



PROJECT DESIGN GUIDE

PROJECT KPI's

Year End Total Project Scores by Consultant

2014

Consultant Name:
Name

<i>SPECIFIC NOTES</i> (relating to any particular project specific matters)
BIM not used on these projects.

Document No.:



PROJECT
DESIGN
GUIDES

PROJECT DESIGN KPI's

QA

Revision:	Revision description:	Revision date:
R01		
R02		
R03		
R04		
R05		
R06		
R07		
R08		
R09		
R10		
R11		
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R40		
R41		

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 for HAL

Introduction

This tool is to total year end averages for a single consultant. Trends can then be reviewed and consultants compared.

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, thereby tying together the processes into a whole. Processes can be categorised into Mandatory, Advisory and Potentially useful (MAP). It is the Mandatory ones that are scored here.

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

The administrator is to ensure there are Project tabs for all the projects this period undertaken by a consultant.

The administrator is to ensure the KPI Totals tab's links/formula's are updated for all the Project tabs included.

The administrator is to undertake a sense check to ensure the spreadsheet is working properly.

Results from the totals and graphs on this consultant period end spreadsheet can then be compared with other consultant period end spreadsheets.

Findings from this process is to be fed back into the business for future decision making.

Findings from individual consultant totals and graphs is to be fed back to the consultants concerned, and discussed in an open manner.

Notes

The KPI Totals tab is now formulated to understand which categories or stages have been scored, so averages are consistent item by item.

Some parts of the spreadsheet are locked. If formulas need changing, because 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.

Details - consultant details to log the key information and the list of project undertaken this period from which data is to be measured.

Project tabs 1, 2 ,3 etc for which consultant data is taken from the Project Design KPI spreadsheets.

KPI Totals - Plots all projects and provides averages for stages and categories.

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



PROJECT DESIGN GUIDES

PROJECT DESIGN KPI's

Consultant Details

DM / PM validating projects inc.: **Name** **DM** **Name** **PM** **Name** **other**

Consultant details

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

Project list

	Name
PROJ 0001	Project 01
PROJ 0002	Project 02
PROJ 0003	Project 03
PROJ 0004	Project 04
PROJ 0005	Project 05
PROJ 0006	Project 06
PROJ 0007	Project 07
PROJ 0008	Project 08
PROJ 0009	Project 09
PROJ 0010	Project 10

PDG	PROJECT DESIGN GUIDES	PROJECT DESIGN KPI's
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Score sheet

Project Number & Name: **PROJ 0001 Project 01**
 Consultant: **RFT**

Client Stages	Work winning	Solutions Development	Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	n/a	3	5		6	
RIBA Stages	Work winning	Developed Design	Design & Technical	Construct	Handover	
Stages	n/a	3	4	5	6	
Categories						Average
DESIGN PROGRAMME	1	0	1	1	n/a	0.8
TECHNICAL KNOWLEDGE	1	0	1	1	n/a	0.8
DESIGN DASHBOARD [Statutory & Stakeholder approvals]	1	0	1	1	n/a	0.8
DELIVERABLES DESIGN DASHBOARD	1	0	1	1	n/a	0.8
DOCUMENT PROTOCOLS	1	0	1	1	1	0.8
BIM	n/a	n/a	n/a	n/a	n/a	0.0
CHANGE CONTROL	n/a	0	1	1	n/a	0.7
QUALITY CONFORMANCE (Samples, Benchmarks, etc)	n/a	0	1	1	n/a	0.7
H&S / CDM compliance	1	0	1	1	1	0.8
Client relationship	1	0	1	1	1	0.8
Contractor relationship	1	0	1	1	1	0.8
Team leading / working	1	0	1	1	1	0.8
Average score (excl. n/a)	1.0	0.0	1.0	1.0	1.0	0.8
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,					

Note:
 For HAL projects Work Winning has been defined as Gateway 2.

