

	PROJECT DESIGN GUIDES	PROJECT DESIGN KPI's
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PROJECT DESIGN GUIDE

PROJECT KPI's

1-5 Consultants

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

<i>SPECIFIC NOTES</i> (relating to any particular project specific matters)

Document No.: PDG-PDG-PRO-L03.1



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QA

Revision:	Revision description:	Revision date:
R01	10/10/2014 More sophisticated formula's used that work out automatically how many consultant tabs are used.	
R02	26/11/2015 Review of criteria to be scored, included Desig to Cost for QC and retitled to other catagories for clarity.	
R03	11/01/2016 All stages now included, more automation in spreadsheets.	
R04		
R05		
R06		
R07		
R08		
R09		
R10		

Edited to be project specific / Revised by:	
Name:	Position:
Signature:	Date:
Checked by:	
Name:	Position:
Signature:	Date:
Authorised by:	
Name:	Position:
Signature:	Date:



Guide to Project Design KPI's

Introduction

This tool, as the title indicates, is for scoring project design. There where a few decision to make when setting up this process; which categories to score, between what time periods, any weightings, how simple it should be, etc. This is to ensure a consistent approach for all projects, to gather comparable and meaningful data. This really comes down to the resources available for undertaking this task and more importantly the detail of feed-back you wish to analyse. This tool has been set up for stage reviews.

Strategy

Ensure Board or Division level agreement and authorisation before embarking on this tool. The outputs will need to be recognised by the business.

The categories for this KPI spreadsheet are taken directly from fundamental design processes and knowledge of design management requirements.

If amending the categories on this spreadsheet, think about your business, client or sector needs (or how to bring all 3 together), a smart way to measure them and if there will be a weighting system.

Process

1 - This spreadsheet is automated and will understand the difference between using it for 1, 2, 3, 4 or 5 consultants.

2 - Score from Work Winning onwards. Simply leave '0' for stages or categories not scored.

3 - At the end of each project stage simply score the consultants 1 to 5 against each category.

Brief descriptions of what to consider, when scoring, can be found in the Comments/Notes column.

These notes are to be over written with any specific comments you have on the category.

4 - Score 1 is low (unacceptable), score 5 is high (exemplar).

5 - The formula's in the spreadsheet do the rest.

6 - If you think there is a glitch, contact the author or administrator.

Remember tabs cannot be shared between consultants. This spreadsheet is set up to score a maximum of 5 consultants. If you need more tabs the spreadsheet will need to be extended and score sheet rebuilt!

At year end scores will be collated for each consultant to provide trends.

Notes

Some parts of the spreadsheet are locked. If formulas need changing, because e.g. Work Winning column is to be used, then contact the author or administrator.

The inevitable subjectivity of how different people score will balance out over time.

The tabs

Title sheet.

QA sheet - to record when your tools was created, who authorised it, and amendment made over time.

Guide - for explaining this tool.

Project & Consultant Details - to log the key information

Designers Data Input Tabs - for individual projects, by discipline (or company for multi discipline). Record by stage (or amended for monthly scores).

Project Totals - Individual project totals and KPI Dashboard graphs.

Password to unlock this spreadsheet is 'KPI'. Check with the administrator before undertaking **ANY** changes.



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Consultant Details

Project Number & Name: **Project no.5** **Test project name 5**
 DM / PM undertaking scoring: **Name** **DM** **Name** **PM** **Name** **other**

Project details

Ref.	
Contract Value	
Start Date	
SoS Date	
Contract P.C. Date	
P.C. Date	
Sector	
Building type	
Client	
Master plan	
Project	
Main contract	

Architect details

Company name	Arch 05
Directors in charge (name)	
Project Lead (name)	
Project Office Address	
Project Office Phone number	
Project Lead Mobile number	
Project Lead Email	
Appointment doc	

Structural Engineer details

Company name	Struct 05
Directors in charge (name)	
Discipline Lead (name)	
Project Office Address	
Project Office Phone number	
Project Lead Mobile number	
Project Lead Email	
Appointment doc	

Mech Engineer details

Company name	Mech 05
Directors in charge (name)	
Discipline Lead (name)	
Project Office Address	
Project Office Phone number	
Project Lead Mobile number	
Project Lead Email	
Appointment doc	

Elec Engineer details

Company name	Elec 05
Directors in charge (name)	
Discipline Lead (name)	
Project Office Address	
Project Office Phone number	
Project Lead Mobile number	
Project Lead Email	
Appointment doc	

Other details

Company name	Other 05
Directors in charge (name)	
Discipline Lead (name)	
Project Office Address	
Project Office Phone number	
Project Lead Mobile number	
Project Lead Email	
Appointment doc	

Add in additional staff as required.

