

## **Session Report**

### **Medical Center Replacement Wing Kick-Off Partnering Session**

## Warm-Ups and Introductions

To begin the session, each participant was asked to share the following with the group:

1. Their name.
2. Their role in the organization and life.
3. What is the most surprising thing on the project in the last 90 days?

Warm Up		
Name	Organization/Role	Most surprising thing last 90 days
<b>1/7/14</b>		
Martin	Leader and Brother.	How complex this project keeps getting.
Paul	QA/QC. Husband and Father.	The accident.
Avi	Designer. Familyman.	It was pleasant to see the site clear.
Herb	County PWA. Engineer and Husband.	The overall transformation of the site.
Pete	County PM. Father.	Getting out of the ground and building momentum.
Joe	PM. Engineer.	How fast the 4 year project is moving.
Diana	County PWA. Mother, Wife and Friend.	The change in the project and how fast it's progressing.
Matt	County PM. Father and Engineer.	How adaptable Clark is.
John	County PWA. Grandfather.	The cooperation among all the people on site.
Jim	Facilities Manager. Husband and Father.	The wonderful people within the growing team.
Redstar	Site Safety Officer. Father and Outdoorsman.	How many relatives of mine work at the hospital.
Brian	OSHPD Inspector of Record. Good Husband and Father.	How oblivious the general public is of safety issues.
Cindy	Hospital Admin. Mother and Nurse.	How committed Clark has been to making things work and getting things right.
John	PWA PE. Husband and Father.	That the project is going smoothly, considering its size and scope.
Jeff	Sr. Superintendant. Pianist and Father.	The collaboration and cooperation has been a surprise.

*Continued from above*

Warm Up		
Name		Surprising thing last 90 days
<b>1/7/14</b>		
Lou	Cr. VP. Husband. Father and Winemaker.	There are different complexities and solutions.
Ed	"I plan to improve the planet."	The level of commitment the team has.
Alicia	Good mother and Avid Reader.	How we all hold onto our passion and commitment for the project.
Jerry	Husband and Father.	We still find ways to get in our own way.
Hugh	PM. Husband, Father and Painter.	The amount of deadlines we've had to meet and that we've met them on time.
Rich	Nevell Project Executive. Father.	Seeing a fresh start from positive people.
Jack	Project Executive. Father.	The complexity of the job. The fast pace and great group of contractors.
Levi	PE. World Traveler and Superstar.	The complexity of working in an operating hospital.
Nick	PE. Son and Brother.	Collaboration between the hospital and Clark has been great.
Katie	PE. Sister, Daughter and Friend.	The fast pace that we are working with and the adaptability of team.
Rebekah	Project Manager. Wife, problem-solver.	The large number of meetings we have to get things done.
Chris	Deputy Director of County. Good Father and Husband.	The quality of people that this project has.
Paul	Architect. Traveler.	How challenging it has been to get OSHPD approval.
Michael	Engineer. Husband and Father.	We're dealing with a lot of unknowns but figuring out ways to get them done.
Josh	CM. Father and Husband.	This is a project that is challenging with time constraints and schedule, but we're committed to get things done.
Lynne	PM Med. Equipment. Dog Lover and Wife.	That we're all sitting here.
Terry	Elec. Engineer. Husband, Father, Photographer and Traveler.	It's a pleasure to see the quality and breadth of this team.
Young	Project Architect. Good Father and Husband.	Everything surprises me, I started yesterday.

