity, quality, and cost performance.
 - c) Chapters of most interest to manufacturers of construction related materials and equipment would probably be 1, 2, 3, 4, 5, 6, 7, 8, 12, 13, 14, and 15.
- 6. Professional liability insurance underwriters and their agents.**
 - a) Market and audience within such firms.
 - (1) Professional liability agents.
 - (2) Marketing staff members
 - (3) Training and education staff.
 - b) Major benefit.
 - (1) To provide methods and techniques by which professional liability underwriters can help planning, design, and construction liability claims to a minimum while helping their clients conduct their business effectively and profitably.
 - c) All chapters of the book would be of interest to professional liability insurance underwriters and their agents.
- 7. Regulatory agencies.**
 - a) Market and audience
 - (1) Code enforcement agencies.
 - (a) Department management
 - (b) Building officials.
 - (c) Building inspectors.
 - (d) Code review engineers and architects.
 - (e) Legal advisors.
 - (2) Environmental agencies.
 - (a) Department management.
 - (b) Field inspectors.
 - (c) Chemists.
 - (d) Physicists.
 - (e) Engineers.

- (f) Technicians
 - (g) Legal advisors.
 - (3) Safety agencies.
 - (a) Department management.
 - (b) Field inspectors.
 - (c) Chemists.
 - (d) Engineers.
 - (e) Technicians.
 - b) Major benefit - the book provides information that is of potential value in assisting regulatory agencies to:
 - (1) Keep current on the management methods being used by those they regulate.
 - (2) Allow the regulator to have a more authoritative voice in how conflict can be reduced for them on their projects.
 - (3) Provide means of building a channel of communication with those who are most directly concerned with regulatory matters in planning, design, and construction projects.
 - c) All chapters of the book would be of interest to regulatory staffs.
8. **Users and occupants of facilities.**
- a) Market and audience for users and occupants of commercial, residential, recreational, and industrial facilities.
 - (1) Tenants
 - (2) Facilities managers.
 - (3) Building superintendents.
 - (4) Maintenance staff
 - b) Major benefits - the book offers information that is of potential value in assisting private owners of facilities to:
 - (1) Better understand the design and construction processes needed to make their large and small design and construction projects successful.
 - (2) Employ design and construction management that allow fair, inexpensive and rapid methods of resolving conflict.
 - (3) Raise the potential for improving construction quality while lowering design, construction and operating costs.
 - c) All chapters of the book would be of interest to regulatory staffs.

IV. Subject matter of your book - pages 4 to 6 in Author's Questionnaire

A. Please describe in paragraph form exactly what your book is about. What is there about your selection, organization, or treatment of the subject that should make readers buy the book? What are the benefits or values to the readers? What new information, ideas, or philosophy are presented?

1. What the book is about.

- a) Partnering is a method of conducting business in the planning, design and construction profession without unnecessary, excessive, or disruptive external party involvement.
 - b) The objective of partnering is to maximize the efficiency, effectiveness and quality of professional and business working relationships so as to deliver high quality projects in the planning, design and construction business.
 - c) Today's design and construction professional are striving to improve working relationships and to better deliver high quality projects. Past experience has shown that adversarial positions have frequently resulted in disrupted projects, and debilitating legal actions. These unfortunate design and construction experiences have caused clients, designers and contractors to explore more effective working relationships and project delivery systems.
 - d) Partnering has emerged as a potential means of achieving optimum relationships between clients, contractors and suppliers by increasing the effectiveness of each participant's resources. This preventive dispute resolution technique, coupled with intelligently selected project delivery systems is increasingly being used to provide improved efficiency, effectiveness, and quality.
 - e) This book is designed to assist the planner, architect, engineer, contractor and owner and user to explore and apply conflict and risk experiences in understanding and using effective partnering methods.
 - f) The book is designed to present the practicing professional with industry background, steps, procedures, and guidelines for successfully using teamwork and knowledge to build useful and effective partnering systems on their projects.
- 2. Why the reader should want to buy the book.**
- a) The selection, organization, and treatment of the subject of project partnering helps make the book attractive and usable to the reading construction professional in that it:
 - (1) Provides a brief background history of the changes and cycles in the design and construction industry over the past seventy years.
 - (2) Identifies the structure and components of the planning, design, and construction profession in a micro and macro setting.
 - (3) Explores the nature of construction as a business and profession, and examines the traditional and newly emerging relationships between the participants.
 - (4) Discusses and recommends effective methods of managing projects within the various project delivery systems.
 - (5) Identifies the roles of participants in a partnering system.

