

SFCPSC Partnering Enhancement Proposal (PEP)

Success Factor 2.0: Performance Measures

Issue 2.3.2 San Francisco Partnering Awards

Barrier

There is currently no formal recognition program for construction project teams that celebrates and encourages the full implementation of partnering on City projects.

Problem Statement and Current Practice

There is no partnering awards program to recognize construction project teams who are successfully implementing the partnering process. A new citywide award will promote the partnering program and celebrate the collaborative culture we are developing.

- How do we recognize construction project teams who are using (or have used) partnering successfully?

Proposal:

We will create a San Francisco Project Partnering Award. We will design categories for small and large projects based on the partnering specification. The application and scoring process will be adapted from the International Partnering Institute (IPI) awards program, so that top competitors may also be nominated for IPI's program (See Addendum 1 for the application).

Resources Required and Implementation Plan

Once the award application and program are developed, we will add links to and instructions for the application to the new Partnering Field Guide. We will also launch a Partnering Awards Committee focused on developing the recognition program and awards ceremony. The committee will be co-chaired by Jennifer Blot and Kevin Wagner.

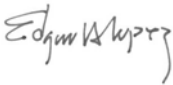

Implementation Plan:

- Partnering Awards Committee co-chaired by Kevin Wagner and Jennifer Blot launched 10/11/17
- Develop final scoring and judging criteria for the award by 12/15/17
- Incorporate new partnering award application and instructions in new Partnering Field Guide by 12/15/17
- Publish award application on www.sfpartnering.com by 3/1/18

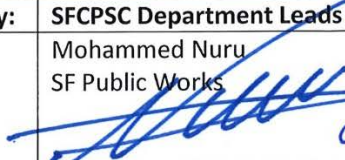


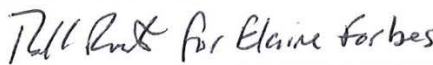
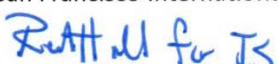
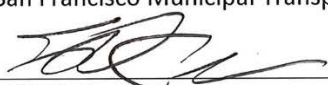

Performance Measurement

The measurement of success will be a new partnering awards program endorsed by both City staff and industry to be included in the new Partnering Field Guide.

Partnering Enhancement Proposal - 2.3.2 San Francisco Partnering Awards

Concept Approved By:	Performance Measures Co-Chair Signatures	Date
Performance Measures Subcommittee co-chairs	Edgar Lopez SF Public Works 	10/10/17
	Jim Pappas Hensel Phelps Construction Co. 	10/10/17

Addendum I: San Francisco Partnered Project of the Year Award

Success Factor 2.0: Performance Measures		
Issue 2.3.2 San Francisco Partnering Awards		
Concept Approved By:	SFCPSC Department Leads	Date
SFCPSC Co-Chairs	Mohammed Nuru SF Public Works  Mike Ghilotti Ghilotti Bros., Inc. 	10/11/17
SFCPSC Department Leads	Kathy How San Francisco Public Utilities Commission  RYAN COYNE	10-11-17
	Elaine Forbes Port of San Francisco  Full name for Elaine Forbes	10/11/17
	Ivar Satero San Francisco International Airport  Full name for IS	
	Ed Reiskin San Francisco Municipal Transportation Agency 	10.11.17
	Phil Ginsburg San Francisco Recreation and Park Department 	10.11.17

Addendum I:

PEP 2.3.2 San Francisco Partnering Award

**San Francisco
Partnered Project of the Year Award**



2018 Application

Available for download at www.sfpartnering.com

Recognition Levels

Nominee (0 – 74 points)

Bronze (75 – 79 points)

Silver (80 – 89 points)

Gold (90 – 100 points)

**For projects completed between
January 1 and December 31, 2017**

Application Deadline: June 30, 2018

San Francisco Partnered Project of the Year Award 2018

PURPOSE

The San Francisco Partnered Project of the Year Award is an annual commemoration of completed projects that best exemplify the principles of partnering. The purpose of the award is to celebrate successes, share lessons learned, highlight best practices and acknowledge the collaborative efforts of teams who achieve extraordinary results.