*Continued from above*

<b>Warm Up</b>		
<b>Name</b>	<b>Organization/Role</b>	<b>Surprising thing last 90 days</b>
<b>1/7/14</b>		
Daniel	County Med. Center. Husband and Guitarist.	There are a lot of surprises, but I'm always impressed how dedicated the group is.
Patrick	Great Uncle.	Our issue resolution process. Everyone looks for the best solution.
John	PM. Husband and Former Marine.	The collaborative and cooperative nature of the team.
Lindsay	PM. Wife.	How fun it has been working with the entire team.
George	MEP Design Team Production. Father and Good Husband.	Not much surprise, but everything seems to be going well.
Ben	Sr. MEP Manager. Son, Brother, Student and Engineer.	The ever increasing collaboration between Design/Build team despite numerous challenges.
Daniel	ME Engineers PM. Good Husband and Father.	The existing condition is already a surprise, also our extensive coordination.
Hani	Construction. Musician.	How resilient the team is.
Jesse	Sr. PM. Outdoorsman, Husband and Soon-to-be-Father.	The flexibility of the hospital.
Tom	Project Designer. Husband and Father.	We couldn't get the last few design items by the holidays.
Barbara	Sr. VP. Wife, Daughter, Sister Mentor and Runner.	The progress and challenges of the project.
Jim	Simplex Branch Manager. Father.	No surprises, but I do wish we'd be done with make-readies.
Hunvey	Architect. Traveler and Daughter.	The complexity of design problems.
Ray	Brother.	The diversity of the project team and that we've seen progress on MR4.
Leticia	Chief Ops. Officer. Facilitator of fun and Mother.	How fast we're moving.
Fadi	PM of Construction. Father and Husband.	How well Clark handles crisis.
Scott	PM Golfer, Traveler and F1 Fan.	I'm surprised every day that we find something new underground.
Jim	Regional PM.	No surprises.
Ted	County Inspector.	That the project is moving.

## What's Working? What's Not Working?

The Facilitator requested the parties break into their silo teams to review the survey results, and discussed the following questions:

1. So far in the team interactions on the project, What's Working?
2. So far in the team interactions on this project, What's Not Working?

Team	What's Working	What's Not Working
<b>1/7/14</b>		
<b>Owner</b>	There is good communication between RG Group, Clark and VCMC.	The quality and constructability of CDs.
	The problem-solving.	A lack of foresight and planning (crisis prevention).
	The overall commitment of team members.	Sensitivity to suggestions and criticism.
<b>GC</b>	Our good relationships with the Subs.	Unclear expectations.
	Our facilities collaboration.	Issue prioritization.
	Dedication, commitment and quality.	A lack of fun. We want people to <i>want</i> to come to work and enjoy their jobs.
<b>AIA</b>	We are creating a high quality building.	The OSHPD collaborative process.
	Our discussions include partnership and communication.	Decision making (Not closing design issues quickly).
	We have an open communication and schedule that leads to achieving multiple deadlines in a short period of time.	Trust (Concentration on problem resolution, not blaming).
<b>Trades</b>	Our team dynamics.	Design intent issues are open too long.
	Trades brought on early in the design process.	The 3D coordination process, and document control.
	Problem resolution.	A lack of openness to best project solutions/ideas from the trade partners.
	The critical path was designed early.	

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Team	What's Working	What's Not Working
<b>1/7/14</b>		
<b>Engineers &amp; Design Engineers</b>	Cooperation.	We need an "info traffic cop".
	The timing of the Owner's decisions.	The Owner's peer review team. Too detailed too early, not getting all documents they need to review.
	OSHDP rolling review.	Communication channels are too long.



## Status of the Project

Here the participants were invited to openly discuss the current status of the project. Any comments regarding its design and construction were added to this report.

Status of the Project
We started the project last spring.
Currently, we're working on Project MR 2, 3, 4.
We're digging the hole for the new hospital wing.
Work is being done at 2 main locations.
The wing will be opened November 2016.
All the critical path equipment has been identified.
We're designing, documenting, building, approving work for the project.
HOK is preparing packages.
17-18 OSHPD permits will be needed by the end of the project.
There has been substantial peer review effort.
Safety has been paramount for all team-members and organizations.



## Communication Protocol

The Facilitator had the participants realign into their respective Horizontal Groups (Executives, Managers and Field Teams). Here they discussed their communication protocols with each other.