- (6) Analyzes and recommends methods of achieving objectives that determine a design and construction project's potential for success.
- (7) Examines the nature and sources of conflict in the planning, design, and construction process.
- (8) Reviews the relation of various project delivery systems to the potential for destructive conflict.
- (9) Describes the means by which positive conflict can help encourage project success.
- (10) Discusses critical transition points in a project and how they are often the source of major destructive conflict.
- (11) Explores the interaction of professional obligations and business needs.
- (12) Discusses the value of using basic business ethics and moral behavior to help achieve business, social, and professional success.
- (13) Examines the relation of project planning to effective partnering and positive team play.
- (14) Discusses the relation between project delivery systems, alternative dispute resolution, and partnering.
- (15) Shows how contract characteristics influence partnering behavior on a project.
- (16) Investigates and describes the impact of organizational structure on the prompt and suitable resolution of project conflict.
- (17) Presents key concepts of negotiated dispute resolution and project success.
- (18) Includes a comprehensive glossary of construction terms related to project management, partnering, alternative dispute resolution, project evaluation and other day to day design and construction actions.
- (19) Provides criteria to determine where project partnering is applicable
- (20) Shows the relation of project partnering to other forms of alternative dispute resolution.
- (21) Helps identify the roles, responsibilities and authority of members of the partnering team.
- (22) Establishes guidelines and procedures for preparing the project partnering plan of action
- (23) Shows how to plan and write a project partnering charter
- (24) Shows how to prepare and use a project partnering evaluation system

- (25) Presents the various methods used to resolve contested claims and the resulting conflict
- (26) Explores experiences with and applications of alternative dispute resolution.
- (27) Examines methods and styles of managing destructive conflict in the planning, design and construction industry
- (28) Explores procedures to solve disputes and problems throughout the project
- (29) Provides case studies in partnering and dispute resolution for individual and group study by the readers.
- (30) Shows the benefits and disadvantages of working under project partnering concepts
- (31) Discusses the use of partnering techniques to improve the construction professional's marketing efforts.
- (32) Presents detailed information about the components of design, and construction project delivery systems.
- (33) Reviews the nature of risk in planning, design, and construction and suggests guidelines for effectively coping with risk.
- (34) Identifies characteristics of the problem job and describes by case studies the root of the problems and the reason for the claim prone potential.
- (35) Provides criteria for measuring project success.
- (36) Describes in detail the essential components of a project partnering system.
- (37) Describes through case studies the full process building a project partnering system from the concept through to implementation of the three major elements of the system
- (38) Presents the development and use of the three essential elements of partnering - the charter, the evaluation system, and the issue resolution system.
- (39) Reviews the methods of determining when and where project partnering can be used effectively.
- (40) Outlines how to determine who should participate in the partnering effort.
- (41) Outlines the details of how to plan for the project partnering meeting.
- (42) Provides tips, hints, and techniques for conducting successful partnering meetings.
- (43) Outlines the procedures and methodologies proven successful in writing and obtaining approvals of project partnering charters.

- (44) Presents sample partnering meeting agendas and workshop outlines.
- (45) Describes how to prepare the partnering evaluation system to use for periodic monitoring of project progress in relation to the project charter.
- (46) Describes how to evaluate project success in achieving the objectives of the project charter.
- (47) Defines actions that the design and construction professional can take to effectively resolve potentially destructive disputes.
- (48) Presents the steps to preparing and implementing a project partnering issue resolution system.
- (49) Provides detailed information on the results of twenty-three project partnering meetings and the resultant problem statements, mission definitions, and recommendations for improvement.
- (50) Presents case study examples of how the project partnering system can be applied to helping resolve eight of the most frequently mentioned problem areas.
- (51) Provides twenty-six recommendations for improving the planning, design, and construction profession derived from the partnering results and analysis of the major problem areas identified.
- (52) Provides a bibliography of partnering and management references for the planning, design, and construction practitioner.
- (53) Reproduces nineteen charters from a variety of partnering meetings on a wide range of different size projects.
- (54) Provides a detailed analysis of forty-five problem types abstracted from twenty-three charters.
- (55) Defines the various problem types encountered in partnering charter workshops.

3. What are the benefits or values to the readers?

- a) Book material has been drawn from a wide variety of observed, studied, and personal experiences in the planning, design, and construction business to which the reader can quickly relate.
- b) The book shows how the readers' daily practice influences the success achieved in his or her relationships with other individuals and groups working on the project.
- c) The end result of reading this book and applying the principles presented will help practitioners achieve better profitability in construction related efforts for which they must accept responsibility.

- d) Users and owners will gain insights from this book into how to more effectively work with their design and construction team.
- e) Planners, architects and engineers will be helped to see how their work can best be used in the actual construction process to achieve their design and functional objectives.
- f) Contractors and vendors will achieve insights into the needs and value added expectations of the user/owner, and the design team.
- g) The book is focussed on how to build profitable working relationships with others on the construction team by using principles having their roots in partnering concepts.

