

IBEE Convention, 1997
Appleton, Wisconsin

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Fern N. Nagel, Executive Vice President
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4926 West Chicago Street 57702-1828
P.O. Box 2274
Rapid City, South Dakota 57709-2274

Re: Workshop suggestions for IBEE Convention - Summer (mid June) 1997 -
Appleton, Wisconsin

Dear Fern:

It has been good to talk to you over the past few weeks about how the IBEE might again glimpse a view, through the eyes of their members, of why the member chooses to belong to an exchange.

I reviewed the material from our 1989 workshops at Shanty Creek, Michigan and find it is still important to builder's exchange success. It is almost a textbook on how to awaken and maintain membership interest and participation in activities that benefit the membership. I have outlined below an overview of the work that went into preparing and presenting that program. Some of the steps may have differed slightly from the description -- but they are as close as I can get to an accurate reconstruction.

First a set of approximately 54 possible workshop topics was listed for initial screening. Topics were selected by Diana Brown, Marla Janness, Curt Hacias, and me. They were aimed at providing an overview of what we each felt might be primary member and exchange staff interests.

Next, about 22 of the 54 topics were selected as being of interest to exchange members and a mail survey was made of IBEE members, asking them to rate the importance of these from an individual exchange member view. [REDACTED] that responded rated the 22 subjects on a scale from one to five, indicating [REDACTED] interest, 10 indicating very high interest.

Ratings were to be made from two standpoints -- the association executive's view of his or her own interests, and from the association executive's perception of what his or her members were interested in, and what exchange activities they feel are important to them.

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The screening resulted in [REDACTED] 13 top rated subjects which IBEE members felt would be most appropriate to serve as base topics for discussion in membership interest workshops at the conference.

Workshop #1 was held on day 1 in the afternoon [REDACTED] through 4:30 P.M. [REDACTED] table leaders and table members were preselected by the CAM committee. Workshop groupings were established first, by membership size, and then by geography.

Each of the five teams participating had five members, including the leader and a secretary, sitting at a work station with a flip chart. During workshop #1 five different topics were assigned to the IBEE members. The table groups each discussed the problems and the opportunities for improvement related to their assigned subjects, and kept flipchart notes of their suggestions for improvement.

Flip charts were transcribed by me with the sterling assistance of you and Marla Janness, and with Diana helping whenever she could. This material then served as a handout for the working session #2 held from 8:30 to 10:15 A.M. on the 3rd day of the conference.

At workshop session #2 the various table representatives presented their workshop #1 ideas, focussing on what they saw as problems and opportunities. The entire group then reviewed the material to obtain a better understanding of what usable ideas had been uncovered by the various discussion groups. The objective of the workshop #2 discussion was to provide attendees something of value in their minds and in their reference materials that might encourage and help them improve their service to their members.

I believe a similar format might be profitably used during the upcoming convention in Appleton. The problems facing the various exchanges today are somewhat similar to those they faced in 1989, although it would be advisable to review the fundamental topic list for updating. However, I recommend similar questions be considered this time, and possibly in the future, to better gain an look at what trends are appearing in builders exchange management and membership.

To assist in your review of the workshop activity, I have listed below the steps I recommend you take in setting up a workshop program for the 1997 conference.

Step #1:

State the mission of the convention and the mission of the workshops. The mission statements should define the single most important objective to be accomplished, first by the convention, and next by the workshops, being successful.

As a model the 1989 convention mission was defined as --

To provide IBEE attendees an opportunity to discover, discuss, and analyze operating and managerial methods that have proven successful in exchanges throughout the United States, Canada, and other parts of the world.

The 1989 workshop mission was defined as --

To improve the probability of IBEE executive's memberships becoming or remaining successful in their construction activities for the next two years.

Step #2:

Prepare a list of questions about individual builders exchange members and use these to determine what topics might be of interest for IBEE members to explore in the workshops. Questions used for the 1989 sessions included:

1. How do your successful members stay successful?
2. Why do your unsuccessful members fail?
3. What is the prime source of business for your members?
4. What is the main geographic area in which your members operate?
5. What contractual arrangements do most of your members operate under with their clients?
6. Who are the major users of construction services in your area?
7. What are the characteristics of the major users of construction services in your area?
 - a. Are they government, private, or quasi public agencies?
 - b. Are they purchasing, management, or engineering oriented?

- c. What are the types of business and professional relationships they maintain with their construction contractors?
- d. What are the types of business and professional relationships they maintain with their planners, architects, and engineers?
- e. What are the types of businesses and organizations that use construction and design services in your geographical area - are they institutional, educational, industrial, commercial, residential, governmental or other?
- f. What similar questions do you feel must be asked and answered if you are to improve exchange services to your membership?

Step #3:

Prepare a list of possible topics that might be considered to address all or some of the questions about exchange membership you listed in Step 2 above. Topics should also be of help in achieving the mission of the convention. The list used for the Shanty Creek workshops contained the following as a random list.

1. Plan room operation
2. Electronic transmission and submittals
3. Reproduction of plan room documents
4. Transmission of construction information
5. Content and format of construction reports
6. How project delivery systems affect the exchange membership in their use of the exchange
7. How to serve all size members
8. How to effectively use CSI/UCI coding system
9. The problem volunteer
10. Better motivating the volunteer in your organization
11. How to use volunteer work effectively
12. Selecting the volunteer
13. Preparing and publishing volunteer work guidelines
14. Effective communication between the paid exchange staff and the volunteer staff
15. How to more effectively educate and train your members
16. How to more effectively educate and train your member`s clients to use your member`s services
17. How to stimulate the planners and designers (land planners,

- architects & engineers) to effectively participate in exchange activities
18. Encouraging and motivating planners and designers to better utilize the abilities of your membership
 19. How to create and maintain a well accepted professional image of the construction industry
 20. How to help your members to better compete with each other
 21. How to help your members to compete outside their geographic area
 22. How to help your members diversify their activities
 23. Helping your members achieve profitable performance
 24. Analyzing the work potential for your members in their geographic area
 25. How to help your members diversify geographically
 26. The role of the exchange in obtaining good bonding and insurance rates
 27. The role of the exchange in helping to moderate the claim prone job incidence
 28. The exchange as a catalyst in financing development
 29. How the exchange can better work with the user and developer to help guide economic development
 30. The role of free enterprise government in the construction industry.

Step #4:

Select and combine topics to produce a final list of subjects that can be rated for their perceived interest to exchange members by members of the IBEE. Of the initial list of 54 only 22 were selected as being of potential interest to exchange members. These were:

1. Plan room operation
2. Electronic transmission of drawings and submittals to your members and others
3. Reproduction of plan room documents for member use
4. Electronic transmission of construction information to your members and others
5. Content and format of construction reports
6. Construction project delivery systems (hard money, negotiated, design/build, construction management, other), and how they affect the way your members use builder's exchange services

7. How to effectively serve all sizes and types of members
8. Preparing and publishing volunteer work guidelines
9. How to more effectively educate and train your members to improve their business skills
10. How to educate and train your member`s clients to more effectively use your member`s services
11. Encouraging and motivating planners, architects and engineers to better utilize your member's services
12. Creating & maintaining an acceptable image of the construction industry
13. Helping your members to better compete with each other
14. Helping your members to better compete outside their main geographic area
15. Helping your members diversify their construction and business activities
16. Helping your members achieve and maintain profitable performance
17. Analyzing the work potential of your geographic market area to help your members better plan their business future
18. Helping your members diversify geographically
19. The role of the exchange in obtaining good bonding and insurance rates
20. The role of the exchange in helping to moderate the number and seriousness of claim prone construction jobs
21. Building the exchange to operate as a catalyst in financing development opportunities for your members
22. How the exchange can better work with the user and developer to help guide economic development
23. The role of government and the free enterprise system as it impacts the construction industry
24. Labor relations and their impact on your member's business health

Step #5:

Take a mail survey of IBEE members. The questions listed in Step #2 and the discussion topics listed in Step #4 were sent to each IBEE organization and the exchange executives were asked to add topics to the list as they thought of them, and then to rate the importance of all topics as they perceived what their individual member's viewpoints might be.

The thirty nine IBEE members that responded rated the subjects on a scale from 1 to 10 -- 1 indicating little, if any interest, 10 indicating very high interest.

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The surveys were returned to CAM and we tabulated the results and determined the top subjects of interest. The highest ranking 13 were selected as the base topics of workshop #1. These 13 were:

1. Plan room operations
2. Reproduction of plan room documents for member use
3. Electronic transfer of construction information to your members and others
4. Content and format of construction reports
5. Construction project delivery systems
6. How to more effectively educate and train your members to improve their business skills
7. Encouraging and motivating planners, architects, and engineers to better utilize your member's services
8. Creating and maintaining an acceptable image of the construction industry
9. Helping your members to better compete with each other
10. Helping your members achieve and maintain profitable performance
11. Analyzing the work potential in your geographical area
12. The role of the exchange in obtaining good bonding and insurance rates
13. The role of government and the free enterprise system as they impact the construction industry

Step #6:

Hold the workshops as described in the opening portion of this letter.

* * *

As you know the details of carrying out a program as outlined above are sizable. You asked me to outline how I might best participate in such an effort. I suggest that steps #1 through #5 above can be best done by you and your members. During the 1989 convention planning I was able to help considerably in these activities because of my involvement with CAM, my closeness to their offices, and my personal desire to help make Curt's, Diana's, and Marla's efforts a success. I still have that strong desire to make this Appleton convention a success for you and your members but because of the distances involved could probably only help by reviewing the efforts of you and your members in steps 1 through 5. So what I propose, if you choose to go the six step route above, is to assist you in any way I can during the first five steps so we can select several authentic areas of

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interest and get a good survey of the feelings of your IBEE members.

For the conduct of the workshops, Betty and I would probably take a driving vacation to Appleton and I would participate for a fee in the workshops. I propose to charge IBEE a \$950 total fee for my participation in the workshops and the backup work to be done in analyzing the responses, plus travel and living expenses incurred in the interest of the workshops. If IBEE finds this beyond their capabilities I am certain we can work out an arrangement that would allow me to participate if you desire.

Enclosed are some miscellaneous attachments that may be of further help to you and your board in considering the member-viewpoint workshop.

- Attachment A is a memo containing a suggested format, possible topics, and related questions for the 1989 convention workshops.
- Attachment B is the preliminary draft of the 1989 survey letter to IBEE members.
- Attachment C is the tabulation by IBEE member ratings for the various subjects. Note that we used only the 22 of these since many of the others dealt with operational aspects of the exchanges, rather than member desires.
- Attachment D contains the 1989 notes taken directly from flip charts prepared in workshop #1 .

This letter and the attachments may stimulate some additional thinking about the subjects for the workshops. I feel strongly that the subject material contained in this set of attachments must be addressed continually to help your members see their association activities as their member see them. Such a program as you are considering is certainly an excellent way to help achieve that goal.

If you have any questions please call.

Regards,



Ralph J. Stephenson



a:ibee0323 - General notes for meeting plans - International Builders Exchange Executive's summer convention - March 23, 1989 - Meeting at CAM offices (the notes below are those taken in a meeting on Thursday, March 23, 1989. They are substantially as recorded with some minor correction and rearrangement)

To: Curt Hacias, Diana Brown, and Marla Janness

From: Ralph J. Stephenson

Re: Workshop planning meeting for IBEE summer convention

Date of meeting: Thursday, March 23, 1989

Place of meeting: Construction Association of Michigan offices

Those attending:

Curt Hacias
Diana Brown
Marla Janness
Ralph J. Stephenson

Mission of the convention

TO PROVIDE IBEE ATTENDEES AN OPPORTUNITY TO DISCOVER, DISCUSS, AND ANALYZE OPERATING AND MANAGERIAL METHODS THAT HAVE PROVEN SUCCESSFUL IN EXCHANGES THROUGHOUT THE UNITED STATES AND CANADA.

Mission of the workshop

TO IMPROVE THE PROBABILITY THAT IBEE EXECUTIVE'S MEMBERSHIPS WILL BECOME OR REMAIN SUCCESSFUL IN THEIR CONSTRUCTION ACTIVITIES FOR THE NEXT TWO YEARS

Strategies of accomplishing the mission

- The format of the sessions should be a semi structured and directed workshop.
- The discussion content should be set by an informal survey of attendee topic preferences, and, in their opinions, those of their members.
- Keynote speaker should set tone of the workshop discussions.
- Use qualifying questions to set workshop format and content.
- Bring conversations and discussions of attendees to definitive conclusions. These must result in recommended actions to be taken.
- Attendees must leave convention with reference material that allows them to review the material in the future at their leisure.

