University of Texas at San Antonio
Combined Science Facilities Renovations
Project # 401-286

Summary Report
for
Construction Phase Partnering
November 10, 2009

Kimble/Zetty
Facilitating Collaboration
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Partnering Principles

- Open, Honest Communication
- Full Stakeholder Participation
- Mutual Respect and Trust
- Teamwork and Collaboration
- Accountability and Responsibility
- Innovation and Creative Problem Solving
- Issue and Conflict Resolution
- Shared Goals
- Fairness, Equity and Win-Win Thinking
- Quality, Safety and Good Service
- Evaluation, Recognition and Celebration
- Full Commitment to the Partnering Process and to the Partnering Values
- Have Fun!

The Spirit of Partnering

“To partner is to act on our awareness of our interdependence. To partner is to serve, support and inspire the unleashing of everyone’s full potential. It is based upon the belief that others are inherently able and that we serve each other best when we view ourselves as partners in the discovery of both our abilities. In doing so, we foster our own and other’s growth and development. To partner is to act on our awareness of mutuality, to learn from each other and to learn together. To partner is to work together to serve self and others in pursuit of something greater than ourselves.”  

Jill Janov
Agenda

Welcome
   Opening Comments
   Review Agenda
   Introductions
   Partnering Values

Getting Started
   Project Overview
   Schedule Overview

Getting the Job Done
   Communication Matrix & Issue Resolution
   Needs, Issues and Opportunities
   Action Planning and Agreements

Furthering the Partnering Relationship
   Subsequent Meetings
   Ongoing Partnering Follow-up

Conclusion
   Plus / Delta Review
   Closing Comments
   Workshop Evaluation
### UTSA ★ Combined Science Facilities Renovations

**Construction Phase Partnering**  
November 10, 2009 ★ 9:30am – 2:30pm

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## Facilitating Collaboration

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**Kimble/Zetty** Facilitating Collaboration
Expectations

- I hope to get some issues resolved today.
- Effective communication
- Build a cohesive team and move forward with the project.
- Get some issues resolved and move forward.
- Raise some issues and leave with solutions.
- Understand how we will communicate effectively throughout the project.
- Represent UTSA's interests.
- Follow the project timeline and finish it on time.
- Learn how we can make this a successful project.
- Take a good look at the project safety issues.
- Establish a well-coordinated process for completing the work in the occupied spaces.
- Do everything I can to make this a successful project.
- Get a clearer understanding of when we can begin work in the occupied spaces.
- Establish good, effective lines of communication.
- Get everyone on the same page, communicating and resolving issues.
- Establish the flow of communication.
- Meet all the players and have a successful project.
- Resolve issues!
- Resolve the coordination issues with the labs.
- Leave here today with everyone working together as a team.
- Create a beautiful building that works as intended.
- Leave with a Partnering, teamwork mentality and work within the constraints of the contract.
- Listen and learn in order that we can contribute to the project.
- Establish good communication so we can resolve project issues.
- I am here to do whatever I can to help get the project completed in a timely manner.
- Construct a beautiful project on time, in budget and do it safely -- and finish saying this was a good job!
- Get a better understanding of the material submittals.
- Understand the project schedule and issues, and get the issues resolved.
- Learn how we can best contribute to a successful project.
- Encourage everyone to raise all their issues and begin to resolve them. Speak up and do not leave with unanswered questions.
- Be UTSA's representative for the project and create a beautiful building.
- Streamline project communications.
Opening Comments

Dave Riker
My hope for this Partnering meeting is that everyone will open up and talk candidly. I want everyone to be successful, and I hope we can resolve issues before they turn into conflict.

This is a complex project with renovation in occupied buildings. One important priority will be to coordinate the work with the building users. UTSA is attempting to become a Tier I research institution. This is a huge priority, and this project will further this effort.

Rob McNicol
I want to thank everyone for their participation, and I appreciate the investment of your time in the Partnering process. This will be a working session focused on project issues.

This is a high stakes project for everyone. This project will provide enhanced laboratory facilities for the campus, and labs are always challenging projects.

Normally, Partnering is conducted earlier in the construction process, but in this case there will be some benefits from holding the session now (several months into the project). We can use this meeting today to address some of the current, important project issues.

Project Overview

The Combined Sciences Facilities Renovations (CSFR) project includes two different building projects: (1) the complete renovation of two existing buildings in the west campus (the Life Science Lab and the Physical Science Lab), and (2) the fire alarm and sprinkler retrofit in the central campus Science Building.

