NAVAL FACILITIES
ENGINEERING COMMAND

GUIDE TO Partnering FOR Environmental Projects

"We cannot accomplish the Navy's mission to clean up our bases without working closely with the Environmental Protection Agency, the States, and the individual communities. Partnering is the process to bring us together; teamwork is the result. Because each member brings a commitment to the table, partnering has to be relatively formal to increase the chances of success. Ultimately we want partnering to be the preferred method for everything the Navy does."

—William A. Quade
Director of Environment,
Naval Facilities Engineering Command

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List of Acronyms

ARAR—Applicable or Relevant and Appropriate Requirements

BEC—BRAC environmental coordinator

BRA—baseline risk assessment

BRAC—Base Realignment and Closure

CEO—Chief Executive Officer

CERCLA—Comprehensive Environmental Response, Compensation, and Liability

CERLCIS—Comprehensive Environmental Response, Compensation, and Liability Information System

CLEAN—Comprehensive Long-Term Environmental Action, NAVY

CO—Commanding Officer

COE—Army Corps of Engineers

DERA—Defense Environmental Restoration Account

DOD—Department of Defense

DOE—Department of Energy

DSERTS—Defense Site Environmental Restoration Tracking System

DSMOA—Defense State Memorandum of Agreement

DSN—Defense Switched Network

DUSD(ES)—Deputy Under Secretary of Defense for Environmental & Security

EFD—engineering field division

EPA—Environmental Protection Agency

EPA HQ—Environmental Protection Agency headquarters

ESC—Engineering Service Center

FDEP—Florida Department of Environmental Protection

FFAs—Federal Facility Agreements

H & S—health and safety

IDW—investigation derived waste

IR—installation restoration

LANTDIV—Atlantic Division

MCAS—Marine Corps Air Station

MI—management information

MIS—management information system

NAVFAC—Naval Facilities Engineering Command

NAVFAC HQ—Naval Facilities Engineering Command Headquarters

NCP—National Contingency Plan

NFESC—Naval Facilities Engineering Service Center

NFRAP—no further response action planned

NPL—National Priorities List

O&M—operations and maintenance

PA/SI—preliminary assessment/site investigation

PCR—pollution control report

PIP—Partnering Implementation Plan

PM—project manager

PMA—positive mental attitude

POC—point of contact

QA/QC—quality assurance/quality control

QITs—quality improvement teams

RA—remedial action

RAB—Restoration Advisory Board

RCRA—Resource Conservation and Recovery Act, as amended

RCRIS—Resource Conservational Recovery Information System

RD—remedial design

RECs—regional environmental coordinators

RFA—RCRA facility assessment

RI/FS—remedial investigation/feasibility study

ROD—record of decision

RPMs—remedial project managers

RTQM—remedial technical quality management

SOP—standard operating procedure

SOUTHDIV—Southern Division

SOUTHWESTDIV—Southwest Division

TBC—to be considered

TQL—Total Quality Leadership

TQM—Total Quality Management

Introduction

What Is Partnering?

Partnering is a process that brings key players in a project together to work as a team. The process creates an environment of trust in which the team members (known in partnering as stakeholders) communicate with one another and work together to achieve common goals. Positive leadership, customer focus, employee empowerment, and continuous process improvement are hallmarks of partnering.

A History of Partnering

Partnering principles are at least 2,000 years old. In the early 1980s, these principles were applied in the chemical industry to resolve in-plant problems. In 1987, the Construction Industry Institute introduced partnering into the private construction industry to reduce expensive litigation and delays. The Army Corps of Engineers (COE) adopted this idea to its construction projects in the mid-1980s. By 1989, the Naval Facilities Engineering Command Headquarters (NAVFAC), in Alexandria, VA, had awarded two large military construction contracts using partnering. Today, NAVFAC uses partnering on more than 100 military construction contracts and in numerous environmental projects and initiatives at significant time and dollar savings.

Total Quality Management (TQM), known as Total Quality Leadership (TQL) in the Department of the Navy, is a great foundation for partnering. Organizations changing their management style to reflect TQM principles can more easily adapt to partnering because they have already begun the team building required of partnering.

Partnering is a process that brings key players in a project together to work as a team.

COE and NAVFAC are currently using partnering for their environmental programs. Southwest Division, Naval Facilities Engineering Command (SOUTHWESTDIV), in San Diego, CA, initiated the first environmental partnering sessions with regulators at Marine Corps Air Station (MCAS) in Yuma, AZ. After partnering was successfully used at this site, another base within the SOUTHWESTDIV region was selected to apply the partnering principles. Eventually, SOUTHWESTDIV expanded partnering use from site focus to program focus, working with the regional Environmental Protection Agency (EPA) office and State of California EPA staffs.

In fall 1992, Atlantic Division, Naval Facilities Engineering Command (LANTDIV), in Norfolk, VA, decided to use facilitated partnering techniques to improve communication over Naval Weapons Stations Dahlgren and Yorktown, both in Virginia and most recently named to the National Priority List. Partnering was used to develop the Federal Facility Agreements (FFAs).

In spring 1993, Southern Division, Naval Facilities Engineering Command (SOUTHDIV), in Charleston, SC, EPA Region IV, and the Florida Department of Environmental Protection (FDEP) signed an Environmental Restoration Partnership Charter to achieve effective teamwork for environmental restoration programs at Navy and Marine Corps installations.

With the support of the Office of the Deputy Assistant Secretary of the Navy for Environment and Safety, partnering is being applied at the national level in bringing together the efforts of the Headquarters, EPA, Office of the Under Secretary of Defense for Environment and Security (DUSD(ES)), the other equivalent

representatives in military service and in the Department of Energy (DOE) under the banner of the EPA/DOE/Department of Defense (DOD) Leadership Council. It is this kind of top management commitment to partnering that will effectively move the Federal Government's installation restoration program toward more timely and cost-effective cleanups. A tri-service committee is working on a partnering guide for DOD environmental missions, which is expected to be printed by December 1994. The DOD guide, with the backing of the DUSD(ES), will advocate the use of formal partnering for all environmental missions in DOD with the commitment that this tool will enable DOD to accomplish its missions effectively and efficiently.

Today, NAVFAC uses partnering on more than 100 military construction contracts and in numerous environmental projects and initiatives at significant time and dollar savings.

LANTDIV has produced a partnering video entitled "American Challenge: Build Bridges." The video is currently available from Naval Facilities Engineering Services Center (NFESC). The purpose of the video is to promote partnering, to champion partnering, and to show where partnering has made a difference. The video contains various interviews with environmental partnering participants and partnering champions both within DOD and outside DOD.

Vision Statement

Partnering will be used to execute all of the Navy's environmental programs.

Mission Statement

Environmental projects that are affordable and of superior quality will be completed in a timely manner through partnering. The projects include installation remediation, compliance, obtaining permits, pollution prevention, solid waste minimization/recycling, research and development, dredging, training, and base closure.

Each stakeholder of an environmental project team will represent that agency's interest while working for the mutual benefit of the entire team. Every agency will empower its team representatives to conduct daily business in such a way that most issues and problems are resolved at the level where they occur. In other words, involvement of top management should be a last resort.

Guiding Principles

Agencies committed to partnering will—

- Support partnering by assigning one person to the team throughout the life of the team.
- Share the expenses of a facilitator and facilities with other members of the team.
- Allow their representatives, within mutually agreeable guidelines, to make decisions that will accelerate the remediation and compliance processes at Navy installations.
- Pursue budgetary policies that resolve, on a case-by-case basis, the indemnification issue so that all stakeholders appropriately share the risk associated with the project(s).

The team will—

- Identify and eliminate barriers to a faster, more cost-effective program.
- Identify, quantify, and eliminate waste through continuous process improvement.
- Develop acceptable program risk and risk sharing that fosters progress while protecting natural resources and human welfare.

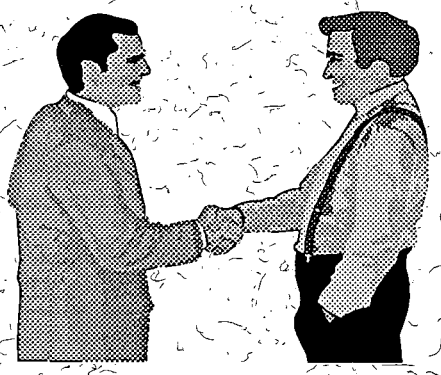
Stakeholders will—

- Respect their fellow stakeholders and the positions they hold within their respective organizations.
- Resolve issues/problems/conflicts, thus avoiding adversarial relationships and the need for formal disputes resolution.
- Maintain professionalism and enthusiasm and encourage open communications, so that the partnership experience is educational and enjoyable.
- Conduct themselves with the highest standards of honesty and integrity.
- Apply partnering concepts to all areas of the organization as well as to other Federal, State, and local governmental agencies, contractors, and citizen groups.

