

PDGPROJECT
DESIGN
GUIDES**A00.b**

PROJECT DESIGN GUIDE A00.b

Appendix B - Balanced Scorecard

Project Name:	Project No.:	Date:
<i>Name</i>	<i>Number</i>	<i>Date</i>

SPECIFIC NOTES (relating to any particular project specific matters)

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Guide to Balanced Scorecard

Introduction

This tool is a system for providing a fair appraisal of the short list of bidding consultants strengths and weaknesses. The decision making process for getting to the short list is discussed in the Consultant Appointment Strategy guide - A00. In line with corporate responsibility the scoring system should under no circumstances be manipulated to suit any individuals purposes. Some large clients include tender questions on consultant selection criteria and wish to see evidence of a rigours process, for which this can be a part.

Strategy

The Project Director/PM is to decide who is to undertake the interviews.

The Project Director/PM is to nominate a Lead interviewer, who is to arrange a meeting at which all interviewers understand who is to be interviewed, when, set up the scoring system, understand the categories and are given a copy of the DCQ.

Interviews are to be undertaken a discipline at a time, using this spreadsheet for each discipline group.

This system is to ensure fairness, provide data for future selection processes and provide an audit trail.

If Project score sheets are used it can also provide an understanding of the comparison between interview strengths and delivery strengths.

The tabs

Criteria

This tab lists the scoring criteria and gives a summary explanation of each category.

The columns to the right are for the interviewers to set out their individual belief of the weighting to be applied to each category.

The default for each category is 1 and the interviews have a total of 10 weighting points to distribute.

The column to the far right totals up the average weighting, these figures are used on the scoring sheet.

The spreadsheet can be altered to add or omit interviewers.

Scoring System

The scoring system has been set up so that 4 people scoring maximum point = 200 for ease.

This scoring system has a built-in weighting favouring the Exceptional.

The points can be altered to suit the interviews wishes, but remember to re-calculate the maximum score. This figure is linked to the score sheet.

The pass mark has been set at 50% but can be altered to suit the interviewers wishes and project demands.

Score Sheet

Each interviewer is to score each designer.

When scoring, interviewers should refer back to the DCQ.

Remember the spreadsheet can be altered to add or omit designers. It does take a little Excel knowledge. Seek advise if you are uncertain. There are automatic formulas that add up the scores as percentages and flag up Pass or Fail. A Sense Check column has been added to enable an end of process review to ensure marking was undertaken with an even mindset.

Project Score - designer 1, 2, 3 etc

An optional KPI record of delivery performance against the selection categories.

Scoring and Selection of Design Consultant

Selection Criteria and Weighting

	CATEGORY	KEY ISSUES TO REVIEW	DCQ
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The following are suggested criteria - interview panel to review criteria according to project requirements.

1	Understanding	Understanding of the project/local knowledge/relationships.	
2	Experience	Relevant recent project experience in sector/location and past performance, chosen construction methods.	
3	People	Key people/resources - quality and depth, location and availability.	
4	HS&E	Evidence of Health Safety and Environment in design.	
5	Approach	Design approach and management - collaboration, process, systems and assurance, proactive attitude, design to cost.	
6	IT	2D, 3D modelling & use of BIM (Revit), information transfer, common protocols.	
7	Procurement & Contract	Experience of specific project procurement route, ability to manage variations & approvals, fee proposal and commercial position.	
8	Bid Risk Sharing (if appropriate)	Attitude to risk sharing on fees.	
9	Delivery and Programme	Evidence of design programming, package management and timely delivery.	
10	Work Winning (if appropriate)	Evidence of bid winning with Contractors.	

Note: Cross reference answers to the Designers Competency Questionnaire answers (DCQ).

Interviewer 1	Interviewer 2	Interviewer 3	Interviewer 4	Average Weighting Factor
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Each Interviewer to identify weighting according to importance of each criteria and award a total of 10 weighting factors, or work to an agreed weighting factor (minimum is 1).

1	2	2	1	1.5
2	3	2	2	2.3
4	4	2	5	3.8
1	1	1	2	1.3
2	1	1	2	1.5
2	1	2	1	1.5
2	1	4	1	2.0
1	1	1	1	1.0
4	5	4	3	4.0
1	1	1	2	1.3
20	20	20	20	20
OK	OK	OK	OK	OK

Scoring and Selection of Design Consultant

Scoring Sheet

Scoring System	
Score	Definition
0	Unacceptable
0.5	Weak - meets requirement in some respects.
1	Satisfactory - meets need with minor weaknesses.
1.5	Good - exceeds our requirements in part.
2.5	Exceptional - Exceeds requirements in the vast majority of aspects.

Notes: This scoring system has a built-in weighting favouring the Exceptional.

Set the following metrixs:

Pass/ Fail Threshold Value %:

50

Max score: 3 x 10 x no. of interviewers + additional weighting factor of x10.

Amend Pass/Fail threshold to project objectives and max score dependent on number of interviewers.

200

Scoring and Selection of Design Consultant

Scoring Sheet

Weighing factor is set up to work with individual interviewers criteria.