BACKGROUND

The San Francisco Partnered Project of the Year Award was introduced by the San Francisco Collaborative Partnering Steering Committee in 2017. The objective of this recognition program is to honor teams who have successfully implemented the partnering process for project delivery, contributing to the improvement of the overall construction program across the City and County of San Francisco.

PARTNERING DEFINITION

Collaborative Partnering is a structured process that, through consistent application, creates a culture of collaboration through which construction project teams:

- Create project goals and strategies to meet them
- Measure progress toward goals
- Resolve issues and disputes
- Identify barriers and opportunities for project success
- Document lessons learned from the project upon completion

Tangible deliverables of the Collaborative Partnering process include a charter (containing core goals, project-specific goals and a signature page), an issue resolution process, action plans and commitments, and an evaluation method (such as a partnering survey or scorecard).

BENEFITS

Winners of a San Francisco Partnered Project of the Year Award will be honored at the annual San Francisco Partnering Awards Ceremony. Finalists may also be nominated for the annual International Partnering Institute Partnered Project of the Year Award.

Winners will:

- Be recognized as leaders in partnering excellence
- Network with peers in the industry committed to partnering excellence
- Contribute to continuous improvement of partnering as a business process

PARTNERED PROJECT OF THE YEAR AWARD CATEGORIES

San Francisco Partnered Project of the Year Awards are granted to projects in two sectors and three categories that have exemplified the benefits of a structured partnering process:

Sectors

Public Infrastructure Construction (i.e. Horizontal and Water/Wastewater Construction):

Highways/state routes, freeways, roads and streets including reconstruction, an expansion or widening of existing roadways, bridges, interchanges, overpasses, road tunnels, transit or light rails, mechanical, utilities, water treatment, pipeline or other construction.

Buildings (Vertical Construction):

Buildings, public infrastructures, commercial, healthcare, historical restoration, industrial, institutional, pre-engineered buildings, parks and playgrounds, public works/environmental, renovation, restoration, public use buildings, etc.

Budget Categories

Category 1 - Project Budget is less than \$10 Million

Category 2 - Project Budget is between \$10 Million and \$30 Million

Category 3 – Project Budget is greater than \$30 Million

2018 ELIGIBILITY REQUIREMENTS

- Projects must be completed between **January 1 and December 31, 2017**
- Projects must be nominated by the owner, designer, contractor, construction manager or partnering facilitator
- Projects must have followed a structured partnered process in accordance with the San Francisco partnering specification and/or Partnering Field Guide

Application Tips

- Review the judging criteria (p. 10) and the point system before beginning the application process.
- Before and after photos are a great way to showcase specific elements of your project. Photos must be supported with text.
- Start the application early, then go back to review and polish it.
- Have your project partners review the materials for additional comments or insight. Quotes and buy-in from principal stakeholders will strengthen your application.
- The application must include each of the requested elements to be considered. In cases where scores are close, the quality of the application may be the deciding factor.
- Provide examples throughout the application. Examples are a concrete way to illustrate how the project was exceptional.
- A panel of judges who likely have no previous exposure to your project will review and evaluate your submission. The judging panel for each project category is made up of experienced and qualified professionals who will evaluate only the materials your team has presented.
- Any inconsistencies between your description and other project elements may lead to lower scores. Staff may follow up with you prior to judging to clear up any confusing elements of the application. Take that opportunity to clarify and give your project the best possible chance of winning.

Good Luck!

AWARD PROGRAM GUIDELINES

Award Process

The San Francisco Partnered Project of the Year Award selection process is led by the awards committee under the San Francisco Collaborative Partnering Steering Committee. The awards committee is comprised of volunteers from the City and construction industry with in-depth understanding of construction partnering. The awards committee establishes the standards for award-winning projects, reviews applications and determines the level of recognition awarded to applicants.

Submittal requirements are clearly outlined each year.

The award recipients are recognized at the annual San Francisco Partnering Awards Ceremony.