Communication Protocol	
1/7/14	
Team	Process
<b>Executive Team</b>	Don't try to solve complex problems via e-mail.
	To minimize e-mail, meet face to face or pick up the phone.
	For e-mail: Be specific, 5 sentences, subject line is "FYI", "Action Needed" etc.
	To line: The person from whom action is required.
	Author owns the issue after the e-mail is sent. Find a way to follow up on it.
<b>PM1</b>	Some prefer phone call, some prefer e-mail.
	After 2 e-mails, pick up the phone.
	Avoid negative emotions in e-mail.
	Let's re-establish a consistent e-mail protocol.
	Don't produce long e-mails. Messages should be short and concise.
<b>PM2</b>	E-mail should be followed-up with phone call.
	If you feel a negative tone in e-mail, pick up the phone.
	Confirming e-mails are acceptable.
	Be as descriptive as possible in e-mail.
	Respect other people's priorities when asking for an action from them.

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<b>Communication Protocol</b>	
<b>1/7/14</b>	
<b>Team</b>	<b>Process</b>
<b>PM3</b>	E-mail should be the primary form of communication.
	Phone calls are acceptable when you need to close an infinite loop or discuss a complex subject.
	In-person communication should be used for visual information.
	Memorialize information in e-mails.
<b>Field Team</b>	Face-to-Face communication is best.
	"Find me or phone me" to make an action plan.
	Memorialize action plan in an e-mail.



## Issue Resolution Protocol

While the participants were still in their Horizontal Groups, they were asked to discuss their protocol for resolving issues. It is shown here how the teams deal with issues and the expectations they set for themselves and the other teams.

Issue Resolution Protocol	
1/7/14	
Team	Process
<b>Executive Team</b>	More frequent meetings among key group. Commitment to monthly meeting to resolve issues.
	Continuing theme of consultant sessions.
	You are empowered to make a decision. Make it.
	"I know I'm going to make mistakes, but I'll fix them".
<b>PM1</b>	If you structure e-mails correctly, the issues will be presented to the right people.
	Prevent issues with early and complete communication.
<b>PM2</b>	If resolution is time sensitive, use direct communication, not e-mail.
	Don't elevate issues unnecessarily when it can be made at lower levels.
	Clearly establish roles and responsibilities of the teams. Who do I go to for certain issues?
<b>PM3</b>	Most issues need to be solved at lower levels. Weed out as many issues as we can before going up the ladder.
	Establish the stakeholder/who gives final sign-off.
	When an issues arises, it changes the proposal and needs to go up the ladder. We must track this information. (E-Builder)
<b>Field Team</b>	We will try to resolve things among ourselves before we elevate them.
	Foreman/Inspector -> Superintendent/IOR -> PM Group

## Top 5 Issues

The Facilitator had the group expand upon their Issue Discussion topics. With their top 5 issues from their Horizontal Teams, they discussed specific definitions, root causes and mitigation strategies and actions they would take. (Action Items begin on page 17.)

Issue	Mitigation	Discussion
<b>1/7/14</b>		
<b>Design Process</b>	Definition:	1. The quality and constructability of the CDs. 2. Design issues closure. 3. Peer reviews.
	Root Causes:	1a. Past documents have been permit-able, but not constructible. There is Concern for future drawing sets. 1b. The schedule for drawing sets. 2. Currently they are more like presentations than design working sessions with the owner. 3a. Documents were low quality. 3b. Some comments we unreasonable. 3c. The process to close the comments is too long.
	Mitigation Strategies:	1. More Owner-Team development. 2. Hold a work session with the Owner's group to solve issues. 3. We're going to meet and close them in one work session.



