



# Detailed Information Package



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***“What gets measured gets managed.”***

Dr. Peter Drucker

# DETAILED INFORMATION PACKAGE For CONSTRUCTION PROJECTS

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**Note - By downloading the Project Scorecard™ Detailed Information Package, you have received the PDF version. To receive the interactive Microsoft Word version, contact [info@allanlowe.com](mailto:info@allanlowe.com)**

**"There are risks and costs to a program of action. But they are far less than the long-range risks and costs of comfortable inaction."**  
– *John F. Kennedy*

**"When you confront a problem you begin to solve it."**  
– *Rudy Giuliani*

## 1. Introduction to Detailed Information Package for Construction Projects

Thank you for downloading the **Project Scorecards™ Detailed Information Package for Construction Projects**. This package contains everything you need to get started on your **Project Scorecard™** for your project.

If you require further information at any time, refer to [www.allanlowe.com](http://www.allanlowe.com), send an e-mail to [info@allanlowe.com](mailto:info@allanlowe.com), or call Allan Lowe Construction Partnering & Project Scorecards™ at 780-984-6676.

## 2. How to complete the Detailed Information Package

It is recommended that you work through the Detailed Information Package in the step-by-step order in this package.

Best results are obtained if you gather together senior project team members from each major party that will be participating in the Project Scorecards™. This is often done at a pre-construction meeting or other project meeting. You should allow between 1 – 2 hours to complete the Detailed Information Package.

Each meeting participant should have a copy of the Detailed Information Package.

For your convenience, you can complete this Detailed Information Package and provide it to Allan Lowe Construction Partnering & Project Scorecards™ as follows:

1. \*Complete as a Microsoft Word document and e-mail it to [info@allanlowe.com](mailto:info@allanlowe.com)
2. Complete by hand and save as a PDF file and e-mail it to [info@allanlowe.com](mailto:info@allanlowe.com)

*An Allan Lowe Construction Partnering & Project Scorecards™ representative will be pleased to call in to your project meeting to assist in completing the Detailed Information Package. To schedule this participation, please call Allan Lowe at 780-984-6676.*

**\*See note on Page 1 regarding receiving document in interactive Microsoft Word format**



### 3. Primary contacts for your Project Scorecard™

Please identify the **primary contacts** for the Project Scorecards™ for this project:  
*(Note – you will be asked to provide the names of all participants later in the package)*

Project: \_\_\_\_\_

Owner: \_\_\_\_\_

(Owner Name)

(Owner Key Contact)

(Phone)

(e-mail)

Consultant: \_\_\_\_\_

(Consultant Name)

(Consultant Key Contact)

(Phone)

(e-mail)

Contractor: \_\_\_\_\_

(Contractor Name)

(Contractor Key Contact)

(Phone)

(e-mail)

Other: \_\_\_\_\_

(Organization Name)

(Organization Key Contact)

(Phone)

(e-mail)

Other: \_\_\_\_\_

(Organization Name)

(Organization Key Contact)

(Phone)

(e-mail)

## 4. Types of Project Evaluation Statements

**Project Scorecards™** measure the project's key performance indicators (KPI's) that are included in the **Project Evaluation Statements**.

There are generally three types of **Evaluation Statements** that are used on each **Project Scorecard™** to monitor the progress of the project and the partnership:

1. **Project Success Goals** – Evaluation statements on **Project Success Goals** center on project related performance measures that are key to the successful completion of the project.
2. **Partnership Success Goals** – Evaluation statements on **Partnership Success Goals** center on partnership related performance measures that are key to effective partnering with all stakeholders (which ultimately are key to the successful completion of the project).
3. **Key Project Challenges** – Evaluation statements on specific **Key Project Challenges** center on issues that the team identifies as challenges that are key to the successful completion of the project.

The following sections provide examples and samples to easily identify the **Project and Partnership Success Goals** and the **Key Project Challenges** and develop evaluation statements for your **Project Scorecard™**.

## 5. Developing Project Success Goals

Typical performance measures and accompanying questions for **Project Success Goals** may include, but are not limited to:

- Safety
- Quality
- Schedule
- Capital Budget / Cost
- Environmental Stewardship
- Issue Resolution
- Scope
- Risk Management
- Traffic Management / Maintenance of Traffic
- Communications - External
- Inclement Weather Management
- Stakeholders' Satisfaction

Please check off any of the **Project Success Goals** and goal evaluation statements listed below that you would like to have included on the **Project Scorecard™** for this project.

