University of Texas at San Antonio
Engineering Building ★ Phase II
Project # 401-205

Summary Report
for
Construction Phase Partnering
November 1, 2007

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

Kimble/Zetty Facilitating Collaboration
University of Texas at San Antonio
Engineering Building ★ Phase II
Construction Phase Partnering
November 1, 2007 ★ 9:00am – 2:00pm

Agenda

Welcome
Opening Comments  Patrick Rogers | Dave Riker
Review Agenda
Introductions
Partnering Values

Getting Started
Project Overview  Patrick Rogers | Rob McNicol
Schedule Overview  Rob McNicol

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

Furthering the Partnering Relationship
Subsequent Meetings and Follow-up
Ongoing Partnering Follow-up and Evaluation

Conclusion
Plus / Delta Review
Closing Comments
Workshop Evaluation

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### UTSA ★ Engineering Building – Phase II
### Construction Phase Partnering
### November 1, 2007 ★ La Cantera ★ 9:00am – 2:00pm

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**Project & Schedule Overview**

**Project History**
The project began in April 2004, with an RFQ for the architect. By December 2004, the programming was complete. However, in August 2005, the project was put on hold at design development phase.

The project resumed in September 2006, and the delivery method was switched from CSP to CM at risk. Walbridge/Bartlett-Cocke came on board at 50% CDs.

Walbridge/Bartlett-Cocke has provided invaluable project overview and preconstruction services (alternates, value engineering, etc.)

Walbridge/Bartlett-Cocke also did an outstanding job reducing the project overrun, and produced a miracle by getting the GMP within the budget. The Notice to Proceed was issued in July 2007.

Walbridge/Bartlett-Cocke has brought great value to this project.

**Project Schedule**
August 13, 2008 – structure complete
November 24, 2008 – permanent power
December 24, 2008 – conditioned air
May 4, 2009 – exterior complete
June 2009 – substantial completion
July 2009 – final completion

The project is on schedule now and may actually finish early.

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Discussion

Issues Disposition Matrix
The issues disposition matrix is working well. The goal is to continue to update and use this tool on an on-going basis. Minor issues are tracked at the project level through meeting minutes and at the field level with the project logs. Participate in the project meetings and to track the progress on safety issues.

Project Management Charter
Adhere to the agreements we have already made. Don’t put OFPC on the spot – they need 48 hours notice for inspections.

Charter Addition (Paul G.)
Timely review of submittals: the project team will proceed if not comments are received.

Campus Disruptions
Any activity resulting in campus disruptions requires significant notice: 7-14 days (the more the better). UTSA needs time to notify faculty and students about the changes to their routine. Err on the side of caution with plenty of advance notice (example: 2 weeks notice for fire lane).

Building Envelope and Leaks
The building envelope mock-up is quite extensive. There will be plenty of time to comment. The real challenge is with the attention to details during installation.

Safety
W/BC has been doing a great job. The team encourages everyone to speak up whenever they see a safety issue.

User Space Requirements
It has been hard to know the user space requirements with new incoming faculty not yet here. We will need 110 and 220 outlets in each room to accommodate a variety of uses and applications. As soon as new faculty come on board, check in with them about specific needs. Any major changes will require additional funding and engineering. The single point of contact for UTSA users is Daniel Sibley.

Engineering Students Tour
The civil engineering students appreciated the opportunity for site visits. To coordinate future site visits contact Rick Z. The celebration of the end of the Engineering Project will be on Monday, November 5 at 10:a.m. in the atrium.

Engineering Drawings
The engineering dean has a complete set of drawings. Contact Rick Z. to get access to the drawings you would like to see.
**Plan Questions**
Subcontractors need to document the answers they receive when getting clarification on design questions.

**Subcontractor Communication**
Subcontractors should not send email directly to UTSA. All subcontractor communication should go to W/BC. All notices to protect lien rights need to go to Mike Murphy at the UT System. Nathan O. will notify the subs. Remember: Rick Z. is not the owner until the project is turned over to UTSA.

The first owner’s meeting had about 40 people. This highlights the importance of a single point of contact (Daniel Sibley) for UTSA.

**Changes**
At this stage of the project, changes often have significant schedule and cost impacts. UTSA will minimize changes to project – or they will accept the impact.

**Note:**
(Additional discussion items are listed in the Action Plans & Agreements tables on pages 13 & 14, and some of the above items are duplicated in those tables. All action plans and agreements from this meeting are in the tables.)