Key:

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

PDG	PROJECT DESIGN GUIDES	PROJECT DESIGN KPI's
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Score sheet

Project Number & Name: **PROJ 0002 Project 02**
 Consultant: **RFT**

Client Stages	Work winning	Solutions Development	Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	n/a	3	5		6	
RIBA Stages	Work winning	Developed Design	Design & Technical	Construct	Handover	
Stages	n/a	3	4	5	6	
Categories						Average
DESIGN PROGRAMME	4	0	4	4	n/a	3.0
TECHNICAL KNOWLEDGE	4	0	4	4	n/a	3.0
DESIGN DASHBOARD [Statutory & Stakeholder approvals]	4	0	4	4	n/a	3.0
DELIVERABLES DESIGN DASHBOARD	4	0	4	4	n/a	3.0
DOCUMENT PROTOCOLS	4	0	4	4	4	3.2
BIM	n/a	n/a	n/a	n/a	n/a	0.0
CHANGE CONTROL	n/a	0	4	4	n/a	2.7
QUALITY CONFORMANCE (Samples, Benchmarks, etc)	n/a	0	4	4	n/a	2.7
H&S / CDM compliance	4	0	4	4	4	3.2
Client relationship	4	0	4	4	4	3.2
Contractor relationship	4	0	4	4	4	3.2
Team leading / working	4	0	4	4	4	3.2
Average score (excl. n/a)	4.0	0.0	4.0	4.0	4.0	3.2
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,					

Note:
For HAL projects Work Winning has been defined as Gateway 2.

Key:

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

PDG	PROJECT DESIGN GUIDES	PROJECT DESIGN KPI'S
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Score sheet

Project Number & Name: **PROJ 0003 Project 03**
 Consultant: **RFT**

Client Stages	Work winning	Solutions Development	Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	n/a	3	5		6	
RIBA Stages	Work winning	Developed Design	Design & Technical	Construct	Handover	
Stages	n/a	3	4	5	6	
Categories						Average
DESIGN PROGRAMME	3	1	3	3	n/a	2.5
TECHNICAL KNOWLEDGE	3	3	1	3	n/a	2.5
DESIGN DASHBOARD [Statutory & Stakeholder approvals]	3	3	3	1	n/a	2.5
DELIVERABLES DESIGN DASHBOARD	3	3	3	3	n/a	3.0
DOCUMENT PROTOCOLS	3	3	3	3	3	3.0
BIM	n/a	n/a	n/a	n/a	n/a	0.0
CHANGE CONTROL	n/a	3	3	3	n/a	3.0
QUALITY CONFORMANCE (Samples, Benchmarks, etc)	n/a	3	3	3	n/a	3.0
H&S / CDM compliance	3	1	3	3	3	2.6
Client relationship	3	3	1	3	3	2.6
Contractor relationship	3	3	3	1	3	2.6
Team leading / working	3	3	3	3	1	2.6
Average score (excl. n/a)	3.0	2.6	2.6	2.6	2.6	2.7
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,					

Note:
 For HAL projects Work Winning has been defined as Gateway 2.

Key:

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

PDG	PROJECT DESIGN GUIDES	PROJECT DESIGN KPI's
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Score sheet

Project Number & Name: **PROJ 0004 Project 04**
 Consultant: **RFT**

Client Stages	Work winning	Solutions Development	Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	n/a	3	5		6	
RIBA Stages	Work winning	Developed Design	Design & Technical	Construct	Handover	
Stages	n/a	3	4	5	6	
Categories						Average
DESIGN PROGRAMME	4	4	4	4	n/a	4.0
TECHNICAL KNOWLEDGE	4	4	4	4	n/a	4.0
DESIGN DASHBOARD [Statutory & Stakeholder approvals]	4	4	4	4	n/a	4.0
DELIVERABLES DESIGN DASHBOARD	4	4	4	4	n/a	4.0
DOCUMENT PROTOCOLS	4	4	4	4	4	4.0
BIM	n/a	n/a	n/a	n/a	n/a	0.0
CHANGE CONTROL	n/a	4	4	4	n/a	4.0
QUALITY CONFORMANCE (Samples, Benchmarks, etc)	n/a	4	4	4	n/a	4.0
H&S / CDM compliance	4	4	4	4	4	4.0
Client relationship	4	4	4	4	4	4.0
Contractor relationship	4	4	4	4	4	4.0
Team leading / working	4	4	4	4	4	4.0
Average score (excl. n/a)	4.0	4.0	4.0	4.0	4.0	4.0
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,					