Some suggested questions around which the topics to be discussed can be structured (questions are listed at random) - more to be developed:

1. How do your successful members **stay** successful?
2. Why do your unsuccessful members fail?
3. What is the prime source of business for your members?
4. What is the main geographic area in which your members operate?
5. Under what contractual arrangements do most of your members operate with their clients?
6. Who are the major users of construction services in your area?
7. What are the characteristics of the major users of construction services in your area?
 - Government, private or quasi public
 - Purchasing, management, or engineering oriented
 - Business relationships maintained with contractors
 - Business relationships maintained with architects/engineers
 - Types of businesses and organizations that use construction and design services - institutional, educational, industrial, commercial, residential or other

Attendee discussion topics of potential interest in achieving the convention and the workshop mission: (topics noted with bold x may not fit the workshop mission)

1. Plan room operation
2. Electronic transmission of drawings and submittals
3. Reproduction of plan room documents
4. Electronic transmission of construction information
5. Content and format of construction reports
6. Construction project delivery systems and how they affect the way members use their builder's exchange services.
7. How to effectively serve all size members
- X** 8. How to effectively use CSI/UCI coding system
- x** 9. The problem volunteer
- x** 10. Better motivating the volunteer in your organization
- x** 11. How to use volunteer work effectively
- x** 12. Selecting the volunteer
13. Preparing and publishing volunteer work guidelines
- x** 14. Effective communication between the paid exchange staff and the volunteer staff
15. How to more effectively educate and train your members to improve their business skills
16. How to educate and train your member`s clients to effectively use your member`s services
- x** 17. How to stimulate planners, architects and engineers to better participate in exchange activities
18. Encouraging and motivating planners, architects and engineers to better utilize your member's services

19. Creating and maintaining a well accepted professional image of the construction industry
20. Helping your members to better compete with each other
21. Helping your members to better compete outside their geographic area
22. Helping your members diversify their construction and business activities
23. Helping your members achieve and maintain profitable performance
24. Analyzing the work potential of your geographic market area to help your members better plan their business future
25. Helping your members diversify geographically
26. The role of the exchange in obtaining good bonding and insurance rates
27. The role of the exchange in helping to moderate the number and seriousness of claim prone construction jobs
28. Building the exchange to operate as a catalyst in financing development opportunities for your members
29. How the exchange can better work with the user and developer to help guide economic development
30. The role of free enterprise government in the construction industry
 - Additional topics to be added

Marla mentioned that topics that deal with making the association better without necessarily making the member companies better should be eliminated.
This was done above on the items marked with the bold x.

Schedule of events for convention:

Day 1 - Monday, June 19, 1989

- 7:30 to 8:30 am - Board of director's breakfast
- 8:30 to 9:30 am - Hospitality suite open for general conversation and continental breakfast
- 9:00 to 9:30 am - Convention opening
- 9:30 to noon - Sessions #1 & 2 - divided by break
 - Speaker - Harrison Coever - President Lawrence-Leiter & Company
 - General topics
 - Successful Association Executives - a survey study of the skills of the executive
 - How executives use the survey study material
 - Volunteering - trends and the red ant issue
 - The changing role of the volunteer
 - How do you motivate the board
 - Other topics as decided
- noon to 1:30 pm - Lunch
- 1:30 to 1:50 pm - Session #3 - Orientation and definition of workshop objectives
- 1:50 to 2:30 pm - Workshop
- 2:30 to 2:45 pm - Break
- 2:45 to 4:30 pm - Session #4 - Workshop
 - Handout material should be available

- Response tabulations re topic interest degree in subject should be available

Day 2 - Tuesday, June 20, 1989

• Session #5 - Business session

• Session #6 - Business session

Results of workshop sessions to be tabulated and summarized for distribution at sessions #7 and 8 on Wednesday AM

Day 3 - Wednesday, June 21, 1989

• 8:30 to 10:15 am - Session #7 - Resumption of workshop

- Presentation of workshop findings

- Team discussion of workshop findings

- Conclude workshops with wrap up summary

• 10:15 to 10:30 - Break

• 10:30 to noon - Session #8 - Other program topics

- By end of session #8 should have final report of workshop findings to pass out to participants.

• noon to 1:30 pm - lunch on attendees own

• 1:30 to 3:30 pm - Session #9 - Other program topics

General notes

- Should have respondents name on topic rating response sheet. Topics to be assigned to the workshop teams correspond to the highest rated topics in the response tabulation from that team.

- If topic rating response is returned by you, you will be provided a copy of the findings. If you do not respond, you will not receive the summary.

- Ratings should be both from your view and from what you believe your member's view would be. Perception is reality.

- Question list is primarily to help the discussion leaders set the workshop patterns. Answering questions ahead of time is to be optional.

- Send out question list with the topic list

Room layout

- Well lighted

- Well ventilated

- Large enough to accommodate 6 large circular tables

- 5 people/table with room for notes and reference material

- Large rectangular table at front for discussion leader

- Flip chart available at each workshop table

- Overhead transparency projector at discussion leader's table

-Large screen (6' x 6') for projector screen

- Participants

- Assume 30 people will attend
- Size of group - four plus leader
- Preassign workshop teams to tables
- Workshop grouping should be by membership size first, then geographical. CAM staff will set team makeup
- CAM staff will preselect a leader for each group
- Team leaders to select team recording secretary. Not necessary to select ahead of time
- Have guidelines available for the recording secretary
- Makeup of team to be given to leaders morning of first day
- Marla and Diana will be available to help tabulate material from workshops.



Suggested format of topic and question mailings. Cover letter, topic list and question list to be final prepared, duplicated and sent by Diana and Marla.

Date: Date of Memo

Re: Workshop format, possible topics and related questions for summer convention sessions

To: Attendees at the IBEE summer convention in Shanty Creek Resort, Michigan - June 20, 21, 22, 1989

From: Diana Brown and Marla Janness (or from Curt Hacias)

The featured attendee participation event at the summer convention of the IBEE will be a workshop centering on two important missions. These are:

TO PROVIDE IBEE CONVENTION ATTENDEES AN OPPORTUNITY TO DISCOVER, DISCUSS, AND ANALYZE OPERATING AND MANAGERIAL METHODS THAT HAVE PROVEN SUCCESSFUL IN EXCHANGES THROUGHOUT THE UNITED STATES AND CANADA.

AND

TO IMPROVE, BY WORKSHOP PARTICIPATION, THE PROBABILITY THAT IBEE EXECUTIVE'S MEMBERSHIPS WILL BECOME, OR REMAIN, SUCCESSFUL IN THEIR CONSTRUCTION ACTIVITIES FOR THE NEXT TWO YEARS

To help structure discussion sessions at the convention, the workshop topics below are offered as a starter list for you to express your opinion as to importance and interest. Please rate each topic's importance, and the interest level you feel it has, on a scale of 1 to 10. A rating of 1 indicates little, if any interest. A rating of 10 indicates very high interest. Other ratings will range between one and ten

Please provide two ratings of each topic;

- 1.) Rating A -The topic's importance and interest to you.
- 2.) Rating B - The topic's importance and interest to your membership, as you perceive your member's needs. Remember perception is often reality.

Indicate your ratings in the spaces adjoining each topic. Do not try to rank the topics. Identical ratings can be given to more than one topic.

One way to rate topics is to select the subject of highest interest in the list and give it a 10. Next select the subject of lowest interest in the list and give it a 1. All other

ratings can then be based on a comparison with these.

<u>A</u>	<u>B</u>
Level of interest to you	Level of interest to <u>your members</u>

1. Plan room operation
2. Electronic transmission of drawings and submittals to your members and others
3. Reproduction of plan room documents for member use
4. Electronic transmission of construction information to your members and others
5. Content and format of construction reports
6. Construction project delivery systems (hard money, negotiated, design/build, construction management, other), and how they affect the way your members use builder's exchange services
7. How to effectively serve all sizes and types of members
8. Preparing and publishing volunteer work guidelines
9. How to more effectively educate and train your members to improve their business skills
10. How to educate and train your member`s clients to more effectively use your member`s services
11. Encouraging and motivating planners, architects and engineers to better utilize your member's services
12. Creating & maintaining an acceptable image of the construction industry
13. Helping your members to better compete with each other
14. Helping your members to better compete outside

their main geographic area

15. Helping your members diversify their construction and business activities

16. Helping your members achieve and maintain profitable performance

17. Analyzing the work potential of your geographic market area to help your members better plan their business future

18. Helping your members diversify geographically

19. The role of the exchange in obtaining good bonding and insurance rates

20. The role of the exchange in helping to moderate the number and seriousness of claim prone construction jobs

21. Building the exchange to operate as a catalyst in financing development opportunities for your members

22. How the exchange can better work with the user and developer to help guide economic development

23. The role of government and the free enterprise system as it impacts the construction industry

24. Labor relations and their impact on your member's business health

Below, please add as many other topics as you feel might be of interest in the workshops, and give your ratings for each.

25.

26.

27.

28.

Please add your topics to the list.

*

*

*

The questions below should be considered in rating topics for workshop discussion. These questions and others suggested by you will be used to stimulate thought about selected topics at the workshop. If you can provide some summary answers to the questions for workshop consideration, please do so on a separate sheet of paper. We would be very pleased to get your views. (Marla and Diana - or Curt Hacias)

1. How do your successful members **stay** successful?
2. Why do your unsuccessful members fail?
3. What is the prime source of business for your members?
4. What is the main geographic area in which your members operate?
5. Under what contractual arrangements do most of your members operate with their clients?
6. Who are the major users of construction services in your area?
7. What are the characteristics of the major users of construction services in your area?
 - Are they government, private or quasi public agencies
 - Are they purchasing, management, or engineering oriented
 - What are the types of business and professional relationships they maintain with their construction contractors
 - What are the types of business and professional relationships they maintain with their planners, architects and engineers
 - What are the types of businesses and organizations that use construction and design services in your geographical area - institutional, educational, industrial, commercial, residential or other
 - What similar questions do you feel must be asked and answered if you are to improve Exchange services to your membership?

We will look forward to receiving your reply to the topic ratings and the questions by _____. Enclosed is a addressed, stamped envelope for your convenience. If you have any questions please call either Diana Brown or Marla Janness at the Construction Association of Michigan, phone 313 567 5500, or FAX number ?.

Respondent_____

Sincerely yours,

City & state_____

?ch, db, mj?

tot m avg	tot s avg	Item
7.82	7.92	01 Plan room operation
7.64	7.28	14 Helping your members achieve & maintain profitable performance
7.46	7.26	03 Reproduction of plan room documents for member use
7.18	8.82	10 Creating & maintaining an acceptable image of the construction industry
7.00	7.00	05 Content & format of construction reports
6.97	8.10	09 Encouraging and motivating planners, architects & engineers to better utilize your member's services
6.56	7.59	21 The role of government & the free enterprise system as it impacts the construction industry
6.26	6.74	15 Analyzing the work potential of your geographic market area to help your members better plan their business future
6.18	5.90	11 Helping your members to better compete with each other
5.79	7.13	04 Electronic transmission of construction information to your members & others
5.77	6.46	17 The role of the exchange in obtaining good bonding and insurance rates
5.51	5.92	06 Const proj delivery systems & how they affect the way your members use builder's exchange services
5.49	6.85	07 How to more effectively educate & train your members to improve their business skills
5.26	5.03	22 Labor relations and their impact on your member's business health
5.18	6.10	08 How to educate and train your member's clients to more effectively use your member's services
5.05	5.26	18 The role of the exchange in helping to moderate the number & seriousness of claim prone const jobs
5.00	6.08	02 Electronic transmission of drawings & submittals to your members & others

listed in perceived member interest order

tot m avg	tot s avg	Item
4.44	5.49	20 How the exchange can better work with the user & developer to help guide economic development
4.33	4.62	12 Helping your members to better compete outside their main geographic area
4.13	4.10	13 Helping your members diversify their construction and business activities
3.69	3.62	16 Helping your members diversify geographically
3.15	3.56	19 Building the exchange to operate as a catalyst in financing developmt opportunities for your members
0.00	0.00	23 The relationship between the exchange & local government
0.00	0.00	24 Publications - in house or done outside
0.00	0.00	25 BX building locale, accessibility, full use, mtgs, own or rent?
0.00	0.00	26 Is non profit status obsolete in view of changing laws, tax advantage, uniting of functions, etc: consider profit corp instead
0.00	0.00	27 Best use of part vs full time employees - ratio to each 100 members, mechanical accounting (computer) etc.
0.00	0.00	28 Group purchase plans
0.00	0.00	29 Member increase & retention (checked items)
0.00	0.00	30 Exchange director employment search (checked of value to self only)
0.00	0.00	31 Plans deposit guarantee program
0.00	0.00	32 Industry library
0.00	0.00	33 Combined purchasing fo publications, etc.
0.00	0.00	34 National property & casualty insurance program

