



# *Stepping Up Relationships*

Guidelines & Expectations for relationships & communications on District 5 Construction Projects



# District 5 Expectations

1. Develop & Evaluate Goals, Discuss Progress & Setbacks
2. Build & Maintain relationships with your Counterpart
3. Communication on Performance Deficiency
4. Communication on Added/Unforeseen Work
5. Communication on issues of concern for the Contractor or FDOT

# 1. Develop & Evaluate Goals, Discuss Progress & Setbacks

- Hold Initial Partnering Meeting (Projects >\$10M)
  - Develop Project Goals, Lines of Communication/Escalation
  - Discuss at Pre-Con if Partnering Meetings aren't planned
- Have Meaningful Discussions in Progress Meetings
  - Focus on Project Goals: progress and setbacks
- Hold Periodic Partnering Meetings (Projects >\$10M)
  - Use Evaluation Tool to measure progress & discuss

## 2. Build & Maintain relationships with your Counterpart

- PAs, SPEs, PMs & RCAs - Identify your counterpart on the project's escalation matrix
- Have regular, non-specific discussions on how things are going
  - Non-specific means not related to a specific issue
  - “Courtesy Call” ...it's relationship maintenance
- Going to lunch is an effective way to do this
  - Pay your own way and you will be fine
- Make this “Courtesy Call” no less than...
  - PAs & SPEs – Monthly
  - RCAs & OEs – Quarterly
  - DCE – Semi-Annually

# 3. Communication on Performance Deficiency

- DO NOT SURPRISE THE CONTRACTOR
- Use the escalation protocol...VW → DWL → DL  
....unless it is a critical safety issue
- Establish workable deadlines for corrective action
- Document/follow-up VW with email
- ALWAYS talk to the Contractor before issuing Letters....inform, ask questions, listen, then share your perspective
  - ~~“I’m calling to tell you a DL is on the way...”~~

## 4. Communication on Added/Unforeseen Work

- Make time to discuss the scope of the work before asking for a price.
- DO NOT ask for a price until the scope is well understood by both parties...*unless it's emergency/critical to schedule*
- DO NOT rely on statewide average as your sole reason for your price position
- Make time to listen to the Contractor's perspective/justification

