



Teaming for Success: Using Partnering Principles to Support Collaboration and Communication In Government, Non-Profit, Business and Community Groups

By Jerry Clay and Tracey Wiltgen

Partnering is a process that was originally developed and used in the construction industry to redesign the relationship of all stakeholder parties so that project-related problems were resolved in a cooperative manner before they escalated into conflicts, disputes and lawsuits that would have delayed the project and added costs. As a proven *conflict prevention approach*, the principles of Partnering can be applied to any project or group working together.

The Partnering process stresses the importance of developing positive relationships, honest communication and moving beyond differences to achieve a common vision and goals. It addresses miscommunication, misunderstanding and personality clashes that can impact productivity, delay timelines and affect success. It focuses groups on prioritizing action steps, to efficiently implement a plan and achieve the targeted goals. It strengthens collaboration, communication and mutual respect. It seeks to ensure that key project participants and their employees understand and share the same vision and have a plan in place to minimize the potential for disputes that can destroy a project. These concepts are core needs in a broad variety of settings such as governmental agencies, non-

profit organizations, business transactions, boards of directors and community groups guided by a common mission.

Partnering In Construction

The Construction Industry Institute defines partnering as "a concept that focuses on making the goals of the owner, contractor, designer and supplier better understood and easier to manage. Partnering outlines mutually attainable goals, satisfies long-term needs and assigns risk among all the parties involved." Typically, a neutral party assembles the key players (owner, designer, contractor, subcontractor, supplier, and regulatory agency) of a project to agree on project goals and establish a process for resolving conflict. In the words of the Associated General Contractors of America:

"Simply put, Partnering is just people working together – a voluntary system of handling normal, everyday jobsite construction problems in a mutually agreeable manner before they turn into major issues that create lawsuits. There is no mystery about partnering; it is simply an attitude change. All stakeholders resolve that issues be settled by peacefully employing a positive and cooperative approach."

Adapting Partnering Principles

Unlike a construction project that has a defined beginning and end and readily identifiable goals and process steps, projects in other settings may be ongoing and involve a wide range of participants with divergent goals and ill-defined action steps. They still lend themselves to the central element of the Partnering process: participation by key stakeholders in a retreat led by an experienced facilitator. The retreat focuses the participants on their commitment to their mutual goal or mission, and assists them in identifying and agreeing on guidelines for effective communication, coordination and cooperation to prevent conflicts and ensure the mission or goal is achieved. Among other things, at the retreat the participants:

- learn and experience one another on a personal level
- identify potential problems or challenges in completing their project or meeting their goal
- brainstorm solutions to prevent or overcome the potential problems and challenges
- develop a problem-escalation ladder which provides a mechanism for resolving conflicts that may arise; and
- draft and sign a project charter or pledge to abide by the identified goals and action steps during the retreat.

The facilitator captures the ideas and agreements that are generated in the retreat on a flip chart as a group memory and later provides them to each participant. The interaction builds stronger working relationships and elicits ideas and agreed upon steps to follow later when challenges and problems arise.

Ideally, everyone involved in the project, team or department must agree to be involved in the partnering process, including completing a pre-survey and participating in the retreat. Pre-surveys provide insights into the group and project issues which allow the facilitators to customize a retreat agenda to meet the needs of the people participating, including appropriate exercises and activities designed by the facilitator. The retreat should be conducted in a comfortable setting outside of the typical workplace and may take one to two days, depending on the size of the group and the complexity of their project or goals.

To ensure the greatest success, following the retreat, the charter and action steps should be regularly reviewed and updated by the group, reinforcing their commitment to working together and evaluating their progress to achieving the goals that the group agreed on at the retreat. Consistent re-evaluation of how things are working ensures that the group doesn't slip back into old habits and further strengthens communication. It provides satisfaction that goals are being achieved and re-energizes the group to continue working together towards their shared vision.