listed in perceived member interest order

tot m avg	tot s avg	Item
0.00	0.00	35 Home shows ?? (no values assigned)
0.00	0.00	36 Social functions (no values assigned)
0.00	0.00	37 UBIC (unrelated business income) (no values assigned)
0.00	0.00	38 Rising cost of health care and its impact on the construction industry
0.00	0.00	39 How to provide useful services to all categories of membership
0.00	0.00	40 How to best communicate with your membership
0.00	0.00	41 How to maintain your data base so as to provide the most efficient means of communications with various membership sub-groups
0.00	0.00	42 How your exchange can be work better with public agencies & legislators to help your members
0.00	0.00	43 Impact of laws on our industry?
0.00	0.00	44 Can and should we take a positive role against slow growth environmentalists?
0.00	0.00	45 Can an office manager effectively run an association?
0.00	0.00	46 Maintaining a professional image
0.00	0.00	47 (comment) Mentioned had not heard anything about summer conference since he rejoined.
0.00	0.00	48 Minority set aside vs economic &/or socially disadvantaged
0.00	0.00	49 Who are builders exchanges competitors & what services are they providing the industry that bx's are not?
0.00	0.00	50 Group buying power discount programs
0.00	0.00	51 Unrelated business income

listed in perceived member interest order

tot m avg	tot s avg	Item
0.00	0.00	52 Worker & management education
0.00	0.00	53 Finances
0.00	0.00	54 Delegating responsibility to volunteers

listed in perceived member interest order

- **ibee convention workshop notes rjs - disk 179**
 - **#01 - Plan room operations**
 - Team Michigan
 - A. Problems
 - 01. Obtaining plans & specs *
 - 02. Upcoming project lead time *
 - 03. Cost effective
 - 04. Plan theft & defacing
 - 05. Monopolizing of plans
 - 06. Organization of plan room
 - 07. Hours of operation
 - 08. Competitive plan rooms
 - 09. Addenda - timely?
 - 10. Document reproduction
 - B. Opportunities
 - 01. Improve liaison with a/e's, gc's, cm's, etc *
 - 02. Use members as informational resource
 - 03. Potential revenue source
 - 04. New members and retention
 - 05. Daily contact with members
 - 06. Project awareness *
 - 07. Beat competitive plan rooms
 - Team Erie
 - A. Problems
 - 01. Getting Plans*
 - 02. Getting more than one set
 - 03. Getting accurate bid lists
 - 04. Non-members using plan room
 - 05. Plans, specs, and adenda disappearing
 - 06. Jobs coming in at last minute
 - 07. Defacing plans
 - 08. Plans not picked up nor returned on time
 - 09. Plans tied up all day by one member
 - B. Solutions
 - 01. AE reporter making personal contacts *
 - 02. Blueprint copy service in house
 - 03. Encourage GC to let us know when bidding *
 - 04. AE membership category w/n assn.*
 - 05. Reciprocal agreements with other BXs

- 06. Monitor front desk with sign in book
- 07. Key or code systems
- Team Superior
 - A. Solutions
 - 01. Provide plans & specifications
 - 02. Provide plans & specifications on a timely basis *
 - 03. Provide "bidders list" on projects
 - 04. Provide physical facilities for plan room
- #03 - **Reproduction of plan room documents for member use**
 - Team Ontario
 - Problems
 - Competing with "for profit" who reproduce
 - Liability of using copyrighting material
 - Improper equipment size & speed
 - Labor intensive *
 - Blueprint copies versus spec copies
 - Security of documents
 - Solutions
 - Making it member services and not plan reproduction services
 - KTL *
 - Use a disclaimer with AIA approval
 - Develop Exchange related equipment to make copiers user friendly *
 - Will reduce labor requirements for copying
 - Educate members that copiers will allow them to estimate more jobs, in less time, & maintain documentation to check bid
 - Team Huron
 - A. Problems
 - 01. Easier to steal plans than to copy
 - 02. Copyrights of plans
 - 03. Cost of machines - purchase, lease, maintain
 - 04. Disassembling plans to copy
 - B. Solutions
 - 01. Security system for plans
 - 02. Plans check in and out
 - 03. Copy machine
 - a. all sizes (full size, 1/2, etc.)
 - b. cheap
 - c. large volume
 - d. consumer use

- 04. Engineering copier
 - a. various sizes
 - b. consumer use
- 05. Computer scanning
 - a. blueprints
 - b. specifications
 - c. computer transmitting
- 06. Microfilming
- **#04 - Electronic transfer of construction information to your members & others**
 - Team Huron
 - A. Problems
 - 01. Industry equipment standard
 - 02. Small member cannot afford electronic equipment or service
 - 03. Training
 - B. Solutions
 - 01. Provide training
 - 02. Discounts on equipment
 - 03. Utilize computers*
 - a. modem to exchange
 - b. direct access in plan room
 - c. bulletin board (computer type) (networking)
 - d. regional/national networking of exchanges
 - e. advantages
 - -24 hour operations *
 - -cheaper & more dependable than people *
 - 04. Fax
 - a. multiple transmission of reports/information
 - 05. Telephone
 - a. "audio response system" (free service, reduces personnel time)
 - b. recording machine
 - **#05 - Content & format of construction reports**
 - Team Michigan
 - A. Problems
 - 01. Not aware of all projects out for bid *
 - 02. Bidder's lists
 - 03. Contract awards & sub contract awards
 - 04. What is appropriate content?
 - 05. Frequency?
 - 06. Should advertising be included?
 - 07. Format

- 08. Quality - appearance - image
- 09. Cost
- 10. Timeliness *
- B. Opportunities
 - 01. Income for member & for builder's exchange
 - 02. Public relations
 - 03. Member service
 - 04. Recruit members and retention
 - 05. What competition is doing
 - 06. Advertising opportunities for members
 - 07. Educational vehicle
 - 08. Maintain liaison with government agencies, a/e's, etc *
- C. Resources
 - 01. Competitive reports
 - 02. Other IBEE reports
 - 03. Owners - users
 - 04. Government
 - 05. Trade associations
 - 06. Clipping services
 - 07. Contractor network
- Team Ontario
 - General observations
 - Not having sufficient lead time to advertise projects
 - Not receiving enough information on projects in timely fashion
 - Publish adequate information to our members?
 - Timeliness of publication
 - Publishing FAX numbers?
 - Updating information in timely manner?
 - Fomat understandable?
 - Solutions
 - Survey members about content of project info? Frequency of publication?
 - Encourage (educate?) design professionals to submit projects in timely fashion
 - Meet with local and national chapters of AIA, etc *
 - Exchange staff pursue info until enough info is obtained
 - Provide documentation regarding proper time for bidding purposes?
 - Coordination of bid times & dates with other projects in area *
 - Format of reports
 - Project location

- Project name
- Project time
- Bonding
- Price range
- List of plan holders
- Bidders
- Special requirements
- Job description
- Team Huron
 - A. Problems
 - 01. Readers don't like change
 - 02. Readers don't appreciate image
 - 03. Readers don't recognize others' information needs other than their own
 - B. Solutions
 - 01. Call members
 - 02. Surveys
 - C. Notes
 - 01. Size
 - a. 8 1/2 x 10
 - b. color
 - c. professional appearance
 - d. thickness is impressive
 - 02. Content
 - a. location
 - b. due date
 - c. scope
 - d. title
 - e. designer
 - f. owner
 - g. cost
 - h. size
 - i. bidders - telephone, fax, address
 - j. low bid
 - k.. contract awards
 - l. planning board (upcoming)
 - m. building permits
 - n. accurate
 - o. assn. notices
 - p. special interest items

- q. clear
- r. professional print look
- 03. Format
 - a. book
 - b. due date order
 - c. all jobs
 - d. summary
 - e. by private, state/local, federal sectors
- 04. Frequency
 - a. postal class
 - b. weekly
 - c. daily updates
- 05. Delivery
 - a. postal
 - b. computer (modem)
 - c. FAX
 - d. private delivery
- 06. Production method
 - a. in-house
 - b. out house
 - c. control
 - d. timeliness
- **#06 - Const project delivery systems**
 - How they affect the way your members use builder's exchange services.
 - Team Michigan
 - 01. Educate users in contracting methods *
 - 02. Develop & encourage construction code of ethics
 - 03. Teach members how to market services
 - 04. Teach members how to avoid problem projects
 - 05. Educate a/e's in contracting methods
 - 06. Bid code of ethics
 - 07. Bid registry?
 - 08. Convince all segments of const team that low bid is not always the best bid *
- **#07 - How to more effectively educate & train your members to improve their business skills**
 - Team Erie
 - A. Problems
 - 01. Finding qualified educators
 - B. Solutions
 - 01. Use qualified members (retirees)

- 02. Monitor other association activities and look for gaps in education
- 03. Offer a mix of formats to fit all needs such as half day, full day, evenings, extended classes *
- 04. Survey members to determine needs
- 05. Question individuals during personal contacts
- 06. Use your board for input
- 07. Local vo-techs, community colleges and continuing education courses can be planned *
- Team Superior
 - A. Solutions
 - 01. Construction articles on bulletin *
 - 02. Complimentary mailing of bulletin between exchanges
 - 03. Seminars/ workshops (construction, legal, office management, etc.)
 - 04. Information source for industry seminars/ workshops (sponsor, dates, etc.) *
 - 05. Provide brochures, pamphlets, etc.
- **#09 - Encouraging & motivating planners, arch & engineers to better utilize your member's services**
 - Team Ontario
 - Fast tracking of projects
 - Architect, engineer - professional
 - Contractor firms - tradesmen
 - Committee of Exchange Board members sit down to find solutions to overcome this
 - CSI can be used as a conduit for ideas (architects belong, as do contractors) *
 - Problem is owners not allowing plans to be put on Exchange
 - Educate professionals on advantages to using Exchange plan rooms
 - Educate professionals on advantages to using Exchange plan rooms *
 - Encourage owners that using plan room will possibly save money & produce quality construction
 - Invite owners to the Exchange
 - Exchanges do more to convince a/e's to put jobs on Exchange - if necessary use select list of bidders
 - Offer easy membership rules for a/e's to join Exchange
 - Local construction users groups
 -

- **#10 - Creating and maintaining acceptable image of the construction industry**
 - Team Huron
 - A. Problems
 - 01. Get your name, picture, activity in paper, tv, radio and other periodicals
 - B. Solutions
 - 01. Publications
 - a. complete & accurate project information
 - b. providing industry specialty information
 - c. newsletters
 - f. professional appearance
 - 02. Public relations
 - a. executive director exposure
 - b. speakers
 - c. PR committee/employee
 - d. construction news reports
 - e. resource library
 - d. human interest
 - 03. Membership in other groups
 - a. active in other organizations
 - 04. Civic activities
 - a. speakers
 - b. special forum meetings
 - c. volunteer
 - d. working with youth (schools, trades, learning centers)
 - e. human interest
 - 05. Industry
 - a. expos
 - b. meetings
 - c. social
 - Team Superior
 - A. Solutions
 - 01. Active participation in local group activities
City, state, national, chamber of commerce, etc.
 - 02. Emphasize the importance of doing quality work *
 - 03. Emphasize the importance of employee & equipment appearance
Neat uniforms, clean equipment, etc.
 - 04. Maintain sound & ethical business standards
 - 05. Advertising
 - **#11 - Helping your members to better compete with each other**
 - Team Erie

- A. Problems
 - 01. Communication
 - 02. Proper bidding procedures
- B. Solutions
 - 01. Offering educational programs on specific aspects of doing business *
 - 02. Keep members informed of legal and legislative changes that effect their business
 - 03. Offer training programs for employees *
 - 04. Provide opportunities for contractors to meet each other
 - 05. Offering take-off service
 - 06. Blueprint copy service
- Team Ontario
 - Problems
 - Some compete better than others
 - Desire to protect turf
 - No management ability *
 - Lack of industry ethics
 - Solutions
 - Serve on committees and boards
 - Use Exchange bulletin and services effectively
 - Education and seminars
 - Estimating
 - Bidding requirements
 - Project management
 - labor & supervision
 - safety
 - Quality control
 -
 - Stay current with contracts awarded, low bidders, building permits
 - Know more about owners before signing contract
 - Contract content & awareness
 - KTL *
 - Know your subs, know your competitors
 - Attend Exchange functions to meet competitors
 - Establish personal relationships
 - Membership in Exchange allows knowledge of broad spectrum of contractors
 - Establish reputation of ethical conductg, prompt payment of bills, quality work, reliability of character

- **#14 - Helping your members achieve & maintain profitable performance**
 - **Team Michigan**
 - 01. Member education *
 - A. Management techniques
 - B. Safety
 - C. Supervision
 - D. Marketing
 - E. Public relations
 - F. Financing - insurance - purchasing
 - 02. Accurate, comprehensive information
 - 03. New technology & product updating *
 - 04. Legislation & regulation *
 - A. PAC's
 - B. Lobbying
 - C. Summary of legislation
 - D. Legislative alert
 - 05. Resources
 - A. Chambers of commerce
 - B. Industry publications
 - C. Management consulting firms
 - D. Industry coalitions
 - E. Educational institutions
 - F. Member networking
 - **Team Erie**
 - A. Problems
 - 01. Bid Shopping *
 - 02. New contractors coming into area and taking work cheap
 - 03. Members unwilling to discuss problems
 - 04. Availability of skilled labor
 - 05. Educational deficiencies (employers)
 - B. Solutions
 - 01. Bid depositories
 - 02. Better educated owners could help*
 - 03. Cost control programs & accounting methods
 - Cost control programs & accounting methods can point out problems.
 - Association-sponsored programs can make it "easier" for members to discuss problems.
 - 04. More training programs*
 - Develop programs in secondary schools to promote construction careers. Provide qualified speakers to speak about construction careers. Association should take a lead in training.

