California Department of Transportation
Partnering Facilitator Checklist

☐ Submit Facilitator Registration Form to Caltrans Partnering Program

☐ Facilitate kick-off partnering workshop

☐ Develop partnering charter:
  □ Mutual goals
    □ Include core project goals (safe, on time, on budget, quality met)
    □ Include project-specific definitions of all mutual goals
  □ Partnering maintenance and close-out plan
  □ Dispute resolution plan
    □ Include dispute resolution ladder
  □ Commitment statement and signatures
  □ Submit partnering charter to Caltrans Partnering Program

☐ Set-up monthly partnering evaluation survey:
  □ Get email addresses of survey participants and report recipients
  □ Mutual goals
    □ Includes core project goals and the associated objective criteria of success
    □ Includes any project-specific goals and mutually supported individual goals
      and the associated objective criteria of success
    □ Optional - key issues/risks (update as needed quarterly)

☐ Facilitate close-out partnering workshop, if requested
  □ Document lessons learned (no standard format required)
    □ Send lessons learned to project team
    □ Send lessons learned to project executives
    □ Submit lessons learned to Caltrans Partnering Program

☐ Submit final partnering evaluation survey results on core project goals to Caltrans Partnering Program using standardize submittal format to Caltrans Partnering Program

Monthly Reminders
Review survey results
  • Take action as appropriate
Submit survey participation-levels to Caltrans Partnering Program
  • # team members invited to take survey
  • # team members that submitted a completed survey

Quarterly / Periodical Reminders
Update key issues on monthly partnering survey
Hold follow-up partnering sessions and/or facilitated dispute resolution sessions
Check in with the RE, PM, and other team members as appropriate to keep informed on project progress