Goals and Objectives

Goals for environmental partnering are to—

- Build a cohesive team based on trust and open communications between the Navy, the regulatory agencies, the community, and the contractor(s). This team will work to complete a quality environmental project on time, within budget, and at a reasonable profit for the contractor.
- Make decisions and resolve as many as possible of the issues/problems/disputes between members of the team at the team level.
- Develop long-term relationships between stakeholders that can be effectively transferred to other environmental projects to improve the execution of those projects.
- Develop an environment that promotes the open exchange and consideration of ideas. Avoid tunnel vision, or such responses to new ideas as "that's not the way we have always done it."
- Take appropriate risks commensurate with rewards as stakeholders seek win-win solutions.
- Ensure that each stakeholder is aware of other stakeholders' specific objectives and is genuinely interested in helping that partner to attain objectives and to overcome concerns.



Elements of Partnering

Who Are the Stakeholders?

Stakeholders are those people and agencies involved in or affected by a project. They are committed to building trust and open communications for the betterment of all. The people may change over the course of the project, so the key to success is selecting those who have strong interpersonal skills and are willing to try new approaches.

Applications of Partnering

Partnering may occur at any level of the agencies and contractors involved. For example, partnering in EPA Region IV involves senior management at SOUTHDIV, EPA Region IV, and the FDEP. The purpose of this partnering effort is to accelerate the cleanup on all Navy bases within Region IV.

Partnering in this effort uses a two-tier arrangement. The first tier consists of the agencies' remedial project managers (RPMs) and the contractor's project manager (PM). Other stakeholders at that level may be invited to join the team as needed for a specific phase of the project. The second tier consists of the managerial level of stakeholders, such as the engineering field division (EFD) environmental director, the regional EPA Federal facilities director, the State Federal facilities division director, and the appropriate manager from the contractor.

How to Form a Team

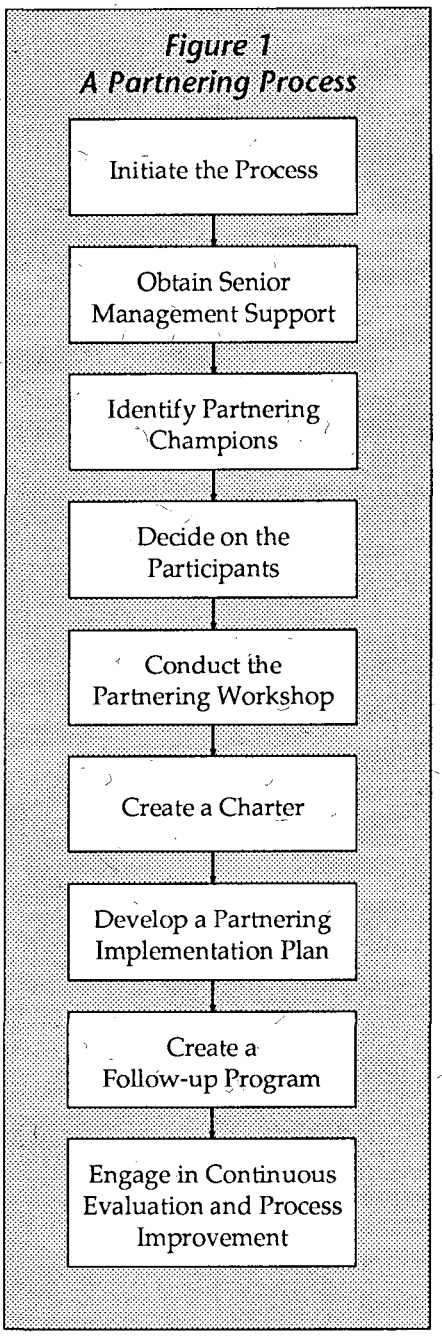
Implementation of Navy environmental partnering has been focused within an EPA region. Figure 1 illustrates a flow chart of a partnering process. Two approaches have been taken to forming partnering teams within a region.

In the "top-down" approach, the regional managers use partnering to establish the ground rules for applying partnering within a region. Specific project teams are then established. A regional team is composed of the regional EPA Federal facilities director; EFD environmental and construction division directors; regional environmental coordinators (RECs); and equivalent State, county, or local environmental administrators. A regional partnering charter, or Memorandum of Understanding, is developed. The charter details the roles and responsibilities of each stakeholder and the informal issue resolution process to be used by all project teams within that region.

A "bottom-up" approach follows the construction industry model for partnering and conducts the initial partnering session at the local installation. The teams are made up of environmental RPM personnel from the local, county, State, and Federal agencies; the EFD RPM; the contractor's PM; and local community representatives. The local installation team establishes its set of roles and responsibilities, mission/vision statements, goals and objectives, and informal procedures for resolving issues.

The people may change over the course of the project, so the key to success is selecting those who have strong interpersonal skills and are willing to try new approaches.

Figure 1
A Partnering Process



An expansion on the concept of the local installation team has been to set up a core team and an enhanced installation team. The core team, which meets bimonthly and is the smaller of the two teams, conducts the project's daily business by using partnering. The enhanced team consists of support, regulatory, and other governmental agencies concerned with a specific project. This larger team meets at least twice a year and focuses on programmatic issues related to the project.

Further expansion of partnering would occur normally at the regional EPA administrator level, which focuses on budgetary priority systems, regional training requirements, and overall regional coordination issues.

Partnering Commitment

Before any partnering efforts can begin, there must be a commitment of top management from all the stakeholder agencies. Top management must be willing to allocate the additional funds and up-front personnel time that will be needed to support partnering (although this investment is returned manyfold through improved communication and cooperation) as well as to support their representatives' decisions. Navy's partnering commitment begins with the Assistant Secretary of the Navy for Installations and Environment and Deputy Chief of Naval Operations for Logistics.

The chief executive officers for the prime contractors and subcontractors must be likewise committed. However, it is important to understand that *partnering cannot be forced upon potential stakeholders.*

Partnering Process

For partnering to be successful, the complete partnering process must be adhered to. All stakeholders must exercise patience.

Top management must be involved and participants need to be committed to partnering. In addition, all partnering efforts require a *champion*—an advocate who has the vision for improving the productivity, efficiency, and timeliness of a project through the use of partnering. This individual must be the bird dog who keeps track of the process and related action items and provides administrative and logistical support. For partnering within the installation restoration program, this champion usually is the RPM or designated EFD section leader. For the top-down approach, the champion is usually the environmental division director at the EFD servicing the EPA region or someone from NAVFAC.

With these elements in mind, it is time to look at the specific elements of partnering.

Preparation for the Initial Workshop

Partnering begins with a 2- to 3-day workshop, preferably led by a professional third-party facilitator who is familiar with the environmental requirements, process, and phraseology.

All major stakeholders should be involved in the initial partnering sessions. The ideal size for partnering sessions is 8 to 12 people, the maximum 24. The most important aspect is to maintain a balance among the stakeholders. No one agency or contractor should dominate the membership. The stakeholders must be volunteers; forced participants will most likely not enjoy the experience, and the other members will not gain the intended benefit of positive players from all participating agencies and contractors.

Representatives should come into partnering as team players. Sometimes the process will convert a non-team player into a team player.

Selection of the Facilitator

Once the members of the team are decided upon, the champion should lead the agencies and contractor(s) in selecting a professional facilitator to conduct the workshops. The facilitator, who is a third party rather than an employee of any of the agencies or contractors involved, is an objective participant, skilled in team building and group dynamics. The facilitator is concerned with how the sessions are conducted, not what is specifically decided.

Exhibit 1 lists the qualities to look for in selecting a facilitator. Consider the availability of the facilitator, as there may be a need to use the facilitator for subteam meetings. For consistency, it is wise to use the same facilitator throughout the project. Normally, as an early demonstration of the stakeholders' commitment to partnering, the cost of the facilitator is shared by all of the agencies and contractors involved. However, this decision should be made on a case-by-case basis.

Top management must be willing to allocate the additional funds—and up-front personnel time that will be needed to support partnering...

An important step toward achieving success is to conduct at least one premeeting with the professional facilitator. The meeting gives the major players of the partnering agreement a general understanding of the process. Also, the meeting familiarizes the facilitator with the specific objectives desired for the initial session and gives the facilitator a working knowledge of the groups represented on the partnering team. The champion and any other visionary leader of the agencies and contractor(s) should participate. On average, this meeting should last about 4 hours. A good facilitator will have conducted a survey of the participants prior to this premeeting to establish their knowledge of partnering principles, motivation toward partnering, and preliminary expectations of the process.