Scheduling follow-up reviews is an extremely important component of Partnering for businesses, organizations and other groups that will continue working together in the future (unlike construction projects that generally bring in different players for one specific job that eventually comes to an end). Partnering for these groups creates an entirely new paradigm in their working relationship that allows them to succeed on current initiatives, as well future ones. To ensure that the new paradigm replaces the old way of operating, regular reviews must be scheduled in which the group charts its own progress. Through an established routine of

meeting to celebrate successes and brainstorm ideas to overcome challenges, the group builds on the positive outcomes generated from the Partnering retreat.

Examples

Government Agency. The Hawaii Department of Human Services had suffered downsizing and one division had been without a supervisor for a number of months. When a prior supervisor was reassigned to the division, she encountered low morale and a lot of miscommunication and misunderstanding among the staff. She asked the group to participate in a Partnering process with the hope that it would help them refocus on the important work and responsibilities of their office and thereby strengthen efficiency and productivity.

Everyone in the division completed a confidential pre-partnering survey to help the facilitators gain an understanding of the employees' view of the situation. Based on the very candid responses in the survey, the facilitators designed a one-day Partnering retreat that provided both team-building exercises to strengthen the working relationships of the participants and strategic planning activities to help them brainstorm ideas to overcome identified challenges.

While the employees started the day of the retreat with trepidation, the team-building exercises and comfortable surroundings allowed them to quickly warm up and enjoy interacting with one another. This set the stage for the harder work of describing their current working environment, including the challenges that were interfering with their successfully doing their jobs. Listing the strengths (the gems) of the group before tackling the challenges (the rocks) reminded all participants about the positive qualities they possessed both in their work and their interpersonal relationships. Highlighting their strengths also helped them to focus on the core mission of their division and their common commitment to that mission.

With a more unified focus, further activities in both small and large groups enabled them to identify the barriers that prevented them from being more productive and efficient and to envision what a new paradigm might look like. During these interactions, management and employees were able to open a discussion about core regulations and procedures that hadn't been fully understood by the employees in the past. This breakthrough conversation helped them adopt a new approach for working together in the future.

Two days after the retreat, the entire staff gathered to review the group memory as recorded by the facilitators and the key areas of agreement generated during the retreat. By continuing the discussion initiated during the retreat they helped ensure that the retreat's positive outcomes also continued.

Following the retreat both the supervisor and various other employees who participated reported improved communication and a more open working environment. Two months after the retreat, some of their comments included:

"We got to address difficult issues that we just couldn't talk about in the workplace."

"We've met as an office since the retreat and have continued talking."

Partnering for businesses and other organizations creates an entirely new paradigm in their working relationship that allows them to succeed on current initiatives, as well as future ones.

"We really needed this. The work we do is difficult and we're all committed to the families and youth we help. It's really important that we can talk and work together to do our job successfully."

To further build on the positive outcomes of the Partnering retreat, the facilitators conducted a half-day follow-up session for the group. During that session the participants: evaluated their progress; brainstormed additional ideas to strengthen daily operations; and created a charter reflecting their core values and vision to guide them in their work. The charter was later enlarged and framed and placed in a prominent location in the office to remind everyone of the importance of being a team and working together.

Bar Association. Craig P. Wagnild, the 2013 President of the Hawaii State Bar Association (HSBA), started his presidency by asking all of the members of the HSBA board of directors and the HSBA staff to participate in a half-day accelerated Partnering process. Unlike the Division of the Department of Human Services previously described, members of the HSBA board and staff did not have a long-term working relationship. The group was comprised of past directors, a few new directors, and both a few long-time and a few new staff members. Wagnild had already invested numerous hours helping members of the board and staff to see a common vision and identify goals to achieve that vision. "I had a vision that I really wanted to see achieved during my year as President," said Wagnild. "I knew that the directors and staff were committed to the vision, but I felt we needed some assistance to ensure that we would create a plan to really achieve it. The Partnering process seemed to be just what we needed."