4. What new information, ideas, or philosophies are presented?

Partnering has been used in business for centuries, but the concept of agreeing on non contract behavior in our contemporary society was lost in the late 1950s, the 1960s, and the early 1980s. Project partnering is providing a method by which we are reminded of these important rules of business courtesy. It shows the powerful and positive impacts that dependable, ethical attitudes, and competent work can have on a construction project.

The book presents project partnering as a useful, easily applied, but powerful idea. It shows how concerned professionals can take optimum advantage of the good characteristics of people who are confronted with potentially destructive alternatives in their daily technical and management work.

The true problem areas encountered in the planning, design, and construction business are presented as those dealing with common, ordinary, matter-of-fact items that frequently produce perceptions that are not intended. These, in turn, lead to management, communication, and personal problems and often produce dangerous and potentially destructive conflict.

Project partnering philosophies are specifically designed to help prevent these critical perceptive misunderstandings from escalating into a destructive mode on the project. The book presents project partnering as a tested technique for reducing the potential for misunderstandings and escalating claims.

- B. In what way is your material important, different, controversial and stimulating? What material backs up your sales claim (major benefit)? Please list chapter subheadings, and/or pages.**

1. **A.**

The process of project partnering is somewhat obscure until it has been experienced. The major benefits of the system seem to stem from the fact that there are some basic assumptions about people that help a voluntary system of trust work well. These are covered in chapters 3, 4, 6, 7, and 8.

2. **B.**

Partnering workshops reveal that often very simple management elements when escalated can cause serious problems that could be avoided if some non contract ground rules had been clearly understood at the start of the project. The occurrence of problems, their nature and suggestions for their solutions is covered in chapters 5, 6, 11, 12, 13, 14, and 15, and in appendix D.

3. **C.**

There is occasional controversy about the value of project partnering. In some cases the use of project partnering is not recommended. Where it is used the voluntary nature of the charter writing process, and the free exercise of judgment about project health, encourages healthy and often corrective dialogue.

If the project is obviously not suited to partnering however, it is well to consider other alternative dispute resolution methods. After all project partnering is a preventive dispute resolution technique. Other types exist that can be applied without using the partnering system. These options often are the base of controversial elements of project partnering systems. Some of the controversial issues are reviewed in chapters 6, 7, 8, 11, 13, and 15.

4. **D.**

Project partnering is a stimulus system since it forces the key participants and the ultimate decision makers to commit to a moral behavior pattern that if followed produces courteous and generally predictable behavior on the project.

Another feature of the project partnering system is the voluntary nature of the stakeholders (team members) commitment to the charter objectives. Nobody participating in a partnering charter writing session has an obligation to sign the charter. This leaves the stakeholders with a full day of interaction with the other key players before they must make their moral commitment to the charter. Even then they only agree to attempt to abide by the charter guidelines. However, it is to the planner's, designer's, and constructor's credit that very few do not last out the charter writing or do not sign the charter.

The techniques and process of writing a design and construction rule book of courtesy is described in chapters 7, 8, 9, 10, 11, 14, and 15.

- C. **List any special physical features of your book (tables, illustrations, bibliography, etc.) which would be of special interest or value to readers.**
1. **Graphics are included in the book that illustrate the various subjects to be discussed. These include such items as:**
 - a) Macro matrix boundaries of the design and construction business.
 - b) Project delivery systems data.
 - c) Generic line of action diagrams.
 - d) Alternative dispute resolution steps.
 - e) Organizational partnering.
 - f) Phased project partnering matrixes.
 - g) Network flow charts for preparing the project partnering system.
 - h) Project evaluation matrixes.
 - i) Problem frequency histogram.
 - j) Communications matrixes.
 - k) Illustration of a partnering effectiveness evaluation system.
 2. **Special information and appendix items contained in book include:**
 - a) Partnering specification format.
 - b) Observations and responses from partnering charter meetings.
 - c) Issue resolution policies and procedures.
 - d) Methods of conducting effective partnering charter meetings.
 - e) Procedures for resolving disputed issues.
 - f) Glossary of terms.
 - g) Bibliography.
 - h) Charters from actual applications of partnering.
 - i) Statistical problem data from partnering workshops.
- D. **Preface - submitted with book manuscript.**
- E. **For new editions only. (not applicable).**
- V. **Information on the competition (where relevant) -- see Partnering Reference Data File enclosure for listing of other literature on partnering and alternative dispute resolution - page 7 in Author's Questionnaire**
- A. **What books compete with or are similar to your book?**
1. **Competing works.**

I am not familiar with other books similar to the one which I propose to write. There are many specially written publications directed to specific audiences that cover the subject of partnering, alternative dispute resolution and related subjects. However most of material I have read presents the subject as a series of findings, as a committee or task force

report, or as a loose collection of writings on the subjects.