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Issue	Mitigation	Discussion	
<b>1/7/14</b>			
<b>People Relations</b>	Definition:	<ol style="list-style-type: none"> <li>1. Sensitivity to criticisms.</li> <li>2. Lack of fun at work.</li> <li>3. Unclear expectations, and by whom.</li> </ol>	
	Root Causes:	<ol style="list-style-type: none"> <li>1a. Texting when dialoging, body language, harsh words.</li> <li>1b. Lack of openness to others' opinions and viewpoints.</li> <li>2. Stress inherent of the project/lack of positive reinforcement.</li> <li>3a. A lack of understanding of roles and responsibilities.</li> <li>3b. A lack of communication.</li> </ol>	
	Mitigation Strategies:	<ol style="list-style-type: none"> <li>1. Develop set of principles of professionalism and camaraderie.</li> <li>2. Have a partnering session.</li> <li>2. Team building exercises and empowering individuals.</li> <li>3a. Have a better definition of roles and responsibilities.</li> <li>3b. Have a better definition of roles and responsibilities.</li> <li>3c. New members will be educated with shared goals/objectives and roles and responsibilities.</li> </ol>	
	<b>OSHPD Collaborative Process</b>	Definition:	A lack of closure from the OSHPD issues, on the segments and increments in the collaborative process.
		Root Causes:	Misaligned expectations between the Design Team, MOU, and OSHPD reviewers. This results in a misunderstanding of the process for OSHPD to provide conditional approval.
		Mitigation Strategies:	<ul style="list-style-type: none"> <li>• Review the Critical Path schedule and provide an amended MOU to OSHPD on Jan 23.</li> <li>• Refine the existing primer (Explanation/Narrative that accompanies every package) regarding MOU, to make sure OSHPD reviewers understand what's there and not there and what they should be reviewing.</li> <li>• Do a page turn with OSHPD reviewer for each submission.</li> <li>• Request weekly meetings with OSHPD, instead of bi-weekly.</li> <li>• Request monthly Executive meeting with OSHPD. Review status and schedule of increments.</li> <li>• Work session with OSHPD reviewers to establish work flow process.</li> </ul>

*Continued from above*

Issue	Mitigation	Discussion	
<b>1/7/14</b>			
<b>Problem Solving</b>	Definition:	<ol style="list-style-type: none"> <li>1. Priorities.</li> <li>2. A Lack of planning/forward thinking.</li> <li>3. Trust.</li> </ol>	
	Root Causes:	<ol style="list-style-type: none"> <li>1. A lack of delegation and empowerment.</li> <li>2. The fast pace of the project, design roadblocks, blaming, not looking forward.</li> <li>3a. A lack of openness.</li> <li>3b. Not enough give and take leads to lack of trust.</li> </ol>	
	Mitigation Strategies:	<ol style="list-style-type: none"> <li>1. We must define why something is a priority, but we must respect others' priorities.</li> <li>2. In OAC meetings, we'll look forward to future issues: Assign POC to resolve the issue and set dates for its resolution.</li> <li>3. Needs to be discussed at the Executive level to better the culture.</li> </ol>	
	<b>Communication and Information</b>	Definition:	The lack of a defined distribution of information structure.
		Root Causes:	<ul style="list-style-type: none"> <li>• No structure or guidelines.</li> <li>• The way we communicate is undefined.</li> <li>• Guidelines are not available to everyone or they are unclear.</li> </ul>
		Mitigation Strategies:	<ul style="list-style-type: none"> <li>• Establish a distribution chain for the overall team for all parties.</li> <li>• Create distribution groups by e-mail. "Subscribe to folder".</li> <li>• Add specifications to CD. Making sure all info is available in one specific location.</li> <li>• Develop a quick map of E-Builder (where are meeting minutes/permits? etc.).</li> <li>• Create a roles and responsibilities matrix.</li> </ul>

## Action Items

The partners identified the following Action Items and the person who will take responsibility for assuring it is accomplished and by when.