PROJECT DESIGN GUIDES

PROJECT DESIGN KPI's

Score sheet

Project name & Number: **Project no.5 Test project name 5**
 Consultant: **Arch 05**

Client Stages	Work winning	Preparation and Brief	Concept Design	Solutions Development		Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	X	1	2	3		4		5	
RIBA Stages	Work winning	Preparation and Brief	Concept Design	Developed Design		Design & Technical	Construct	Handover	
Stages	X	1	2	3.1	3.2	4	5	6	
Categories									Average
DESIGN PROGRAMME	5	0	1	5	5	5	5	5	4.4
TECHNICAL KNOWLEDGE	5	0	1	5	5	5	5	5	4.4
DESIGN TO COST	5	0	1	5	5	5	5	5	4.4
DESIGN DELIVERABLES	5	0	1	5	5	5	5	5	4.4
MANAGING CONDITIONS & APPROVALS	5	0	1	5	5	5	5	5	4.4
BIM	5	0	1	5	5	5	5	5	4.4
DOCUMENT PROTOCOLS	5	0	1	5	5	5	5	5	4.4
CHANGE CONTROL	5	0	1	5	5	5	5	5	4.4
H&S / CDM compliance	5	0	1	5	5	5	5	5	4.4
Client relationship	5	0	1	5	5	5	5	5	4.4
Contractor relationship	5	0	1	5	5	5	5	5	4.4
Team leading / working	5	0	1	5	5	5	5	5	4.4
Average score (excl. n/a)	5.0	0.0	1.0	5.0	5.0	5.0	5.0	5.0	4.4
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,			LA Planning submission at the end of 3.1 ?					

Note:

Key:

1-2	Poor - Unsatisfactor
3-4	Satisfactory - Good
5	Exemplary standard
n/a?	n/a

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Score sheet

Project name & Number: **Project no.5 Test project name 5**
 Consultant: **Struct 05**

Client Stages	Work winning	Preparation and Brief	Concept Design	Solutions Development		Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.	
Gateway	X	1	2	3		4		5		
RIBA Stages	Work winning	Preparation and Brief	Concept Design	Developed Design		Design & Technical	Construct	Handover		
Stages	X	1	2	3.1	3.2	4	5	6		
Categories										Average
DESIGN PROGRAMME	4	0	2	4	4	4	4	4	4	3.7
TECHNICAL KNOWLEDGE	4	0	2	4	4	4	4	4	4	3.7
DESIGN TO COST	4	0	2	4	4	4	4	4	4	3.7
DESIGN DELIVERABLES	4	0	2	4	4	4	4	4	4	3.7
MANAGING CONDITIONS & APPROVALS	4	0	2	4	4	4	4	4	4	3.7
BIM	4	0	2	4	4	4	4	4	4	3.7
DOCUMENT PROTOCOLS	4	0	2	4	4	4	4	4	4	3.7
CHANGE CONTROL	4	0	2	4	4	4	4	4	4	3.7
H&S / CDM compliance	4	0	2	4	4	4	4	4	4	3.7
Client relationship	4	0	2	4	4	4	4	4	4	3.7
Contractor relationship	4	0	2	4	4	4	4	4	4	3.7
Team leading / working	4	0	2	4	4	4	4	4	4	3.7
Average score (excl. n/a)	4.0	0.0	2.0	4.0	4.0	4.0	4.0	4.0	4.0	3.7
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,			LA Planning submission at the end of 3.1 ?						

Note:

Key:

1-2	Poor - Unsatisfactor
3-4	Satisfactory - Good
5	Exemplary standard
n/a?	n/a

PROJECT DESIGN KPI's

Score sheet

Project name & Number: **Project no.5 Test project name 5**
 Consultant: **Mech 05**

Client Stages	Work winning	Preparation and Brief	Concept Design	Solutions Development		Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	X	1	2	3		4		5	
RIBA Stages	Work winning	Preparation and Brief	Concept Design	Developed Design		Design & Technical	Construct	Handover	
Stages	X	1	2	3.1	3.2	4	5	6	
Categories									Average
DESIGN PROGRAMME	3	0	3	3	3	3	3	3	3.0
TECHNICAL KNOWLEDGE	3	0	3	3	3	3	3	3	3.0
DESIGN TO COST	3	0	3	3	3	3	3	3	3.0
DESIGN DELIVERABLES	3	0	3	3	3	3	3	3	3.0
MANAGING CONDITIONS & APPROVALS	3	0	3	3	3	3	3	3	3.0
BIM	3	0	3	3	3	3	3	3	3.0
DOCUMENT PROTOCOLS	3	0	3	3	3	3	3	3	3.0
CHANGE CONTROL	3	0	3	3	3	3	3	3	3.0
H&S / CDM compliance	3	0	3	3	3	3	3	3	3.0
Client relationship	3	0	3	3	3	3	3	3	3.0
Contractor relationship	3	0	3	3	3	3	3	3	3.0
Team leading / working	3	0	3	3	3	3	3	3	3.0
Average score (excl. n/a)	3.0	0.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,			LA Planning submission at the end of 3.1 ?					