## 5. Communication on issues of concern for the Contractor or FDOT

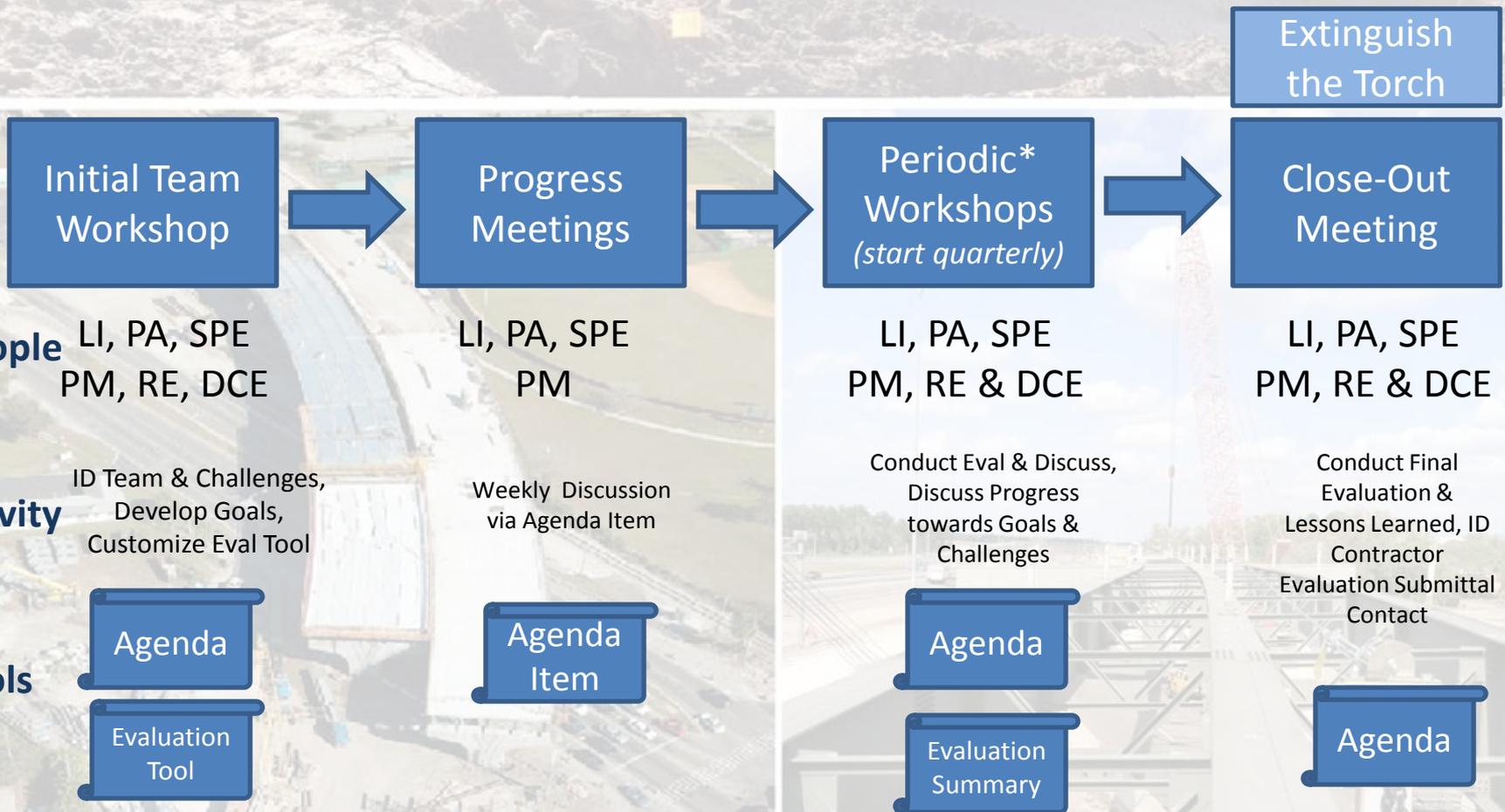
- Recognize what will be a concern for the Contractor and make every effort to TALK with the Contractor before issuing a written position.
- TALK to the Contractor before denying their request
- Recognize when the Contractor does a good job in an area related to the project's goals.