As in the previous example, all the participants completed an anonymous pre-retreat survey. This survey focused on each person's view of the vision for HSBA, specific goals or activities that they felt needed to occur, and any obstacles they could foresee that would prevent them from achieving those goals. Because the survey results showed an understanding of the vision and a unified desire to achieve it, the facilitators designed a retreat process that focused on the identification of measurable goals and concise action steps to achieve the goals.

The retreat participants came ready to work. The facilitators used an abbreviated team-building exercise to help everyone quickly get to know one another, as well as set the stage for collaborative engagement. In small groups the participants shared personal strengths that they brought to HSBA, identified measurable goals to achieve during the year and prioritized which goals should be worked on first.

The small groups then came back together to share their key goals with the rest of the participants. Following a large group discussion, the goals developed by the small groups were collapsed and narrowed down to four key measurable goals. Every participant was then assigned to a new group comprised of both staff and board members. Each group was assigned one of the goals and charged with creating clear action steps with deadlines and an identified champion, to achieve it. Every small group came up with detailed plans and timelines that they shared at the end of the session with the entire group.

Following the half-day partnering retreat, Wagnild, the Board, and the Staff were enthusiastically implementing action plans created during the session. Updates on each plan became a regular item on every Staff, Committee and Board meeting agenda. Six months later, Wagnild reported that:

"Thanks to the Partnering process, we have implemented specific, tailored plans to accomplish goals the Board and Staff set together, and many of these goals have already been achieved. I'm confident we'll achieve the vision I saw entering this year, and the sense of buy-in and commitment on the part of all of our Directors and Staff has truly made this possible."

Cecelia Chang, one of the newer members of the HSBA Board said:

"As a newcomer to a large board, I especially appreciated the Partnering process because it helped to identify

our different goals and zero in on what matters most. This dynamic process guided the board's strategic planning for the year."

Key Elements of Partnering.

People striving towards a common vision, and want to succeed. Participation in a Partnering process before commencing the work to achieve that vision will lay the foundation for success. Partnering is an excellent strategy for strengthening the working relationships and increasing the productivity of individual teams, departments, or even inter-departments within a company.

It is important to remember that Partnering is a conflict prevention rather than a conflict resolution process. It is not a substitute for mediation or other dispute resolution processes for groups already entrenched in conflict to work with any group, large or small, that is involved in a joint project or has a common goal or mission. Examples include but are not limited to:

- a new project or initiative being launched
- a team coming together for the first time
- a group that has been working together that needs to take stock
- a group with conflicts just below the surface
- groups that need to develop action plans; and
- organizations that are merging or decoupling.

However, to ensure that a Partnering process is successful, the key stakeholders of the group must be committed to investing the time it takes to make it work. Without the pre-planning (including a pre-retreat survey), full participation in the Partnering retreat, the post-retreat follow-up and the integration of progress evaluations into the regular routine of the group, the positive impact of Partnering will be diminished.

Finally, there is no one set approach or recipe for successful Partnering. While every Partnering process involves a pre-survey and a retreat, the questions in the survey as well as the exercises and activities conducted during the retreat depend on the make-up and specific needs of the group. For example, people in a department who have been and will continue working together for a very long

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time may benefit from more team-building activities, exercises that help them assess their current paradigm to determine what is and isn't working well, and problem-escalation ladders to address conflicts that may arise in the future. On the other hand, a group that will only be working together for a limited period, such as a Board of Directors, may need to focus its energy on identifying measurable goals and clear action plans to achieve those goals before their time is up.

The three key elements to keep in mind for a successful Partnering process are:

1. designing the right process to address the specific issues and dynamics of the group involved;
2. working with committed stakeholders who will continue to build on the positive outcomes of the Retreat by continually evaluating progress with the group members; and
3. remaining flexible to adapt the process as the needs of the participants require.

About The Authors



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