- 05. CPM
- Team Ontario
 - Discussion points
 - Lack of education & estimating knowledge
 - Lack of skilled tradesmen
 - Timely payment
 - Contract progress management
 - Working in too large an area in order to maintain control
 - Not aware of codes & laws
 - Taking on project beyond capability
 - Solutions
 - KTL *
 - Seminars & education - all aspects
 - Greater participation in apprenticeship programs
 - Prompt payment - progress payments & change orders (signed prior to work)
 - Hire quality superintendents, middle management
 - Preach that volume should not replace quality and control
 - Exchange must make members aware of code changes and new laws
- Team Huron
 - A. Problems
 - 01. Don't recognize need for help through various methods
 - 02. Don't know how to compete effectively
 - 03. Improve your competitors business business ability (lowballing)
 - B. Solutions
 - 01. Education/Training
 - Estimating classes; Financial planning; and Awareness of all phases of business - administrative and operational
 - 02. Information
 - Available projects; Bidders (contr/ subcontr); Changes; Project news; Assn. newsletter
 - 03. Regulatory (Legislative)
 - How it affects operations; Codes; Permits; Certification programs
 - 04. Social
 - Meetings; Classes; Picnics
- **#15 - Analyzing the work potential in your geographical area**
 - Team Superior
 - A. Solutions
 - 01. Contact architects & engineers, owners on future projects *
 - 02. Publishing this information in bulletin (6 month intervals)

- **#17 - The role of the exchange in obtaining good bonding and insurance rates**
 - Team Erie
 - A. Problems
 - 01. Wide variation of practices from area to area including U.S. and Canada
 - B. Solutions
 - 01. Bonding

We can encourage our members to use sound accounting and business practices which will influence their ability to be bonded.
 - 02. Health Insurance *

Encourage or sponsor community task force to find solutions to rising costs of health care including wellness programs, employee/employer incentives, cost containment, etc.
 - 03. Workers Compensation

Promote regulation of rehab facilities, put burden on employee to prove no history of injury, make investigative services available to contractors.
 - 04. Providing self insured programs if feasible
- **#21 - The role of government & the free enterprise system as impacts the const industry**
 - Team Michigan
 - 01. Properly fund public construction
 - 02. Less governmental intervention *
 - 03. Provide input for government regulatory bodies
 - 04. Organized national construction coalitions
 - 05. Change the governmental perception, & all user, perception of the construction industry
 - 06. Encourage the competitive bid process
 - Team Superior
 - A. Problem
 - 01. More & more participation

Building codes, EPA, HUD, National and state guidelines, OSHA
 - B. Solutions
 - 01. Keep members informed on current government policies *

IBEE Summer Convention, 1997
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April 14, 1997

Fern N. Nagel, Executive Vice President
International Builders Exchange Executives, Inc.
4926 West Chicago Street 57702-1828
P.O. Box 2274
Rapid City, South Dakota 57709-2274

Re: Workshop notes for IBEE Convention - Summer 1997 - Appleton, Wisconsin

Dear Fern:

Attached is a progress set of guideline notes for the workshops to be held at the summer convention on June 18-21, 1997 in Appleton, Wisconsin. These notes are part of the ongoing material I usually prepare when outlining a complex program of this type. The notes are for stimulating ideas and will be continually modified to suit the nature of the program. However they reflect my current thinking about the program.

Please note item F - "Suggested subjects for program workshop table discussions." This is an expansion of the subject list you started in your March 1997 Construction Executive Report. There you also asked your members to provide additional ideas and comments on the topics they would find of interest. The topic list is critical to a good workshop effort and I would appreciate being informed about any other subjects in which your members express an interest.

We will have to make a final screening of the list so as mentioned in section H1a of the enclosed notes we have at least 4 topics per table. This will require a initial pool of 20 subjects. In addition we need several standby subjects for optional discussion material. We can discuss details of the program as we get closer to the date of the meeting. Meanwhile if you have any comments or questions please call.

enclosure: progress set of notes

Regards,



I. Notes on 1997 IBEE Convention - Program workshop - June, 1997 - Appleton, Wisconsin

A. Location - Appleton, Wisconsin

B. Dates of conference - June 18, 1997 through June 21, 1997

1. 1st workshop session - Thursday June 19, 1997 - 1:30 P.M. to 4:30 P.M.
2. 2nd workshop session - Friday June 20 - 4:15 P.M. to 5:15 P.M.

C. Title of workshop sessions.

1. "Revisiting Our Member's Musts, Wants, and Wishes "
What Help Do Your Members Need to Stay in Business, be Profitable, Have Fun, and Enjoy It?

D. Missions and objectives - suggested?

1. Mission of 1997 IBEE summer convention.
 - a) Not formulated as yet - 04/14/97.
2. Mission of program work shop
To explore methods by which members of the International Builders Exchange Executives, Inc. can better recognize, respond to, and serve the interests of their individual members

E. Suggested titles of program workshop.

1. "Exploring member's interests in being members of the Builders Exchange"
2. "Refocusing on our members' needs."
3. "Your Member's Needs Revisited"
4. "Musts, Wants, and Wishes - What Help Does Your Membership Need to Stay in Business, be Profitable, Have Fun, and Enjoy It?"

F. Suggested subjects for program workshop table discussions - not grouped by subject matter - listed alphabetically.

1. An overview of the transmission of construction information.
2. Analyzing the work potential of your geographic market area to help your members better plan their business future.
3. Building the exchange to operate as a catalyst in financing development opportunities for your members.
4. Construction project delivery systems (hard money, negotiated, design/build, construction management, other), and how they affect the way your members use builder's exchange services.
5. Content and format of construction reports.
6. Creating & maintaining an acceptable image of the construction industry.
7. Effective communication between the paid exchange staff and the volunteer staff.

8. Electronic transfer of construction information to your members, their clients, and others.
9. Encouraging and motivating planners and designers to better utilize the abilities of your membership and their services.
10. Handling prebid revisions to projects - hard copy vs. electronic
11. Helping your members achieve and maintain profitable performance.
12. Helping your members diversify their construction and business activities.
13. Helping your members to better compete in diversified geographic areas.
14. Helping your members to better compete with each other.
15. How project delivery systems affect the exchange membership in their use of the exchange
16. How the exchange can better work with the user and developer to help guide economic development.
17. How to better motivate the volunteer in your organization.
18. How to create and maintain a well accepted professional image of the construction industry.
19. How to educate and train your member`s clients to more effectively use your member`s services.
20. How to effectively serve all sizes and types of members. Who are these potential members and where do you find them?
21. How to effectively use CSI/UCI coding systems.
22. How to get and retain members.
23. How to more effectively educate and train your members to improve their business skills.
24. How to more effectively educate and train your members to improve their business skills.
25. How to more effectively educate and train your member`s clients to use your member`s services.
26. How to serve all size members.
27. How to stimulate planners and designers (land planners, architects & engineers) to effectively participate in exchange activities.
28. How to use volunteer work effectively.
29. How your successful members stay successful?
30. Insurance - health, lost time, and retirement.
31. Labor relations and their impact on your member's business health.
32. Member services and programs.
33. Methods of obtaining plans and specifications.
 - a) Hard copy vs. electronic (floppy or CD disks.)

- b) Copying techniques to reproduce plans and specifications.
 - c) Internet
 - 34. Plan room operation and how to improve it.
 - 35. Preparing and publishing volunteer work guidelines.
 - 36. Professional liability considerations for the design/build contractor.
 - 37. Reproduction of plan room documents for members and others use.
 - 38. The development and application of alternate dispute resolution systems for your members benefit.
 - 39. The development and application of partnering by your members and their clients.
 - 40. The exchange as a catalyst in financing development.
 - 41. The nature of the design/build delivery system.
 - 42. The role of government and the free enterprise system as it impacts the construction industry
 - 43. The role of the exchange in obtaining good bonding and insurance rates
 - 44. Unrelated income and its potential.
 - a) Long distance phone lines.
 - b) R..S. Means books and forms.
 - 45. What are the characteristics of the major users of construction services in your area?
 - 46. What are the types of business and professional relationships the owners in your area maintain with their planners, architects, engineers, contractors, subcontractors, and vendors? How can they be improved?
 - 47. What contractual arrangements do most of your members operate under with their clients?
 - 48. What is the main geographic area in which your members operate?
 - 49. What is the mix of owners in your market area - government, private, and quasi public agencies?
 - 50. What is the orientation of your member's clients - purchasing, management, or engineering?
 - 51. What is the prime source of business for your members?
 - 52. What questions do you feel must be asked and answered if you are to improve exchange services to your membership?
 - 53. Why do your unsuccessful members fail?
- G. Workshop format**
- 1. Assume 30 to 35 people will attend
 - 2. Divide into 5 groups. These should be groups whose exchanges have similarities that would help promote discussions at similar planes of interest.

Some of the exchange characteristics that should be considered include:
(Fern: this list should be expanded.)

- a) Size of membership.
 - b) Major sources of construction work in the exchange area.
 - c) Nature of contractors belonging to the exchange
 - d) Nature of other participants in the business of construction such as:
 - (1) Architects
 - (2) Engineers
 - (3) Planners
 - (4) Owners
 - (5) Users
 - (6) Regulatory bodies
 - (7) Project delivery systems
 - (8) Other?
 - e) Services offered.
 - f) Other.
3. Have 5 round tables with a flip chart at each table
 4. Assign a moderator to each table, and a secretary to each table (or group?).
(Fern: might consider having the secretary travel with the group from table to table to get more people participating in discussing all the subject areas.) The permanent table moderator will lead the discussions at each table and encourage attendees to formulate new ideas and approaches to the subjects being discussed in the session.
 5. Six or seven people will be at a table. Traveling attendees (possibly including the secretary) will move from table to table occupying each of the five tables during the session. At each table a separate set of problems will be discussed. The same moderator will remain at each table throughout the discussions.

H. Agenda for sessions

1. Thursday, June 19, 1997 - 1:30 P.M. to 4:30 P.M.
 - a) 1:30 to 2:00 P.M. - Session #1 - Move to tables and identify new subjects for discussion. Should have at least 4 subjects per table to discuss. Total subjects needed = 20.
 - b) 2:00 - 2:25 P.M. - Session #2
 - c) 2:25 - 2:30 P.M. - Table groups move
 - d) 2:30 - 2:55 P.M. - Session #3
 - e) 2:55 - 3:20 P.M. - Refreshment break and table groups move
 - f) 3:20 to 3:40 P.M. - Session #4
 - g) 3:40 - 3:45 P.M. - Table groups move

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- h) 3:45 - 4:05 P.M. - Session #5
 - i) 4:05 - 4:10 P.M. - Table groups move
 - j) 4:10 - 4:30 P.M. - Session #6
 - k) 4:30 - Adjourn
2. Friday, June 20, 1997 - 4:15 P.M. to 5:15 P.M.
- a) 4:15 to 4:30 P.M. - Presentation of suggestions from Thursday workshop.
 - b) 4:30 to 5:10 P.M. - Discussion of suggestions from Thursday workshop
 - (1) What do they mean.
 - (2) How to select what to implement.
 - (3) How to implement selected subjects
 - (4) Other
 - (5) Adjourn
 - c) 5:10 to 5:15 P.M. - Recap and adjournment

**F. 1:30 - 4:30 - Session #3 - Revisiting Our Members' Musts, Wants, and Wishes -
Ralph J. Stephenson, Consulting Engineer - Mt. Pleasant, Michigan**

1. The mission of this program workshop is to explore methods by which Executives can better recognize, respond to, and serve the interests of their individual members.
2. Recorder and chairs suggested
 - a) Trish Corbitt
 - b) Larry Groves
 - c) John Kelly
 - d) Gregg Mazurek
 - e) Michael Tollette
3. Subjects to be covered
 - a) Table A - Trish Corbitt
 - (1) Membership - getting and retaining
 - (2) How to serve all sizes and types of members
 - b) Table B - Larry Groves
 - (1) How do your successful members stay successful?
 - (2) Why do your unsuccessful members fail?
 - c) Table C - John Kelly
 - (1) Major designers of projects in your area
 - (a) Government
 - (b) Private
 - (c) Quasi Public Agencies
 - (2) Manner of receiving plans and specifications
 - (a) Hard copy vs CD rom
 - (b) Cost of government drawings
 - (c) Use of blueprint copier for additional plans
 - d) Table D - Gregg Mazurek
 - (1) Electronic plan rooms
 - (2) Member services and/or programs
 - (a) Insurance - Health, lost time and retirement
 - (b) Bulletins and addenda - hard copy vs electronic
 - (c) Unrelated business income
 - i) Long distance phone lines
 - ii) R.S. Means books and forms
 - e) Table E - Michael Tollette
 - (1) Education - the training and educating of members to improve their business skills

1. This ice-breaker session allows each attendee to introduce themselves and the Exchange or Construction Association they represent.