I have attached a data base list of the publications I have collected and used as references in preparing my book manuscript . This is to be used for reference only.

2. Weaknesses and strengths.

The available partnering literature I have seen and used for reference and practice ranges from excellent to very limited in scope and content. Most of the publications focus on a narrow range of subjects dealing primarily with history and techniques.

They are all of value for initiating efforts in the subjects they cover. However, an overall coherence of subject material is lacking in most. Such coherence must be provided by the reader and user of this literature from their own experience and background.

3. Differences between current literature on project partnering and your book.

The book I have written includes my interpretation of material currently presented by a wide range of literature, most of which are single purpose articles, pamphlets, and essays. My coverage of project partnering extends to the practices, characteristics, strengths, weaknesses, and overall requirements of the planning, design, and construction industry. It is intended to be a single source of information for preparing and implementing a project partnering system.

The book is designed to show the professional planner, designer, and constructor how to reduce destructive conflict in their practice, and within their industry capabilities. It further shows the professional designer and constructor how to improve profitability and competence by using workable conflict resolution methods.

VI. Textbook adoptions - page 8 in Author's Questionnaire

A. Please describe in paragraph form exactly what your book is about.

1. See item IV A1 above - "What the book is about" for this description.

B. Why should professors (faculty) adopt or make students buy the book?

The book is about a very important segment of the planning, design, and construction business that is virtually ignored in current college curriculum .

Knowledge of management techniques such as project partnering and related information on its origin, need and application is of considerable value to

young students in planning, engineering, architectural, and construction. It gives the instructor a means of emphasizing the softer management and people areas of the student's future profession as he or she is absorbing the technical information and abilities that are the basics of the profession.

- C. **What new information, ideas, or philosophy are presented?**
1. See item IV A4 above - "What new information, ideas, or philosophies are presented?" for this information.
- D. **In what way is your material important, different, and stimulating?**
1. See item IV B above - "In what way is your material important, different, controversial and stimulating?" for this information.
- E. **What are the benefits or values to the reader?**
1. See item IV A3 above - "What are the benefits or values to the reader?" for this information.
- F. **At what level would your book be adopted? Why does your book fit the level indicated?**
1. **Graduate level**
 - a) The book is well suited for advanced classes in planning, architecture, engineering, and construction since it is concerned with subjects that require a fundamental knowledge of planning, design and construction. It is focussed on the proper management of planning, design, and construction projects which is a subject most faculty prefer to teach in advanced undergraduate classes or in graduate school.
 2. **Undergraduate level - last two years.**
 - a) The book could definitely be used during the last two years of the undergraduate level to bring the previous two years of education into focus as part of the management and interpersonal world so important to all professional people today. I suggest that the junior and senior year use of the book could make heavy use of the early chapters, with lecture and some table work using the middle chapters. Latter chapters are best left for graduate school or optional courses in the senior year.
 3. **Undergraduate level - first two years**
 - a) The book is probably not of major application during the freshman and sophomore years in planning, design, and construction courses.
 4. **Junior colleges**
 - a) Some of the early background chapters could prove helpful in vocational and technician courses. The book content could lead students into higher education in the planning, design, and construction fields or practice.

5. Professional courses (professional society short courses)

- a) The book would be an excellent text to provide in the continuing education efforts of most colleges and universities. I teach professional short courses at the University of Wisconsin and would find such a book of great value if the economics of its use could be accommodated.

G. What are the prerequisites for the course?

1. For junior and senior years the first two years of the curriculum so the student is well acquainted with the language and technology of the business of planning, design, and construction.
2. For graduate work the course prerequisite should be an undergraduate degree in planning, architecture, engineering, or construction management.
3. For junior colleges a basic knowledge of construction terminology and practices.
4. For professional short courses an interest in and knowledge of the subject, and an understanding of what constitutes project partnering.

VII. Advertising - page 9 in Author's Questionnaire

A. Direct mail - List professional associations or societies whose membership lists might be used for direct mail advertising in order of importance or effectiveness. Designate a list for each market and each audience you specified in the market section above

1. A representative sample of associations whose members might be interested in the book (not only to buy but to publicize).
 - a) Air Conditioning Contractors of America
 - b) American Arbitration Association.
 - c) American Bar Association.
 - d) American Chemical Society
 - e) American Economic Development Council
 - f) American Institute of Architects.
 - g) American Institute of Chemical Engineers
 - h) American Planning Association
 - i) American Society for Quality Control
 - j) American Society for Testing and Materials
 - k) American Society of Civil Engineers.
 - l) American Society of Heating, Refrigeration and Air Conditioning
 - m) American Society of Mechanical Engineers.
 - n) American Society of Safety Engineers
 - o) American Welding Society
 - p) Associated Builders and Contractors.
 - q) Associated General Contractors.