We are having some challenges with submittals and equipment. The heat recovery unit submittal on the west campus is challenging. In addition, the installation, maintenance and operations for this unit will also be challenging.

The Science Building will also be challenging because it is fully occupied. In addition, the classrooms at UTSA are heavily utilized and this presents a challenge to the retrofit work. Our goal will be to minimize the impact and inconvenience to the building users. There are various options we can consider, and we will need to discuss these today.

Q: What is the Heat Recovery Unit (HRU)?
A: Hot and cool air that was previously exhausted will be recovered and reused for heating, cooling and dehumidifying. This is a heat/cooling exchange, not an air exchange, and the cross contamination standard is .045%. Lab buildings are energy intensive, so this is an important energy conservation technology.
There will be logistical challenges getting piping into the main campus. There were also challenges (noise and vibration disturbances) with the research labs adjacent to the west campus project. While the west campus is a typical construction site, the work in the Science Building will be much more complicated since the building is occupied.

The Science Building is a safety renovation project and there will be other campus renovations going on in this building simultaneously. Most of the campus projects will be small with some classroom and office renovations. The project team needs to understand how all the contractors will interact.

In fact, there will always be other campus-managed projects underway in this building, so the coordination of these multiple projects will be important. The impacted areas that are occupied will need to be reviewed, and this will be a good opportunity to coordinate with the CSFR project work.

Q: Is there a statement of shared values between OFPC and UTSA?
A: Yes. There is an OFPC and UTSA charter, but the charter is not specific to this project.

Compliance with code is a critical issue for UTSA, and adherence to code is explicitly mentioned in the charter. We hope the issue of code compliance was adequately addressed in the design. However, the review of the shop drawings will provide another opportunity to review and confirm compliance with code specifications.

It will be vitally important to agree about shared values now. It is also important to honor the contract documents – and there is a framework for changing the contract documents if there are cost and/or schedule changes.

Schedule Overview

The substantial completion for the west campus buildings is July 2, 2010; substantial completion for the Science Building is December 2, 2010. There will be incremental milestones such as completing work before and during holidays. Gilbane would ideally like to begin work this month in the Science Building on the third floor. However, it may be necessary to consider alternative sequencing, e.g., beginning on the second floor instead of the third floor.

The lecture halls must be done during the Christmas break. This auditorium work will be huge, and we have a very limited timeframe (3 weeks) in which to accomplish the work.

Currently, there is some disagreement over our work plan strategy:
- The contract describes conditions for completing the work in the Science Building, and it allows Gilbane to shut down workspaces for up to seven days. However, UTSA’s common practice is different.
- In addition, the amount of work to be done at night is also in question.
- Also, exposure to chemicals in the labs could be a huge safety and liability issue.
Nonetheless, we will work within the contract, and our goal will be to minimize disruptions to the campus.

Coordination with the users will be essential, and UTSA faces this type of coordination challenge on all their projects. Campus notification will be handled through a town hall meeting after UTSA receives a work plan from OFPC and Gilbane.

In the current plan, the classrooms and labs will have to be done at night. Corridors can be done during the daytime if passage in the corridors is not blocked. Work times in the research and office areas are still in question. However, this will not be an insurmountable challenge.

Gilbane needs direction within seven days to begin work by December 18th. We also need to define where we are going so we can order piping and plan the staging areas.

UT Health Science Center San Antonio had a similar challenge with renovating occupied spaces four years ago, and the decision to do all the work at night worked pretty well. There was a challenge keeping the work areas cleaned up, but it was much easier not having people underfoot in the hallways.

Associated Challenges:
- Shop drawings and submittals – There may be potential showstoppers, e.g., the proposed extended coverage fire sprinkler heads.
- The schedule is set to begin work on November 23rd.

The extended coverage sprinkler head works in all rooms where there are ceilings. The only challenge is in rooms without a ceiling. These include all labs and research rooms – about 50% of the building. The challenge here is the interpretation of the code. The State Fire Marshal is the office with jurisdiction.

The change to extended coverage sprinkler heads occurred during the VE process. These heads are designed to spray down, not up. This change was accepted without full agreement about whether the head will meet code requirements with the double T beams.

We need better communication with the UTSA users. Occupants need to be notified before construction begins. The town hall meeting will with help with this issue. With the previous mice issue, people who needed the information never got it.