- ✓ * a) Alva Anaas - Eau Claire-Chippewa Falls Builders Exchange - Eau Claire, Wisconsin. (405 members)
 - (1) Was in the retail business
- ✓ * b) Sandy Backalars - La Crosse Builders Exchange, Inc. - La Crosse, Wisconsin (392 members)
 - (1) Got letter from Linda inviting her to conference
 - (2) Not associated with construction previously
 - (3) Looking forward to meeting other people in the business
- ✓ * * c) Julia Berry - Northern Colorado Builders Exchange - Fort Collins, Colorado (200 members)
 - (1) Has been with bx for 3 years
 - (2) Graduated from college in Arizona
 - (3) Learning more every year
- ✓ * d) Frances Bulheller - Builders Exchange Association of Virginia - Richmond, Virginia (510 members)
 - (1) 10 years with the bx
 - (2) Have FAX and electronic mail
- ✓ * * e) Trish Corbitt - Knoxville Builders Exchange - Knoxville, Tennessee (250 ? members)
 - (1) Celebrating their 50th anniversary
 - (2) Background in construction
 - (3) Was with the AGC
 - (4) Out of construction for a while
 - (5) bx called her and she came with the exchange
 - (6) Been member of IBEE since 1988
 - (7) Happy to see all name tags on except ?
- ✓ * f) George Elam - Tulare and Kings Counties Builders Exchange - Visalia, California (400 members)
 - (1) Has been there 27 years
 - (2) Described where his exchange is located
 - (3) Bid processing instead of bid depositary
 - (4) Was born in the industry
 - (5) Was very active in the community
 - (6) Trying to motivate people to volunteer service
 - (7) Active in promoting 13 in California

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- ✓ g) Phyllis Everett - Greater Peoria Contractors Association - Peoria, Illinois
 - (1) First IBEE convention attended
 - (2) Hope to get on the internet
- ✓ h) Tammy Fenimore - Northern Colorado Builders Exchange - Fort Collins, Colorado
 - (1) New member
 - (2) Glad to be here and hope to learn
- ✓ 3 i) David Fritz - Minneapolis Builders Exchange - Minneapolis, Minnesota (700 members)
 - (1) Started in 1888
 - (2) Been there for 8 years
 - (3) Found out about
 - (4) Excited about new workmens comp program
 - (5) Was a school teacher for about 23 years
 - (6) Has been an enjoyable time
- ✓ j) Tim Greenfield - Dubuque Builders Exchange - Dubuque, Iowa (140 members)
 - (1) First meeting - thinks this is great
 - (2) Born into the construction company
 - (3) Inherited glass company and builders exchange
 - (4) Thinks IBEE is a wonderful association
- ✓ k) Larry Groves - Builders Exchange of East Central Ohio - Canton, Ohio (350 members)
 - (1) Best job there is
 - (2) Worked as an architectural draftsman for many years
 - (3) Was a vice president of a general contractor
 - (4) Was an officer in a design-build firm
 - (5) Had a very large health plan - turned it over a few years ago
 - (6) Has been with IBEE since ??
- ✓ l) Peter Gum - Harrisburg Builders Exchange - Harrisburg, Pennsylvania (600 members)
 - (1) Have sponsored trips to many places
- ✓ m) Rhonda Gutknecht - Lincoln Builders Bureau - Lincoln, Nebraska (380 members)
 - (1) Has been there for 14 years
 - (2) First convention attended was in Dead Wood, South Dakota
- ✓ n) Curt Hacias - Construction Association of Michigan - Detroit, Michigan (3450 members)
 - (1) Born in the business
 - (2) Started as cub reporter

- (3) Took job temporarily - still there
- (4) Bought new building recently
- (5) Much credit goes to the staff
- (6) Have surrounded the association with young, energetic people
- (7) Workmens Comp
- (8) Credit Union
- (9) Is a wonderful business
- ✓ o) Gerald Hansen - Tampa Builders Exchange, Inc. - Tampa, Florida (190 full members - others are associate members)
 - (1) 21 years in the air force
 - (2) Was not too familiar with the IBEE
 - (3) Exchange was bought out by an outside firm
 - (4) Has been recently bought by another firm
- ✓ p) John Kelly - Builders Exchange of Louisville - Louisville, Kentucky (600 members)
 - (1) John has been with the exchange for 26 years
 - (2) Involved with most of the basic services everyone else does
 - (3) Starting into the electronic plan room
 - (4) Took considerable time going through college
 - (5) Decided after college to join the exchange
 - (6) Has enjoyed his experiences with the association
 - (7) Did miss several years of the convention - was a big mistake
- ✓ q) Linda Kohlmeyer - Builders Exchange of Milwaukee - Milwaukee, Wisconsin (450 members)
 - (1) Just starting in computers.
 - (2) No printers
 - (3) Same general services everyone else has
- ✓ r) James Lambert - Sacramento Builders Exchange - Sacramento, California (1150 members)
 - (1) Started in 1901
 - (2) Coming on line with the web page
 - (3) Background in special education
- ✓ s) Trudi Larson - Central Florida Builders Exchange - Winter Park, Florida (864 members)
 - (1) Suburb of Orlando
 - (2) Spoke of being on-line
 - (3) Started with association about ?? years ago
 - (4) Has many social events

- ✓ t) Robert Lyons - Contractors Exchange of Hampton Roads Virginia - Norfolk, Virginia (964 members)
 - (1) Founded in 1908
 - (2) Been there since 1991
 - (3) Filled out application for IBEE as soon as he joined the exchange
 - (4) Will go on line soon
 - (5) 26 years in the navy
 - (6) Had no experience in construction
 - (7) Welcomed the newcomers
- ✓ u) James Lyons - Windsor Construction Association - Windsor, Ontario (230 members)
 - (1) Discussed location of Windsor
 - (2) Started in January 1997
 - (3) Association has brought much to the community
 - (4) Background - promoting development
 - (5) Has worked with architects and other development professionals
- ✓ v) Gregg Mazurek - The Builders Exchange, Inc. - Cleveland, Ohio (?? members)
 - (1) On line services
 - (2) Have a very large craftsman award program
 - (3) Applied for exchange job and got it
 - (4)
- ✓ w) Roger Miller - Builders Exchange of St. Paul - St. Paul, Minnesota (650 members)
 - (1) With exchange 17 years
 - (2) Is his 27th consecutive conference
 - (3) Newest offering - self funded workmen's comp program
- ✓ x) Gordon MacPherson - Edmonton Construction Association - Edmonton, Alberta - (500 members)
 - (1) 3 years in air force
 - (2) Mounted police
 - (3) 17 years with the construction association
 - (4) Brought membership folders
- ✓ y) William McIntosh - Honorary Member - Windsor, Ontario
 - (1) Retired
 - (2) Likes IBEE
 - (3) Likes people
 - (4) Not only an association - its a family

- ✓ z) Fern Nagel - Executive Vice-President/ IBEE Headquarters - Rapid City, South Dakota
 - (1) Was executive with organization for several years
 - (2) Is busy
 - (3) Likes her job
- ✓ aa) Kerry Rice - Greater Peoria Contractors Association - Peoria, Illinois
 - (1) First trip here
 - (2) School teacher by training
 - (3) Came long route along
- ✓ ab) Laurel Screptock - The Builders Exchange, Inc - Cleveland, Ohio (?? members)
 - (1) Worked across hall - joined exchange
 - (2) Excited to be here
 - (3)
- ✓ ac) Scott Stariha - Duluth Builders Exchange - Duluth, Minnesota (70 new members - etc)
 - (1) First experience with IBEE
 - (2) Had some trouble getting his board to agree to let him attend
 - (3) Marketing manager after college
 - (4) Project manager for family owned mechanical contractor
 - (5) Appl\
 - (6) 95th year of existence
 - (7) Going on line with web page
 - (8) Want 500 strong by 2000
- ✓ ad) Michael Tollette - Builders Exchange of Texas - San Antonio, Texas (552 members)
 - (1) Founded in 1900
 - (2) Members about 552
 - (3) FAX and other services
 - (4) Father is a light residential builder
 - (5) Worked for his dad pushing a broom
- ✓ ae) Linda Voster - Fox Valley Builders Exchange - Appleton, Wisconsin (220 members)
 - (1) Dave Voster
 - (2) Wife runs the exchange
 - (3) Dave is the head engineer
 - (4) Has full authority to speak so long as he doesn't say anything
 - (5) Bought exchange short time ago
 - (6) Originally had 60 members

IBEE Summer Convention, 1997
Appleton, Wisconsin

Ralph J. Stephenson, P.E., P.C.
Consulting Engineer
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Mt. Pleasant, Michigan 48858
phone 517-772-2537

- (7) Now has 220 members
- (8) Provides cellular phones and many other services
- ✓ af) Del Walker - Pittsburgh Builders Exchange - Pittsburgh, Pennsylvania (1550 members)
 - (1) Background summer of college - worked in field for contractor
 - (2) Sold building products and ran jobs in the field
 - (3) Used the bx in Pittsburgh
 - (4) Applied for job as it opened
 - (5) Went through services offered
 - (6) Exchange been around for more than 100 years
 - (7) Has learned a lot about bx work
 - (8)

Ralph J. Stephenson, P. E., P.C.
Consulting Engineer

IBEE CONVENTION
WORKSHOP NOTEBOOK
Helping Your Members be
Successful

Date: Thursday June 19, 1997 - 1:30-4:30 P.M.

Friday June 20, 1997 - 4:15-5:15 P.M.

Location: Paper Valley Hotel

Appleton, Wisconsin

date printed: 6/16/97

1997 IBEE CONVENTION - JUNE 18 - 21, 1997 - APPLETON, WI

TOPICS FOR RALPH STEPHENSON

1st SESSION - Thursday June 19, 1997 - 1:30 p.m. to 4:30 p.m.

2nd SESSION - Friday June 20, 1997 - 4:15 p.m. to 5:15 p.m.

SUGGESTED TOPICS:

- - Membership - Getting and Retaining
- - How to Serve all Sizes and Types of Members
- - How Do Your Successful Members Stay Successful
- - Why Do Your Unsuccessful Members Fail
- - Major Designer of Projects in Your Area
 - *Government
 - *Private
 - *Quasi Public Agencies
- - Manner of Receiving Plans and Specifications
 - *Hard Copy vs CD Rom
 - *Cost of Government Drawings
 - *Use of Blueprint Copier for Additional Plans
- - Electronic Planrooms - Networking - InterNet - Etc.
- - Member Services and/or Programs
 - *Insurances - Health, Lost Time and Retirement
 - *Bulletins and Addenda - Hardcopy vs Electronic
 - *Unrelated Business Income
 - *Long Distance Phone Lines
 - *R.S. Means Books and Forms
- - Education - The Training and Educating of Members to Improve their Business Skills.