If you would like to have a different goal evaluation statement than the one listed for the **Project Success Goal**, please provide your evaluation statement in the space provided under "Other:" for each goal.

\_\_\_ **Safety**

\_\_\_\_\_ All parties place a high priority on safety for all workers and the public on the project **OR**

Other: \_\_\_\_\_

\_\_\_ **Quality**

\_\_\_\_\_ The quality of workmanship and materials meets the specifications and the standards expected on this project **OR**

Other: \_\_\_\_\_

\_\_\_ **Schedule**

\_\_\_\_\_ The project is on schedule, and will likely be completed on schedule **OR**

Other: \_\_\_\_\_

\_\_\_ **Capital Budget / Cost**

\_\_\_\_\_ Costs and cost impactors are being managed to keep the project on budget, while providing value to the owner **OR**

Other: \_\_\_\_\_

\_\_\_ **Environmental Stewardship**

\_\_\_\_\_ The environment is being respected and preserved during the construction of this project (e.g. erosion and sediment control, etc.) **OR**

Other: \_\_\_\_\_

\_\_\_ **Issue Resolution**

\_\_\_\_\_ Team members and their counterparts identify issues and when necessary, use the Issue Resolution Ladder to address issues in a timely manner **OR**

Other: \_\_\_\_\_

\_\_\_ **Scope**

\_\_\_\_\_ We are maintaining the intended and defined scope of the project **OR**

Other: \_\_\_\_\_

\_\_\_ **Risk Management**

\_\_\_\_\_ We are proactively evaluating risk on the project and identifying and mitigating potential project risks **OR**

Other: \_\_\_\_\_

\_\_\_ **Traffic Management / Maintenance of Traffic**

\_\_\_\_\_ Traffic accommodation is working well for the safety of workers on the project and the safety and convenience of the travelling public **OR**

Other: \_\_\_\_\_

\_\_\_ **Communications - External**

\_\_\_\_\_ We are anticipating public and stakeholders' concerns and are providing timely communications to address them **OR**

Other: \_\_\_\_\_

\_\_\_ **Inclement Weather Management**

\_\_\_\_\_ We are proactively planning the mitigation measures needed to minimize the negative impact of weather events **OR**

Other: \_\_\_\_\_

\_\_\_ **Stakeholders' Satisfaction**

\_\_\_\_\_ We are striving to satisfy the project's many stakeholders where possible, including government, community and end users **OR**

Other: \_\_\_\_\_

## Additional Project Success Goals

If there are any additional **Project Success Goals** that you would like to have measured on the **Project Scorecard™**, please list the goals and goal evaluation statements below as you would like them to appear on the **Project Scorecard™**:

Project Success Goal	Goal Evaluation Statement
	•
	•
	•
	•
	•

## 6. Developing Partnership Success Goals

Typical performance measures and accompanying questions for **Partnership Success Goals** may include, but are not limited to:

- Teamwork
- Trust
- Communications – Internal
- All Seek Win–Win Solutions
- Health of the Partnership
- Monitoring the Partnership
- Have Fun / Celebrate Successes

Please check off any of the **Partnership Success Goals** and goal evaluation statements listed below that you would like to have included on the **Project Scorecard™** for this project.



If you would like to have a different goal evaluation statement than the one listed for the **Partnership Success Goal**, please provide your evaluation statement in the space provided under "Other:" for each goal.

\_\_\_\_ **Teamwork**

\_\_\_\_\_ We have a true team spirit characterized by respect, trust and collaboration **OR**

Other: \_\_\_\_\_

\_\_\_\_ **Trust**

\_\_\_\_\_ There is an environment of trust between all parties on the project **OR**

Other: \_\_\_\_\_

\_\_\_\_ **Communications - Internal**

\_\_\_\_\_ We have open, honest, timely and clear communications among the team members **OR**

Other: \_\_\_\_\_

\_\_\_\_ **All Seek Win-Win Solutions**

\_\_\_\_\_ All team members seek to understand the other team members and work to develop solutions for the mutual gain of all members where possible **OR**

Other: \_\_\_\_\_

\_\_\_\_ **Health of the Partnership**

\_\_\_\_\_ We are fostering a healthy partnership through incorporating all of the project and partnership success goals **OR**

Other: \_\_\_\_\_

\_\_\_\_ **Monitoring the Partnership**

\_\_\_\_\_ We monitor the health of the partnership at monthly intervals **OR**

Other: \_\_\_\_\_

\_\_\_\_\_ **Have Fun / Celebrate Successes**

We are striving to have some fun on this project and...