 SUS
Needs, Issues and Opportunities

UTSA Facilities
- Security contracts, timelines and issues
- Schedule for submittals from OFPC
- Safety issues at labs from OFPC
- Science Building schedule for occupants (by Thursday, Nov. 12, from OFPC)
- Contingency plan from OFPC
- Shutdown plans including lab shutdowns from OFPC
- Communication with Facilities on emerging issues from OFPC
- Submittal review parties with advance copies (2 weeks) from OFPC

UTSA Academic Affairs & Users
Three levels of communication will be necessary:
(1) Department Chairs (day-to-day)
   - Advance notice of meetings, construction activities and information needed from Department Chairs
(2) Provost
   - Notice of major changes to schedule or scope
   - Dialog on major issues
(3) Office of Space Management
   - Notice of changes to room size, room use, room access and room numbers

OFPC
- From Gilbane (Monty H.) and UTSA (Paul G. & Daniel S.): Approved Science Building schedule
- From UTSA: Timely participation in shop drawing reviews, inspections and RFI responses.
- From UTSA EHS (John D. & Richard G.): Buy-off on inspections, sprinkler testing and flushing and Schirmer participation and recommendations.
- From UTSA EHS: Certification of lab cleanliness (chemicals) by 11/20/09
- From Gilbane: Get the schedule on track.
- From UTSA (Robert P.): Access to Science Building
- From Tom Green/Gilbane: Approved heat recovery unit submittal by 11/13/09
- From Facilities (Robert P.): Better flow of information to the UTSA users. The town hall meeting will help with this issue.

Jennings, Hackler & Partners
- Commissioning and close-out manuals (template for commissioning and close-out) from Gilbane by 11/18/09 in order to keep the process moving.
- Complete and compliant submittals from Gilbane on an on-going basis.
- Operation and Maintenance manuals from Gilbane after submittals and before the end of the project.
- RFIs – Suggestions from Gilbane on an on-going basis to help expedite the job.
Needs, Issues and Opportunities