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Needs, Issues and Opportunities

UTSA
- Issues disposition matrix from OFPC
- Minimum 48 hours notice for all inspections from OFPC. After resolution – charter
- Pay close attention to details: OFPC - A/E - W/BC
- Sprinkler shop drawings minimum 30 days prior to installation from A/E and W/BC
- Notify UTSA prior to making significant design or field changes that may impact the maintainability of the facility: A/E – OFPC – W/BC
- Require a single point of contact for the UTSA faculty
- Pay close attention to details: waterproofing, roof, windows, all openings: A/E – OFPC – W/BC
- Codes and contract documents
- Final buy-in on mock-up on decisions made by UTSA: A/E – OFPC – W/BC
- Maintain proper coordination of all contractor’s work: W/BC
- Buy-in on project ownership: UTSA
- Need special space requirements from users well in advance of installation; i.e., high power lasers, equipment with heavy weight, equipment with high-energy needs that require special consideration, special chilled water requirements, etc.

OFPC
- Safety awareness from W/BC, UTSA A/E & OFPC
- Communication: Shops → Facilities → UTSA → OFPC → W/BC → Subs
- Timely schedule of events: W/BC
- 48 hours inspection notice
- W/BC pre-test and prep prior to owner inspections
- Adequate representation from A/E and W/BC at inspections
- Timely review of submittals: if no comments are received in 2 weeks, proceed.
- Oversight/document review of building envelope roof, windows and skin from W/BC and A/E
- Fire hydrant/fire line issue meeting with W/BC OFPC, UTSA and A/E by 11/16/07

Garza Bomberger and Consultants
- Adherence to the contract documents
- Can small dimensional and coordination items be handled outside of the RFI process?
  - phone call with memo record and as-built
  - saves time, money and man-hours
  - reduces magnitude of email traffic
- Subcontractor coordination of drawings before fabrication
  - floor by floor
  - team review 1 week after submission
  - conflict areas clouded
  - coordination between trades on submittals
Garza Bomberger and Consultants (continued)
- Think ahead two weeks to avoid crisis decisions/time
- Clarity of submissions
  - data sheets that note (highlight) actual material
  - identify variance from specifications
- Reasonable notice for meetings, inspections and observations
- Integrate commissioning into project schedule
- Substitutions due to schedule conflict, follow procedure for substitutions
- Call for inspections only when ready

Walbridge/Bartlett Cocke
- Electronic submittal of shop drawings
- Construction inspections schedule
- Informal conflict resolution with follow-up documentation
- Concern on reluctance to make decisions
- Full understanding of CDs (add alternates, ASIs, clarifications)
- Close off Paseo
- Define the commissioning agents roles.
- Subcontractors understanding of the substitution procedure
- End user operations prior to substantial completion
- Changes vs. plan in place
- Quantity of people involved in decision making
- Timely review of submittals and shop drawings, RFIs