The Location

Two important aspects are the location and type of facility used to conduct the initial meeting and some

Exhibit 1
Facilitator Qualities

- Adaptable
- Articulate
- Calm
- Centered
- Empathetic
- Even tempered
- Firm
- Flexible
- Good memory
- Listener
- Neutral
- Nonjudgmental
- Objective
- Observant
- Patient
- Perceptive
- Polite
- Sense of humor
- Trustworthy

of the follow-on partnering sessions. The sessions should be conducted away from the offices of the parties involved. This location does not need to be luxurious, but it should be isolated from phones and other disturbances. The members of the partnering team can then focus on building a team spirit, developing open communications by removing barriers to communications, establishing partnering goals and objectives, and developing an implementation plan to achieve them.

The Initial Workshop

The major focus of the initial session is to build a team concept among the stakeholders. Generally, a minimum of 2 days should be reserved for this initial session. Every effort should be made to ensure the that stakeholders leave the meeting enthusiastic about this new team-oriented relationship.

The facilitator should bring some icebreaker activities to help team members get to know each other. Suggested activities for this initial session are listed in exhibit 2. These activities are followed by active listening exercises and self-examination exercises, such as the Myers-Briggs Type Indicator or the Acumen Leadership Style Inventory.

Team-building exercises are next on the schedule. It is important that the participants understand group dynamics and the requirements for a successful team. The group will then focus on removing barriers to effective communications. Several techniques are used, such as the nominal group method. Generally, participants who have never been through these sessions will have a negative reaction. However, once they have been through the entire initial session on team building, the participants' reactions will become very positive.

During the initial session, the team should develop an operating charter containing a vision and mission statement along with the team's goals and objectives. The team should also develop a strategy for problem resolution. Within the context of the Defense Environmental Restoration Account (DERA), this strategy does *not* replace the formal dispute resolution process outlined in the FFA. Rather, it is intended to resolve the disagreements and issues at the level where they occur, so that a formal process for resolution of disputes is never invoked. Finally, if time allows in this initial session, an implementation plan with appropriate checkpoints and action addressees is developed.

...all partnering efforts require a champion—

Follow-on Sessions

The implementation plan should include regular scheduling of follow-on maintenance and refresher sessions. These maintenance sessions focus on reviewing one or two of the team-building principles along with updating the status on action items in the implementation plan. Scheduling one of the member's facilities for this session is the minimally acceptable procedure. The best option is to go off-site. A facilitator is also recommended and, if agreed upon by all stakeholders, can be from within one of the organizations represented. The maintenance session is generally scheduled for 1 day and as often as needed, as determined by the team during the initial session.

A refresher session should be held at least once a year and preferably twice a year. Again, it is strongly recommended that this session be

Exhibit 2
Suggested Activities for Initial Partnering Workshops

The goals of the workshop are to open communications, develop a team spirit, establish partnering goals, develop a plan to achieve them, and gain commitment to the plan. There are a number of processes that could be used to accomplish the workshop goals. The following are only suggested steps for the process. Neither the specific exercises nor the sequence are critical. Be flexible and creative. Your ideas and your facilitator's suggestions should be incorporated into your process.

1. Strengthen interpersonal communications with exercises such as active listening/congruent sending or other communications skill-building techniques.
2. A self-examination exercise such as the utilization and discussion of the Myers-Briggs Type Indicator survey would be appropriate as the next effort.
3. Develop teamwork with specific team-building exercises. One way to start is to perform some icebreaker exercises for the participants to get to know one another. It is very important that the individuals understand group dynamics. Exercises in which the participants solve problems as individuals and then as groups are excellent for achieving this.
4. Team exercises are important to get the individuals to start thinking and working as a team. Specially designed exercises that contrast competition and cooperation are useful at this point. Note: For these exercises and all during the workshop, the participants can be divided into smaller working groups with different combinations of participating groups.
5. Define strengths and weaknesses from prior projects. The participating groups should work independently to list strengths and problems they perceive from previous jobs. Then, together they can analyze these lists and develop a list of possible problems they might face during the course of the contract. This lets them start thinking in terms of project-specific issues that they will be dealing with as a team.
6. Provide instruction on conflict management techniques. If time permits, include some exercises to reinforce the training. It is important for the team members to understand the difference between "positions" and "interests" or "values" and understand how to negotiate based on interests.
7. Develop a problem-solving strategy or methodology for the team to use. The facilitators can provide an instructional session on problem solving; the team can choose to use it, modify it, or develop their own. The team will then use the process throughout the project to deal with problems as they arise.
8. Develop trial solutions using the selected problem-solving process and the list of potential problems outlined in Step 5. The trial solutions may be only conceptual at this point, but they will serve to reinforce the team approach to solving real-life project problems and disputes.
9. Define partnership goals. As an individual exercise or, if the participants are "exercised out," as a group, develop a realistic set of goals for the partnership.
10. Execute an agreement. Using the goals developed above as a base, draw up an actual agreement for the members to sign to express their commitment. After the workshop, as a strong signal of support, have the CEOs of each organization also sign the agreement, and freely distribute copies of the final document to all members.
11. Develop an implementation plan. This is probably the most important step of the entire process. Without a realistic working plan, the goals and ideals fostered at the workshop will tend to fade with time. A plan is needed to make the partnership a living and breathing entity. Checkpoints and followup workshops, combined with the energy of the champion previously identified, will ensure its health.

held off-site and conducted by the same facilitator as the initial session. The focus of this refresher session is to determine the pulse of the partnering team and ensure that open communications and trust building are actually occurring. The refresher sessions are generally scheduled for 1 or 2 days.

Both of these follow-on sessions are vital to the success of partnering, since they build on relationships. All stakeholders must make a conscientious effort to attend these follow-on sessions. Any new members can be oriented to the team at these sessions.

Partnering Charter (Memorandum of Understanding)

A partnering charter is a win-win document outlining the long-term vision, mission, goals, strategy for goal attainment, and guiding principles for the partnering team. It is a collaborative effort written at the initial workshop and preferably signed by all of the participants. The partnering team will use the goals from the charter to develop expanded objectives to be contained in the Partnering Implementation Plan (PIP). The charter is a short document of approximately 1 to 2 pages. An example of a charter is shown in exhibit 3.

The charter commits the stakeholders to conduct themselves under new relationships as they focus on building a team solution to complex issues.

Partnering Implementation Plan

A PIP is a "living" document that changes with the various stages of the project. Key elements of the implementation plan are an outline of each member's specific organization, billet roles, and responsibilities as related to their parent organization and the team; measurable objectives related to each goal; a process for informally resolving issues and problems at the level at which they occur; an effective communications plan; a system of rewards and recognition for the team; and a method to orient new members to the team.

The charter details the roles and responsibilities of each stakeholder and the informal issue resolution process to be used by all project teams within that region.

Appendix A contains a PIP compiled by the EPA Region IV/Navy/FDEP. Elements of the plan were developed during a facilitated partnering session and represent the consensus of the entire team. The PIP in appendix A is focused on initiating partnering on a regional basis with follow-on application to installation-specific remediation projects.

During the development of the plan in appendix A, two sessions took place on the individual agency's measures of success and the guidelines for project teams in resolving problems/issues. The discussion of the agency's measures of success gave representatives an opportunity to understand how that agency's success was measured and the important items of concern for the team. The toughest session was the one that developed the guidelines for project teams to use to resolve problems informally. However, all of the representatives said it was the most helpful of all the sessions for improving relationships toward accelerating cleanup at military installations within EPA Region IV.

Implementation plans developed by partnering teams on the West Coast have used a tool called the *graphic plan*. This approach makes a picture of the plan to describe goals and objectives. The picture provides a constant reminder of what the team is working toward and improves the retention of these goals and objectives every time a member views it. At the center of the graphic plan is the core purpose. Radiating out in a spokelike pattern are the key elements needed for the team to fulfill this core purpose. The final elements, and often the most time-consuming to develop, are the action items annotated around the outer ring of the plan and keyed to each major element. It is in managing these action items that the team is able to proceed toward accomplishing its purpose.

Exhibit 3

EPA REGION IV/NAVY/FLORIDA ENVIRONMENTAL RESTORATION PARTNERSHIP

PARTNERING CHARTER – APRIL 1, 1993

Goal: To characterize and respond as appropriate to additional risk posed by release of hazardous substances on public health and welfare and the environment at Navy and Marine Corps Installations.

Mission: To structure an effective program for prompt environmental restoration that will be a model for similar efforts elsewhere.

Vision: Teams are empowered and operate cohesively to achieve our environmental restoration goal.

We, the partners, commit to teamwork to achieve these objectives:

- Develop ways to determine acceptable program risk in fostering progress
- Eliminate barriers to a faster more cost-effective program
- Clarify roles and responsibilities of each party
- Make our processes more efficient
- Create organizational cultures able to accommodate change
- Provide for a greater exchange of lessons learned
- Obtain consensus on short and long-term budget and implementation plans
- Promote success and cooperation
- Develop innovative ways to acquire and administer contracts
- Demonstrate and use innovative technologies
- Foster community participation
- Resolve conflicts through a coordinated work effort to avoid adversarial relations
- Maintain professionalism and enthusiasm and encourage communication to make the partnership educational and enjoyable
- Reinforce the partnered relationship with honest feedback and continual improvement

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...the communication plan provides the strategy for informing the public, the team's seniors, and stakeholders regarding issues arising out of the partnering arrangement.