# Project Cycle & Tools

Required for use on all contracts greater than \$10 Million

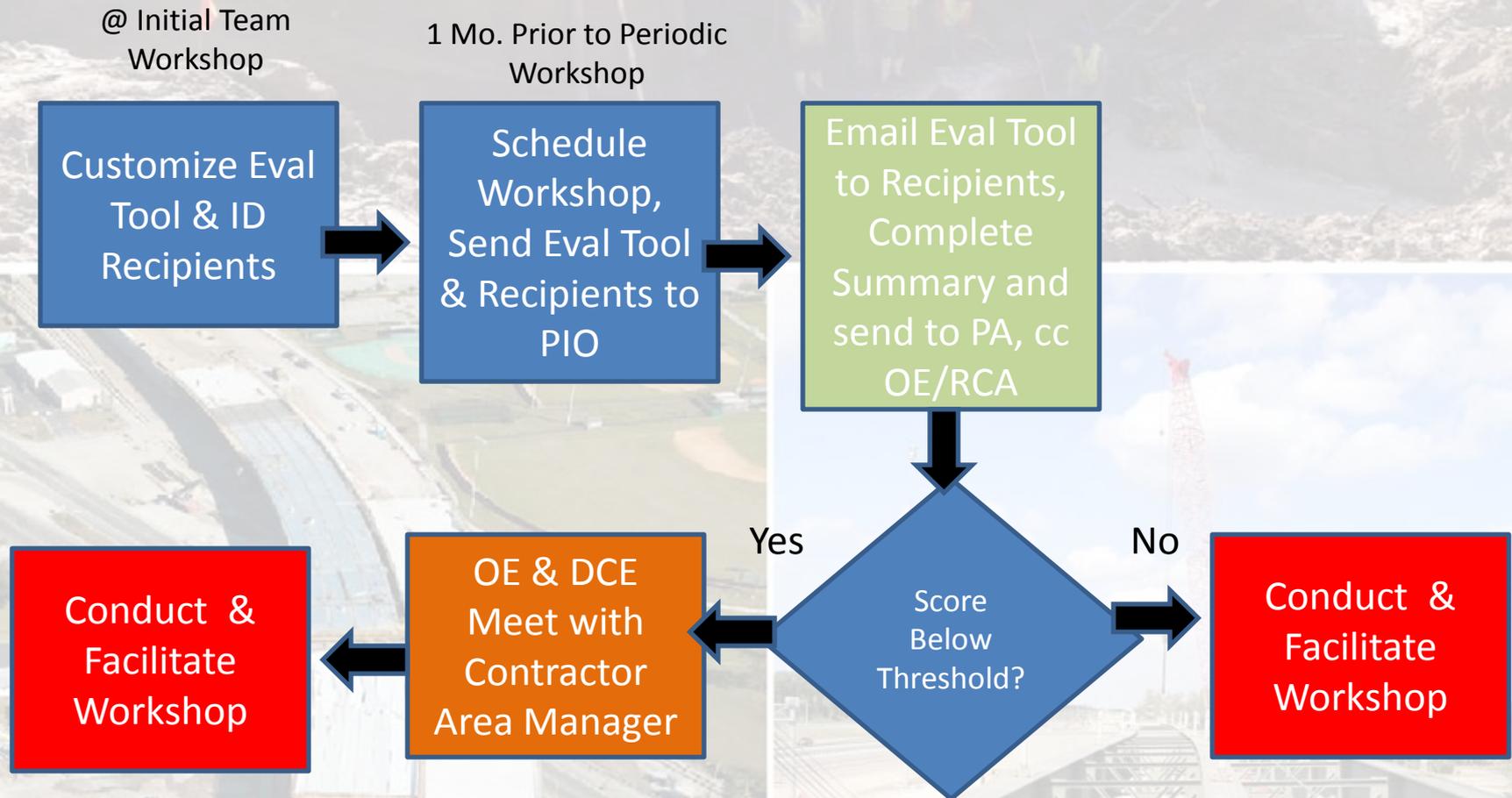
Recommended for use on all contracts greater than \$ 3.5 Million OR > 180 days

*\*Workshop at mid-point of project for recommended projects*



Category	<b>Rating</b> <small>.5 = the worst  4.0 = exceeding expectations  3.0 = meeting expectations</small>	Comments
<b>(1) Safety</b> The process to monitor and assure safety is supported by everyone:	Rating ▼	Comments on Safety
<b>(2) Quality:</b> The process to ensure quality work every time:	Rating ▼	Comments on Quality
<b>(3) Schedule:</b>	Rating ▼	Comments on Schedule
<b>(4) Public Perception:</b>	Rating ▼	Comments on Public Perception
<b>(5) Issue Resolution:</b>	Rating ▼	Comments on Issue Resolution
<b>(6) Responsiveness:</b>	Rating ▼	Comments on Responsiveness
<b>(7) Teamwork &amp; Cooperation:</b>	Rating ▼	Comments on Teamwork & Cooperation
<b>(8) Communication:</b>	Rating ▼	Comments on Communication

# Performing the Evaluation



**Florida Department of Transportation, District 5**  
**E5R39, I-95 Widening North Brevard County**  
Partnering Agenda  
At Brevard Operations  
Cocoa, Florida