The steps of the process include:

1. Review submittals for eligibility and adherence to the guidelines and criteria
2. Selection of finalists
3. Verification/clarification of project history and results
4. Judges' final recommendations
5. Presentation at the San Francisco Partnering Awards Ceremony

Application deadlines and submittal information

Applications are to be sent **by June 30, 2018 before 5 p.m. PST** to:

Jennifer Blot
Deputy Director of Communications and Public Affairs
Jennifer.blot@sfdpw.org
Attn: SF Partnering Awards Program

For questions contact Jennifer Blot at 415-554-6993.

Selection of Winning Applications

Applicants must complete the standard application form (sections 1-3), the one-page summary and the judging criteria in accordance with the guidelines below. All materials may be used in future SFCPSC publications.

- Application form
- Application content
 - One-page summary describing why the project should receive a San Francisco Partnered Project of the Year Award (this write-up should be suitable for publication)
 - Responses to all judging criteria questions in the order listed on page 10 (**maximum of 10 pages**)
- Attachments
 - Exhibits (**maximum of 5 pages**) such as press clippings, relevant special event materials, photos, charts, graphs or tables that highlight results, with a glossary of terms, if needed
 - Copy of the Charter/partnering agreement with signature page (if applicable), core goals and project-specific goals
 - Copy of a survey form/evaluation tool for the partnering process

Format for the submittal:

- Entire application contents should be emailed to Jennifer.blot@sfdpw.org Attn: SF Partnering Awards Program
- Font size of 11 pt. Calibri with one-inch margins; 1.5 spacing
- A cover sheet with a photo or graphic may be used
- Please use chapter heads for each scored section
- Please submit the application as a MS Word (.doc) or Adobe (.PDF) file

Judges will score the responses given against the criteria established and select winners based on the quality of the application, not on the sophistication of graphics. If, in a given category, none of the applications receive winning scores, no award for that category will be granted.

FINAL DETAILS

Deadline: Entries must be received by June 30, 2018 before 5 p.m. PST.

Late entries will not be accepted.

Submit completed applications to:

Jennifer Blot

Deputy Director of Communications and Public Affairs

Jennifer.blot@sfdpw.org

Attn: SF Partnering Awards Program

Questions? Contact Jennifer Blot at 415-554-6993.

Applicants will be notified of the results in fall of 2018. Teams will be notified in writing if their project is a winner, but the specific level of each award will not be disclosed until the Awards Ceremony.

All submitted materials become the property of the San Francisco Partnering Awards program and may be used in education, marketing and promotion for the awards program.

San Francisco Partnered Project of the Year Award 2018

Application Form (1 of 3)

Category

Note: See page 3 for eligibility requirements. Project teams must have utilized a structured partnering process. There may be multiple awards in each category.

Check only one category below:

Category 1 (Under \$10M)

- Public Infrastructure
Construction
- Buildings

Category 2 (\$10 - 30M)

- Public Infrastructure
Construction
- Buildings

Category 3 (\$30M+)

- Public Infrastructure
Construction
- Buildings

Applicant Information

please list all key contractors and stakeholders

San Francisco Dept: _____ _____	Owner’s Project Lead (Name and Title): Address: Office Phone / Cell Phone Number: Email Address:
Prime Contractor Firm: _____ _____	Prime Contractor’s Project Lead (Name and Title): Address: Office Phone / Cell Phone: Email Address:
A&E Firm (or Dept.): _____ _____	Designer’s Project Lead (Name and Title): Address: Office Phone / Cell Phone: Email Address:
Partnering Facilitator: _____ _____	Partnering Facilitator (Name and Title): Address: Office Phone / Cell Phone: Email Address:
List any stakeholders, including subs/ vendors/ funding agencies, etc. that significantly contributed to the partnering effort. They may be invited to the awards ceremony. Include an additional page if necessary.	Name and Title: Phone Number: Email Address: Name and Title: Phone Number: Email Address: Name and Title: Phone Number: Email Address:

San Francisco Partnered Project of the Year Award 2018

Application Form (2 of 3)

A) Schedule Outcome:

Did the contract come in behind schedule, on schedule, or ahead of schedule?

Start date: _____ Finish date: _____

(Provide contract working days + additional CCO working days vs. actual working days in the contract)

Contract working days _____ + CCO days _____ = _____.
Actual working days = _____.