Note:
 For HAL projects Work Winning has been defined as Gateway 2.

Key:

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

PDG	PROJECT DESIGN GUIDES	PROJECT DESIGN KPI's
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Score sheet

Project Number & Name: **PROJ 0005 Project 05**
 Consultant: **RFT**

Client Stages	Work winning	Solutions Development	Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	n/a	3	5		6	
RIBA Stages	Work winning	Developed Design	Design & Technical	Construct	Handover	
Stages	n/a	3	4	5	6	
Categories						Average
DESIGN PROGRAMME	5	5	5	5	n/a	5.0
TECHNICAL KNOWLEDGE	2	2	2	2	n/a	2.0
DESIGN DASHBOARD [Statutory & Stakeholder approvals]	5	5	5	5	n/a	5.0
DELIVERABLES DESIGN DASHBOARD	2	2	2	2	n/a	2.0
DOCUMENT PROTOCOLS	5	5	5	5	5	5.0
BIM	n/a	n/a	n/a	n/a	n/a	0.0
CHANGE CONTROL	n/a	2	2	2	n/a	2.0
QUALITY CONFORMANCE (Samples, Benchmarks, etc)	n/a	5	5	5	n/a	5.0
H&S / CDM compliance	2	2	2	2	2	2.0
Client relationship	5	5	5	5	5	5.0
Contractor relationship	2	2	2	2	2	2.0
Team leading / working	5	5	5	5	5	5.0
Average score (excl. n/a)	3.7	3.6	3.6	3.6	3.8	3.7
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,					

Note:
 For HAL projects Work Winning has been defined as Gateway 2.

Key:

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

PDG	PROJECT DESIGN GUIDES	PROJECT DESIGN KPI's
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Score sheet

Project Number & Name: **PROJ 0006 Project 06**
 Consultant: **RFT**

Client Stages	Work winning	Solutions Development	Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	n/a	3	5		6	
RIBA Stages	Work winning	Developed Design	Design & Technical	Construct	Handover	
Stages	n/a	3	4	5	6	
Categories						Average
DESIGN PROGRAMME	3	3	3	3	n/a	3.0
TECHNICAL KNOWLEDGE	3	3	3	3	n/a	3.0
DESIGN DASHBOARD [Statutory & Stakeholder approvals]	3	3	3	3	n/a	3.0
DELIVERABLES DESIGN DASHBOARD	3	3	3	3	n/a	3.0
DOCUMENT PROTOCOLS	3	3	3	3	3	3.0
BIM	n/a	n/a	n/a	n/a	n/a	0.0
CHANGE CONTROL	n/a	3	3	3	n/a	3.0
QUALITY CONFORMANCE (Samples, Benchmarks, etc)	n/a	3	3	3	n/a	3.0
H&S / CDM compliance	3	3	3	3	3	3.0
Client relationship	3	3	3	3	3	3.0
Contractor relationship	3	3	3	3	3	3.0
Team leading / working	3	3	3	3	3	3.0
Average score (excl. n/a)	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	
Stage comment:	Value added, Problem solving, Exemplary documentation,					

Note:
 For HAL projects Work Winning has been defined as Gateway 2.

