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.