Please explain any schedule anomalies or considerations:

B) Project Budget Outcome:

Original contract (or Guaranteed Maximum Price if applicable) amount: _____

Final contract amount: _____

Project cost under or over budget A-B): _____

Cost increase associated with owner initiated change orders: _____

Please explain any budget amendments or considerations:

C) Change Order Outcome:

Estimations are fine. This data provides context and does not affect scoring.

Number of PCOs/CORs change orders executed: _____

Number of owner initiated project change orders (PCOs) executed: _____

Number of field initiated change order requests (CORs) executed: _____

Describe any change order issues encountered and detail how the partnering process was used to address those issues in question 3 (Issue Resolution).

D) Claims Outcome:

Number of claims accepted: _____

Number of unresolved claims (at close-out, ongoing?): _____

Describe any claim issues encountered and how the partnering process was used to address those issues in question 3 (Issue Resolution).

San Francisco Partnered Project of the Year Award 2018

Application Form (3 of 3)

E) Safety Outcome:

OSHA recordables: _____

Lost-time rate: _____

Number of fatalities: _____

Comments regarding safety issues that arose during the project:

F) Partnering Expense Analysis:

Total cost of project partnering (facilitator, meeting expenses, and surveys): _____

Final project cost: _____

Partnering expense as a percentage (%) of project budget: _____

Estimated savings due to partnering (i.e. Approved Value Engineering proposals, issues resolved, schedule savings, etc. that resulted from the partnering process or collaborative relationship):

Saving expense ratio / partnering expense (e.g. \$1/\$40): _____

Project Summary

Please use this page to briefly describe the scope, location and budget of this project and outline why this project should receive a San Francisco Partnered Project of the Year Award.

Judging Criteria

100 points maximum

The judging criteria includes the following (please use these titles as the headers of each section and give each criterion its own page – maximum of 10 pages):

1. How did you partner this project? (20 points)
 - Did you use a professional neutral facilitator? For how many sessions? Please specify if you held a kick-off session, interim follow-up sessions and/or a close-out lessons learned session, and if these sessions were facilitated.
 - Did the project use surveys? If so, how many?
 - How did your team follow up on survey findings? If applicable, include an example of a decision the team made based on survey findings.
 - Did you use a DRA/DRB, facilitated issue resolution (FIR), or any other form of alternative dispute resolution process to resolve a disputed issue?
2. Charter and goals of the partnership (15 points)
 - What were the team’s goals relative to scope, schedule, quality, safety and budget? Did your team use other project-specific goals (i.e. exceed local business enterprise (LBE) requirement, value engineering, etc.)?
 - How were the partnerships goals updated and evaluated throughout the project?
Please include your partnering charter in the appendix (including signature page, core goals, project-specific goals, etc.). This does not count against the 10-page limit.
3. Issue resolution (20 points)
 - Describe the issues that your team overcame through partnering.
 - What was your team’s issue resolution procedure? Please provide examples.
 - Estimate the value of the issues resolved (in terms of cost and of schedule).
 - How did your team ensure that most issues were resolved at the field level?
4. Teamwork (15 points)
 - How did you develop team relationships? Describe those relationships and how you maintained them.
 - How did you inform, educate and/or engage the public, third parties, or other project stakeholders? Describe those relationships and how you maintained them.
 - Share examples of how your partnership added value for the team and the stakeholders, including the end-users.
5. Value/Outcome (25 points)
 - How well did you meet the goals relating to scope, schedule, quality, safety and budget as well as the team’s project-specific goals?
 - Did your outcomes exceed expectations in terms of scope, schedule, budget, safety, quality, personal fulfillment, etc.? If so, please provide details.
 - What were your lessons learned and how will you use them to improve future projects?
6. Innovation/Creativity (5 points)
 - What “out of the box,” innovative/creative ideas were implemented on this project and/or in your partnering process?
 - Describe any special adaptations or refinements that were made to improve the project partnering process to fit this project.

EXHIBITS AND PARTNERING MATERIALS

You may include up to five pages of exhibits – please provide text supporting all photos.

Please attach the project charter and at least one scorecard or partnering survey to the application (note – Partnering materials do not count against your page counts).