Key:

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

PDG	PROJECT DESIGN GUIDES	PROJECT DESIGN KPI's
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Score sheet

Project Number & Name: **PROJ 0007 Project 07**
 Consultant: **RFT**

Client Stages	Work winning	Solutions Development	Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	n/a	3	5		6	
RIBA Stages	Work winning	Developed Design	Design & Technical	Construct	Handover	
Stages	n/a	3	4	5	6	
Categories						Average
DESIGN PROGRAMME	5	5	5	5	n/a	5.0
TECHNICAL KNOWLEDGE	5	5	5	5	n/a	5.0
DESIGN DASHBOARD [Statutory & Stakeholder approvals]	5	5	5	5	n/a	5.0
DELIVERABLES DESIGN DASHBOARD	5	5	5	5	n/a	5.0
DOCUMENT PROTOCOLS	5	5	5	5	5	5.0
BIM	n/a	n/a	n/a	n/a	n/a	0.0
CHANGE CONTROL	n/a	5	5	5	n/a	5.0
QUALITY CONFORMANCE (Samples, Benchmarks, etc)	n/a	5	5	5	n/a	5.0
H&S / CDM compliance	5	5	5	5	5	5.0
Client relationship	5	5	5	5	5	5.0
Contractor relationship	5	5	5	5	5	5.0
Team leading / working	5	5	5	5	5	5.0
Average score (excl. n/a)	5.0	5.0	5.0	5.0	5.0	5.0
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,					

Note:
 For HAL projects Work Winning has been defined as Gateway 2.

Key:

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

PDG	PROJECT DESIGN GUIDES	PROJECT DESIGN KPI's
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Score sheet

Project Number & Name: **PROJ 0008 Project 08**
 Consultant: **RFT**

Client Stages	Work winning	Solutions Development	Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	n/a	3	5		6	
RIBA Stages	Work winning	Developed Design	Design & Technical	Construct	Handover	
Stages	n/a	3	4	5	6	
Categories						Average
DESIGN PROGRAMME	4	5	4	5	n/a	4.5
TECHNICAL KNOWLEDGE	4	5	4	5	n/a	4.5
DESIGN DASHBOARD [Statutory & Stakeholder approvals]	4	5	4	5	n/a	4.5
DELIVERABLES DESIGN DASHBOARD	4	5	4	5	n/a	4.5
DOCUMENT PROTOCOLS	4	5	4	5	4	4.4
BIM	n/a	n/a	n/a	n/a	n/a	0.0
CHANGE CONTROL	n/a	5	4	5	n/a	4.7
QUALITY CONFORMANCE (Samples, Benchmarks, etc)	n/a	5	4	5	n/a	4.7
H&S / CDM compliance	4	5	4	5	4	4.4
Client relationship	4	5	4	5	4	4.4
Contractor relationship	4	5	4	5	4	4.4
Team leading / working	4	5	4	5	4	4.4
Average score (excl. n/a)	4.0	5.0	4.0	5.0	4.0	4.4
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,					

Note:
 For HAL projects Work Winning has been defined as Gateway 2.

Key:

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

PDG	PROJECT DESIGN GUIDES	PROJECT DESIGN KPI'S
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Score sheet

Project Number & Name: **PROJ 0009 Project 09**
 Consultant: **RFT**

Client Stages	Work winning	Solutions Development	Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	n/a	3	5		6	
RIBA Stages	Work winning	Developed Design	Design & Technical	Construct	Handover	
Stages	n/a	3	4	5	6	
Categories						Average
DESIGN PROGRAMME	0	0	0	0	n/a	0.0
TECHNICAL KNOWLEDGE	0	0	0	0	n/a	0.0
DESIGN DASHBOARD [Statutory & Stakeholder approvals]	0	0	0	0	n/a	0.0
DELIVERABLES DESIGN DASHBOARD	0	0	0	0	n/a	0.0
DOCUMENT PROTOCOLS	0	0	0	0	0	0.0
BIM	n/a	n/a	n/a	n/a	n/a	0.0
CHANGE CONTROL	n/a	0	0	0	n/a	0.0
QUALITY CONFORMANCE (Samples, Benchmarks, etc)	n/a	0	0	0	n/a	0.0
H&S / CDM compliance	0	0	0	0	0	0.0
Client relationship	0	0	0	0	0	0.0
Contractor relationship	0	0	0	0	0	0.0
Team leading / working	0	0	0	0	0	0.0
Average score (excl. n/a)	0.0	0.0	0.0	0.0	0.0	0.0
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,					

Note:
 For HAL projects Work Winning has been defined as Gateway 2.