We recognize contributions and achievements of teams and individuals throughout the project and...

\_\_\_\_\_ We get together as a group to celebrate the successful progress of the project **OR**

Other: \_\_\_\_\_

### Additional Partnership Success Goals

If there are any additional **Partnership Success Goals** that you would like to have measured on the **Project Scorecard™**, please list the goals and goal evaluation statements below as you would like them to appear on the **Project Scorecard™**:

Partnership Success Goal	Goal Evaluation Statement
	•
	•
	•
	•
	•

## 7. Identifying Key Project Challenges

In addition to the **Project and Partnership Success Goals**, every project often also has its own **Key Project Challenges** that should be addressed to ensure that the **Project and Partnership Success Goals** are achieved and maintained.

These **Key Project Challenges** would typically be identified in a construction partnering session. If the project did not include a specific partnering session, it is recommended that the owner, consultant(s), and contractor(s) get together to identify **Key Project Challenges** that could prevent the team from achieving the **Project and Partnership Success Goals**.

Once the key challenges have been identified, the group should develop strategies and actions that can be proactively instituted to avoid or minimize the effects of each **Key Project Challenge**.

These strategies or actions can then be measured on the **Project Scorecard™** to ensure that all parties can provide their insights on how the key challenges are being addressed. This proactive approach will help to minimize or eliminate negative effects of each key challenge.

Some examples of project specific challenges are listed below. Some may be similar to goals that have been developed, but will likely be more specific than the goals.

### Examples of Typical Key Project Challenges:

- Utility relocation
- Lighting
- Landscaping
- Structure quality (may include fine details)
- On-site physical coordination (on small site projects)
- Communications and timely decision making by a particular party
- Scheduling of specific items
- Minimizing impact of design and scope changes
- Weather – mitigating negative results of bad weather
- Safety – site specific safety issues
- Human resources supply
- Material supply
- Quality – ensuring expected quality is achieved
- Schedule and contractor coordination
- Environmental concerns – site specific
- Traffic accommodation – public safety and inconvenience, and worker safety

## Developing Key Project Challenge Evaluation Statements

Please identify each **Key Project Challenge** below. After the **Key Project Challenges** have been identified, work together as a team to identify strategies / actions that will help to avoid or minimize the effects of each key challenge. These actions will then be measured as **Key Project Challenge** evaluation statements in your **Project Scorecard™**.

**Key Challenge #1:** \_\_\_\_\_

Action item: \_\_\_\_\_

Action item: \_\_\_\_\_

**Key Challenge #2:** \_\_\_\_\_

Action item: \_\_\_\_\_

Action item: \_\_\_\_\_

**Key Challenge #3:** \_\_\_\_\_

Action item: \_\_\_\_\_

Action item: \_\_\_\_\_

**Key Challenge #4:** \_\_\_\_\_

Action item: \_\_\_\_\_

Action item: \_\_\_\_\_

**Key Challenge #5:** \_\_\_\_\_

Action item: \_\_\_\_\_

Action item: \_\_\_\_\_

**Key Challenge #6:** \_\_\_\_\_

Action item: \_\_\_\_\_

Action item: \_\_\_\_\_

**Key Challenge #7:** \_\_\_\_\_

Action item: \_\_\_\_\_

Action item: \_\_\_\_\_

**Key Challenge #8:** \_\_\_\_\_

Action item: \_\_\_\_\_

Action item: \_\_\_\_\_

**Key Challenge #9:** \_\_\_\_\_

Action item: \_\_\_\_\_

Action item: \_\_\_\_\_

**Key Challenge #10:** \_\_\_\_\_

Action item: \_\_\_\_\_

Action item: \_\_\_\_\_

## 8. Developing your Project Scorecard™ Participant List

Two different groups of individuals often participate in Project Scorecards™.