- r) Associated Underground Contractors
 - s) Association for Project Managers
 - t) Association of Iron and Steel Engineers
 - u) Association of Planning Officials
 - v) Construction Association of Michigan
 - w) Construction Specifications Institute.
 - x) Engineering Societies in various metropolitan areas of the United States
 - y) Engineering Society of Detroit
 - z) Engineering Society of Michigan
 - aa) Illumination Engineering Society
 - ab) International Builders Exchange Executives, Inc.
 - ac) Mechanical Contractors Association of America
 - ad) Michigan Society of Professional Engineers
 - ae) Mid America Economic Development Council
 - af) National Association of Women in Construction.
 - ag) National Electrical Contractors Association.
 - ah) National Society of Professional Engineers.
 - ai) Society of American Military Engineers
 - aj) Society of American Value Engineers
 - ak) Society of Automotive Engineers
 - al) Society of Manufacturing Engineers
 - am) User Councils in various metropolitan areas and states.
2. **Many of the people belonging to the above professional and technical associations will be a prime market for the book.**
3. **Below is listed the professional associations in descending order of what I feel may be their interest in the book.**
- a) Those associations whose members would have very high interest
 - (1) American Arbitration Association
 - (2) American Bar Association
 - (3) American Institute of Architects
 - (4) American Society of Civil Engineers
 - (5) Associated Builders and Contractors
 - (6) Associated General Contractors
 - (7) Associated Underground Contractors
 - (8) Association for Project Managers
 - (9) Construction Association of Michigan
 - (10) Construction Specifications Institute
 - (11) International Builders Exchange Executives, Inc.
 - (12) Mechanical Contractors Association of America
 - (13) Michigan Society of Professional Engineers

- (14) National Electrical Contractors Association
 - (15) National Society of Professional Engineers
 - (16) Society of American Military Engineers
 - b) Those associations whose members would have moderately high interest.
 - (1) Air Conditioning Contractors of America
 - (2) American Society of Heating, Refrigeration and Air Conditioning
 - (3) American Society of Mechanical Engineers
 - (4) Association of Iron and Steel Engineers
 - (5) Engineering Societies in various metropolitan areas of the United States
 - (6) Engineering Society of Detroit
 - (7) National Association of Women in Construction.
 - (8) Society of American Value Engineers
 - (9) User Councils in various metropolitan areas and states.
 - c) Those associations whose members would have average interest.
 - (1) American Economic Development Council
 - (2) American Society for Quality Control
 - (3) American Society for Testing and Materials
 - (4) American Society of Safety Engineers
 - (5) American Welding Society
 - (6) Engineering Society of Michigan
 - (7) Mid America Economic Development Council
 - (8) Society of Manufacturing Engineers
 - d) Those associations whose members would have below average interest but would find the book of value.
 - (1) American Chemical Society
 - (2) American Institute of Chemical Engineers
 - (3) American Planning Association
 - (4) Association of Planning Officials
 - (5) Illumination Engineering Society
 - (6) Society of Automotive Engineers
- B. If you have access to mailing lists to which promotional material should be sent, please advise us.**
- 1. I do not have any organizational or association mailing lists available to me.
 - 2. I do have my own address list of about 1500 names, many of which are already members of the organizations listed above. If you wish a selected list from my address file I shall prepare it for you.
- C. Journal advertising. What are the three most specialized journals which accept advertising and are most effective in reaching potential buyers of**

your book? Please designate journals for each market and each audience you have specified on pages 2 and 3.

1. Potential advertising publications

- a) Engineering News Record
- b) Engineering Times - publication of the National Society of Professional Engineers
- c) Constructor - publication of the Associated General Contractors of America

2. Other journals - I am not familiar with other journals that might accept advertising for the book.

D. Industrial and bulk sales. With your knowledge of the field, what organizations, companies or institutions would be most likely be interested in purchasing large quantities of your book?

- 1. Colleges and universities having schools of continuing education such as the University of Wisconsin.
- 2. Organizations presenting for--profit seminars in design and construction related subjects.
- 3. Construction related associations having in-house education and training programs.
- 4. Colleges and universities that might use the book in their undergraduate and graduate management and engineering courses.

VIII. Publicizing your book - page 10 in Author's Questionnaire

A. Suggest journals or magazines which could be expected to review your book. List only those journals which regularly review books.

- 1. I am not familiar with journals or magazines which regularly review books on design and construction subjects.

B. For a news release to author's hometown/local newspaper, staff publication and alumni journal please give us the following information.

