**SFCPSC Partnering Enhancement Proposal (PEP)**

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| **Success Factor 1.0: Education and Training**  **Issue 1.1.1 Partnering Training** |
| **Barrier**  Project teams have not been thoroughly trained on ways to properly implement structured Collaborative Partnering. For project teams to thrive using partnering, they need to understand the benefits, how it should be implemented, the selection of compatible facilitators and how to participate in the new awards and recognition program.  **Problem Statements and Current Practice**  Currently, the project managers (PMs), construction managers (CMs) and resident engineers (REs) delivering projects for City departments and the contractors and subcontractors they work with often do not have a mutual understanding of how to implement and maximize the partnering process. The result is that the application of partnering is inconsistent, and not all departments see the return on investment they can reap from fully implementing the partnering process.   * How do we educate City and industry staff on the benefits of partnering? * How can we develop a partnering culture that allows us to deliver construction projects faster and more efficiently? * How do we educate our field teams so they focus on what is fair, while maintaining project requirements and allowing the contractor to be profitable? * How do we train our department and industry supervisors and executives to support the partnering culture we are trying to develop? |
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| **Proposal:**  **Partnering Training based on the new Partnering Field Guide**  We agree that a training program based on the new Partnering Field Guide should be developed. The training needs to be in-person, immersive and involve both City and industry staff. The training needs to be focused on the practical implementation of the new San Francisco Partnering Field Guide.  **Recommendations:**   * We will develop an in-person, face-to-face partnering training based on the new San Francisco Partnering Field Guide * We will develop multiple ways for City and industry staff to register for the training * We will develop a campaign and tools to market the partnering training * We will develop a training certification process * We will develop a half-day training and a shorter “booster class”   + The half day training session will be for new City staff and first-time City contractors   + The booster class will be for those who have taken the International Partnering Institute’s *Collaborative Partnering Orientation Training* or Caltrans’ F*undamentals in Partnering* training * We will identify appropriate funding vehicles for the training including “As-needed contracts” and the allowance for project partnering on large projects   **Resources Required**  The SFCPSC Partnering Facilitator and Partnering Coordinator will develop the draft training program and work with the Education and Training Subcommittee to vet the content, marketing, and funding vehicles. |

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| **Performance Measurement**  The measurement of success for this PEP will be the launch of a training program for both City and industry staff based on the new San Francisco Partnering Field Guide. We will launch a pilot training in 2018 and seek to train more than 300 City staff and contractors by December 2019. |

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| Concept Approved By: | Performance Measures Co-Chair Signatures | Date |
| Education and Training Subcommittee Co-Chairs | Bijan Ahmadzadeh  C:\Users\Rob\Dropbox\OrgMetrics\SFCP Steering Committee\6-28-17 - SFCPSC Meeting #4\Final Report\Bijan Ahmadzadeh Signature.pngSF Municipal Transportation Agency  C:\Users\Rob\Dropbox\OrgMetrics\SFCP Steering Committee\6-28-17 - SFCPSC Meeting #4\Final Report\Ed Moore Signature.png | 6/6/18 |
| Ed Moore Monterey Mechanical | 6/6/18 |

**Addendum 1: Partnering Training Roll-out Strategy**

**Addendum 2: Training Content**

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| **Success Factor 1.0: Education and Training**  **Issue 1.1.1 Partnering Training** | | |
| **Concept Approved By:** | **SFCPSC Department Leads** | **Date** |
| SFCPSC Co-Chairs | Mohammed Nuru Mike Ghilotti  SF Public Works Ghilotti Bros., Inc. |  |
| SFCPSC Department Leads | Kathy How San Francisco Public Utilities Commission |  |
|  | Elaine Forbes  Port of San Francisco |  |
|  | Ivar Satero  San Francisco International Airport |  |
|  | Ed Reiskin  San Francisco Municipal Transportation Agency |  |
|  | Phil Ginsburg  San Francisco Recreation and Park Department |  |

**Addendum 1: Partnering Training Roll-out Strategy**

*Training Roll-out*

* SFCPSC goal is to launch a pilot training based on the new San Francisco Partnering Field Guide in fall of 2018. We will then roll out the vetted training in 2019.
* We will launch a Partnering Training Task Group to vet and support the roll-out of the training.
* We need to train an estimated 280 total City Staff.
  + 80 Public Works Infrastructure and Buildings staff
  + 14 Port of San Francisco staff
  + 50 SFPUC staff (40 Construction managers and 10 others)
  + 30 SFMTA staff
  + 90 SFO staff (60 PMs, CMs, REs and PEs) and 30 PMSS
  + 12 Rec & Park staff
* We need to train an estimated 200 Contractor staff members (at least one PM and one Exec from GCs working on City projects).
* Training is intended for groups of 20-25 people – ideally, the groups will be made up of City staff and representatives from contractors, architects, engineers, etc. Project teams will also be eligible.
* We will engage the department Partnering Champions in the training roll-out effort.