Appendix B displays a graphic plan developed at SOUTHWESTDIV for MCAS Yuma.

The team's early success will depend a great deal on the communication plan. A communication plan provides points of contact for local, State, and Federal governments and the media; an overview of the background to the remediation program of the particular installation; objectives of the plan; and a schedule of community activities related to this installation's program and when particular players would get involved. This plan should also provide guidance on how the team will communicate internally. In general, the communication plan provides the strategy for informing the public, the team's seniors, and stakeholders regarding issues arising out of the partnering arrangement.

Aside from communication plans, there is another form of communicating—rewards and recognition. There should be recognition and rewards to encourage the member organizations to adapt to partnering. Much as a sports team enjoys the recognition of a winning record, so the partnering team enjoys the recognition associated with the team's successful progress. Periodically, the management level above the stakeholders of the partnering team needs to thank the stakeholders for their progress with both non-monetary and monetary rewards. Recognition may also be in the form of being listened to, praised, complimented, and made to feel like an important element of the agency/corporation.

The PIP *must* include a process for orienting new stakeholders into the partnering team and for reorienting the team to the new stakeholders. Any team will go through the basic four stages of development: forming, storming, norming, and performing. The team must go through each stage to achieve productivity. Likewise, when the team's membership changes, it must momentarily return to the orientation phase and go back through the storming and norming phases with the new stakeholder(s). If the team does not go through this process conscientiously, it will occur anyway, probably when the team can least afford the time or energy to deal with it effectively. The orientation phase for the new stakeholder may include a 1- or 2-day training session on the basic principles of partnering and how this specific team has implemented those principles.

Small Project Partnering

Partnering works for small projects as well as large, complex projects. For smaller projects the parties can come together for a minipartnering session led by an in-house facilitator who has been mutually agreed to by the parties involved. This miniworkshop normally is 1 day or less in length and can be conducted on-site if interruptions are eliminated. The informal group can go through the basic team-building exercises, develop a charter, establish goals and objectives, and agree to an informal process of problem resolution.

Advantages to Partnering

- Partnering promotes continuous improvement of the project.
- Responsibility for risks is more clearly delineated from the outset and matched to each stakeholder's anticipated rewards.
- Budgets and schedules are continuously evaluated throughout the process.
- Cleanup can be accelerated as communications occur up front instead of in a piecemeal fashion throughout the process.
- There is more efficient use of all resources, including scarce resources, since all stakeholders are moving toward a clear, mutually beneficial objective.
- There is reduced or no litigation.
- There is open involvement with the local and regional DOD staffs regarding the cleanup and setting priorities for budget adjustments.
- Redundancy is eliminated in the review of elements in the National Contingency Plan process.
- Innovative solutions are introduced into the process in a more effective manner.
- Client satisfaction is enhanced thanks to day-to-day contact and regular communication that allows for early problem identification and resolution.

Client satisfaction is enhanced thanks to day-to-day contact and regular communication that allows for early problem identification and resolution.

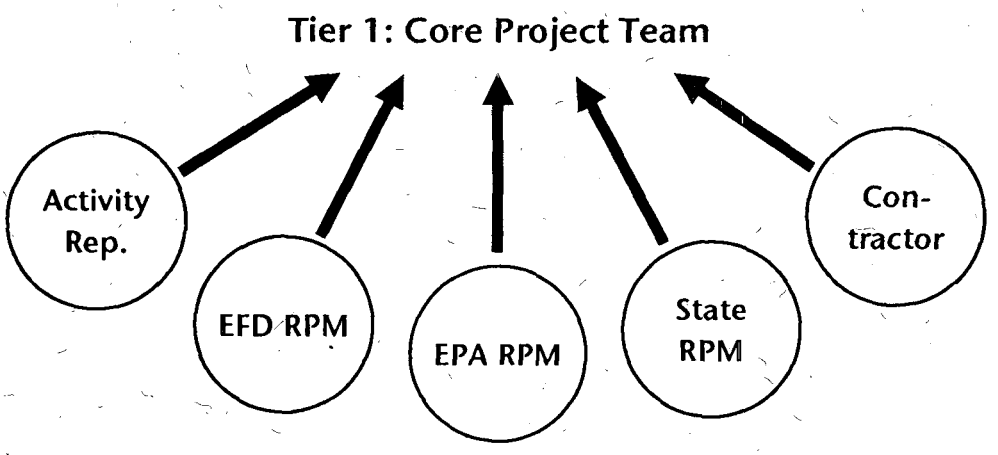
- Staffing projections are guaranteed for the duration of the project. Staff are committed to the program for the long term, which in turn builds loyalty to the project and the team.
- The design and remedial contractor teams work together on the solution to a cleanup, spending their resources effectively to accomplish the cleanup rather than fighting each other through litigation.
- A partnered remediation project allocates risks. The increased communication, trust, and knowledge of the project control risks and should eliminate costly bid contingencies. Partnering may also allow for a long lead time for the procurement of capital equipment, which reduces the risk of capital escalation.

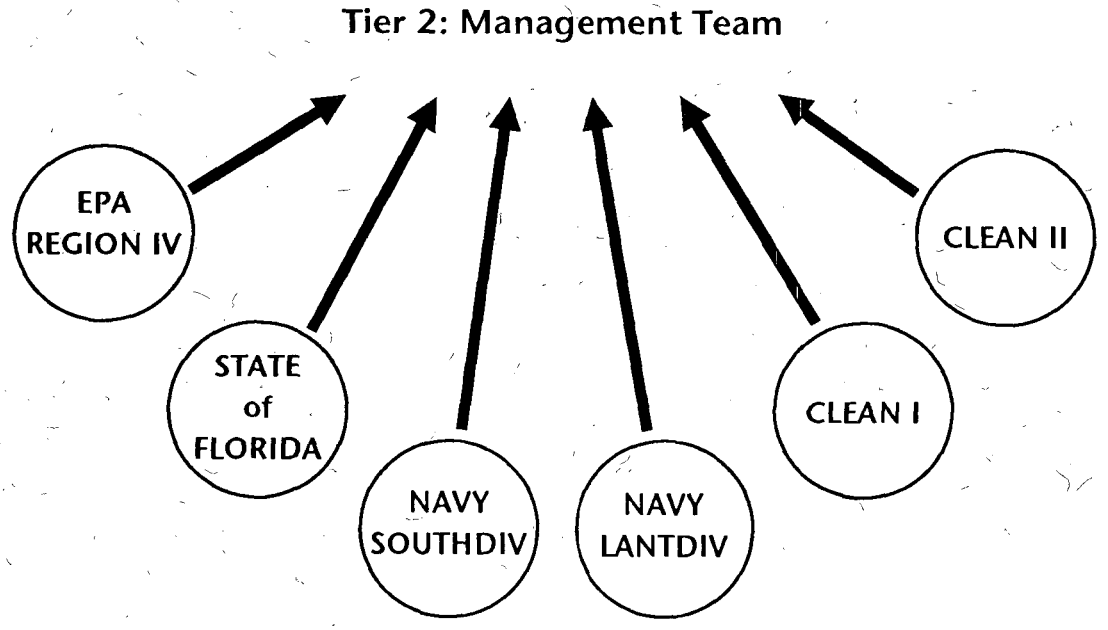
Appendix A: Partnering Implementation Plan

History of the EPA Region IV/Navy/Florida Environmental Restoration Partnership

Situation	Working relationships between agencies had become so adversarial that disputes were being addressed only through formal legal channels, often with implied fines and penalties. The level of distrust was so high that court recorders were present at routine technical meetings. Program progress had ground to a halt with more and more of our resources being used to respond to formal allegations. Agencies were communicating through their lawyers. They were receiving increasing pressure from higher echelons (EPA HQ and Assistant Secretary of the Navy) to make progress on the CERCLA cleanups.
Feb. 10, 1993	During a February 10, 1993, meeting between Jon Johnston, EPA IV, and Joe McCauley, SOUTHDIV, it was agree that the present situation would cause both agencies to fail and that a detente was needed between our agencies. Each had been exposed to TQM and teaming within their own organizations and agreed that a facilitated meeting at the management level would be a first step. We agreed on a common goal—"**PROVIDE A TEAM APPROACH TO ACCOMPLISH OUR COMMON CERCLA GOALS.**"
Mar. 16–17, 1993	The first partnering meeting was held between EPA Region IV, SOUTHDIV, and Florida representatives in Charleston, SC. The meeting was facilitated by Pat Franklin from SOUTHDIV. Representatives from EPA HQ, NAVFAC HQ, LANTDIV, and REC Jacksonville were also participants. The focus of the first meeting was on team building and brainstorming training. The group developed the expectations for the sessions and established a set of ground rules to use for their meetings. The group developed a common goal—"**TO CHARACTERIZE AND RESPOND AS APPROPRIATE TO ADDITIONAL RISK POSED BY RELEASE OF HAZARDOUS SUBSTANCES ON PUBLIC HEALTH AND WELFARE AND THE ENVIRONMENT.**" Brainstorming sessions generated a list of 48 items considered obstacles to a successful program. The list was grouped into eight common topics. All agreed that we had come a long way, but no specific decisions were reached on which items should be focused on. A second meeting was needed.
Mar. 31–Apr. 1, 1993	The second meeting of the group was facilitated. This meeting developed the goals for the team, and a Partnering Charter was signed.
To present	Additional meetings led to development of the information in the orientation section and this Tier I Partner's Workshop.