1. Home address

Ralph J. Stephenson, P. E.
323 Hiawatha Drive
Mt. Pleasant, Michigan 48858

2. Name and address of local newspapers:

- a) Morning Sun
215 North Main Street
P. O. Box 447
Mt. Pleasant, Michigan 48804-0447
- b) Isabella County Herald
300 East Broadway
P. O. Box 270
Mt. Pleasant, Michigan 48804

- c) Central Michigan Life
8 Anspach Hall
Central Michigan University
Mt. Pleasant, Michigan 48858

IX. Promoting your book - page 11 in Author's Questionnaire

A. Suggest ten distinguished authoritative individuals in your field who should receive a complimentary copy of your book upon publication, and provide complete addresses with zip codes. Your selection should be limited to those who will not receive a copy of the book from you, but who might recommend your book to their students and colleagues, and from whom we could solicit an endorsement.

- 1. Philip M. Bennett, Professor and Program Director**
University of Wisconsin Extension
Department of Engineering and Applied Science
432 North Lake Street
Room 809
Madison, Wisconsin 53706-1498
- 2. Alan J. Hurst, Principal**
48-430 Racquet Lane
Palm Desert, California 92260
- 3. Dewey Little, Editorial Consultant**
2902 Glenview Avenue
Royal Oak, Michigan 48023
- 4. James J. Kolb, P.E., Executive Director**
Michigan Society of Professional Engineers
P.O. box 15276
215 N. Walnut
Lansing, Michigan 48901-5276
- 5. Dr. Richard Marburger**
Lawrence Technological Institute
21000 West Ten Mile Road
Southfield, Michigan 48075-1058
- 6. Joseph Neussendorfer**
Detroit Chapter
Associated General Contractors of America
23999 Northwestern Highway
Southfield, Michigan 48075-2579
- 7. Oswald L. Pfaffman, F. A. I. C.**
Chairman of the Board
Woods Construction, Inc.

34650 Klein Road
Fraser, Michigan 48206

8. **Charles R. Scales, P.E., President**

Scales & Associates, Inc.

Suite 1400

28 West Adams Street

Detroit, Michigan 48226

9. **Leo G. Shea, F.A.I.A., Vice President Operations**

Lionel Trains

50625 Richard W. Blvd.

Chesterfield, Michigan 48051-2493

10. **Charles H. VanDeusen, P.E., President**

Charles H. VanDeusen Consulting Services

21160 East Farm Lane

Northville, Michigan 48167

X. Author biography - page 12 in Author's Questionnaire

A. Information from this section may be used for book jacket, publicity releases, etc. If you have a biographical release which gives the information we need, please attach.

1. **See attached biographical sketch**

2. **Your academic and professional record - see attached resume**

3. **Honors, offices in scientific societies, and other important biographical information**

a) Awards

(1) Steinman Award - Michigan Society of Professional Engineers,
1995

(2) Fellow Member - Michigan Society of Professional Engineers,
1995

(3) Alumni Achievement Award - Lawrence Institute of Technology,
1969

(4) Engineer of the Year Award - Detroit Chapter, Michigan Society
of Professional Engineers, 1977

4. **For Library of Congress and copyright information only**

a) Birth date - August 25, 1922

b) Citizenship - United States of America

Partnering Book Index

This list is a preliminary selection of words to be included in the Project Partnering book index. It is to be revised and updated as work on the book proceeds.

1. **Acoustic ceiling**
2. **Administrative operations**
3. **Adversarial**
4. **Advisory arbitration**
5. **Advisory opinion**
6. **Agent**
7. **Allowance items**
8. **American Service of Civil Engineers**
9. **Analyze**
10. **Approve**
11. **Arbitration**
12. **Arbitration**
13. **Arbitrator**
14. **Architect of record**
15. **Architect, engineer ruling**
16. **Architects**
17. **Architecture**
18. **Articulate**
19. **At-risk**
20. **At-risk construction manager**
21. **Attorney**
22. **Authority**
23. **Backcharging**
24. **Bias**

25. Bid
26. Binding arbitration
27. Binding resolution
28. Binding resolution methods
29. Binding settlement
30. Binding third-party settlements
31. Bonding
32. Breach of contract
33. Building codes
34. Carpentry
35. Caveat
36. Cement finishers
37. Charter
38. Claim Avoidance
39. Claim Potential
40. Claim prone
41. Claim prone job
42. Close out
43. Closed System
44. Communicate
45. Community activism
46. Conceive and communicate
47. Conceivers
48. Concrete masonry
49. Conflict
50. Conflict resolution
51. Construct

- 52. **Construction**
- 53. **Construction business**
- 54. **Construction climate**
- 55. **Construction contractors**
- 56. **Construction document quality**
- 57. **Construction documents**
- 58. **Construction drawings**
- 59. **Construction economics**
- 60. **Construction environment**
- 61. **Construction management**
- 62. **Construction practices**
- 63. **Construction practitioners**
- 64. **Construction Professional Group of the National and State Societies of Professional Engineers**
- 65. **Construction professionals**
- 66. **Construction project team**
- 67. **Construction services contract**
- 68. **Construction tradesmen**
- 69. **Constructors**
- 70. **Consulting services contract**
- 71. **Contested claim**
- 72. **Contingency**
- 73. **Contract**
- 74. **Contract Agreement**
- 75. **Contract condition**
- 76. **Contract document**
- 77. **Contract language**