Note:

Key:

1-2	Poor - Unsatisfactor
3-4	Satisfactory - Good
5	Exemplary standard
n/a?	n/a

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Score sheet

Project name & Number: **Project no.5 Test project name 5**
 Consultant: **Elec 05**

Client Stages	Work winning	Preparation and Brief	Concept Design	Solutions Development		Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	X	1	2	3		4		5	
RIBA Stages	Work winning	Preparation and Brief	Concept Design	Developed Design		Design & Technical	Construct	Handover	
Stages	X	1	2	3.1	3.2	4	5	6	
Categories									Average
DESIGN PROGRAMME	0	0	0	0	0	0	0	0	0.0
TECHNICAL KNOWLEDGE	2	0	4	2	2	2	2	2	2.3
DESIGN TO COST	0	0	0	0	0	0	0	0	0.0
DESIGN DELIVERABLES	0	0	0	0	0	0	0	0	0.0
MANAGING CONDITIONS & APPROVALS	0	0	0	0	0	0	0	0	0.0
BIM	0	0	0	0	0	0	0	0	0.0
DOCUMENT PROTOCOLS	0	0	0	0	0	0	0	0	0.0
CHANGE CONTROL	0	0	0	0	0	0	0	0	0.0
H&S / CDM compliance	0	0	0	0	0	0	0	0	0.0
Client relationship	0	0	0	0	0	0	0	0	0.0
Contractor relationship	0	0	0	0	0	0	0	0	0.0
Team leading / working	0	0	0	0	0	0	0	0	0.0
Average score (excl. n/a)	2.0	0.0	4.0	2.0	2.0	2.0	2.0	2.0	2.3
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,			LA Planning submission at the end of 3.1 ?					

Note:

Key:

1-2	Poor - Unsatisfactor
3-4	Satisfactory - Good
5	Exemplary standard
n/a?	n/a

PROJECT DESIGN KPI's

Score sheet

Project name & Number: **Project no.5 Test project name 5**
 Consultant: **Other 05**

Client Stages	Work winning	Preparation and Brief	Concept Design	Solutions Development		Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	X	1	2	3		4		5	
RIBA Stages	Work winning	Preparation and Brief	Concept Design	Developed Design		Design & Technical	Construct	Handover	
Stages	X	1	2	3.1	3.2	4	5	6	
Categories									Average
DESIGN PROGRAMME	1	0	5	1	1	1	1	1	1.6
TECHNICAL KNOWLEDGE	1	0	5	1	1	1	1	1	1.6
DESIGN TO COST	1	0	5	1	1	1	1	1	1.6
DESIGN DELIVERABLES	1	0	5	1	1	1	1	1	1.6
MANAGING CONDITIONS & APPROVALS	1	0	5	1	1	1	1	1	1.6
BIM	1	0	5	1	1	1	1	1	1.6
DOCUMENT PROTOCOLS	1	0	5	1	1	1	1	1	1.6
CHANGE CONTROL	1	0	5	1	1	1	1	1	1.6
H&S / CDM compliance	1	0	5	1	1	1	1	1	1.6
Client relationship	1	0	5	1	1	1	1	1	1.6
Contractor relationship	1	0	5	1	1	1	1	1	1.6
Team leading / working	1	0	5	1	1	1	1	1	1.6
Average score (excl. n/a)	1.0	0.0	5.0	1.0	1.0	1.0	1.0	1.0	1.6
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,			LA Planning submission at the end of 3.1 ?					

Note:

Key:

1-2	Poor - Unsatisfactor
3-4	Satisfactory - Good
5	Exemplary standard
n/a?	n/a



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Totals sheet

Project name & Number: **Project no.5 Test project name 5** Test project name 5
 Title: **Scores**

Client Stages	Work winning	Preparation and Brief	Concept Design	Solutions Development		Implementation		Transition	WARNING: If any score is below 1 or above 5 check the individual score sheets.							
Gateway	X	1	2	3		4		5								
RIBA Stages	Work winning	Preparation and Brief	Concept Design	Developed Design		Design & Technical	Construct	Handover								
Stages	X	1	2	3.1	3.2	4	5	6								
Categories	SCORED	NOT USED	SCORED	SCORED	SCORED	SCORED	SCORED	SCORED	Average							
DESIGN PROGRAMME									3.2							
TECHNICAL KNOWLEDGE									3.0							
DESIGN TO COST									3.2							
DESIGN DELIVERABLES									3.2							
MANAGING CONDITIONS & APPROVALS									3.2							
BIM									3.2							
DOCUMENT PROTOCOLS									3.2							
CHANGE CONTROL									3.2							
H&S / CDM compliance									3.2							
Client relationship									3.2							
Contractor relationship									3.2							
Team leading / working									3.2							
Average score (excl. n/a)									3.0	0.0	3.0	3.0	3.0	3.0	3.0	3.0
Warning letters / emails written									Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No
Stage comment:	Value added, Problem solving, Exemplary documentation,			LA Planning submission at the end of 3.1 ?												

Note:

Key:

1-2	Poor - Unsatisfactory
3-4	Satisfactory - Good
5	Exemplary standard
n/a?	n/a

