

## California Department of Transportation

# Partnering Facilitator Checklist

- Submit Facilitator Registration Form to Caltrans Partnering Program
- Facilitate kick-off partnering workshop
- Develop partnering charter:
  - Mutual goals
    - Include core project goals (safe, on time, on budget, quality met, Fundamentals of Partnering training, communication)
    - Include project-specific definitions of all mutual goals
  - Partnering maintenance and close-out plan
  - Dispute resolution plan
    - Include dispute resolution ladder
  - Commitment statement and signatures
  - Submit partnering charter to Caltrans Partnering Program
- Set-up monthly partnering evaluation survey:
  - Get email addresses of survey participants and report recipients
  - Mutual goals
    - Includes core project goals and the associated objective criteria of success
    - Includes any project-specific goals and mutually supported individual goals and the associated objective criteria of success
    - Optional - key issues/risks (update as needed quarterly)
- Facilitate close-out partnering workshop, if requested
  - Document lessons learned (no standard format required)
    - Send lessons learned to project team
    - Send lessons learned to project executives
    - Submit lessons learned to Caltrans Partnering Program
- Submit final partnering evaluation survey results on core project goals to Caltrans Partnering Program using standardize submittal format to Caltrans Partnering Program

### **Monthly Reminders**

Review survey results

- Take action as appropriate

Submit survey participation-levels to Caltrans Partnering Program

- # team members invited to take survey
- # team members that submitted a completed survey

### **Quarterly / Periodical Reminders**

Update key issues on monthly partnering survey.

Hold follow-up partnering sessions and/or facilitated dispute resolution sessions.

Check in with the RE, PM, and other team members as appropriate to keep informed on project progress.