- 78. **Contract provisions**
- 79. **Contract terms**
- 80. **Controls contractor**
- 81. **Coordinate**
- 82. **Cost**
- 83. **Cost growth**
- 84. **Cost overruns**
- 85. **Credentials**
- 86. **Critical transition points**
- 87. **Disclaimers**
- 88. **Delays**
- 89. **Depression**
- 90. **Design**
- 91. **Design-build**
- 92. **Destructive conflict**
- 93. **Direct costs**
- 94. **Direct negotiations**
- 95. **Direct question**
- 96. **Disclaimers**
- 97. **Discovery**
- 98. **Disincentives**
- 99. **Dispute resolution**
- 100. **Dispute resolution board**
- 101. **Dispute review board and standing neutrals**
- 102. **Disputes**
- 103. **Documentation**
- 104. **Early neutral evaluation**

- 105. **Effective**
- 106. **Efficient**
- 107. **Electrical contractor**
- 108. **Electrical systems**
- 109. **Electronic systems**
- 110. **Empathy**
- 111. **Engineer of record**
- 112. **Engineering**
- 113. **Engineering construction drawings**
- 114. **Engineers**
- 115. **Entrepreneur**
- 116. **Equipment procurement**
- 117. **Estimating**
- 118. **Estimators**
- 119. **Ethical**
- 120. **Everyone-must-know**
- 121. **Ex'e'cutive**
- 122. **Excavation**
- 123. **Executive**
- 124. **Fabricators**
- 125. **Facilitator**
- 126. **Facility**
- 127. **Fact-finding**
- 128. **Field administration**
- 129. **Financial liability**
- 130. **Financing**
- 131. **Fire protection contractor**

- 132. Floor tile
- 133. Force majeure
- 134. Functional
- 135. Functional - as related to continuous management
- 136. Functional - as related to management
- 137. Functional management
- 138. Functional units
- 139. General Eisenhower
- 140. Generic construction
- 141. Geotechnical
- 142. Glazing
- 143. Goals
- 144. Governmental acts
- 145. Governmental regulations
- 146. Grapevine
- 147. Guaranteed Maximum Price
- 148. Hard-money
- 149. Heating, ventilating, and air conditioning contractor
- 150. Incentive-disincentive system
- 151. Incentives
- 152. Independent advisory opinion
- 153. Industrial renovation
- 154. Industrial Revolution
- 155. Informal negotiation
- 156. Interim representative
- 157. Interpretation
- 158. Issue

- 159. **Issue resolution**
- 160. **Judicial system**
- 161. **Jurisdictional disputes**
- 162. **Laborers**
- 163. **Landscaping**
- 164. **Law**
- 165. **LCD projection panel**
- 166. **Leasing**
- 167. **Lecture session**
- 168. **Legal**
- 169. **Legal procedures**
- 170. **Liability insurance**
- 171. **Liable**
- 172. **Licenses**
- 173. **Light fixtures**
- 174. **Line of Action**
- 175. **Line operations**
- 176. **Liquidated damages**
- 177. **Litigate**
- 178. **Litigation**
- 179. **Litigious**
- 180. **Logistics**
- 181. **Long list**
- 182. **Macro matrix**
- 183. **Macro matrix elements**
- 184. **Manage**
- 185. **Management**

- 186. **Management by Exception**
- 187. **Manufacturers**
- 188. **Market driven**
- 189. **Marketing**
- 190. **Matrix**
- 191. **Matrix Management**
- 192. **Mechanical**
- 193. **Mechanical systems**
- 194. **Mediation**
- 195. **Mental Peripheral Vision**
- 196. **Mini-trial**
- 197. **Mission**
- 198. **Model**
- 199. **Modular lighting**
- 200. **Morale**
- 201. **Must list**
- 202. **Need-to-know**
- 203. **Negotiated contract**
- 204. **Negotiation**
- 205. **Neophyte**
- 206. **Neutral**
- 207. **Non binding arbitration**
- 208. **Non binding resolution**
- 209. **Non contract provisions**
- 210. **Non destructive testing**
- 211. **Non liable**
- 212. **Non-binding**