- Date: Tuesday April 2, 2013
- 9:30 am Welcome and Opening Remarks  
Stakeholder Introductions & Icebreaker
- 9:45 am Partnering Discussions- Issue Escalation matrix.  
• See attached.
- 10:00 am Review, Approve and Sign Draft Mission Statement  
With Goals and Objectives
- 10:15 am Rocks in the road, identify major Issues, Concerns.
- Design Approach
  - SR 46 Bridge Construction
  - Wild Life Fence Construction
  - Environmental Impacts
  - SR442 Reconstruction
  - Box Culvert Extensions
  - Traffic Opening
  - Existing ITS Maintenance
  - SR 44 Landscaping
- 11:15 pm Action Planning list.
- 11:45 pm Establish Means to Keep Partnering Alive  
Establish Follow up Workshop  
• Partnering Team Evaluation
- 12:00 pm Adjourn

**Progress Meeting # XX Agenda  
(Date)**

**Florida Department of Transportation  
(Project Description)**

**FPN: XXXXXX-X-52-01**

\_\_\_\_\_ **County**

- **Weekly Progress Report / Controlling Item of Work**

- ....
- ....

- **Schedule**

Original Contract Amount:	\$XX,XXX,XXX.X	Contract Day as of	4/8/13	is	XX of XXX
Current Contract Amount:	\$XX,XXX,XXX.X	Percent Time Elapsed:			XX%
Total Paid To Date:	\$XX,XXX,XXX.X	* Granted Weather Days:			X
* Progress Earned:	XX.X%	* Total Weather Days:			X
		* Holiday Extension Days			X
		*SAWO Extension Days			X

**As of Estimate dated \_\_\_\_\_ Percent Time Elapsed (XX/XXX) = XX%**

- **Partnering/Project Relationships**

- *Communication – Are there any issues with communication on the project? (Try to bring attention to good things that happened and any improvements that might be needed.)*
- *Project Goals – (Pick a project goal to discuss...could be random rotation or one that had an issue since the last meeting...ex. Safety or Quality)*
- *Milestone Ahead – (What is the next major milestone for the project and discuss what actions can be taken on either side to ensure success? Plan for celebrating successfully meeting the milestone.)*
- *Next Periodic Partnering Meeting – (Is date/location set? Are team members identified for partnering evaluation? When will partnering evaluation be sent out...one month prior to meeting.)*

**Quarterly Management Update Meeting**

**Project SR 50 239535-5-52-01**

**From Good Holmes Road to West Oakes Mall**

**2/12/2013**

**1) Introductions-**

- a. Name, Title and Role on Project
- b. Ice Breaker- What is your favorite thing to do outside of work. Tell us one personal thing about yourself.

2) **Partnering Survey-** Review and discuss survey results and progress towards project goals.

3) **Design Issues-**

4) **Construction Issues-**

5) **Things that have gone Well-** (Issues we have worked out)

6) **Action Items for Next Meeting**

7) **Date for Next Meeting-** 6/4/13

8) **LUNCH**

**REQUIRED ATTENDIES**

**FDOT-**

John Tyler

Todd Womick

Carlton Daley

Mick Decker

**Lane Construction**

Chris Dubois

Kurt Mathiasmeier

Chris Forman

Tommy Sample



**FDOT PARTNERING SURVEY: Project # 239535-5**

**Contractor:** Lane Construction  
**Office:** FDOT D-5  
**Data Compiled:** Monday, September 23rd, 2013

**Response Summary:** # sent: 9 # received: 9

[Legend: 6-N/A 5-Strongly Agree 4-Agree 3-Neutral 2-Disagree 1-Strongly Disagree]

**1. SAFETY: Safe work environment for workers and the public**

Rating	6	5	4	3	2	1	Wt. Avg
#		6	2			1	4.33
%	0%	67%	22%	0%	0%	11%	

Additional Comments: NONE

**2. SAFETY: Number of contract days with out an accident / incident**

Rating	6	5	4	3	2	1	Wt. Avg
#	1	1	3	1	1	1	3.63
%	13%	13%	38%	13%	13%	13%	

Additional Comments: **1:** 68 plus days without an incident. **2:** One (1) participant skipped question.

