

# Collaboration Matrix Eases the Process of Teaming Up

## Practice Matters

By James F. Porter, AIA

As clients put architectural projects on hold, firms are finding that work is slowing significantly. That often means talented staff members are laid off, which in turn makes it harder to seek new work. However, tough times can be good times to try new things. A good way to stay busy during periods of slow economic growth is to forge collaborative relationships with other firms. Collaborations allow the combined practices to leverage their expertise when personnel may be in short supply, as well as ease the competitive tensions that often become more severe in an economic drought. A well-considered collaborative agreement will allow your firm to contribute its own expertise to a project and still maintain its identity.

Collaborative partnerships are most successful when the client, design architect, and executive architect have clear lines of responsibility at every stage of a project's life span. The structure for collaboration should entail more than a loose-knit strategic alliance but should not be as tightly woven as a formal Joint Venture.

Some years ago, Altoon + Porter Architects developed a tool for forming collaborative partnerships and enabling them to flourish. It is called the "collaboration matrix." This deceptively simple list of duties, which charts who is responsible for performing what—whether the design architect,

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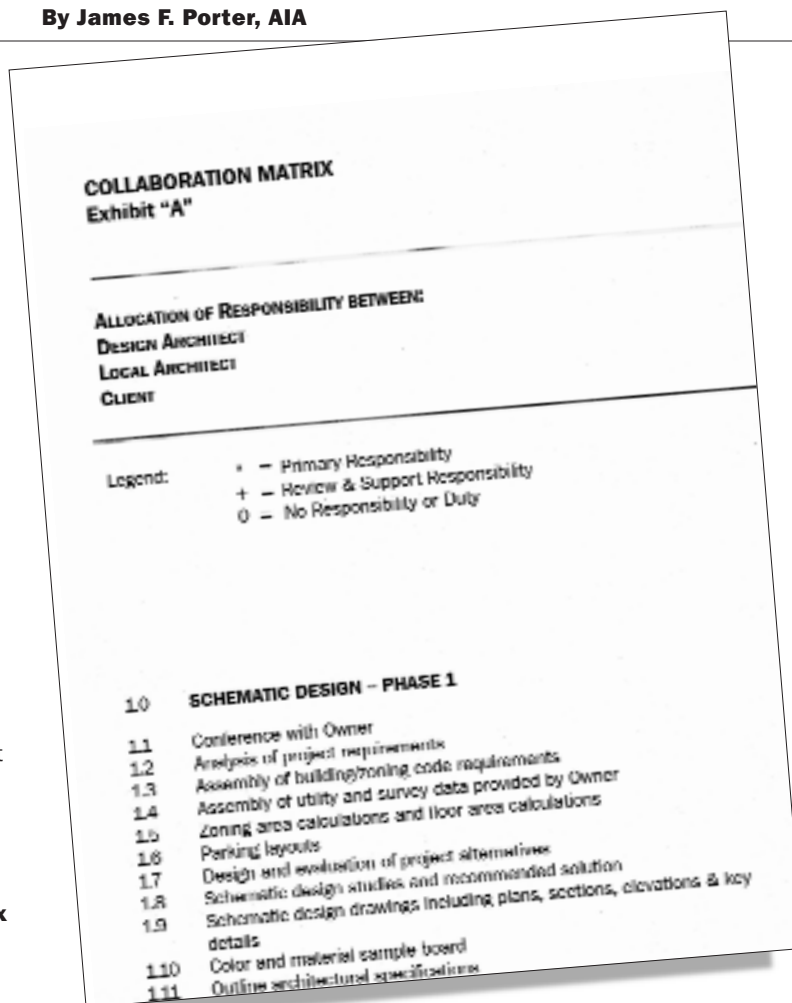
executive architect, or the owner—forms the backbone of a comprehensive strategy for project management. It helps all of the parties involved in a project to define and maintain their roles and responsibilities as peer collaborators. Although a collaboration matrix may begin with a standard list of responsibilities, each and every project is unique, and each must have a matrix specifically tailored to its requirements. The matrix format can be continually and easily updated.

The matrix was designed to fill a void within AIA Document B141, the standard form of Agreement between Owner and Architect, and it is completely compatible with it. Earlier this year, the AIA published a new international form of contract (AIA-B611), which incorporates the Altoon + Porter services-collaboration-matrix concept.

### Origins of the collaboration matrix

Twenty-two years ago, Altoon + Porter partners were working on a fast-track, high-rise office building project located out of state. The client, local to the project, chose the firm as design architect for its background and proven track record with them, encouraging it to team up with a local executive architect who had extensive knowledge of the local politics and building practices. They wanted to specify clearly which partner had responsibility for liability.

The situation had the potential for generating reams of confusing paperwork between the client and the two firms, as well as creating



The first page of a sample collaboration-matrix document.

possible complications regarding insurance, licensing, and taxes.

This potentially unwieldy project inspired the development of the collaboration matrix. When the matrix is added to the contract, it allows each architectural firm to maintain a direct "prime" contractual relationship with the client. Each task or duty to be performed is assigned so that only one of the three parties (executive architect,

design architect, or client) has primary responsibility and authority for executing it, while the others retain support and review roles. The client has only to look to one party with regard to a given task, and accountability is assured. Because the client is a party to the matrix, it is clear to all involved from the outset who is supposed to do what throughout each phase of the entire project.

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## A document with many uses

The collaboration matrix has also proved especially beneficial for breaking down the cultural misunderstandings that sometimes occur in international work. This is accomplished by explicitly delineating roles, communication procedures, and who is accountable to whom.

one partner is an out-of-state firm known for its lab experience and design excellence. The local firm might not have been considered for the project alone, because labs are not its primary specialty. The other firm, located on the East Coast, also would not have been selected without a presence in California. The

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When not used as a part of the contract, a collaboration matrix can also be put to use as a marketing tool, because it helps illustrate to prospective clients the roles that two partnering firms will assume if they are hired together for a project. For example, for a high-tech academic science building in California,

collaboration matrix was used to help illustrate to the client how the local firm could successfully act as the project's executive architect, while the out-of-state firm served as its design architect. In this particular case, it is likely that neither of the firms could have got the project on its own.

## Do your due diligence

After having identified a potential firm to collaborate with, it is essential to study its entire business, from its corporate organization to the way its branch offices are run, as well as its core values, culture, and ethics. Check references and determine whether its relationships with its consultants and clients are positive. Be certain that your partner can live up to its obligations and your expectations. Become well versed in the region where you will be working. Most importantly, research local business and licensing laws.

## Getting everything on paper

The collaboration matrix can be used at the outset of a project to assist with the negotiation between the parties for the division of responsibilities. It can also incorporate a list of required documents to be prepared during each phase. The complete agreement would include cover letters describing the fee structures and overall job responsibilities of each party; a form of standard

owner-architect agreement detailing the comprehensive scope of services and terms; and, lastly, the collaboration matrix, detailing assignment of responsibilities between the parties. Make sure that all significant tasks are identified, and that no task or role is left vague. Document an explicit division of responsibilities for client and architects. In addition, spell out all the terms of payment. On overseas projects, do whatever is necessary to get a retainer up front. The collaboration matrix will help ensure that team members have an equitable share in both a project's responsibilities and its fees. This helps team members avoid conflicts.

The collaboration matrix is a flexible and simple document. It is adaptable as a tool for use in structuring collaborations involving strategic alliances of complementary talents, and where great distance separates the design architect from the client and the project site. ■