- 213. **Non-contract matters**
- 214. **Non-liable**
- 215. **Non-traditional project delivery system**
- 216. **Not-at-risk parties**
- 217. **Objectives**
- 218. **Open system**
- 219. **Operate and maintain**
- 220. **Operator**
- 221. **Ordinances**
- 222. **Organization**
- 223. **Organizational grapevine**
- 224. **Organizational management**
- 225. **Organize**
- 226. **Outsider (in reference to binding resolution)**
- 227. **Over-the-Wall management**
- 228. **Overhead projector**
- 229. **Overhead question**
- 230. **Owners**
- 231. **Par**
- 232. **Par importance (or weight)**
- 233. **Par performance**
- 234. **Participant**
- 235. **Partnering**
- 236. **Partnering - project or tactical**
- 237. **Partnering - strategic**
- 238. **Pavement**
- 239. **Perception**

- 240. **Performance**
- 241. **Permits**
- 242. **Perspective**
- 243. **Pipefitters**
- 244. **Planners**
- 245. **Planning - in the management sense**
- 246. **Planning - in the physical environmental sense**
- 247. **Plumbers**
- 248. **Plumbing and piping contractor**
- 249. **Policies and procedures**
- 250. **Political climate**
- 251. **Political interference**
- 252. **Positive conflict**
- 253. **Pragmatist**
- 254. **Prebid addenda**
- 255. **Precast sill wall contractor**
- 256. **Prepare-and-publish**
- 257. **Prescriptive**
- 258. **Preventive law**
- 259. **Prime contractor**
- 260. **Principal**
- 261. **Pro Forma**
- 262. **Problem job**
- 263. **Productivity**
- 264. **Professional**
- 265. **Professional services contract**
- 266. **Profit potential**

- 267. **Program - as defining a step in the design process**
- 268. **Program - as defining a generic construction effort**
- 269. **Program and articulate**
- 270. **Project - as a set of work actions**
- 271. **Project - as related to discrete management**
- 272. **Project administration**
- 273. **Project Delivery System**
- 274. **Project management**
- 275. **Project management - the definition of the management structure of a project.**
- 276. **Project manager**
- 277. **Project secretaries**
- 278. **Property management**
- 279. **Punch list**
- 280. **Purchase orders**
- 281. **QI rating**
- 282. **Quality**
- 283. **Quality assurance**
- 284. **Quality circles**
- 285. **Question - Closed**
- 286. **Question - Direct**
- 287. **Question - Open**
- 288. **Question - Overhead**
- 289. **Question - Relay**
- 290. **Question - Reverse**
- 291. **Rapport**
- 292. **Real estate**
- 293. **Regulators**

- 294. **Relations - Formal Functional**
- 295. **Relations - Informal**
- 296. **Relations - Reporting**
- 297. **Relations - Staff**
- 298. **Relations - Temporary**
- 299. **Relay question**
- 300. **Resolution**
- 301. **Resources**
- 302. **Responsibility**
- 303. **Retainage**
- 304. **Reverse question**
- 305. **Revisiting**
- 306. **Risk**
- 307. **Risk allocation**
- 308. **Risk analysis**
- 309. **Risk management**
- 310. **Risk-contingency plan**
- 311. **Risk-passing**
- 312. **Roof-top units**
- 313. **Rough-in**
- 314. **Schematics**
- 315. **Science**
- 316. **Seminar**
- 317. **Short list**
- 318. **Signatory**
- 319. **Simulation**
- 320. **Single point responsibility**

- 321. Sponsor - partnering
- 322. Staged use occupancy schedule
- 323. Stakeholders - must be better defined
- 324. Standing neutral
- 325. Statutory
- 326. Step negotiations
- 327. Strategic planning
- 328. Strategy
- 329. Strikes
- 330. Sub contractor
- 331. Subsurface conditions
- 332. Support functions
- 333. Supportive
- 334. Surety
- 335. Symposium
- 336. Syndrome
- 337. Synectic
- 338. Synergism
- 339. Synergistic
- 340. System
- 341. Tactics
- 342. Task force
- 343. Technicians
- 344. Technography
- 345. Technology
- 346. Tenant
- 347. Tenant coordinator

- 348. **Tenant work**
- 349. **Third party**
- 350. **Time and material contract**
- 351. **Time growth**
- 352. **Time overruns**
- 353. **Timeliness**
- 354. **Tolerance specifications**
- 355. **Tort**
- 356. **Total quality management**
- 357. **Traditional project delivery system**
- 358. **Translators**
- 359. **Turf-building**
- 360. **Turn over**
- 361. **Turnkey**
- 362. **Turnkey project**
- 363. **Ultimate Decision Maker**
- 364. **Unilateral**
- 365. **Unilateral agreement**
- 366. **Union**
- 367. **Users**
- 368. **Utilities**
- 369. **Value added**
- 370. **Value-added potential**
- 371. **Ventilation**
- 372. **Wall coverings**
- 373. **Want list**
- 374. **Weather**

- 375. **Win-win**
- 376. **Wish list**
- 377. **Workshop**
- 378. **World War II**
- 379. **World-of-non-words**
- 380. **World-of-words**