Key:

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

PDG	PROJECT DESIGN GUIDES	PROJECT DESIGN KPI's
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Score sheet

Project Number & Name: **PROJ 0010 Project 10**
 Consultant: **RFT**

Client Stages	Work winning	Solutions Development	Implementation		Transition	WARNING: Any cells highlighted in purple have not been filled in with 1-5 scores.
Gateway	n/a	3	5		6	
RIBA Stages	Work winning	Developed Design	Design & Technical	Construct	Handover	
Stages	n/a	3	4	5	6	
Categories						Average
DESIGN PROGRAMME	5	1	5	1	n/a	3.0
TECHNICAL KNOWLEDGE	5	1	5	1	n/a	3.0
DESIGN DASHBOARD [Statutory & Stakeholder approvals]	5	1	5	1	n/a	3.0
DELIVERABLES DESIGN DASHBOARD	5	1	5	1	n/a	3.0
DOCUMENT PROTOCOLS	5	1	5	1	5	3.4
BIM	n/a	n/a	n/a	n/a	n/a	0.0
CHANGE CONTROL	n/a	1	5	1	n/a	2.3
QUALITY CONFORMANCE (Samples, Benchmarks, etc)	n/a	1	5	1	n/a	2.3
H&S / CDM compliance	5	1	5	1	5	3.4
Client relationship	5	1	5	1	5	3.4
Contractor relationship	5	1	5	1	5	3.4
Team leading / working	5	1	5	1	5	3.4
Average score (excl. n/a)	5.0	1.0	5.0	1.0	5.0	3.4
Warning letters / emails written	Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No	
Stage comment:	Value added, Problem solving, Exemplary documentation,					

Note:
 For HAL projects Work Winning has been defined as Gateway 2.

Key:

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

PDG

PROJECT DESIGN GUIDES

PROJECT DESIGN KPI'S

Totals sheet

Title: **Year Scores**
 Consultant: **RFT**

Client Stages	Work winning	Solutions Development	Implementation		Transition	WARNING: If any score is below 1 or above 5 check the individual score sheets.				
Gateway	n/a	3	5		6					
RIBA Stages	Work winning	Developed Design	Design & Technical	Construct	Handover					
Stages	n/a	3	4	5	6					
Categories	SCORED	SCORED	SCORED	SCORED	SCORED	Average				
DESIGN PROGRAMME	<div style="text-align: center;"> <h3>Average scores by stage</h3> </div>					3.4				
TECHNICAL KNOWLEDGE						3.1				
DESIGN DASHBOARD [Statutory & Stakeholder approvals]						3.4				
DELIVERABLES DESIGN DASHBOARD						3.1				
DOCUMENT PROTOCOLS						3.5				
BIM						0.0				
CHANGE CONTROL						3.0				
QUALITY CONFORMANCE (Samples, Benchmarks, etc)						3.4				
H&S / CDM compliance						3.2				
Client relationship						3.5				
Contractor relationship						3.2				
Team leading / working						3.5				
Average score (excl. n/a)						3.6	3.5	3.6	3.3	3.6
Warning letters / emails written						Yes / NO	Yes/No	Yes/No	Yes/No	Yes/No
Stage comment:						Value added, Problem solving, Exemplary documentation,				

Note:

For HAL projects Work Winning has been defined as Gateway 2.

Key:

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