CATEGORY	Designer 1								Designer 2								Designer 3								Designer 4										
	Interviewer 1	Interviewer 2	Interviewer 3	Interviewer 4	Totals	Weighting	Weighted score	Sense check	Interviewer 1	Interviewer 2	Interviewer 3	Interviewer 4	Totals	Weighting	Weighted score	Sense check	Interviewer 1	Interviewer 2	Interviewer 3	Interviewer 4	Totals	Weighting	Weighted score	Sense check	Interviewer 1	Interviewer 2	Interviewer 3	Interviewer 4	Totals	Weighting	Weighted score	Sense check			
1 Understanding	1.5	1.5	1.5	1.5	6	1.5	9		0	0	0	0	0	1.5	0		2.5	2.5	2.5	2.5	10	1.5	15		1	1	1	1	4	1.5	6				
2 Experience	1.5	1.5	1.5	1.5	6	2.3	14		0	0	0	0	0	2.3	0		2.5	2.5	2.5	2.5	10	2.3	23		1	1	1	1	4	2.3	9				
3 People	1.5	1.5	1.5	1.5	6	3.8	23		0	0	0	0	0	3.8	0		2.5	2.5	2.5	2.5	10	3.8	38		1	1	1	1	4	3.8	15				
4 HS&E	1.5	1.5	1.5	1.5	6	1.3	7.5		0	0	0	0	0	1.3	0		2.5	2.5	2.5	2.5	10	1.3	13		1	1	1	1	4	1.3	5				
5 Approach	1.5	1.5	1.5	1.5	6	1.5	9		0	0	0	0	0	1.5	0		2.5	2.5	2.5	2.5	10	1.5	15		1	1	1	1.5	4.5	1.5	6.8				
6 IT	1.5	1.5	1.5	1.5	6	1.5	9		0	0	0	0	0	1.5	0		2.5	2.5	2.5	2.5	10	1.5	15		1.5	1.5	1.5	1.5	6	1.5	9				
7 Procurement & Contract	1.5	1.5	1.5	1.5	6	2.0	12		0	0	0	0	0	2.0	0		2.5	2.5	2.5	2.5	10	2.0	20		1.5	1.5	1.5	1.5	6	2.0	12				
8 Bid Risk Sharing (if appropriate)	1.5	1.5	1.5	1.5	6	1.0	6		0	0	0	0	0	1.0	0		2.5	2.5	2.5	2.5	10	1.0	10		1.5	1.5	1.5	1.5	6	1.0	6				
9 Delivery and Programme	1.5	1.5	1.5	1.5	6	4.0	24		0	0	0	0	0	4.0	0		2.5	2.5	2.5	2.5	10	4.0	40		1.5	1.5	1.5	1.5	6	4.0	24				
10 Work Winning (if appropriate)	1.5	1.5	1.5	1.5	6	1.3	7.5		0	0	0	0	0	1.3	0		2.5	2.5	2.5	2.5	10	1.3	13		1.5	1.5	1.5	1.5	6	1.3	7.5				
CHECK TOTALS					60	20	120		CHECK TOTALS					0	20	0		CHECK TOTALS					100	20	200		CHECK TOTALS					50.5	20	100	
					%		60							%		0							%		100							%		50	
Pass / Fail							Pass		Pass / Fail							Fail		Pass / Fail							Pass		Pass / Fail							Pass	

Note:

Sense Check order 1-4:

Order consultants by category at the end of the process to ensure marking was undertaken with an even mindset.

Scoring of Design Consultant during project

Scoring Sheet - Designer 1

CATEGORY		Bid			Stage										
		Totals	Weighting	Weighted score	Stage/month score	Weighted score	Stage/month score	Weighted score	Stage/month score	Weighted score	Stage/month score	Weighted score	Stage/month score	Weighted score	Stage/month score
1	Understanding	1.5	1.5	2.3	1	1.5	1	1.5	1	1.5	1	1.5	1	1.5	1
2	Experience	1.5	2.3	3.4	2.5	5.6	2.5	5.6	2.5	5.6	2.5	5.6	2.5	5.6	2.5
3	People	1.5	3.8	5.6	1.5	5.6	1.5	5.6	1.5	5.6	1.5	5.6	1.5	5.6	1.5
4	HS&E	1.5	1.3	1.9	0	0	0	0	0	0	0	0	0	0	0
5	Approach	1.5	1.5	2.3	1.5	2.3	1.5	2.3	1.5	2.3	1.5	2.3	1.5	2.3	1.5
6	IT	1.5	1.5	2.3	2.5	3.8	2.5	3.8	2.5	3.8	2.5	3.8	2.5	3.8	2.5
7	Procurement & Contract	1.5	2.0	3	1	2	1	2	1	2	1	2	1	2	1
8	Bid Risk Sharing (if appropriate)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
9	Delivery and Programme	1.5	4.0	6	1	4	1	4	1	4	1	4	1	4	1
10	Work Winning (if appropriate)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TOTALS		12	18	27	11	25	11	25	11	25	11	25	11	25	11

Note: Optional KPI record; the preferred tool being L03.
Scoring to be undertaken by the DM or PM or a team review.