Subcontractors
- Lab equipment coordination: Subs → W/BC ← Subs
- Information clarification: Subs → W/BC → AE/OFPC/UTSA
  - critical items: 2-3 working days (minimize the number of critical items)
  - non-critical items: 5-7 working days
- Submittal/shop drawings approval: Subs → W/BC → AE/OFPC/UTSA
  - Turn-around time?
- Communication of schedule: W/BC
- Full participation of all subcontractors at MEP coordination meetings: Subs → W/BC → Subs
- Safe, clean jobsite: Subs ↔ W/BC ↔ Subs
- Electronic submissions: this will reduce paper copies and people can print what they need.
<table>
<thead>
<tr>
<th>Issue</th>
<th>Action Plans / Agreements</th>
<th>Who</th>
<th>When</th>
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</table>
| **Points of Contact** | • Design Team: Frank D. is the back-up for David T. – cc Frank on all communication to David.  
• Construction Manager: Carlos I. is the back-up for Nathan O. – cc Carlos on all communication to Nathan.  
• UTSA; Rick Zamora – POC for Facilities personnel  
• UTSA: Daniel Sibley – POC for Academic personnel | David T. & Frank D.  
Nathan O. & Carlos I.  
Rick Z  
Daniel S. | Throughout project |
| **Weekly Project Meetings** | • W/BC and the subcontractors hold weekly coordination meetings and regular MEP coordination meetings. | W/BC, Subs, Team | Weekly Meetings |
| **Formal Review of Coordination Drawings** | • The team will have a formal review of the coordination drawings. W/BC with GBA & ETB & HMG. The plan will be to review floor by floor before any fabrication.  
• This will prevent problems. | Team | Floor by floor |
| **Submittals** | • The mechanical submittals will be turned in tomorrow, November 2. A submittal review meeting will be held in two weeks.  
• Submittal turn-arounds in less than 2 weeks are great. Turn-arounds of more than 4 weeks are difficult.  
• W/BC will proceed if no comments are received within two weeks.  
• No substitutions are allowed unless permitted by the specifications – including cost-savings substitutions.  
• Three copies of final submittals with A/E comments from GBA to UTSA.  
• Patrick R., Rob M. and Nathan O. will review the electronic distribution options during the week of November 5th and will implement a system project wide. | W/BC ➔ OFPC & A/Es  
Team  
W/BC  
David T.  
Patrick R., Rob M. & Nathan O. | Nov. 2 Mtg. by Nov. 16 2 weeks  
Throughout project  
Week of Nov. 5th |
| **RFIs** | • Subcontractor should propose solutions with RFIs.  
• W/BC moving the RFIs on to the A/E within 24 hours.  
• Weekly coordination meeting helps to identify critical RFIs. | Subs  
W/BC ➔ A/Es | As necessary  
Within 24 hours |
| **Small Dimensional Changes** | • Try to settle small changes with a phone call and a memo of record instead of using the RFI process.  
• The memos could be sent to Rob M. and UTSA.  
• Alternative: phone calls followed-up by a confirmation RFI, consolidating several small items on one RFI. | Team | Throughout project |
| **Commissioning** | • W/BC will incorporate commissioning into the schedule.  
• The commissioning agents roles will be defined in a meeting after this meeting. | W/BC  
Team | Immediately After Partnering meeting |
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| Mock-ups                  | • The building envelope mock-up is quite extensive. There will be plenty of time to comment.  
                               • Mock-up agreements must be documented following the meeting.  
                               • W/BC cannot make changes after the mock-up review if they affect cost without going through the Change Order review and approval process.                                        | Team                 | TBD                         |
|                           |                                                                                                 | W/BC                 | Following meetings          |
|                           |                                                                                                 | W/BC                 | As needed                   |
| User Space Requirements   | • With new faculty coming, it has been hard to know the user space requirements.  
                               • Check in with new faculty as they come on board about specific needs. Any major changes will require additional funding and engineering.  
                               • The single point of contact for UTSA users is Daniel Sibley.                                                                                         | UTSA                 | TBD                         |
|                           |                                                                                                 | Team                 | Throughout project          |
| Final GMP Documents       | • The final GMP involved multiple alternates and addendums. Everything needs to be documented, and everyone needs to be aware of the most recent approval changes.                                    | Team                 | Immediately                 |
| Fire Hydrant & Fire Lane Meeting | • The team will hold a fire hydrant & fire lane issue meeting.  
                               • UTSA has a resolution on the fire hydrant.  
                               • W/BC does not want this to become a critical path item.  
                               • OFPC & W/BC are waiting on feedback from Rick Z. Rick expects to reply to Rob M. during the week of November 5th.          | Team                 | By Nov. 16                  |
|                           |                                                                                                 | UTSA                 | Week of Nov. 5th            |
|                           |                                                                                                 | W/BC                 |                             |
|                           |                                                                                                 | Rick Z. → Rob M.     |                             |
| Paseo Area Access        | • For safety reasons, W/BC needs to limit access to the Paseo area on the east side of EB II.  
                               • Nathan O. will submit a request with sketches to review and decide at the next owner’s meeting.  
                               • Rick Z. would like to walk the site in this area to better understand what is being requested.                                                        | W/BC                 | TBD                         |
|                           |                                                                                                 | W/BC → OFPC          | Next owner’s meeting        |
|                           |                                                                                                 | W/BC & Rick Z.       | Immediately                 |
| Campus Disruptions       | • Any activity resulting in campus disruptions requires significant advance notice, 7-14 days.                                                                                                                    | W/BC                 | Throughout project          |
| Subcontractor Communication | • All subcontractor communication should go to W/BC.  
                               • Subcontractors should not send email directly to UTSA.  
                               • All notices to protect lien rights need to go to Mike Murphy at the UT System.  
                               • Nathan O. will notify the subs.                                                                                                                                 | Subs → W/BC          | Throughout project          |
|                           |                                                                                                 | Subs                 | As needed                   |
|                           |                                                                                                 | Subs → UT System     |                             |
|                           |                                                                                                 | Nathan O.            | Immediately                 |
Issue Resolution Ladder Guidelines

1. Resolve all issues at the field level, whenever possible.
2. Escalate issues up the ladder 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 evenly up both sides of the ladder, 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 skip levels or “leap-frog” up the ladder.
7. Upper level partners should insist that the ladder (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

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<thead>
<tr>
<th>+ What Worked Well?</th>
<th>Δ What Would You Change or Do Differently</th>
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<tbody>
<tr>
<td>It was good for us to see and identify each other.</td>
<td>Some UTSA stakeholders were not present.</td>
</tr>
<tr>
<td>This is a great facility.</td>
<td></td>
</tr>
<tr>
<td>We had the right people including subcontractors, the contractor, UTSA and OFPC.</td>
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