**3. QUALITY: Work meets specification requirements and quality construction practices**

Rating	6	5	4	3	2	1	Wt. Avg
#		3	5			1	4.00
%	0%	33%	56%	0%	0%	11%	

Additional Comments: NONE

**4. SCHEDULE: On track to finish project ahead of schedule**

Rating	6	5	4	3	2	1	Wt. Avg
#		1	6	2			3.89
%	0%	11%	67%	22%	0%	0%	

Additional Comments: NONE

**5. ISSUE RESOLUTION:** Established a good working relationship through prompt response

Rating	6	5	4	3	2	1	Wt. Avg
#		2	2	4		1	3.44
%	0%	22%	22%	44%	0%	11%	

Additional Comments: NONE

**6. TEAMWORK & COOPERATION:** A strong sense of responsibility for the project is shared by all

Rating	6	5	4	3	2	1	Wt. Avg
#		3	3	2		1	3.78
%	0%	33%	33%	22%	0%	11%	

Additional Comments: NONE

**7. COMMUNICATION:** An effective means of communication has been established and implemented

Rating	6	5	4	3	2	1	Wt. Avg
#		2	5	2			4.00
%	0%	22%	56%	22%	0%	0%	

Additional Comments: NONE

**8. UTILITIES:** Proactive approach to locate and protect existing utilities through coordination

Rating	6	5	4	3	2	1	Wt. Avg
#		6	2	1			4.56
%	0%	67%	22%	11%	0%	0%	

Additional Comments: NONE

Session 1  
1 Hour

**INVITEES:** District Construction Staff  
Construction Resident Engineer / Operations Engineer  
Resident Contact Administrator (if applicable)  
Project Administrator & Staff  
Construction Project Manager (Consultant CEI Projects)  
District Consultant Project Management Administrator (Consultant Projects)  
District Technical Support Engineer (In-house Projects)  
Structures (Neil Kenis)  
Drainage (Pat Muench)  
FDOT Design Project Manager (Consultant Projects)  
Engineer of Record  
Local Maintenance Representative  
M&R Representative  
R/W Representative  
Traffic Operations Representative.  
Structures and Facilities Representative.  
District Utilities Representative (Gary Bass and Staci Nester)

cc: Director of Operation  
Director of Production  
District Construction Engineer  
District Design Engineer

**AGENDA:**

1. Introduction
2. Review of Time & Cost Overrun
3. Review of Work Orders / Time Extensions / Supplemental Agreements.
4. Review of Claims - How could they have been avoided.
5. Plan Review Comments
6. M&R Issues
7. Maintenance Issues – MRP Ratings
8. R/W Issues
9. . Review of public / property owner major concerns and complaints through the life of construction. **Review any resident and business surveys done during the project for District Annual survey or Business Accommodation specification.**
10. What worked, what did not work.
11. Other Issues

Session 2  
1 Hour

**INVITEES:** Session 1 attendees plus Contractor Representatives

**AGENDA:**

1. Introduction
2. Plans
  - a. Helpful Details
  - b. Unnecessary Details
  - c. Details you wish were in the plans
3. MOT improvements
4. Project Relationships & Partnering
  - a. Partnering Evaluations (Summary & Final Evaluation)
  - b. Helpful/Valuable practices
  - c. Communication & Escalation Effectiveness
  - d. Suggestions for future projects
5. Other Issues

Closeout  
30 Minutes

**INVITEES:** Session 1 attendees

**AGENDA:**

1. Review items presented by the Contractor at Session 2.
2. Develop any needed follow up plans.