Partnering Framework





Partnering Participants

Tier 1—Members of the Core Project Team

Activity
EFD RPM
EPA RPM
State RPM
Contractor(s)
Others as needed
BRAC Environmental Coordinator (BEC) for BRAC Facilities

Tier 2—Members of the Management Team

EPA: Federal Facility Branch Chief
DOD Remedial Section Chief
DOD RPM Team Leaders (2)

STATE: Administrative-Technical Review Section
Federal Facility Coordinator

NAVY: (SOUTHDIV) Department Head
Deputy Director
IR Manager(s)

(LANTDIV) Branch Head

NAVY (ACTIVITY):
Regional Environmental Coordinator

CONTRACTOR (CLEAN):
Program Manager/Principal
Technical Director

Optional Participants:

EPA RPMs and/or HQ
State RPMs
Navy RPMs/BECs
Navy Contract Representatives
Activity RPMs
Contractor Project Managers/Technical Specialists

EPA REGION IV/NAVY/FLORIDA ENVIRONMENTAL RESTORATION PARTNERSHIP

PARTNERING CHARTER – APRIL 1, 1993

<u>Goal</u>:	To characterize and respond as appropriate to additional risk posed by release of hazardous substances on public health and welfare and the environment at Navy and Marine Corps Installations.
<u>Mission</u>:	To structure an effective program for prompt environmental restoration that will be a model for similar efforts elsewhere.
<u>Vision</u>:	Teams are empowered and operate cohesively to achieve our environmental restoration goal.

We, the partners, commit to teamwork to achieve these objectives:

- Develop ways to determine acceptable program risk in fostering progress
- Eliminate barriers to a faster more cost-effective program
- Clarify roles and responsibilities of each party
- Make our processes more efficient
- Create organizational cultures able to accommodate change
- Provide for a greater exchange of lessons learned
- Obtain consensus on short and long-term budget and implementation plans
- Promote success and cooperation
- Develop innovative ways to acquire and administer contracts
- Demonstrate and use innovative technologies
- Foster community participation
- Resolve conflicts through a coordinated work effort to avoid adversarial relations
- Maintain professionalism and enthusiasm and encourage communication to make the partnership educational and enjoyable
- Reinforce the partnered relationship with honest feedback and continual improvement

Goals of Tier 2

1. Develop a system to solve problems and issues quickly and informally.
2. Define acceptable risk and develop a cost-effective, timely process to manage risks and minimize adverse consequences.
3. Clarify working role of each party, including lead agency (set common priorities and targets).
4. Develop partnering plan (including execution plan).
5. Develop process for networking and exchange of lessons learned, success stories between agencies.
6. Develop innovative way to work with contractors; establish common goals.

Responsibilities of All Team Members

1. Identify probably remedies
2. Orient new team members
3. Help identify stakeholders
4. Formulate budget
5. Identify sites
6. Identify no-win situations and drop them
7. Maintain corporate knowledge of process
8. Listen and attempt to understand other parties' goals
9. Represent the concerns of your organization
10. Provide a dedicated member to represent the core project team
11. Attend RPM meetings
12. Host meetings as assigned
13. Actively participate in team/partnering
14. Provide approval and concurrence where required
15. Review work products
16. Share all existing information
17. Identify salary support requirements
18. Establish priorities
19. Consider stakeholder concerns
20. Be knowledgeable of innovative cleanup technologies and incorporate into plan
21. Find ways to keep work on schedule
22. Maintain regular contact with team members
23. Resolve informal disputes
24. Be knowledgeable of and maintain compliance with regulations
25. Ensure cost-effective remedies
26. Ensure protection of public health, welfare, and the environment
27. Incorporate risk management and fiscal prudence
28. Participate in preparing decision documents

29. Advise team of agency guidance and SOPs
30. Foster consistency of remediation process
31. Promote technology transfer
32. Transfer and document lessons learned
33. Continuously improve quality
34. Ensure sampling and analysis are in line with data and needs (i.e., value-added)

Responsibilities of the Activity

1. Execute community relations
2. Conduct field oversight and assist contractor when the contractor is on-site
3. Chair the Restoration Advisory Board (RAB)
4. Bring concerns of contractor organization to the team, and vice versa
5. Maintain local administrative records in repository
6. Sign decision documents, including permits
7. Identify probable land uses
8. Prevent or control new sources of contamination
9. Ensure budgetary requests are in MI system
10. Protect natural resources
11. Be responsible for emergency response
12. Provide oversight and coordination of base mission and projects
13. Fund with O&M funds as required
14. Provide long-term maintenance
15. Identify DERA salary support
16. Keep chain of command informed to major claimant and REC

Responsibilities of State RPM and EPA RPM

1. Coordinate and prepare comments on documents
2. Advise team members of upcoming regulatory changes to allow effective implementation of those changes
3. Identify ARARs
4. Review documents in a timely manner
5. Review regulatory compliance status and conduct enforcement
6. Assist in preparing decision documents
7. Approve/disapprove primary documents in a timely manner
8. Draft permits and agreements
9. Ensure regional consistency
10. Provide technical oversight and support
11. Resolve issues or concerns within the department or agency
12. Maintain documents

13. Assist Navy to "not be inconsistent" with National Contingency Plan
14. Assist with EPA-sponsored work
15. Conduct regulatory surveys as required (RFAs)
16. Provide criteria for cleanup
17. Determine regulatory applicability
18. Represent the team to coordinate with other regulatory programs and agencies (e.g., State, county)
19. Oversee technical assistance contractors
20. Support community relations
21. Review and oversee petroleum cleanup (FDEP)
22. Participate in compiling site/facility response needs
23. Meet DSMOA commitments (FDEP)
24. Provide information into RCRIS, CERCLIS data management system
25. Review and oversee State authorized programs (FDEP)
26. Provide program and technical training
27. Attend RAB meetings
28. A 106 review
29. Provide leadership on policy issue resolution
30. Assist in resolution of concerns and issues about permits

Responsibilities of EFD RPMs

1. Create and distribute administrative record
2. Provide contract administration
3. Manage DERA/BRAC program (budgeting)
4. Estimate government expenditures
5. Manage and direct contractor
6. Provide responsive technical support and coordinate legal support to the activity
7. Encourage activity involvement
8. Assist activity in community relations
9. Coordinate involvement of team in the budget process
10. Manage IDW
11. Solicit and respond to comments
12. Keep chain of command informed up to major claimant
13. Coordinate with other EFD RPMs
14. Keep the work on schedule
15. Have contractor prepare and distribute plans and documents
16. Implement team's decision through contractor
17. Coordinate team communication
18. Provide support (lead the effort where assigned) for regulatory agreements

19. Develop and maintain Site Management Plan
20. Determine DERA/BRAC eligibility
21. Maintain customer focus
22. Ensure compliance with NCP and ARARs
23. Author decision documents
24. Maintain execution plan
25. Respond to regulatory inquiries on hazardous waste sites
26. Chair project team meetings
27. Ensure ROD is implemented
28. Ensure site close-out
29. Provide information to MIS, DSERTS, PCR databases
30. Review hazwaste docket
31. Maintain consistency in overall program execution and quality of products
32. Ensure field oversight of contractor efforts in coordination with regulatory agency/community

Responsibilities of the Contractor

1. Conduct field work and prepare work products as directed by EFD in a cost-effective, timely manner
2. Suggest technical ways to meet customer and regulator requirements
3. Advise of ways to do work cheaper/better/faster
4. Maintain cost control
5. Advise EFD RPM of schedule slippage with recommendation to get back on target, or adjust the baseline, as well as changed conditions or when assigned tasks will not meet goals
6. Ensure qualified people are on-site at all times
7. Focus work to support decision making
8. Be responsive to EFD
9. Ensure quality assessment/quality control on all products
10. Keep activity informed of conditions that affect the activity
11. Maintain access to adequate technical expertise
12. Keep team members informed of status of field work
13. Provide adequate quantity and quality of field equipment
14. Maximize use of all existing data and information
15. Be knowledgeable and willing to use latest techniques
16. Respond to changes rapidly with minimum disruption
17. Coordinate with subcontractors and PMs
18. Assist in planning and execution of program
19. Implement team decisions as directed by the EFD
20. Maintain site safety
21. Be knowledgeable of regulations and guidance