Workshop Reference Material - IBEE Convention 1997 - Appleton, Wisconsin

1. Sample construction problem statements from partnering meetings - disk 473
 1. Adequate site staffing by general contractor and sub trades
 2. As subs, we do not give each other realistic delivery dates or updates on changing delivery dates
 3. Asking for concessions not permitted by contract
 4. Attempting to take advantage (intimidate)
 5. Breakdown of communication between mgmt & crews/delayed communication
 6. Broken promises and commitments by individuals
 7. Challenge too late
 8. Change our minds
 9. Clear definition of musts, wants, wishes
 10. Clear definition of what approval means
 11. CM lack of sensitivity to contractor's issues - for example, schedules, cost impact
 12. Communications between subs regarding potential problems
 13. Congestion - truck traffic control
 14. Considerate of others as we want them to be of us
 15. Contractor lack of quality (i.e. check your own work first)
 16. Contractors having to verify proposed design
 17. Crane usage - between suppliers & general contractor
 18. Crews not informing mgmt or foreman re: ideas for solutions to problem
 19. Crews not informing mgmt or foreman re: problems encountered
 20. Damage to finished work
 21. Dated/inaccurate spec information
 22. Defining final decision makers
 23. Definition of quality
 24. Delay in processing change orders
 25. Delay in submittals/shop drawings/training manuals
 26. Delayed payments to contractor
 27. Demanding acceptance of substandard work
 28. Dirt/debris not cleaned up
 29. Drawing discrepancies (arch, struct, mech, elect don't agree)
 30. Early & timely decision making by owners/engineers
 31. Education of Owner - budget impacts
 32. Education of Owner - schedules
 33. Education of Owner - systems

34. Engineer leaves it up to trades to resolve differences
35. Engineer siding with owner
36. Expediting deliveries
37. Expediting submittals
38. Failure to communicate early design needs
39. Failure to have fun
40. Failure to own up to responsibility for errors and omissions
41. Failure to protect completed work
42. Failure to provide clear direction re: budget, schedule
43. Failure to provide timely decision making & approval processes
44. Failure to work together as a team
45. Final payment - retention release
46. Identification of long lead materials and supplies
47. Inability to put decisions behind you
48. Inability to stay on schedules
49. Inadequate supervision of subs
50. Incomplete research of options for substitutions/solutions
51. Incorrect routing of shop drawing
52. Incorrect/incomplete documents
53. Inflexibility in quality control & inspection
54. Inflexibility of design requirements
55. Initiating claims too long after work is completed
56. Installation of work not in accordance with plans, specs, or approved shops
57. Insufficient time to review shop drawings
58. Lack of acknowledging responsibility for mistakes.
59. Lack of challenging owner - budget
60. Lack of challenging owner - schedule
61. Lack of clean up
62. Lack of communications
63. Lack of construction experience for design and testing personnel
64. Lack of documentation
65. Lack of field personnel being able to make on-the-spot decisions
66. Lack of immediate response to resolve issues at hand
67. Lack of notification of contractor's field changes
68. Lack of planning resulting in crises management by owner
69. Lack of preparedness (forward thinking/planning)
70. Lack of pride in workmanship
71. Lack of pride in workmanship and professionalism (self directed quality).

72. Lack of proper supervision
73. Lack of realistic prioritized deadlines
74. Lack of respect shown to A/E
75. Lack of shop drawings review prior to sending shops to a/e
76. Lack of storage area and work space
77. Lack of storage space on job site
78. Lack of taking responsibility for actions
79. Lack of team cooperation
80. Lack of timely, thorough and complete contract closeout
81. Lack of trust
82. Late backcharges
83. Late payment applications from subs
84. Leave debris around job site
85. Making assumptions
86. Material storage limits access for other trades
87. Material-caused delays
88. Materials scattered throughout project
89. Multiple punchlists by owner/designer/engineer
90. Needless disruptions to the traveling public, tenants, and airport operations
91. No answers on job site in timely manner when problems encountered
92. No decision maker at meetings
93. Noise
94. Non payment of sub's subs
95. Not allowing noisy trades to begin before 8 AM
96. Not completing areas to 100%
97. Not following project communication channels.
98. Not following safety rules
99. Not following schedule
100. Not handling potential problems at bid time vs. after award
101. Not investigating all consequence of subcontractors' suggestions
102. Not keeping an open mind to alternate points of view
103. Not keeping us informed of problems as potential problems
104. Not listening to contractor's suggestions
105. Not meeting commitments, time, material delivery, manpower, etc.
106. Not sharing goals and vision at early stage
107. Out-of-sequence work
108. Owner denies legitimate changes
109. Owner expectation of no change orders vs. reality of field adjustments

110. Owner initiated changes after design is complete w/o regard to design process
111. Owner's lack of understanding of impact of changes on schedule, cost, etc.
112. Paper work doesn't process quick enough to field
113. Personality conflicts/bad attitudes
114. Poor access roads
115. Poor housekeeping
116. Poor location of material storage
117. Poor scheduling-unplanned
118. Project manager not bringing correct personnel to meetings
119. Schedule & spec changes made without informing others
120. Shop drawings not submitted on time
121. Site clean up - daily and final
122. Slow pay by owner
123. Slow response to all submittal & shop drawings
124. Slow testing turnaround (contaminants)
125. Slow turnaround by subs on quotes
126. State & regulatory approvals
127. Stereotyping professions
128. Surprises
129. System not understood after installed, payment is stopped
130. Taking advantage of each other
131. Timeliness of problem solutions
132. Too many chiefs
133. Too many golf outings
134. Unkept promises
135. Unrealistic expectations of no-contract changes
136. Untimely and incorrect documentation

PROBLEM MENTIONS

Total assignments of problem types from 2,855 responses to the questions "What job difficulties are caused by us and by others?" Listed by frequency of appearance.

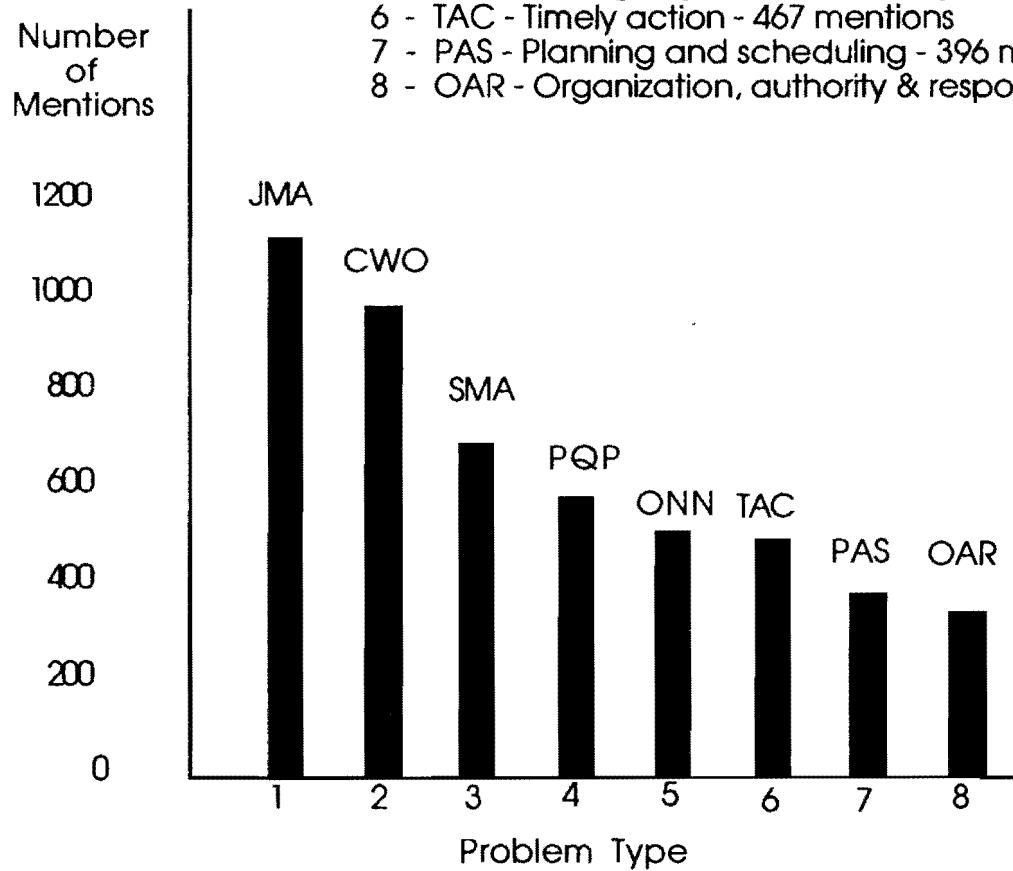
01. 1146 - Job management.
02. 0984 - Communicating with others.
03. 0684 - Staff morale and attitudes.
04. 0593 - Personnel quality and problems.
05. 0475 - Being a good on-site neighbor.
06. 0467 - Timely action.
07. 0396 - Planning and scheduling.
08. 0371 - Organization, authority, and responsibility.
09. 0288 - Work site conditions.
10. 0268 - Revision processing.
11. 0267 - Construction document quality.
12. 0233 - Program conditions.
13. 0205 - Submittal processing.
14. 0166 - Issue, conflict, and problem resolution.
15. 0166 - User group interaction.
16. 0145 - Equipment and material problems.
17. 0141 - Documents and documentation.
18. 0133 - Decision making.
19. 0125 - Procurement of materials and equipment.
20. 0116 - Project cost structure.

21. 0112 - Closing out the project.
22. 0097 - Contract interpretation.
23. 0097 - Quality management.
24. 0095 - Payment processing.
25. 0092 - Paper and administrative work.
26. 0090 - Approval processes.
27. 0088 - Being a good off-site neighbor.
28. 0073 - Time growth.
29. 0070 - Policies and procedures.
30. 0069 - Inspecting and testing.
31. 0069 - Staffing and manpower.
32. 0064 - Cost growth.
33. 0058 - Substitutions and alternates.
34. 0052 - Maintaining regular project evaluations.
35. 0052 - Safety.
36. 0049 - Regulatory agency matters.
37. 0022 - Constructibility.
38. 0022 - Training.
39. 0022 - Value engineering.
40. 0014 - Labor conditions.
41. 0014 - Legal matters.
42. 0011 - Backcharges.
43. 0011 - Financial problems.
44. 0010 - Weather conditions.
45. 0005 - Warranty conditions

- The eight most frequently mentioned design & construction problems. From a total of 2,855 responses to the question "what job difficulties are caused by us and by others?"

Problem Type

- 1 - JMA - Job management - 1146 mentions
- 2 - CWO - Communicating with others - 984 mentions
- 3 - SMA - Staff morale & attitudes - 684 mentions
- 4 - PQP - Personnel quality & problems - 593 mentions
- 5 - ONN - Being a good on-site neighbor - 475 mentions
- 6 - TAC - Timely action - 467 mentions
- 7 - PAS - Planning and scheduling - 396 mentions
- 8 - OAR - Organization, authority & responsibility - 371 mentions



Partnering Charter Objectives

The list of objectives below is designed to assist the stakeholders to write a sound, well expressed charter. If a numbered objective fits a particular recommendation your team wishes to make, note the number of the objective and any revisions you wish to make to it. We will then consider the objective for inclusion as we write the project charter.

Major topics appearing below include:

- A. Approval Processes
- B. Being A Good Off/On Site Neighbor
- C. Closing Out the Project
- D. Communicating With Others
- E. Decision Making
- F. Documents and Documentation
- G. Financial Matters
- H. Inspection and Testing
- I. Issue, Conflict, and Problem Resolution
- J. Job Management
- K. Legal Matters
- L. Maintaining Regular Project Evaluations
- M. Organization, Authority, and Responsibility
- N. Planning and Scheduling
- O. Payment Processing
- P. Personnel Quality and Problems
- Q. Regulatory Agency Matters
- R. Revision Processing
- S. Staff Morale and Attitudes
- T. Submittal Processing
- U. Work-site Conditions

Don't hesitate to change wordings since it is entirely possible that your expression of a desired objective may be different than that of the original.

A. Approval Processes

1. Provide required documentation and approvals within the mutually agreed upon time frame.
2. Make and document all decisions, and provide all approvals at their management level promptly, fairly and with consideration of the requirements of the project.

B. Being A Good Off/On Site Neighbor

1. Maintain a clean, safe, accessible , and well-planned work site.
2. Recognize that project conditions and decisions affect other partners in achieving the overall design intent.
3. Maintain, in conjunction with other stakeholders, a work area plan to be implemented by affected stakeholders.
4. Carefully evaluate and be sensitive to the impact that construction activities may have on the environmental integrity and concerns of the project neighbors.

C. Closing Out the Project

1. Establish close-out guidelines that provide clearly understood direction for punching out the job, issuing Certificates of Substantial Completion, establishing intermediate occupancy dates, and maintaining and transmitting contract record documents.
2. Prepare and specify a close out plan.
3. Prepare and specify a rolling punch list and close out procedure.
4. Establish and implement guidelines that provide direction for accepting the work and closing out the job.
5. Do it right the first time and strive to achieve a minimal punch list.

D. Communicating With Others

1. Empower on-site personnel to make decisions with the objective of shortening lines of communication, thus expediting responses and decision making.
2. Assist all project members to make the transition to metric dimensioning.
3. Prepare, publish, keep current and respect a chart of channels of communication, responsibility, and authority.
4. Limit the release of public information through the owner's designated representative only.
5. Anticipate, identify, and accurately communicate potential job problems.
6. Ask questions and request information clearly and accurately
7. Be sensitive to the informational needs of the design and construction team partners.
8. Communicate all issues in a timely fashion to all those affected by the issues.
9. Communicate clearly, accurately and in a timely manner through appropriate project channels.
10. Communicate effectively in an open, honest manner with all appropriate stakeholders.
11. Anticipate and communicate the conditions and disruptive circumstances inherent in demolition and construction activities, to the staffs of the various facilities that are a part of this total program.
12. Communicate the principles of partnering on this project to all participating organizations and individuals.

