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# PROJECT DESIGN GUIDE D01 'DESIGN DASHBOARD'

Project Name: <b><i>Name</i></b>	Project No.: <b><i>Number</i></b>	Date: <b><i>Date</i></b>
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**A** – Action**I** – Information

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- PROJECT DESIGN GUIDE A00 'CONSULTANT APPOINTMENT STRATEGY AND CAM'
- PROJECT DESIGN GUIDE A00.1 'COMPETENCE STATEMENT AND ASSESSMENT'
- PROJECT DESIGN GUIDE A01 'SCHEDULE OF SERVICES (SOS)'
- PROJECT DESIGN GUIDE A02 'DESIGN RESPONSIBILITY MATRIX (DRM)'
- PROJECT DESIGN GUIDE A03 'DESIGN PROGRAMME & DELIVERABLES'
- PROJECT DESIGN GUIDE A04 'DESIGN REVIEW & AUTHORITY PLAN'
- PROJECT DESIGN GUIDE A05 'PROJECT QUALITY PLAN (PQP)'
- PROJECT DESIGN GUIDE A06 'CONTRACT SCHEDULES & DESIGN PROCESSES'

**DEVELOPMENT & DELIVERY**

- PROJECT DESIGN GUIDE D01 'DESIGN DASHBOARD'
- PROJECT DESIGN GUIDE D02 'COMMUNICATIONS PLAN'
- PROJECT DESIGN GUIDE D03 'DESIGN INFORMATION FLOW MAPPING'
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- PROJECT DESIGN GUIDE D06 'RFI PROCEDURES'
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- PROJECT DESIGN GUIDE L01 'DESIGN MANAGEMENT AUDIT'
- PROJECT DESIGN GUIDE L02 'CONSULTANT PERFORMANCE REVIEW & TREND'

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## 1.0 Introduction

The purpose of a Dashboard is to provide the employer with key status information by which to judge overall project progress and risk. In turn this information is often summarised as part of a monthly report to the client. Design Dashboards therefore need to be a summary of an evaluation of data collected on design progress. Design consultancies can also use this information to better understand contractor priorities and in the management of their teams.

There are many ways to evaluate design performance, and this is a topic of constant debate. This guide primarily uses the joint criteria of Completeness and Timeliness; the former being measured in percentages and the later in days/weeks. Completeness is reliant on evaluation of information by a competent person, and Timeliness by the relevant software measuring the *issued date* against the programme *target date*.

The information can be illustrated in a number of ways, three of which being:

- A drop line on a design programme (e.g. ASTA);
- Trend graphs derived from data taken from a programme and/or Information Management Portal.
- Excel RAG spreadsheet populated with data taken from a programme and/or Information Management Portal.

The author of this guide recommends the use of programme software, ideally to match the one used by the Contractors Project Planner. It is however recognised that not many consultants and Design Managers are trained in planning software and therefore to ensure accessibility by most parties the tools used (refer to appendix A & B) in this Design Guide are created in Excel. They are designed to be user friendly and easily amended by anyone with basic Excel knowledge.

The Design Dashboard is made up from 2 documents: i) an information delivery tracker and, ii) a management and risk based tracker for the primary design based processes.

The Design Dashboards appended to this guide are to be rigorously managed, as they are only as good as the information inputted.

### I) Design Dashboard Information Delivery

This document is a package delivery management spreadsheet and as such is aimed at Tender and Construction stages. It is to be amended to suit packages relevant to the project in question. Population of target delivery dates are to be taken from the main contract programme and amendments to thereafter. Actual delivery dates are to be input upon receipt of information, having been satisfactorily checked as complete. Information pending and received is displayed in the form of a risk RAG with +/- number of days generated to inform on the quantum of the status. In simple terms it provides information on how early or late completed information was issued. It can be amended to track early stage information if required.

### II) Design Dashboard Tracker

This document has been created to track design processes. The sub-headings listed below are pre-populated on the Design Dashboard, but may need to be changed, added to or simply left blank, dependant on project type and processes deployed.

#### Summary

Provides a RAG based summary for all processes recorded under two categories: Submission Risk and Approval Risk. In addition to the RAG the risks are given one of the following numerical values: Days early/late, percentage status, or a value from 1 -10 (1 being good, 10 Bad).

*DRAFT***Planning Conditions**

To manage, track and record progress with discharging L.A. Planning conditions.

**Building Control**

To manage, track and record progress with discharging Building Control conditions.

**Agents**

To manage, track and record progress with discharging Agents (e.g. Insurers) conditions.

**RDD**

For listing agreed Reviewable Design Data and to manage, track and record progress with approvals.

**Change Control**

Often managed by the project Commercial manager; however is a useful tool for tracking design change proposal, and change instructed.

**BREEAM**

To manage, track and record progress with discharging BREEAM points that are mandatory, target and potential. Provides totals for: available, targeted and achieved points

**Quality Conformance**

To manage, track and record progress with gaining approval for Samples, Mock-ups, Prototypes, and Benchmarks.

## 2.0 Managing this document

The Design Dashboards (appendices A & B) are to be regularly reviewed at Progress or Design Team meetings and updated against information uploaded to and reviewed/approved on the project information management portal.

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## **Appendix A – Dashboard-Information Delivery**

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## **Appendix B – Dashboard-Tracker**