22. Cooperate with regulator's oversight during field work
23. Fully coordinate field work with activity prior to entering base
24. Monitor subcontractors
25. Advise team of economic and technical impacts of their recommendations

Expectations of the Project Team

1. Work as a team to meet remediation challenges and make response to site remediation the team's highest priority
2. Be willing to take risks to accelerate remedies
3. Embrace the new way of doing business
4. Achieve objectives in charter
5. Have a basis for remedies
6. Minimize conflict and maximize progress to remediation, but keep project moving forward even during conflicts
7. Drop old baggage; keep no hidden agendas
8. Identify and use best team resource to accomplish goal
9. Facilitate and assist other team members in accomplishing their goals
10. Accept and execute roles and responsibilities
11. Seek solutions that all team members can buy into
12. Be self-motivated
13. Follow the guidance provided as appropriate
14. Share success and failure
15. Be decisive and innovative
16. Maintain flexibility
17. Be professional
18. Think long term

Guidelines for Project Teams in Resolving Problems/Issues

1. Clearly define issue/problem as a team
2. Agree that agreement does not set precedent for subsequent actions
3. Present options for resolution as a team (be creative)
4. Don't let disagreement on issue stop other work from progressing
5. Understand basis of other team members' concern
6. Provide feedback to the team after implementing solution
7. Don't jump prematurely up the chain beyond first-line supervisor
8. Allow any member to raise an issue for resolution
9. Get consensus on issue and resolution
10. Determine deadline to have problem resolved so that it does not affect project
11. Confirm that the issue/problem is not an agency policy issue

12. If issue is policy, find out how far your side can compromise
13. Work in good faith as equals
14. If team cannot resolve issues, draft minority/majority opinions and elevate to the management team (Tier 2)
15. Understand how the ultimate goal is related to the problem
16. Assess the importance of the problem/issue in the overall implementation plan
17. Make all resolutions at Tier 2 and Tier 1 informal
18. Ensure team members have ownership of their own problems
19. Stick with a decision once it is made
20. Don't make the issue personal
21. Consult other team members or case studies
22. Use a facilitated team approach
23. Be open minded; carry no baggage
24. Document resolution
25. Identify stakeholders outside team and involve them as required
26. Know that Tier 2 will support team's resolution
27. Any issue that needs to be revisited should be done within 30 days
28. Use first-line supervisor's expertise as required

Mission of the FDEP

Provide oversight of DOD environmental restoration to ensure compliance and consistency with State regulations, policies, and guidance to protect the public health, environment, and natural resources of the State of Florida.

FDEP Measures of Success

1. Resolving disputes at RPM level
2. Number of sites that are remediated
3. Meeting commitments of DSMOA
4. Meeting commitments of FFAs
5. Performance evaluations of Federal facility coordinator, RPMs, and program administrator
6. Resolving intra-agency conflicts (e.g., Headquarters versus district, RCRA versus CERCLA)
7. Meeting commitments of Petroleum Contamination Agreements

Mission of EPA Region IV

Provide oversight of Federal Government environmental restoration to ensure compliance and consistency with regulations, guidance, and policies so that remedies are selected and implemented in a timely and appropriate manner that is protective of human health, welfare, and environment.

EPA Region IV Measures of Success

1. Progress through remedial "pipeline"
   - PA/SI—NFRAP, other (number of sites evaluated)
   - NPL promulgation
   - Duration of RI/FS; RD; RA
   - Construction starts/completions
   - Number of RODs
2. National Contingency Plan and RCRA corrective action
   - Number of removals
   - Sites remediated and deleted

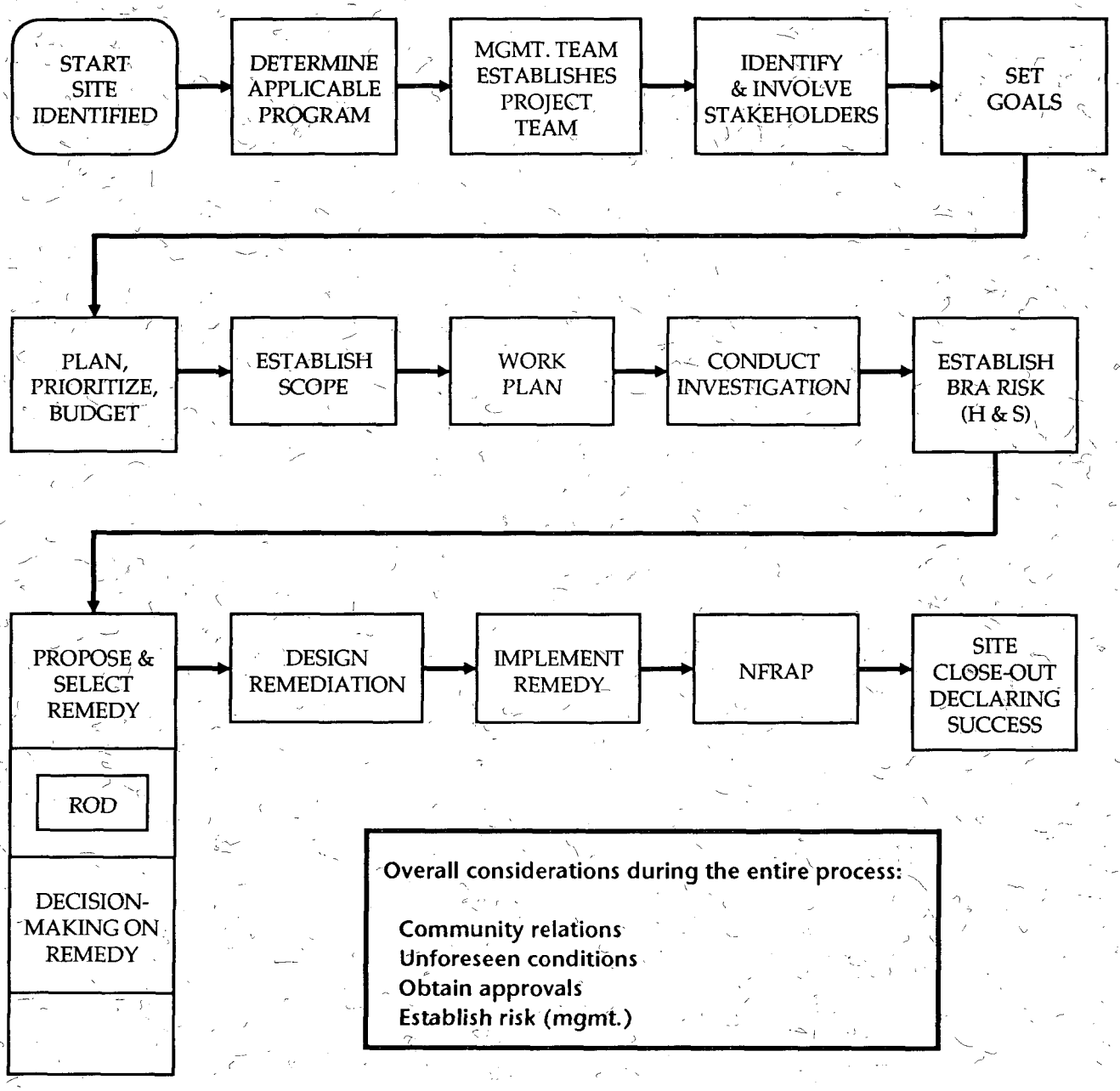
Mission of the Navy

To identify, assess, characterize, and remediate contamination from releases of hazardous substances at Navy and Marine Corps activities to protect public health, welfare, and the environment, while maintaining military operational capabilities.