**Next Steps**

Step 1: Launch a Partnering Training Task Group

Step 2: Develop a Citywide Training Roster:

For the Citywide training attendee roster, we will work with: Public Works (Alex Burns), Port (Uday), SFPUC (Iris), SFO (Judi), SFMTA (Bijan) and Rec & Park (Toks)

For the Industry training roster, we will work with: AACA (Stanford), AIA SF (Doug), AGC CA (Claire), ASCE (Alfonso), CEA (Bob), CMAA (Kevin), UCON (Emily) and NAMC (Pete)

Step 3: Develop Training Registration process

Step 4: Develop and Launch Pilot Partnering Fundamentals Training

Step 5: Engage department Partnering Champion in training roll-out effort (i.e. serve as co-trainers, speakers/panelists, contribute newsletter articles, etc.)

Step 6: Improve Pilot Training based on evaluations and feedback and roll out training in 2019

*Marketing the Partnering Field Guide Training*

* Promote new San Francisco Partnering Field Guide and Training at internal department meetings
  + Public Works: Speak to each of the individual bureaus
  + Port: Present at the internal general engineering group staff meeting
  + SFPUC: Speak at the internal staff meetings and publish an article in “Currents”
  + SFO: Present at the monthly PM meeting
  + SFMTA: Present at the PM meeting
  + Rec & Park: Present at the PM Meeting or lead a brown bag
* Develop Calendar for upcoming conferences to promote the new partnering program and upcoming training opportunities
  + International Partnering Institute – Collaboration2018
  + 2018 and 2019 Industry Conferences: CMAA, AIA SF, AGC CA, UCON, ASCE, CEA, AACA, NAMC event, Contractor Liaison Meeting, etc.
* Promote training in the new partnering newsletter
* Develop Tools for marketing the training
  + Develop one-pager highlighting “How to set up partnering”
  + Develop promotional video for the new partnering program
  + Develop one-page flyer

**Next Steps**

Step 1: Develop San Francisco Partnering “dog and pony show” PowerPoint slide deck

Step 2: Develop internal presentation calendar

Step 3: Develop external conference presentation calendar

Step 4: Develop training tools and update the SFCPSC website ([www.sfpartnering.com](http://www.sfpartnering.com))

Step 5: Develop promotional video to launch Partnering Training

Step 6: Roll-out partnering promotion plan

*Partnering Training Certification*

* We will develop a half-day partnering training
  + Half-day training will be intended for new staff and new CCSF contractors
* We will develop a shorter “booster class” intended for staff who have previously attended partnering training
  + Verified attendees of Caltrans’ *Fundamentals in Partnering Training* or the International Partnering Institute’s *Collaborative Partnering Orientation Training* can receive the shorter “booster class”
* We need to establish requirements and develop a certification for the training
  + We will require that project team members must be trained within 90 days of NTP on a City project
* To incentivize contractors:
  + We will seek bonus points for businesses who have completed the training involved in qualifications-based selection criteria for Design-Build, CM/GC and/or Best Value contracts
  + We will seek bonus points for bidders on professional services contracts (Construction Managers, Engineers/Architects and/or Project Management Support Services staff) who have attended.
  + We will add a bonus to the 2019 San Francisco Partnering Awards Application for teams with members who have attended the Partnering Training.

*Training Funding*

* We will fund the partnering training through two vehicles:
  + As-needed contracts – Shared by the Departments, training events can be tied to contractor Liaison meetings, the SF Partnering Awards Ceremony, etc. (estimated $60-80,000 is needed)
  + Partnering allowance – Additional trainings may be tied to the partnering kick-off workshops for large projects

**Addendum 2: Training Content**

*Training Content*

* We need SFCPSC members to “sponsor” and kick-off each partnering training meeting
* We will include role plays that are specific to the San Francisco departments
  + The role play needs to include multiple perspectives on negotiating a solution
  + Attendees need an opportunity review a negotiation from both the contractor and the owner’s perspective
* We will include a focus on partnering for small projects (Level 1 and 2)
* The Training Task Group will confirm the agenda and serve to improve/update the training content as the Partnering program develops

San Francisco Partnering Training – Sample Agenda

9:00am Welcome and SFCPSC Sponsor Message

Introduction to San Francisco Partnering Program

Benefits

The San Francisco Partnering Field Guide

Your role in the partnering effort

Brief Introductions

San Francisco’s Collaborative Partnering Program

Setting up the process

The new City Partnering Matrix

Structured Collaborative Partnering

Partnering for small projects

Developing the Charter

Issue Resolution Ladder

Scorecards

Finding a Facilitator

What to talk about in a partnering session

The Integrated Dispute System

Advanced Partnering

Interdepartmental projects

Partnering and alternative delivery methods

*Working Lunch*

Role Plays - Partnering Scenarios

* Developing a Charter
* Negotiating a Change Order Request

Additional partnering resources ([www.sfpartnering.com](http://www.sfpartnering.com))

Personal takeaway

1:00pm Training concludes