**Contributors** are familiar with the on-site activities and will receive and fill out the **Project Scorecard™** survey, and will receive a copy of the completed **Project Scorecard™ Report**.

**Recipients** will not receive or complete the surveys, but will receive a copy of the **Project Scorecard™ Report**.

See below for additional information on developing your **Project Scorecard™ Participant List**.

### Project Scorecard™ Contributors

Each **Project Scorecard™** should be completed by representatives of the owner, the consultant(s), and the contractor(s), and possibly other stakeholders. These representatives **should have a strong working knowledge of the project**, and may include, but are not limited to:

- **Owner** – Project Sponsor, Project Administrator, Field Technologist
- **Consultant** – Corporate Support, Project Director, Project Manager, Technical Support
- **Contractor** – Corporate Manager, Contract Manager, Site Superintendent, Foreman, Technical Support, Sub-Contractors

Other key project stakeholders may also be invited to participate as **Contributors** to the **Project Scorecard™**, including but not limited to:

- Municipal representatives
- Key suppliers
- Utility representatives
- Safety and environmental organizations

All **Project Scorecard™ Contributors** are invited to participate in the **Project Scorecard™** survey, and will all receive a copy of the **Project Scorecard™ Report**.

### Project Scorecard™ Recipients

At the team's request, **Project Scorecard™ Reports** may also be provided to additional parties, including **senior team members** who are not actively involved in the day-to-day project activities. These individuals are **Project Scorecard™ Recipients**.

Being included as a **Project Scorecard™ Recipient** enables senior team members to monitor emerging project trends and allows for early identification and intervention on problem areas.

## PROJECT SCORECARD™ PARTICIPANT LIST

Please complete the **Project Scorecard™ Participant List**. Check off if the participant is a **Contributor** or a **Recipient**.

Name	Organization	E-mail Address	Contributor (check) or...	Recipient (check)
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				
21.				
22.				
23.				

Name	Organization	E-mail Address	Contributor (check) or...	Recipient (check)
24.				
25.				
26.				
27.				
28.				
29.				
30.				
31.				
32.				
33.				
34.				
35.				
36.				
37.				
38.				
39.				
40.				

**Note :** There is a maximum of 30 Participants and an additional 30 Recipients for each **Project Scorecard™**. However, it is recommended that participation be limited to 40 individuals in total (including all Contributors and Recipients), as experience has shown that having too many individuals involved can make the review of the **Project Scorecard™** results difficult and inefficient.

If you require additional space, please provide the additional names on a separate sheet.



## 9. Frequency of your Project Scorecards™

**Project Scorecards™** may be filled out **at specific time periods** (usually monthly) or at significant stages or milestones of the project. Experience shows that **to be the most effective, Project Scorecards™** should be completed **at least bi-monthly**.

The results from your **Project Scorecard™ Benefit Evaluation Tool** (available for download at [www.allanlowe.com](http://www.allanlowe.com)) will identify the optimum frequency for your project.

Please identify the frequency for your **Project Scorecards™**:

\_\_\_\_\_ Monthly

\_\_\_\_\_ Bi-Monthly

\_\_\_\_\_ Other

If you selected “Other”, please identify your desired frequency:

Desired frequency: \_\_\_\_\_

## 10. Scheduling your Project Scorecards™

Once **Project Scorecard™ Contributors** receive the online link to complete the **Project Scorecard™**, they are given five business days to complete the survey online. The **Project Scorecard™ Report** is then completed within four business days or less, making the **entire cycle nine business days or less**.

If you plan to discuss your **Project Scorecard™ Report** at a specific project meeting, you should **allow approximately 2 weeks to have the Project Scorecard™, including the report, completed**. **Allan Lowe Construction Partnering & Project Scorecards™** will be pleased to **accommodate your needs**.

Please indicate below the preferred scheduling for sending the line link to your **Project Scorecards™** Contributors:

\_\_\_\_\_ 1<sup>st</sup> week of the month

\_\_\_\_\_ 2<sup>nd</sup> week of the month

\_\_\_\_\_ 3<sup>rd</sup> week of the month

\_\_\_\_\_ 4<sup>th</sup> week of the month

**If you require an accelerated Project Scorecard™**, contact Allan Lowe Construction Partnering & Project Scorecards™ and all efforts will be made to accommodate your needs.