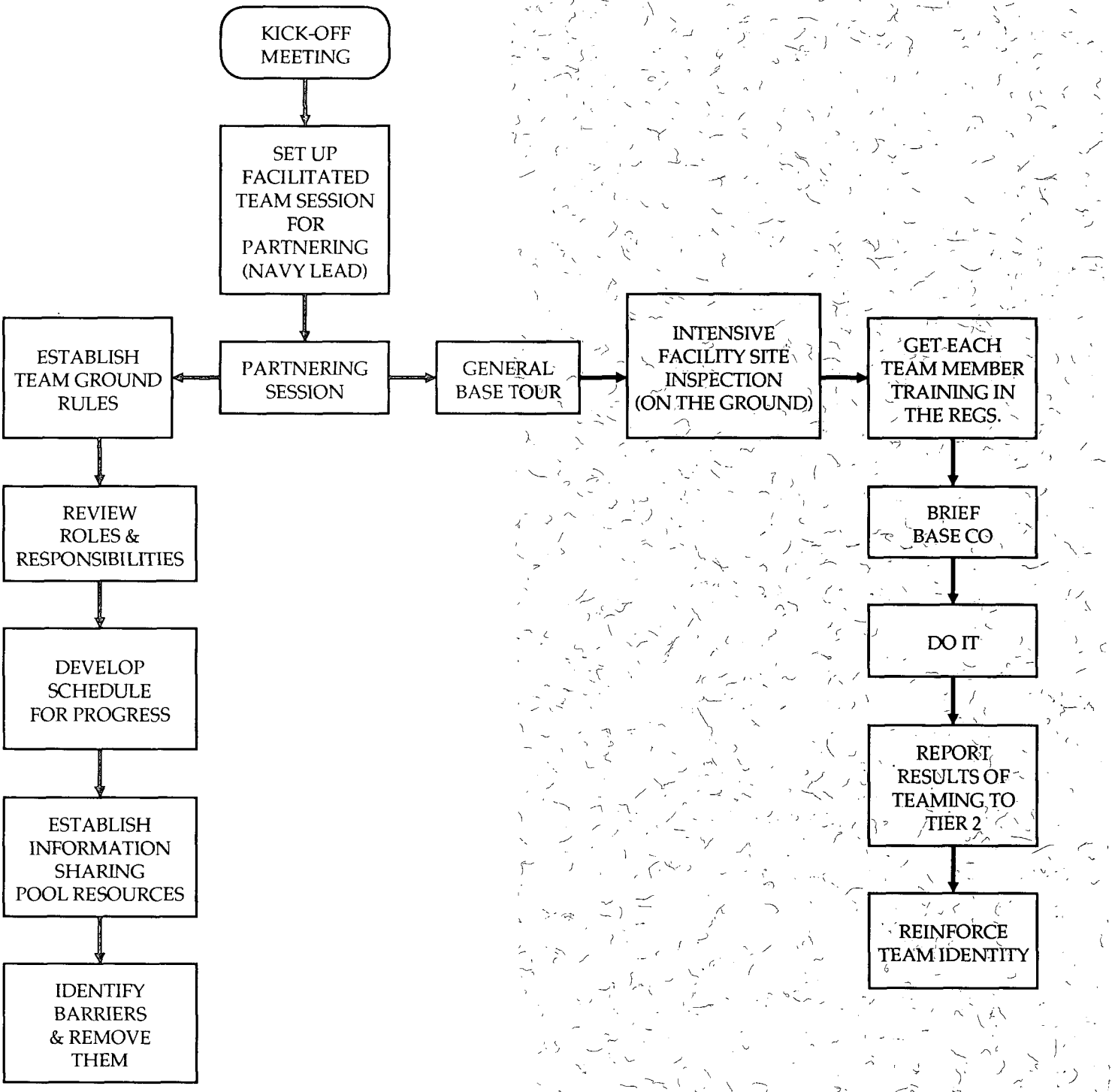
Navy Measures of Success

1. Number of remediations/removals
2. Number of PA/SIs completed
3. Number of RI/FSs completed
4. Number of RODs signed
5. Number of FFAs signed
6. Number of sites through program obligation
7. Percentage of money on remediation

Process Model for Project Team to Execute Remediation (Developed May 19, 1993)



Process a Project Team Uses to Begin Partnering (Developed May 21, 1993)



Appendix B: Graphic Plan

MCAS YUMA PERFORMANCE PROCESS

Phoenix Project Progress Meeting
April 23-24, 1992

The Core Purpose of the MCAS Yuma Project Team Is:

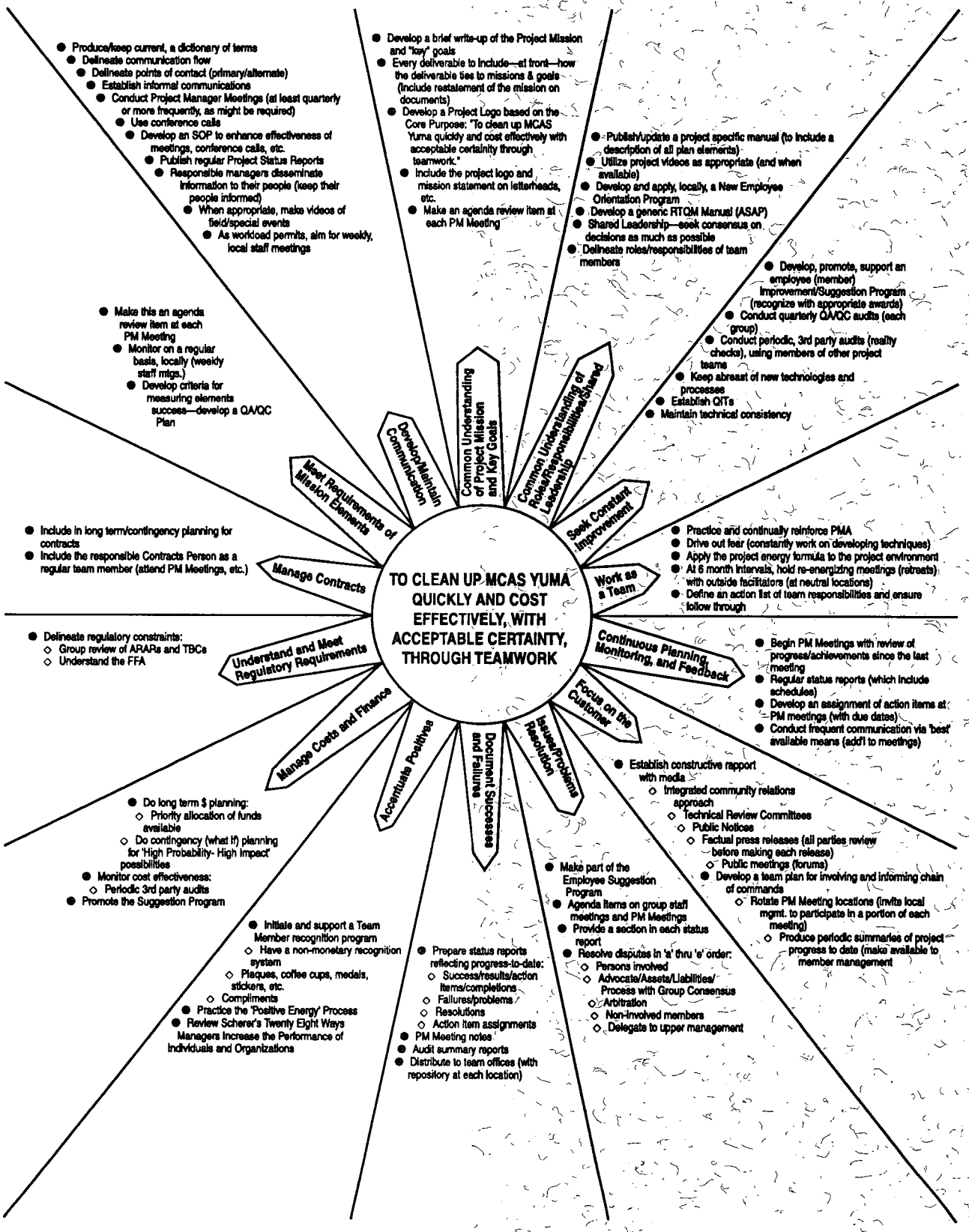
TO CLEAN UP MCAS YUMA QUICKLY AND COST EFFECTIVELY, WITH ACCEPTABLE CERTAINTY, THROUGH TEAMWORK.