13. Identify planned and required shut downs, and outages from and to the designers, builders, and the Capitol Complex operations staffs.
14. Ensure the design is understood and acknowledged by all the partners.
15. Maintain open lines of communication.
16. Make progress and technical meetings productive and brief by preparing well, and bringing both problems and solutions to the table.
17. Prepare and publish a communications flow chart showing roles and responsibilities of all project team members.
18. Prepare well for progress meetings and make them brief and productive.
19. Promptly prepare and respond to requests for information, substitutions, and clarifications of project documents.
20. Provide adequate data re: user-furnished equipment for construction to proceed as desired.
21. Provide timely communications, responses, decisions... and be available.
22. Recognize that project conditions and decisions affect other partners in achieving the overall design intent.
23. Regularly monitor and discuss, all anticipated outages with utility company and subcontractor input and provide maximum possible notice to the user of anticipated outages.
24. Respond promptly to requests for information and clarifications of contract documents.
25. Communicate clearly, accurately and in a timely manner through appropriate project channels.
26. Stay in touch with the project, i.e. reading meeting minutes, attending meetings as needed, and being available for input.
27. Prepare, publish and adhere to the lines of communication, authority, and responsibility for the school building partnering team.
28. Prepare and respond promptly and completely to requests for information and clarification of contract documents.
29. Prepare, publish, keep current and respect a chart of channels of communication, responsibility, and authority.

E. Decision Making

1. Make decisions in a timely manner and stand by the agreements you have made.
2. Make timely decisions in all project related matters.
3. Provide adequate backup data, within expectations, to allow timely and accurate decisions to be made by members of the project team.
4. Recognize that project conditions and decisions affect other partners in achieving the overall design intent.

F. Documents and Documentation

1. Accurately prepare and properly distribute project documentation in a timely manner.
2. Provide adequate documentation, and prepare, package, and process submittals in a timely, fair, and considerate manner consistent with the priorities of the contractors, and the DOT.

G. Financial Matters

1. Practice fairness in price proposals, backcharges, and all other financial matters.

H. Inspection and Testing

1. Provide for timely and professional technical inspection services with appropriate documentation and feedback to those affected.

I. Issue, Conflict, and Problem Resolution

1. Maintain the current issue resolution policy. (The current policy stresses the resolution of conflict at the originating or lowest possible working level.)
2. Minimize disputes and resolve conflicts quickly and at the lowest possible management level.
3. Prepare and publish an issue resolution policy which stresses the timely resolution of conflict at the originating or lowest possible management level and seeks to avoid litigation.
4. Prepare, publish, and implement a dispute resolution system designed to resolve conflicts at the lowest possible management level.
5. Strive to resolve job conflicts quickly and at the originating or lowest possible level.
6. Prepare and publish an issue resolution policy which stresses the timely resolution of conflict at the appropriate management level and seeks to avoid litigation.

J. Job Management

1. Anticipate events - be proactive.
2. Avoid surprises!
3. Be familiar with the contract documents.
4. Carefully evaluate and be sensitive to the impact that construction activities may have on the environmental integrity and safety of all ongoing hospital operations.
5. Continue to implement the partnering evaluation system (involving new participants).
6. Continue to improve and implement agreed-upon project procedures that provide all stakeholders guidelines for:
 - a. Time commitments for procedures.
 - b. Prioritizing assignments.
7. Design and construct a facility that is built so as to recognize the need for the builders and the designers to achieve a reasonable financial profit on their work.
8. Design and construct a facility that is built within the time and cost terms of the lease-purchase documents.

9. Develop a organizational matrix showing lines of communication and responsibility to be maintained on the project.
10. Encourage the participation of all parties at all project levels in the partnering process and the partnering spirit.
11. Enforce the construction traffic and parking plans.
12. Foster understanding of construction documents
13. Identify and remedy incorrect performance in a timely manner.
14. Insure that each of their management team members is fully aware of the requirements of the project.
15. Keep current with project status and requirements.
16. Keep paperwork to a minimum.
17. Maintain a close relationship between expectations and reality
18. Maintain a continuous and efficient work force and effective procurement to ensure quality, sequence, and schedule
19. Maintain an adequate management and work force to fulfill contract commitments.
20. Maintain client safety and user satisfaction during construction.
21. No surprises
22. Plan for and meet the human resource requirements of the project, and maximize opportunities for women and minorities.
23. Plan for future service access to equipment during mechanical, electrical and plumbing installation.
24. Plan for the future not for the past.
25. Prepare and publish a calendar of project events indicating when key personnel are required to participate in project management activities. Partners will attend and participate in all required meetings and provide backup management where necessary.
26. Preplan work recognizing the impact plans have on achieving the design intent.
27. Properly staff and maintain competent personnel, and equipment required on the project.
28. Provide proper resources to support the agreed-upon plan and schedule of work.
29. Provide resources to fulfill contract & charter obligations.
30. Recognize and be sensitive to the needs of other stakeholders on the project.
31. Strive for a zero punch list.
32. Use human and technological resources to their maximum effectiveness.
33. Ensure that the design and specifications are understood and acknowledged by all the partners.
34. Meet individual and organizational obligations.
35. Maintain a clean, safe, accessible and well-planned job site.
36. Maintain a clean, secure, accessible and well-planned job site.

37. Work to improve submittal and request for information (rfi) processing, including agreed-upon schedules and response times to meet the needs of all parties.
38. Work to maintain prompt payment processing including retention.
39. Work to improve revision and change order processing, including a streamlined process for minor changes (\$1000 or less).

K. Legal Matters

1. Strive to avoid litigation.
2. No litigation.

L. Maintaining Regular Project Evaluations

1. Prepare, publish, and implement a partnering evaluation system by which the effectiveness of the system is regularly monitored. (stakeholders task force)
2. Prepare, publish and implement a project partnering evaluation system.
3. Review, monitor, and update the project action plan at regular scheduled team meetings.

M. Organization, Authority, and Responsibility

1. Be accountable for your actions.
2. Fulfill respective responsibilities and commitments to permit on-time completion of the project.
3. Maintain continuity of key job personnel.
4. Prepare and publish a project directory showing people, work category, position and alternate contact.
5. Prepare, publish, and use a project chain of command
6. Prepare, publish, and keep current a chart of channels for communication, responsibility, and authority.

N. Planning and Scheduling

1. Adhere to agreed upon schedules and resource commitments.
2. Adhere to the current master construction schedule in effect on the project.
3. Develop a realistic plan of work and project schedule and honor it.
4. Distribute and regularly monitor and discuss, with subcontractor input, a master project schedule, and update schedules as required.
5. Mutually prepare, publish, implement, and keep current a project action plan and schedule of work that is useful to all stakeholders.
6. Prepare, distribute and regularly monitor and discuss, with subcontractor input, a master project schedule, and update schedule as required.
7. Solicit all team member's input for planning and scheduling
8. Keep a current, realistic project action plan and schedule of work phases that is honored and adhered to by all team members.

O. Payment Processing

1. Promptly prepare, submit, and process all payment requests.

2. Submit properly prepared requests for payment.
3. Promptly prepare, submit, and process all payment requests.

P. Personnel Quality and Problems

1. Do it right the first time and strive to achieve a zero punch list.
2. Prepare, publish, promote, and adhere to standards of work place conduct.
3. Identify and remedy incorrect or poor quality performance in a timely manner.
4. Maintain adequate management, material resources, and work force to fulfill contract commitments.
5. maintain continuity of key job personnel.

Q. Regulatory Agency Matters

1. Work closely with all regulatory agencies to assure compliance to their current standards and regulations.
2. Work with required regulatory agencies to assure compliance with applicable codes and regulations.

R. Revision Processing

1. Accurately price changes to the project in a timely, reasonable and fair manner.
2. Approve and process changes in a timely manner.
3. Approve changes in a timely manner including formal issuance of supplemental agreements.
4. Control revisions being considered for the project to maintain the planned budget.
5. Prepare and implement guidelines for screening proposed changes to the project prior to requesting formal pricing of the changes. (owner, user, designers)
6. Provide accurate data and adequate time to ensure pricing changes that are fair and timely.
7. Provide reasonable change request budgets and identify insufficient budgets promptly.
8. Provide reasonable field change orders and change issue budgets, and accurately price changes to the project in a timely, reasonable, and fair manner.

S. Staff Morale and Attitudes

1. Be available.
2. Be cooperative.
3. Be willing to suggest and consider cost and time effective options.
4. Establish a trustful work environment with other stakeholders.
5. Establish and maintain good informal working relations on the job.
6. Extend the spirit of partnering to all project participants.
7. Have fun!
8. Have fun and celebrate the successful completion of the project.
9. Maintain high job morale and cooperative attitudes among all project participants.
10. Make the project a fun place to work and to meet new friends.

11. Promote and adhere to acceptable standards of conduct by the project team on the site.
12. Recognize individual and team accomplishments.
13. Respect all project participants and their work.
14. Respect and treat other's and their work as you wish you and your work to be treated; accept responsibility for damage to other's work.
15. Respect design and construction excellence as a fundamental goal to be achieved.
16. Respect financial profit as an incentive for private sector stakeholders.
17. Respect other team members' work and abilities.
18. Take pride in our work, respect the ideas and work of others and treat others as you would have them treat you.
19. Treat others as you would have them treat you.
20. Practice fairness in price proposals, back charges, and all other financial matters.
21. Establish a trustful work environment with other partners by taking pride in our work, respecting the ideas and work of others, and treating others as we would have them treat us.

T. Submittal Processing

1. Prepare, package, and process submittals in a timely, fair, and considerate manner consistent with the priorities of the contractors, designers, and owner.
2. Promptly review and determine the merit of properly submitted requests for extensions of time.

U. Work-site Conditions

1. Continue to maintain continuity of work points between trades. (Work points refer to building control coordinates and elevations.)
2. Maintain a safe, orderly, well organized work site.
3. Maintain a well planned and clean work site.
4. Maintain continuity of work points between trades.
5. Maintain, in conjunction with other stakeholders, a work area plan to be implemented by affected stakeholders.
6. Prepare and publish a construction traffic and parking plan.
7. Prepare, publish, and implement a project clean up program for contractors on site.
8. Promote a clean and safe job environment.
9. Provide complete and unencumbered access to needed work areas in accordance with the project schedule.
10. Respect and treat others and their work as you wish you and your work to be treated. Take responsibility for damage to other's work. Amen!

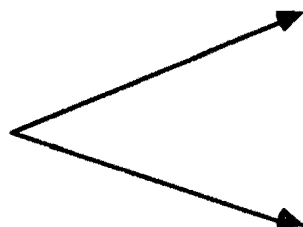
**Problems + Opportunities +
Weaknesses + Strengths +
Solutions = RESULTS &
IMPROVEMENTS FOR MEMBERS**