Gilbane & Subs
• From Schirmer, Northstar and UTSA EHS for design approval:
  • Direction on sprinkler design in precast “Ts” by November 11
  • Direction on fire alarm submittal from by November 20
• From OFPC: Confirmation of “work schedule” specifications for the Science Building by November 17 to confirm sequencing plan to allow work to proceed.
• From the Design Team: Approval of heat recovery unit submittals by November 13 to secure production slot from the manufacturer
<table>
<thead>
<tr>
<th>Issue</th>
<th>Action Plans / Agreements</th>
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| Project Coordination Meetings | • Bi-weekly briefings will be needed to coordinate work between the CSFR project and the campus-managed projects in the Science Building.  
• Rob M. will take the lead on setting up these coordination meetings.  
• The first of these meetings will be held on Thursday, November 12  
• Robert E. will keep Rob M. apprised of campus projects in the Science Building. | Team                    | Bi-weekly                 |
|                              |                                                                                         | Rob M.                  | Throughout project        |
|                              |                                                                                         | Robert E. → Rob M.      | Thursday, Nov. 12         |
| Science Building Campus Impact Meeting | Thursday, November 12 at 1:30p.m.  
Preparation  
• Robert P. will locate a meeting room  
• Rob M. will be responsible for notifying the attendees and managing the agenda.  
• Monty H. will send the current work plan to Rob M.  
• Rob M. will provide copies to Robert P., Daniel S., George P., Robert E., and Paul G.  
Agenda:  
• Review the current work plan and specifications  
• Review the challenges and implications with the current work plan, and what the users will allow.  
• Review work plan options and alternatives.  
• If the work plan changes, we will need to consider the potential schedule and cost impacts.  
Attendees:  
• UTSA: Daniel S., George P., Robert E., Paul G., Robert P. and safety representatives  
• OFPC: Rob M., Michael C. and George B.  
• A/E: Grady J. and Raymundo Rivera.  
• Gilbane: Monty H., Mike G., Northstar and safety representatives. | See attendee list below  
Robert P.  
Rob M. → Attendees  
Monty H. → Rob M.  
Rob M. → See list | Nov. 12 at 1:30p.m. | Immediately  
Immediately  
Immediately  
At meeting |
| Science Building Access      | • Robert P. and Robert E. will work with the UTSA police department to provide access to the Science Building. | Robert P. & Robert E. → UTSC Police | Immediately |
| Lab Safety                   | • A distinction needs to be made between the research and teaching labs. Rob P. will provide this information to Rob M.  
• Exposure to chemicals in the labs could be a huge safety and liability issue for UTSA. Certification of lab cleanliness (chemical safety) will be needed by 11/20/09. | Robert P. → Rob M.  
UTSA EHS →  
Robert P. → Rob M. | Immediately  
By Nov. 20th |
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| **Fire Sprinkler Head Conference Call** | **Strategy**  
- Identify an engineer at Tyco (not the sales reps – they don’t agree) to review and verify the appropriate use of the extended coverage sprinkler heads. This engineer needs to have the authority to verify the conditions, make a decision on the sprinkler head and then sign and stamp his decision.  
- Provide photos and video documenting existing conditions to the engineer for his review.  
- Have the engineer confirm in the phone call and then provide letterhead documentation afterwards to verify his decision. (This is an “engineering judgment”.) | Robert P.  
Monty H., Northstar, Schirmer, & Tyco Engineer | Nov. 10  
Nov. 11 |
| **Fire Sprinkler: Pre-installation Meeting** | • Rob M. will schedule a pre-installation meeting for the fire sprinkler system within 2 weeks. | Rob M. | By Nov. 24 |
| **Project Meetings & Schedule Updates** | • During construction, bi-weekly project meetings will be held on the second and last Tuesdays.  
• The department chairs need regular project updates, and they will be invited to these meetings. They should also receive copies of the meeting minutes.  
• In addition, any changes that may affect the users need to be sent by email to everyone in the building. Robert P. and Robert E. will be responsible for sharing these updates on an as-needed basis. | Team  
Robert P. → Department Chairs  
Robert P. & Robert E. → Users | 2nd & last Tuesdays  
Before & after bi-weekly meetings  
Throughout project |
| **Schedule & Sequence of Work** | • Agreement on an access strategy and work plan in the Science Building is time sensitive and fast approaching critical.  
• Gilbane needs direction within 7 days to begin work by Dec. 18th.  
• We need to define where we are going so we can order piping and plan the staging areas. It may be necessary to consider alternative sequencing, e.g., beginning on the 2nd floor instead of the 3rd floor. | OFPC & UTSA → Gilbane Team | By Nov. 17  
Immediately |
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<tbody>
<tr>
<td>Schedule Float &amp; Recovery Schedule</td>
<td>• Monty H. provided a schedule update last week.</td>
<td>Monty H. → OFPC</td>
<td>Last week</td>
</tr>
<tr>
<td></td>
<td>• All the float is gone, mostly due to rain and submittal delays.</td>
<td>Gilbane</td>
<td>Now</td>
</tr>
<tr>
<td></td>
<td>• The heat recovery unit questions are still outstanding and are in the re-submittal process now.</td>
<td>Gilbane</td>
<td>TBD</td>
</tr>
<tr>
<td></td>
<td>• The work on the west campus needs a recovery schedule. Monty H. will provide this schedule to Rob M. in two weeks.</td>
<td>Monty H. → Rob M.</td>
<td>By Nov. 24</td>
</tr>
<tr>
<td>Contingency Plans</td>
<td>• Two contingency plans may be needed: (1) an alternative plan if the sprinkler heads are not approved, and (2) an contingency plan if work cannot be completed in the allotted timeframe.</td>
<td>Gilbane</td>
<td>As needed</td>
</tr>
<tr>
<td></td>
<td>• Rob M. and Monty H. will begin developing the necessary contingency plan(s) following this meeting.</td>
<td>Rob M. &amp; Monty H.</td>
<td>Immediately</td>
</tr>
<tr>
<td></td>
<td>• Submittal parties are usually held for major items only.</td>
<td>Rob M. → UTSA</td>
<td>Short lead items</td>
</tr>
<tr>
<td></td>
<td>• UTSA requests a 2-week turnaround for submittal reviews.</td>
<td>Team → Paul / Dave Design Team → Gilbane</td>
<td>Time sensitive items</td>
</tr>
<tr>
<td></td>
<td>• With short lead times, more communication will be required. Call with the initial distribution to provide an alert on short turn-arounds.</td>
<td>Gilbane &amp; Design Team</td>
<td>As needed</td>
</tr>
<tr>
<td></td>
<td>• Follow up with Paul G. or Dave R. on time sensitive issues.</td>
<td>Tom G. → Team</td>
<td>Now</td>
</tr>
<tr>
<td></td>
<td>• If submittals cannot be reviewed before the turn-around date, return as “Revise and Resubmit”.</td>
<td></td>
<td>Prior to Nov. 13</td>
</tr>
<tr>
<td></td>
<td>• If there is a problem with the heat recovery unit submittal, Gilbane would prefer having a workshop to resolve issues rather than a directive to revise and re-submit. Tom G. will know the status of the submittal within two days and will notify everyone prior to Friday, November 13. Resubmit for documentation will be suffice.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inspections</td>
<td>• Work must be inspected before closure.</td>
<td>Team → UTSA</td>
<td>Before closure</td>
</tr>
<tr>
<td></td>
<td>• Adequate notice must be provided.</td>
<td>OFPC &amp; Gilbane</td>
<td>Before inspections</td>
</tr>
<tr>
<td></td>
<td>• OFPC cannot wait on UTSA if adequate notice is provided.</td>
<td></td>
<td>For inspections</td>
</tr>
<tr>
<td></td>
<td>• UTSA Environmental Health and Safety buy-off is necessary on multiple items. Richard G. will follow up with John DeLaHunt to confirm that the project will have EHS support on these time-sensitive inspections.</td>
<td>Richard G. → John D.</td>
<td>As needed on EHS inspections</td>
</tr>
<tr>
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</tbody>
</table>
| Piping                                 | • UTSA has had a problem with the cleanliness of pipes in the past, and we need a proactive approach to keeping the piping clean.  
• All piping comes capped from the manufacturer and the contractor will cap and plug all piping at the end of each workday.  
• Assurances were provided that there will be no debris in the piping.  
• One testing option would be to use air to test piping rather than water. The team will use a Partnering approach to negotiate a testing solution. | UTSA  
Gilbane/Northstar Team | In the past  
Throughout project  
Throughout project TBD |
| Commissioning and Close-out Manuals    | • The commissioning and close-out manuals are in process.  
• These will be living documents.  
• Three copies will be distributed to OFPC, Jasmine and the job site office.  
• Operation and maintenance manuals need to follow immediately after. | Gilbane  
Gilbane  
Gilbane  
Gilbane | In process  
TBD  
After C&C manuals |
| Partnering Follow-up                   | • Partnering will remain on the meeting agenda.  
• We will update regularly and evaluate what’s working & what’s not.  
• We will include an “attaboy” list to acknowledge the extra efforts people make.  
• We will schedule another formal meeting only if necessary.  
• Think creatively from this point forward to resolve any future issues. We need to stay in a creative problem-solving mode and consider all good ideas. | Rob M. & Team | At bi-weekly meetings |
**Issue Resolution Guidelines**