Note that after your initial **Project Scorecard™**, Allan Lowe Construction Partnering & Project Scorecards™ will contact your Primary Contacts one week prior to your scheduled **Project Scorecard™** to request any changes in **Project Scorecard™ Participants** and/or **Evaluation Statements**.

## 11. Negative or slanderous comments

**Project Scorecards™** are intended to benefit the project and to measure project related goals and key project challenges. As such, any slanderous or negative comments about any individuals will not be included in the **Project Scorecard™** Report.

Allan Lowe Construction Partnering & Project Scorecards™ reserves the right to edit contributor comments to remove negative or slanderous comments or references about individuals, including names and titles of individuals.

## 12. Anonymity and confidentiality of Project Scorecard™ responses

If **Project Scorecard™ Contributors** wish, they can request that their names be included with their comments in the report. Otherwise, responses and comments are made anonymously.

In cases where comments are likely to identify the contributor of the comments, Allan Lowe Construction Partnering & Project Scorecards™ may edit those comments to reduce or remove the likelihood that the contributor can be identified. While all efforts will be made to enhance the likelihood of anonymity of contributors, Allan Lowe Construction Partnering & Project

Scorecards™ cannot guarantee the anonymity of contributors' identities. Contributors should consider their own desired anonymity when they provide comments.

## 13. Cancellation Policy

**Project Scorecards™** can be cancelled at any time with no penalty.

## 14. Satisfaction Guaranteed

In the unlikely event that you are not satisfied with your **Project Scorecard™**, Allan Lowe Construction Partnering & Project Scorecards™ **guarantees client satisfaction for all projects**. If you are not satisfied that your **Project Scorecard™** has met your expectations, you will not be required to pay for the **Project Scorecard™**.

## 15. Project Scorecard™ Privacy Policy

Allan Lowe Construction Partnering & Project Scorecards™ will not share your information with any third party and will not contact you for any reason except as it pertains directly to **Project Scorecard™** communications.

## 16. Next Steps

Please submit the completed **Detailed Information Package** to Allan Lowe Construction Partnering & Project Scorecards™ as follows:

1. \*Complete as a Microsoft Word document and e-mail it to [info@allanlowe.com](mailto:info@allanlowe.com)
2. Complete by hand and save as a PDF file and e-mail it to [info@allanlowe.com](mailto:info@allanlowe.com)

**\*See note on Page 1 regarding receiving document in interactive Microsoft Word format**

**If you have any questions, please call Allan Lowe Construction Partnering & Project Scorecards™ at 1-780-984-6676 or e-mail to [info@allanlowe.com](mailto:info@allanlowe.com)**



## What to Expect Next...

1. Allan Lowe Construction Partnering & Project Scorecards™ will contact you to address any questions and to schedule your first **Project Scorecard™**
2. Allan Lowe Construction Partnering & Project Scorecards™ sends an e-mail with the online link for the **Project Scorecard™** to each **Project Scorecard™ Contributor**
3. **Project Scorecard™ Contributors** follow the link and complete the **Project Scorecard™** survey, which usually takes between 5 and 10 minutes
4. Allan Lowe Construction Partnering & Project Scorecards™ completes the **Project Scorecard™ Report** and e-mails it in PDF format to everyone identified on your **Project Scorecard™ Participant List**
5. The project team includes the **Project Scorecard™ Report** as an agenda item at their next project meeting. The team then discusses the report and identifies any necessary actions as a result of the information contained in the **Project Scorecard™ Report**
6. The project team identifies any changes required to the **Project Evaluation Statements** on the next **Project Scorecard™** survey, and also any **changes in participants** for the next **Project Scorecard™**
7. One week prior to sending the link for your next **Project Scorecard™**, Allan Lowe Construction Partnering & Project Scorecards™ will contact your Primary Contacts to request any required changes to **Project Scorecard™** Evaluation Statements and/or **Project Scorecard™** Participants
8. On the date scheduled for the next **Project Scorecard™**, the process is repeated

*"Three-fourths of the miseries and misunderstandings in the world will disappear if we step into the shoes of our adversaries and understand their view point."*

**Gandhi**