**IBEE Annual Convention Workshop
June 19, 21, 1989 - Shanty Creek,
Michigan - Sheet #1**

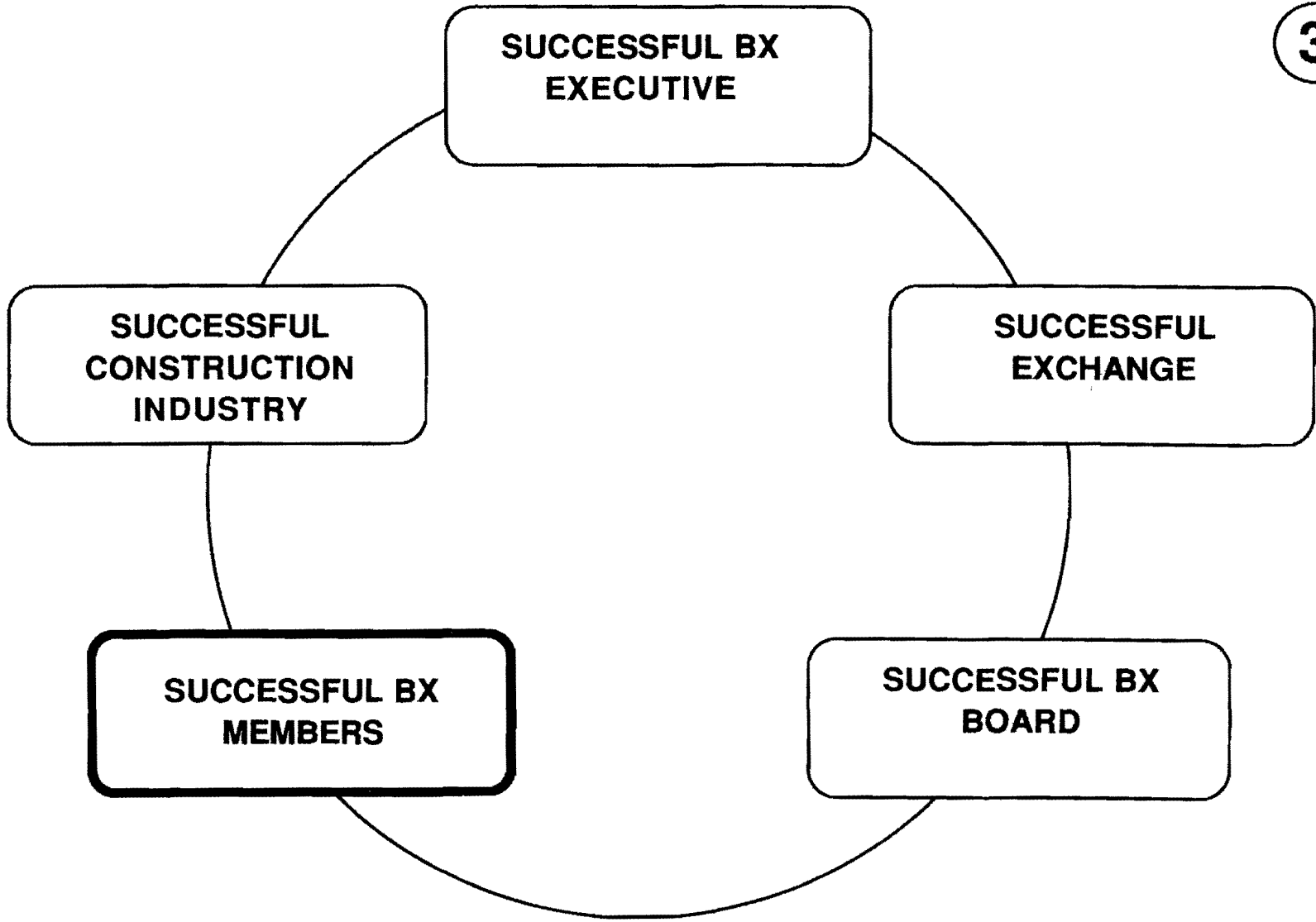
Mission of Work Shop

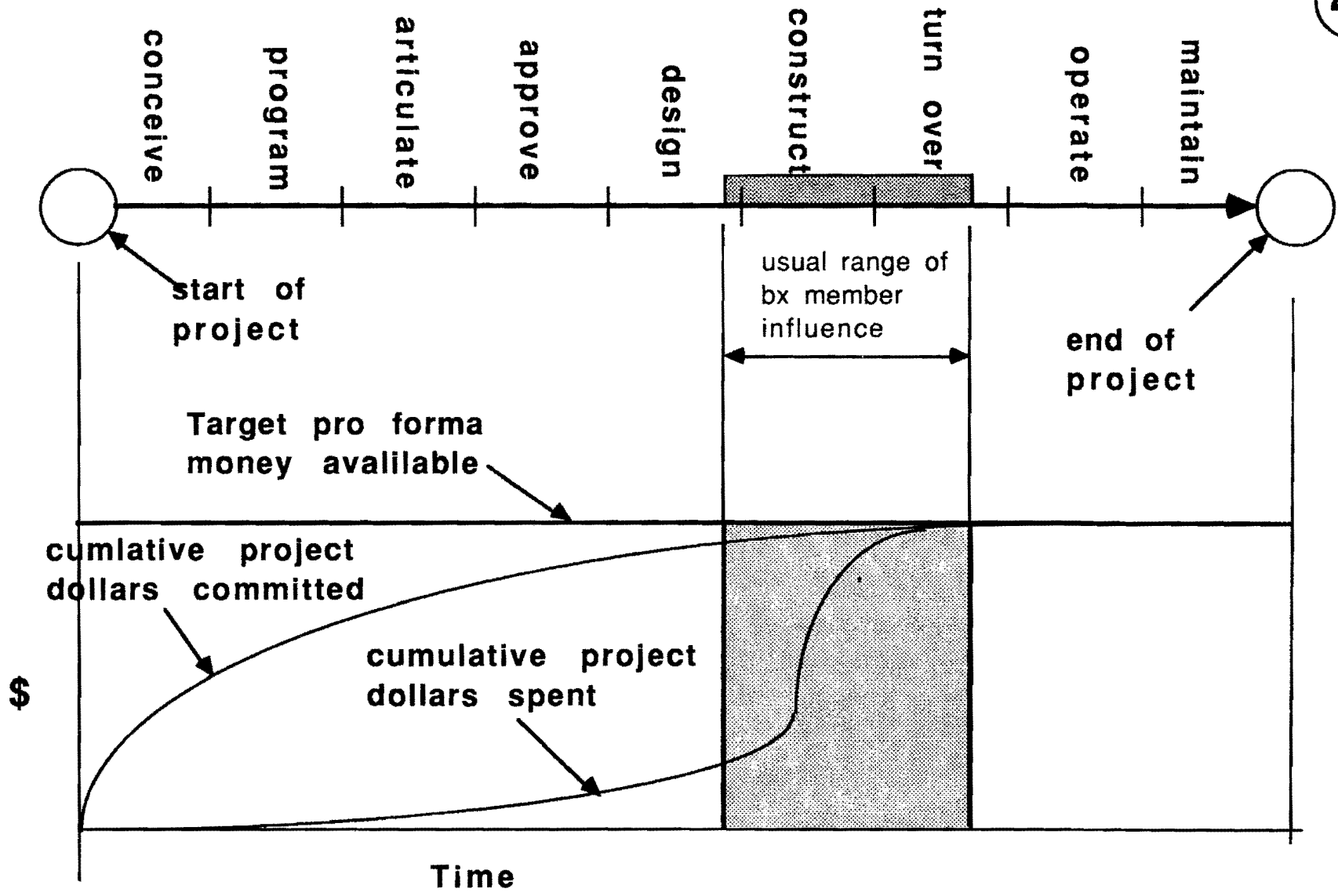
TO IMPROVE THE PROBABILITY THAT
YOUR MEMBERS WILL BECOME OR
REMAIN SUCCESSFUL

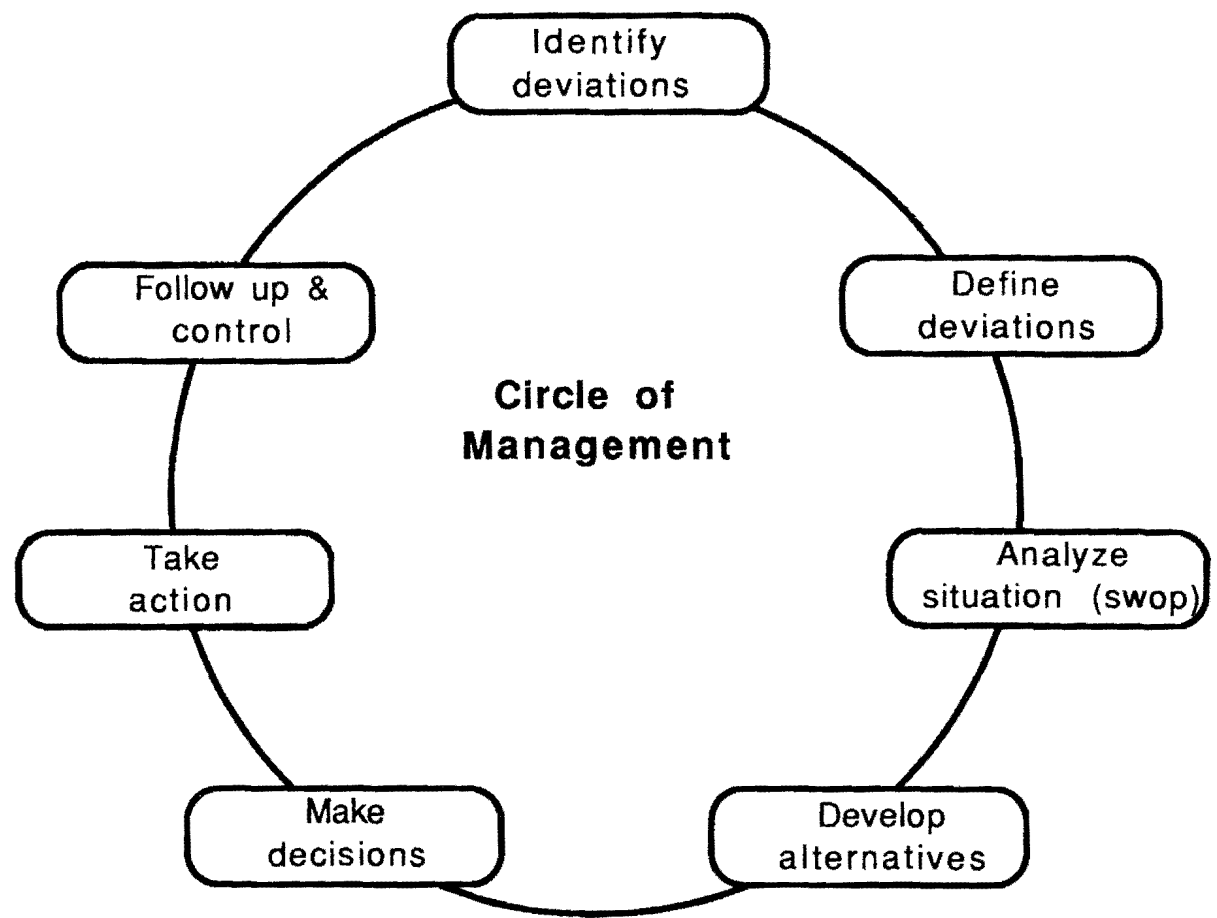
Discussion



1. Produce at least 5 ideas or recommendations re each subject assigned for discussion..
2. Suggest resources in which to find additional ideas & information.







• ATTRACT • USERS
ARCHITECTS
• ENGINEERS

IBEE Summer Convention, 1997
Appleton, Wisconsin

Ralph J. Stephenson, P.E., P.C.
Consulting Engineer
323 Hiawatha Drive
Mt. Pleasant, Michigan 48858
phone 517-772-2537

5. 4:15 to 5:30 P.M. - Membership Retention Workshop Results - Closing Remarks

a) What are some of the more important solutions defined in the workshop notes that are critical to **bx** success?

(1) Basic to starting well

- (a) Understand and keep informed about construction industry matters
- (b) Build and effective networking system with those who can help build membership
- (c) Pay your bills on time
- (d) Look and act professional
- (e) Know your limits and your niches - recognize they do change
- (f) Do routine things excellently
- (g) Keep your cash flow healthy

(2) Measures to maintain association health

- (a) Providing quality services
- (b) Ethical organization
- (c) Customer focussed
- (d) Educate
- (e) Provide needed services
- (f) Make certain the services you provide add value to your member's business
- (g) Understand the construction business
- (h) Preach and teach good money practices
- (i) Keep up-to-date with electronic technology
- (j) Expand your friends-of-the-exchange following
- (k) Get out and talk to your members
- (l) Define your responsibilities, authority, and duties

(3) Measures to do something better than someone else

- (a) Keep up to date with construction technology
- (b) Promote member companies
- (c) Educate excellently
- (d) Involve the middle management of your member's firms in **bx** activities - give them something to do
- (e) Keep in personal touch with your members
- (f) Maintain a meaningful and visible community awards program
- (g) Find ways to provide the design profession reasons for joining your **bx**
- (h) Find ways to provide the user groups reasons for joining your **bx**
- (i) Train your staff in the basic of your member's businesses
- (j) Learn what problems keep your members from being successful

• SHARPEN

YOUR TECHNICAL IMAGE
YOUR PROFESSIONAL " "
YOUR BUSINESS " "

- (k) Maintain good entry level training for your members' staffs
- (l) Keep your staff aware and knowledgeable about the design and construction business
- (m) Self police your bx
- (n) Improve some industry practice every day
- (o) Use the fuddy-duddies and the retired experts to help you improve your value-added
- (4) Unusual steps that will help insure ongoing success in steps one, two and three, and will lead the way to successes in ways we cannot fully visualize yet, but sense are there
 - (a) Improve industry image
 - (b) Educate excellently and about how to be successful now and in the future
 - (c) Maintain diversity in Board membership
 - (d) Plan well for the future of your members
 - (e) Train and educate your local grade and high school students about the planning, design, and construction industry
 - (f) Generate methods to solve the problems that keep you members from being successful
 - (g) Build a business plan and use it

- TRAIN/EDUCATE/COACH/MENTOR
YOUR PRESENT MEMBER'S LOWER
& MIDDLE MANAGERS
(YOUR MEMBER'S MEMBERS)