

PARTNERING WORKSHOPS - AN INSIDER'S VIEW
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Much has been said and written about the need for, the purpose and the "pros" and "cons" of Partnering Workshops. Little has been said about what actually happens in a Partnering Workshop.

This paper is based on experience gained from the author's facilitation of a range of these Workshops in several States, for both public and private clients, and for a number of contractors.

Main Components of a Typical Partnering Workshop

There are only three components which, in my opinion, **must** occur in the Workshop. These are:

- . The generation of, understanding and acceptance of a Partnering Charter
- . An agreed means of resolving issues arising between parties
- . Performance Indicators agreed by the team members indicating, on an on-going way, how (or if) the items in the Charter are being complied with

In addition, most Workshop participants will wish some clarification of roles and inter-relationships of the main parties. Sometimes this has already been agreed and clarified and it may not be seen as necessary by the group.

In my Workshops, I like to extend the topics to **any** issues about which anyone in the team feels uncomfortable, threatened or compromised. I do this by asking the team members to generate assumptions; not design assumptions, but rather assumptions which will have to be made in order to satisfy the requirements of the Partnering Charter. This is done using brainstorming, i.e.,

- . All are free to comment
- . No judgement to be made until **after** the assumptions are gathered
- . As many assumptions as possible to be aired

I believe that this is a vital part of the Workshop because it allows everyone present the opportunity to voice their fears, doubts and aspirations. It helps to ensure that each participant has ownership of the process.

Participants

Rather like Value Management Studies, getting the right mix of participants sounds easy until you investigate the real possibilities.

How many? From which organisation? At what level? ... are all common questions. I'm afraid I have no prescription other than to suggest that discussion with the two main clients (usually Contractor and Owner) will help to define more clearly **their** view of who should be present.

Usually, there is a clear view of Contractor Participants and Owner Participants, eg.,

Contractors normally have:

- . General Manager
- . Project Manager
- . Construction Manager
- . Perhaps the Managing Director, in a major project

Owners normally have:

- . Project Director
- . User representatives
- . Project Management personnel
- . Design Management personnel
- . General Manager or Director responsible for the function of the finished project

The problem often comes at the next level, i.e., Sub Contractors and Design Consultants.

I have found a wide variation in preferences. Some clients want no Sub Contractors at all. Others insist they **all** have to come to the party. Similarly, some wish all Design Consultants, others only the Architects.

It is fairly obvious from the above that numbers can become excessive. Like all participatory events, numbers should be small and the ability to break up into sub-groups, which can sometimes be undertaken at some Value Management Studies, is not possible in Partnering Workshops.

So a compromise must be sought. My previous three Workshops have had 18, 13 and 15 participants, respectively.

What is a Partnering Workshop and What are its Aims?

It is important to understand that the Workshop is, above all, a participatory exercise, which seeks **consensus** from the main parties so that aims and objectives of the parties are understood and accepted.

- . It seeks to **avoid litigation**
- . It seeks to obtain a **win-win** outcome
- . It seeks **equity** in which all parties' concerns are aired
- . It seeks **trust** between parties, without cynicism
- . It seeks to **develop personal relationships** to lead to good teamwork and a synergistic relationship
- . It is **not a panacea** to solve all contractual problems
- . It is **not a contract**

It would be foolhardy to expect that a simple 1 or 2 day Workshop can solve every problem, but it is a single step in the right direction to minimise confrontation and the antagonistic nature of many contractual arrangements.

Potential Problems

Sometimes there are existing dispute resolution devices in place and this can lead to confusion, which can, in turn, generate a negative questioning, which has to be overcome right away. My response is normally to re-iterate that the Charter is not a legally binding document, that it is a statement of trust between individuals and that informality and a good level of interpersonal relationship is the key to its success.

Another potential problem, which has yet to be fully documented as to its validity, can best be described by the statement, "Well, it's fine right now, at the beginning of a project, to have warm, caring feelings. What happens when a **real** dispute occurs, with **real** money involved. Why wouldn't we revert to the confrontational, adversarial approach upon which, after all, our whole legal system is based?"

This is the cynics' view - some might call it the realistic view - and it is at the basis of all our historical disputation. Frankly, it is naive to simply say, "forget it". We have to face historical facts and simply re-iterate that the whole basis of the Partnering is trust and sharing and that, ultimately, it is in the best interests of the whole industry to embrace it. I would add, however, that the Partnering process is not the panacea that many would label it. It will not solve every problem connected with disputes. However, experience so far has **proven** that it is a positive contribution to good relationships and to minimising confrontation. In short, it will be an aid to a smooth, trouble-free project, but will certainly not be a cure-all.

Skills

I have no doubt that a skilled Value Management practitioner is about the most appropriate person to handle a Partnering Workshop. He or she, should have:

- . Highly tuned facilitating skills - which are being exercised and refined regularly
- . The ability to sense 'road blocks' in the form of negative, defensive or aggressive indicators; and to avoid these 'on the run'
- . The ability to think ahead, to pace the Workshop, to ensure that the major issues are addressed
- . The skill not to alienate any party
- . The skill to ensure that 'minor' or less articulate participants are drawn out and feel comfortable about participating
- . The ability to be **non prescriptive**
- . The skill to deal with dominating individuals so that they play a participatory role, without alienating them
- . The strength to maintain leadership throughout the Workshop, without dominating
- . The ability to recognise polarisation of the parties and to take steps to avoid this

I would suggest that those contemplating the commissioning of a Partnering Facilitator be conscious of the above skills and ponder whether regular use of these skills might enhance the performance of the facilitator and hence, the success of the Workshop.

How Do We Know It Will Work?

The answer to the above question is that, in the long term, we don't know. Evidence in the United States, where it has been used for some years, is that, yes it does have long term benefits.

In the short term in Australia, I have had encouraging reports about its success. Recently, I had an excited call from a client the day after a Workshop to say that it was working already! A serious issue had arisen and the dispute resolution agenda had been put into practise, with immediate and positive results.

One of the vital factors which is becoming apparent is the criticality of policing an ongoing commitment. Usually, at the Partnering Workshop, a fortnightly or monthly Partnering Meeting is agreed with a continuous feedback. This sometimes is not carried out as assiduously as it ought. It is vital that this regularity and commitment be pursued.

One of the post positive reports I've received about the value of Partnering is that it **forces** issues to be faced. There is a tendency, which I'm sure we are all aware of, of assuming all will be well, of postponing issues instead of confronting them. A powerful factor in Partnering is that it allows a platform to air these issues with an agreed means of addressing them.

Summary

I believe that we are moving, as a society, and particularly in the building industry, :(and this has been accelerated by the Royal Commission and other investigations) to less adversarial methods of working. The success of Value Management in this country illustrates how group participation enables stakeholders to agree on aims and objectives and to explore value-improving options.

Partnering, I believe, is a cousin of Value Management, embodying similar principles and harnessing the strength and energy of the group to create appropriate, more intelligent and ultimately, better solutions to the many problems which face us in the several industries in which we work.