1. Resolve all issues at the field level, whenever possible.
2. Escalate issues whenever:
   - the partners cannot agree on a decision.
   - the partners do not have the authority to make the decision.
   - an issue is threatening to delay the project.
   - an issue is threatening to damage the Partnering relationship.
3. Escalate unresolved issues as quickly as possible. Do not allow issues to fester. Deal with them immediately.
4. Escalate issues up evenly within each organization, and let go of the issue when it goes to the next level.
5. Agree to disagree, and disagree without being disagreeable.
6. Do not “leap-frog” or skip levels.
7. Upper level partners should insist that the chain of command be used.
8. Avoid “swoop-downs” by partners higher up in the chain of command.
9. Keep partners at lower levels informed of progress in the resolution process as it develops.
10. Return the agreed upon decision to field personnel as quickly as possible, once the issue is resolved.
### Plus / Delta Review

<table>
<thead>
<tr>
<th>+</th>
<th>What Worked Well?</th>
<th>Δ</th>
<th>What Would You Change or Do Differently?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>We had a good, open and respectful conversation.</td>
<td></td>
<td>Perhaps it would have been better to hold this meeting earlier in the project. However, we did not know about the major fire sprinkler issue until the last week or so.</td>
</tr>
<tr>
<td></td>
<td>People did not hold back; they spoke their minds.</td>
<td></td>
<td>Representatives from Schirmer were not here today to help resolve the critical issue. We will need them in next Thursday’s meeting.</td>
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<tr>
<td></td>
<td>We had good cooperation today, and this meeting was essential. I hope this cooperation continues throughout the project.</td>
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<td></td>
<td>This was an effective meeting, and it was worthwhile because we created an action plan to resolve the main issue.</td>
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<td></td>
<td>I was impressed that the facilitators did not let things float, but drove issues to decisions and pinned down responsibilities (action plans).</td>
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<td></td>
<td>It was good to document action plans for moving forward.</td>
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<tr>
<td></td>
<td>We resolved issues today.</td>
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<tr>
<td></td>
<td>We had a good, light lunch, and the location was great.</td>
<td></td>
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