<b>Action Items</b>		
<b>1/7/14</b>		
<b>Action Item</b>	<b>Champion and Team</b>	<b>Date Due</b>
Communication Protocol Meeting (PM Group).	Levi (Champion), Paul and Jesse	1/21/2014
Creation of roles and responsibilities matrix (First pass).	Jesse (Champion), Fadi, Pete and Ed	1/21/2014
Review first-pass responsibility matrix and expand.	Jack (Champion), Scott, Patrick, Chris Lindsay, Alicia, Fadi, Redstar, Diana, Katie, Joe, Ben, Jeff and John	2/4/2014
Take final responsibility matrix to Executive Team for ratification and buy-in.	Jack, Fadi and Chris	2/18/2014
Develop a quick map of E-Builder. (where are meeting minutes, permits, etc?)	Matt (Champion), Avi and Jack	1/21/2014
Schedule Exec. meetings for six months.	Rebekah and Jack	1/31/2014
Schedule consultant collaboration meetings.	Alicia (Champion), Jack, Rebecca and Avi	1/31/2014
Finalize Issue Elevation Ladder and publish it.	Martin (Champion), Leticia, Ray and Jeff	1/21/2014
Establish distribution chain for the overall team for all parties.	Joe	1/31/2014
Create distribution groups by e-mail (Subscribe to folder).	Joe	2/7/2014
Add specifications to CD folder in E-Builder, making sure all info is available in one specific location.	Paul (Champion) and Helen (HOK)	1/14/2014

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<b>Action Items</b>		
<b>1/7/14</b>		
<b>Action Item</b>	<b>Champion and Team</b>	<b>Date Due</b>
HOK to upload and maintain OSHPD CO log, in E-Builder.	Paul	1/14/2014
Review critical path schedule and provide amended MOU to OSHPD on Jan 23.	Jack (Champion), Paul and Hunvey	1/15/2014
Refine existing primer (explanation/narrative that accompanies every package) regarding MOU, to make sure OSHPD reviewers understand what's there and not there and what they should be reviewing.	Hunvey (Champion), Paul and Hugh	1/15/2014
Request weekly meetings with OSHPD, instead of bi-weekly.	Rebekah	1/23/2014
Request monthly Executive meeting with OSHPD. Review status and schedule of increments.	Rebekah	1/23/2014
Work session with OSHPD reviewers to establish work flow process.	Avi	1/15/2014
Incorporate QC review by owner and GC into OSHPD schedule.	Hani	1/21/2014
Establish a pre-OSHPD drawing review process flowchart.	Ed	1/15/2014
Trade partners and inspectors generate document completion list, based on latest progress set.	Levi	1/31/2014
Develop a plan to close all design issues at an agreeable design date.	Dana, Alicia and Rebekah	1/14/2014
Meet and close the 50% CD Peer review 2nd round of comments log in one work session.	Hugh	1/16/2014

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*Continued from above*

<b>Action Items</b>		
<b>1/7/14</b>		
Action Item	Champion and Team	Date Due
Develop set of principles of professionalism and camaraderie.	Leticia, Patrick and Martin	1/31/2014
Develop a mission statement for the entire team (Draw everybody into the project).	Leticia, Patrick and Martin	1/31/2014
Develop an onboarding package.	Jack, Redstar, Patrick, Leticia, Ray and Pete	2/28/2014
Start every meeting with everyone sharing a positive.	Everyone	Immediately



## Goals & Commitments

The Facilitator discussed with the participants the importance of establishing goals and making commitments to the project team. The participants were invited as a group to elect some goals and commitments they would adopt for the remainder of the project. They are as follows.

Goals and Commitments	
1/7/14	
<b>Project Goals</b>	Safety. Zero incidents and zero recordables (Inside and outside the fence).
	No unscheduled impacts to current hospital operations.
	All OSHPD permits by December this year.
	Make the project fun!
	Take something positive from this job.
	Ensure that each of us is proud that we were a part of this team.
	Make a fair an reasonable profit.
	Win Win WIN!
	Make a positive difference for VCMC and the County of Ventura.



## Trust Assessment

A trust poll was taken where trust was calculated using a ten point scale with 10 as the greatest amount of trust parties can have on a project and 0 represents no trust. The results of the poll follow:

PROJECT TEAM TRUST LEVEL:		1/7/14	
TEAM TRUST LEVEL	Range	People	Tally
Highest Level Ranking for Professional Trust/Respect Working Relationships on a Project Team - The Best It Can Get	10	2	20
	9	5	45
Above Average Trust/Respect Working Relationships by the Owner & Contractor PM's and Executive levels on the job - Solid Professional Relationships with the Rest of the project team	8	19	152
	7	6	42
Good Core PM Team Trust/Respect working levels on the Project - The rest of the Project Team has a healthy Working relationship between the A/E, CM, Owner and Contractor team members	6	8	48
	5	1	5
CONCERN - Guarded Trust Levels by Some Team Members - Some Team Members attitudes are affecting communication and the exchange of information	5		0
	4	1	4
LOW TEAM TRUST LEVELS - Challenged Communications and Lack of Trust Among the Majority of the project Team Members - Strained Relationships - Affecting Contract Administration.	3		0
	2		0
(-) NO TRUST - NONE - Worst it can be - Nothing is Easy - All Communications are strained and breaking down. A Bad Attitude Project	1		0
	0		0
	<b>Totals</b>	42	316
	# of People	42	
	Avg. Score:	<b>7.5</b>	

## Plus/Delta

The Facilitator asked the participants, as a group, to list their Plusses and Deltas for this meeting. The Plusses are what went right. The Deltas are what could be improved for the next meeting. They are as follows.

Plus	Delta
<b>1/7/14</b>	
There was a lot of openness in this session.	There should be more coffee and tea.
We had really good interaction.	More middle management should be involved.
There was good attendance from all companies.	The work groups were noisy.
The candor was refreshing.	We should have a bigger room.
We have some good optimism.	We need a bigger response to the survey next time.
This was a very verbal group.	The survey process should be explained better.
We had great humor in the room.	We need to try to bring in Lean concepts to our solutions.
We were all well behaved.	We should have greener food next time.
This was a well led session.	
The small groups were helpful.	
We bonded well.	
Everyone could speak.	
We are being opportunistic with this session.	

## Conclusions and Takeaways

At the end of the session, the participants we asked to discuss the most important aspects of this partnering session.

Takeaways
1/7/14
The high success of a potentially great project.
Everybody got a good view of everyone else's thoughts and general increase of cooperation.
The openness of everyone and sincerity to provide their services.
It was good to walk a mile in someone else's shoes.
I'm encouraged.
Honest and open communication will make the project a success.
I continue to be impressed with the commitment in this room. I am humbled.
I was happy to see everyone's commitment.
The increased potential of everyone in this room.
This was an excellent day spent getting organized and seeing each other's needs. We've solidified the project.
High confidence level that we share a goal in making the project successful.
We have a better perspective of issues and opportunities.
I felt positive reinforcement that we are a quality team.
Hope.
I'm happy to see a shared affirmation of the commitment to this project.
I have optimism for better collaboration and better success.
How similar we are and it's all about how we work together.
We'll have a higher level of team work.

*Continued from above*

<b>Takeaways</b>
1/7/14
I'm surprised by the enthusiasm shared by our team. We have a common goal to deliver the project.
I loved hearing everyone else's perspective.
We're aligning the plan and expectation with all stakeholders.
We have team alignment around the project goals and struggles.
My trust level improved.
I saw everyone's high level of commitment and desire to succeed.
We're much closer to making this work than I thought.
I've learned others' expectations and their preferred forms of communication.
We can and will succeed.
There was great interaction among the different team members.
We shaped our goals to drive alignment and remove confusion.
We started to restructure the culture of this project.
I have a better understanding of what everyone was confused about.
There is a real enthusiasm.
I have a better understanding of the diversity of those involved.
Our diversity can achieve one common goal.
I'm identifying the personalities and the work they do.
I've just witnessed the building blocks of the team effort.
Everyone has a contribution and an important role in the team.
I see a clearer view of the finish line.

*Continued from above*

<b>Takeaways</b>
1/7/14
This group has enough intelligence, talent, and professionalism to build this and any other project.
Today has re-energized me and given me relief.
We established the plan to improve team dynamics and team morale.
I enjoyed the fact that everybody is looking forward to improving our processes.
I was encouraged by everyone's participation and positivity towards problem solving.
It quieted down enough for communication and messages to be heard.
I have a greater perspective of the team's expectations.

Facilitator: Dan Fauchier

Scrivener: Kyle Martinez

Next Session Date: TBD