

### Ten golden rules for establishing a partnering agreement

#### 1 Spend plenty of time planning

- ▶ Partnering requires much more time to be spent 'up front'. Consider at the outset the full extent of what needs to be done, by whom, and by when.
- ▶ Establish a complete procedure timetable with consultation periods, approval dates, tender invitation and evaluation and contract award.

#### 2 Clarify what is important to you

- ▶ Be clear why you are partnering. Identify your Success Factors, and how you will judge at the end of the exercise whether your project is successful.
- ▶ Establish your objectives (e.g. minimising life cycle of whole life costs, raising standards, reducing defects, complaints etc) and communicate them to all involved.

#### 3 Benchmark current performance

- ▶ Measure performance currently achieved by letting projects by the traditional route and identify any areas where you wish to see improvement.
- ▶ Establish Key Performance Indicators that focus on your areas for improvement and Success Factors. Set targets for improvement, and Action Plans for achieving them.

#### 4 Ensure that everybody is ready

- ▶ Ensure that all involved, including lawyers, auditors and members, fully understand the concept of partnering.
- ▶ Nominate a 'partnering champion' to help remove any potential obstacles to partnering (e.g. Standing Orders) before your start.

#### 5 Establish a 'Focus Group' or 'Project Board'

- ▶ A small team, representing partners and stakeholders, should steer the project by focusing on achieving the Success Factors.
- ▶ The team will propose the principles of the agreement (basis of cost, form of contract, duration etc.) and how it will demonstrate the benefits secured.

## 6 Compile robust evaluation models for selecting partners

- ▶ Select your partners on the basis of quality as well price, where 'quality' represents a candidates' potential for adding to the value of the project and the achievement of your Success Factors.
- ▶ Ensure that the selection process is fair and is able to demonstrate probity and accountability.

## 7 Establish mutual objectives with your partners

- ▶ Compile objectives for the project that incorporate both you and your partners' success factors.
- ▶ Make sure your partners understand your objectives and provide them with clear incentives for achieving your Success Factors.

## 8 Hold partnering workshops regularly

- ▶ Get everybody involved to attend a 'start up' workshop to agree details (e.g. reporting procedures, 'open book' arrangements, 'pain/gain' shares, dispute resolution process).
- ▶ Regular workshops help ensure commitment is sustained and that the focus is maintained on the Success Factors by all concerned through to completion.

## 9 Monitor and Review Progress

- ▶ Establish a monitoring system that is based on the Success Factors and Key Performance Indicators that you have identified.
- ▶ Ensure that the cost consultant adequately checks any actual costs that are to be reimbursed, and monitors expected final costs against available budgets.

## 10 Learn from the process and above all else, enjoy it!

- ▶ Hold a 'post-completion' workshop and ask how would you do it better next time? How can we repeat what went well and not what went badly?