

Notes from 10/16/19 Crawfordsville Team Indiana Steering Committee Meeting

Constructability

- Cost of paying designer for their time to be at precon/progress meetings is a worthy investment.
- Should have District “lessons learned” gatherings at the end of the season so that design community feedback loop is inclusive and not limited to the one person who had the experience.
- Conduct and participate in more pre-bid meetings? Not just Stage 2/NEPA information circulated for comment but also a meeting availability to go over plans/thinking to that point.
- Plans to be available at stage 2 for all to see
 - Currently no formal outside of INDOT process. INDOT has determined review criteria
- Way down the road idea if contractor wants to bid on contract, they will be need to do a stage 2 review

Partnering

- Big dividends are paid when there is time invested in communication among all three parties.
- Have a follow up to the Precon meeting with the major parties prior to first day of work (at lunch to set the trend of meeting will all parties during a relaxed setting during contract)
- Need onsite meeting other than formal meetings
- Have a minimum of monthly meeting just for relationship building
- At progress meetings, provide positive as well as negative feedback.
- INDOT Team to act more like an owner on smaller projects and figure out how to engage throughout (more frequent progress mtgs, etc.).
 - Entire project team needs to be aware and engaged in partnering
 - Orient time for general business, patterning engagement and understanding the entire team, and discussing project details
- Need to model desired behavior
 - Portray and orient INDOT folks around the idea that it is okay for contractors and consultants to make money
 - We need each other, financial capitalization and revenue generation with profit is a key part of maintaining healthy and stable partners in industry
- Self-facilitation for smaller projects needs would be good but leaders must have training.
 - Business level training is needed to help conduct meeting and taking notes
 - INDOT team could use training on how to conduct meetings and act as owners and other formal business manage training
- Partnering strata
 - Three tier partnering levels criteria discussion a way to break the categories down is be a combination of monetary value and number of pay items.
 - Perhaps division between Big and Medium is figured by dollars and division between Medium and Small is figured by Pay Items. This would factor in complexity along with cost and what’s left over is considered a Medium project.
 - Failsafe is for the Area Engineer to be able to add to any contract that does not meet the criteria.
 - Discussed proposed three tiers and appropriate use of partnering for each level
 - Big/Large
 - See formal process

- Medium
 - Guidelines to be developed
 - Orienting thoughts around complexity of projects
 - possibly something pay item quantity based
 - at Area Engineers discretion
 - INDOT to review with Area Engineers & others, see notes below for after action items on this topic
 - Small
 - Addition to preconstruction and progress meeting
 - Enforce conducting meetings and require key team member attendance
- Just like there is a Pre-Con agenda there should be a Progress Meeting agenda. Minutes should be taken and shared.
 - A progress meeting template needs to be developed. (Kurt Pelz has begun the gathering of topics to produce a form)
 - Need to clearly define who owns progress meetings?
 - Should reinforce requirements and recommendations for attendance at progress meetings
- Should encourage technology options to engage partners in progress meetings but there is no substitute for in-person conversation

Other Issues/Ideas

Training Opportunities –

- Facilitator Training; see partnering notes above
- More “management training” for lower level/newer INDOT employees a la ICI Leadership Institute;
- Project Manager Boot Camp for P.E.M.S.’s
- District Seminar for AEs/PMs/Inspectors and equivalents – walk thru a project, how decisions are made and why
- Contractor and Consultant based training on their process of putting together a bid/fee estimate for INDOT to understand where they are coming from

Performance management

- Discussed INDOT performance management systems and metrics
 - Conversations focused on reorienting metrics, not strictly tying to performance expectations and appraisals
 - When instituted, INDOT erred by making them punitive, especially as the list of measurable grew and grew.
 - More team measurements rather than individual measurements.
 - Understand logical reasons to miss metrics
 - Need to step back and have a comprehensive review of what is measured, why it’s measured and how the measurement will be used. Some are appropriate for performance review purposes, many are not.
- Performance management a feedback tool
 - Create tool for Contractors and Consultants to review INDOT
 - Need to assess what questions to ask
 - Need to determine most reasonable way to facilitate evaluation
 - Orient interpretation of evaluation as constructive criticism

- Post construction review
 - Consider review with all partners
 - Keep it vague and avoid changes related to E&O items
- INDOT consultant performance evaluation
 - Should gain consistency in evaluation
 - Propose discussing scoring more and prior to completing scoring
 - Require conversation prior to finalizing evaluations
- Discussed CR2 process and problems
 - CR2 form is horrible. All zeroes examples. Form seems to discourage positive feedback.
 - Recommendation for scoring that it be done with both parties
 - If scoring was conducted with both parties reviewing together, how would it be scored?
 - Require conversation prior to finalizing evaluations
 - Propose discussing scoring more and prior to completing scoring
- Specifications
 - Time and Materials has come out of specs and things automatically going to Force Account is now the way of doing business. This puts INDOT in the driver's seat not the folks building the project who may have ideas on how to fix the problem. Is this a trust issue?
 - Change orient control to INDOT and away from contractor, indicating lack of trust
 - Discussed ability to indicate trust within project team

After action items – partnering

- Internal INDOT meeting held 10/31/19 to promote and discuss ITT topics, included:
 - Discuss transition from 360 study to Indiana Transportation Team
 - Who is on our representative Indiana Transportation Team and what are they doing?
 - What are the steering committees focus areas and what is Crawfordsville's specific focus topic?
 - How am I a member of the team?
 - How can I help? - Group Discussion
 - What are your interactions with other ITT members?
 - Thinking about partnering interaction, what would you define as a medium size project and how would you define it?
 - What parts of short, medium, and long range priorities do you find interesting? Why? (include printout for attendees)
 - Survey Questions and Results
 - Overwhelming support indicated for effort toward partnering, constructability reviews, added feedback, and lessons learned engagement. Overwhelming support for greater team participation in field checks. Team strongly preferred designer involvement at progress meetings increased but only as needed.
 - Should Preconstruction meetings be expanded to included greater opportunity for partnering?
 - 27% - Yes, preconstruction meetings should be longer and include more partnering interaction.

- 18% - No, preconstruction meetings should be maintained but a separate meeting should be planned for partnering
- 50%- Yes, we should modify preconstruction meeting format to include partnering but limit time.
- 5% - No, don't change anything.
- Thinking about partnering, please select the most important criteria defining a medium sized project:
 - Complexity – 50%
 - Risk – 13%
 - Complexity of Traffic Management Plan – 18%
 - Number of Stakeholders – 9%
 - Various Other – 10%