Critical Performance Elements (To Achieve the Core Purpose)	Essential Action Steps to Accomplish Each Critical Performance Element
MEET REQUIREMENT OF MISSION (CORE PURPOSE) ELEMENTS	1. Make this an agenda review item at each PM Meeting 2. Monitor on a regular basis, locally (weekly staff mtgs.) 3. Develop criteria for measuring elements success–develop a QA/QC Plan
DEVELOP/MAINTAIN EFFECTIVE, ONGOING COMMUNICATION	1. Produce/keep current, a dictionary of terms 2. Delineate communication flow 3. Delineate points of contact (primary/alternate) 4. Establish informal communications 5. Conduct Project Manager Meetings (at least quarterly or more frequently as might be required) 6. Use conference calls 7. Develop an SOP to enhance effectiveness of meetings, conference calls, etc. 8. Publish regular Project Status Reports 9. Responsible managers disseminate information to their people (keep their people informed) 10. When appropriate, make videos of field/special events 11. As workload permits, aim for weekly, local staff meetings

ENSURE A COMMON UNDERSTANDING OF THE PROJECT MISSION AND KEY GOALS	1. Develop a brief write-up of the Project Mission and 'key' goals 2. Every deliverable to include—at front—how the deliverable ties to missions & goals (Include restatement of the mission on documents) 3. Develop a Project Logo based on the Core Purpose: "To clean up MCAS Yuma quickly and cost effectively with acceptable certainty through teamwork." 4. Include the project logo and mission statement on letterheads, etc. 5. Make an agenda review item at each PM Meeting
ENSURE COMMON UNDERSTANDING OF ROLES/RESPONSIBILITIES AND SHARED LEADERSHIP	1. Publish/update a project specific manual (to include a description of all plan elements) 2. Utilize project videos as appropriate (and when available) 3. Develop and apply, locally, a New Employee Orientation Program 4. Develop a generic RTQM Manual (ASAP) 5. Shared Leadership—seek consensus on decisions as much as possible 6. Delineate roles/responsibilities of team members
SEEK CONSTANT IMPROVEMENT	1. Develop, promote, support an employee (member) Improvement/ Suggestion Program (recognize with appropriate awards) 2. Conduct quarterly QA/QC audits (each group) 3. Conduct periodic, 3rd party audits (reality checks), using members of other project teams 4. Keep abreast of new technologies and processes 5. Establish QITs 6. Maintain technical consistency
WORK AS A TEAM	1. Practice and continually reinforce PMA 2. Drive out fear (constantly work on developing techniques) 3. Apply the project energy formula to the project environment 4. At 6 month intervals, hold re-energizing meetings (retreats) with outside facilitators (at neutral locations) 5. Define an action list of team responsibilities and ensure follow through

CONTINUOUS {INDIVIDUAL & GROUP} PLANNING, MONITORING, AND FEEDBACK ON PROGRESS	1. Begin PM Meetings with review of progress/achievements since the last meeting 2. Regular status reports (which include schedules) 3. Develop an assignment of action items at PM meetings (with due dates) 4. Conduct frequent communication via 'best' available means (add'L to meetings)
CONSTANT FOCUS ON THE CUSTOMER(S) AND MEETING EXPECTATIONS: a. The Public b. Team Member Chain of Commands	a. Establish constructive rapport with media a1. Integrated community relations approach a2. Technical Review Committees a3. Public Notices a4. Factual press releases (all parties review before making each release) a5. Public meetings (forums) b. Develop a team plan for involving and informing chain of commands b1. Rotate PM Meeting locations (invite local mgmt. to participate in a portion of each meeting) b2. Produce periodic summaries of project progress to date (make available to member management)
EARLY IDENTIFICATION AND DEFINITION OF ISSUES/PROBLEMS WITH PROCESS FOR RESOLUTION	1. Make part of the Employee Suggestion Program 2. Agenda items on group staff meetings and PM Meetings 3. Provide a section in each status report 4. Resolve disputes in 'a' thru 'e' order: a. Persons involved b. Advocate/Assets/Liabilities/Process with Group Consensus c. Arbitration d. Non-involved members e. Delegate to upper management
DOCUMENT SUCCESSES AND FAILURES FOR FUTURE BENEFITS	1. Prepare status reports reflecting progress-to-date: a. Success/results/action items/completions b. Failures/problems c. Resolutions d. Action item assignments

	2. PM meeting notes 3. Audit summary reports 4. Distribute to team offices (with repository at each location)
ACCENTUATE POSITIVES—SHOW APPRECIATION/RECOGNITION	1. Initiate and support a Team Member recognition program: a. Have a non-monetary recognition system b. Plaques, coffee cups, medals, stickers, etc. c. Compliments 2. Practice the 'Positive Energy' Process 3. Review Scherer's *Twenty Eight Ways Mangers Increase the Performance of Individuals and Organizations*
MANAGE COSTS AND FINANCE	1. Do long term $ planning: a. Priority allocation of funds available b. Do contingency (what if) planning for 'High Probability-High Impact' possibilities 2. Monitor cost effectiveness: a. Periodic 3rd party audits 3. Promote the Suggestion Program
UNDERSTAND AND MEET REGULATORY REQUIREMENTS	1. Delineate regulatory constraints: a. Group review of ARARs and TBCs b. Understand the FFA
MANAGE CONTRACTS	1. Include in long term/contingency planning for contracts 2. Include the responsible Contracts Person as a regular team member (attend PM Meetings, etc.)


TO CLEAN UP MCAS YUMA QUICKLY AND COST EFFECTIVELY, WITH ACCEPTABLE CERTAINTY, THROUGH TEAMWORK
Develop/Maintain Communication
Produce/keep current, a dictionary of terms
Delineate communication flow
Delineate points of contact (primary/alternate)
Establish informal communications
Conduct Project Manager Meetings (at least quarterly or more frequently, as might be required)
Use conference calls
Develop an SOP to enhance effectiveness of meetings, conference calls, etc.
Publish regular Project Status Reports
Responsible managers disseminate information to their people (keep their people informed)
When appropriate, make videos of field/special events
As workload permits, aim for weekly, local staff meetings
Common Understanding of Project Mission and Key Goals
Develop a brief write-up of the Project Mission and "key" goals
Every deliverable to include—at front—how the deliverable ties to missions & goals (include restatement of the mission on documents)
Develop a Project Logo based on the Core Purpose: "To clean up MCAS Yuma quickly and cost effectively with acceptable certainty through teamwork."
Include the project logo and mission statement on letterheads, etc.
Make an agenda review item at each PM Meeting
Common Understanding of Roles/Responsibilities/Shared Leadership
Publish/update a project specific manual (to include a description of all plan elements)
Utilize project videos as appropriate (and when available)
Develop and apply, locally, a New Employee Orientation Program
Develop a generic RTQM Manual (ASAP)
Shared Leadership—seek consensus on decisions as much as possible
Delineate roles/responsibilities of team members
Seek Constant Improvement
Develop, promote, support an employee (member) Improvement/Suggestion Program (recognize with appropriate awards)
Conduct quarterly QA/QC audits (each group)
Conduct periodic, 3rd party audits (reality checks), using members of other project teams
Keep abreast of new technologies and processes
Establish QITs
Maintain technical consistency
Work as a Team
Practice and continually reinforce PMA
Drive out fear (constantly work on developing techniques)
Apply the project energy formula to the project environment
At 6 month intervals, hold re-energizing meetings (retreats) with outside facilitators (at neutral locations)
Define an action list of team responsibilities and ensure follow through
Continuous Planning, Monitoring, and Feedback
Begin PM Meetings with review of progress/achievements since the last meeting
Regular status reports (which include schedules)
Develop an assignment of action items at PM meetings (with due dates)
Conduct frequent communication via 'best' available means (add'l to meetings)
Focus on the Customer
Establish constructive rapport with media
◇ Integrated community relations approach
◇ Technical Review Committees
◇ Public Notices
◇ Factual press releases (all parties review before making each release)
◇ Public meetings (forums)
Develop a team plan for involving and informing chain of commands
◇ Rotate PM Meeting locations (invite local mgmt. to participate in a portion of each meeting)
◇ Produce periodic summaries of project progress to date (make available to member management
Issues/Problems Resolution
Make part of the Employee Suggestion Program
Agenda items on group staff meetings and PM Meetings
Provide a section in each status report
Resolve disputes in 'a' thru 'e' order:
◇ Persons involved
◇ Advocate/Assets/Liabilities/ Process with Group Consensus
◇ Arbitration
◇ Non-involved members
◇ Delegate to upper management
Document Successes and Failures
Prepare status reports reflecting progress-to-date:
◇ Successes/results/action items/completions
◇ Failures/problems
◇ Resolutions
◇ Action item assignments
PM Meeting notes
Audit summary reports
Distribute to team offices (with repository at each location)
Accentuate Positives
Initiate and support a Team Member recognition program
◇ Have a non-monetary recognition system
◇ Plaques, coffee cups, medals, stickers, etc.
◇ Compliments
Practice the 'Positive Energy' Process
Review Scherer's Twenty Eight Ways Managers Increase the Performance of Individuals and Organizations
Manage Costs and Finance
Do long term $ planning:
◇ Priority allocation of funds available
◇ Do contingency (what if) planning for 'High Probability- High Impact' possibilities
Monitor cost effectiveness:
◇ Periodic 3rd party audits
Promote the Suggestion Program
Understand and Meet Regulatory Requirements
Delineate regulatory constraints:
◇ Group review of ARARs and TBCs
◇ Understand the FFA
Manage Contracts
Include in long term/contingency planning for contracts
Include the responsible Contracts Person as a regular team member (attend PM Meetings, etc.)
Meet Requirements of Mission Elements
Make this an agenda review item at each PM Meeting
Monitor on a regular basis, locally (weekly staff mtgs.)
Develop criteria for measuring elements success—develop a QA/QC Plan