



Project Scorecards™

What is a Project Scorecard™?

Project Scorecards™ are on-line surveys conducted by Allan Lowe & Associates Inc. on large complex construction projects while the projects are underway.

What are the benefits of using a Project Scorecard™?

Project Scorecards™ provide a method of getting anonymous feedback on performance measures that are key to effective partnering and to the successful completion of large complex construction projects.

Benefits include:

- Anonymous format generates honest feedback
- Identifies focus areas for project improvement
- Potential project problems are identified early and allows for proactive project management
- Allows Senior Management to accurately monitor projects when they are not on-site
- Provides a venue for positive feedback
- Provides focus for project meetings
- Greatly improves effectiveness of partnering on projects

“What gets measured gets managed”

Dr. Peter Drucker

www.projectscorecards.com

Who fills out the Project Scorecard™?

Each **Project Scorecard™** should be completed by representatives of the owner, consultant(s), architect(s), contractor(s) and major sub-contractors, and possibly other stakeholders. These representatives **should have a strong working knowledge of the project**, and may include:

- Corporate Managers
- Project Managers
- Contract Managers
- Project supervisors
- Project Foremen/women

Other project stakeholders may also be invited to fill out the Project Scorecard, including:

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

Did you know...

- To date, **over 4,000 Project Scorecard™ Reports** have been issued
- Over **94% of Project Scorecard™ participants** have found them to be helpful in monitoring projects
- **Project Scorecards™** are **now a requirement** on many large infrastructure projects



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How are Project Scorecards™ completed?

Project Scorecards™ are usually completed on-line. Allan Lowe & Associates Inc. sends all participants an e-mail that contains a link to the **Project Scorecard™**. After clicking on the link, the party simply fills out the **Project Scorecard™** on-line.

If any of the parties does not have access to an internet connection, Allan Lowe & Associates Inc. can arrange to conduct the survey in confidence by telephone.

How often are Project Scorecards™ filled out?

Project Scorecards™ may be filled out **at specific time periods** (usually monthly) or at significant stages of the project. It is recommended that **Project Scorecards™** be completed **at least bi-monthly**.

How much time does a Project Scorecard™ take to fill out?

For each **Project Evaluation Statement**, the parties can rate how the project scores, generally ranging on a *5-point scale* from *very poor* to *very well*. The parties can also provide any comments they wish about any statement. The **Project Scorecard™** usually takes between 5 and 10 minutes to complete.



Are the responses on the Project Scorecard™ anonymous?

Yes, anonymity of responses on the **Project Scorecard™** is guaranteed by Allan Lowe & Associates Inc..

However, if a participant prefers to include their identity with comments, they may do so.

Can the Project Evaluation Statements on a Project Scorecard™ be changed?

The project management team **is encouraged** to make necessary changes to the **Project Scorecard™** as the project progresses. This includes changing, deleting or adding **Project Evaluation Statements** and also updating the **Project Scorecard™ Participant List** as different individuals move on and off of the project.

How much do Project Scorecards™ cost?

Compared to the value that **Project Scorecards™** provide on construction projects, they are inexpensive:

- \$600 (CAD) for the **initial set-up** of the first **Project Scorecard™** and participant database*
- \$600 (CAD) or each **Project Scorecard™**, including up to 25 participants

* If the project has been **formally partnered by Allan Lowe & Associates Inc.**, the **initial set-up fee is waived**.

How is it decided what to measure on a Project Scorecard™?

If a **formal project partnering session** has been conducted for a project, the **project goals** and **key challenges** identified in the partnering session will usually be the **Project Evaluation Statements** that are measured in the **Project Scorecard™**.

If the **project has not been formally partnered**, Allan Lowe & Associates Inc. provides a **Creating Your Project Scorecard™** information package that gives step-by-step guidance to identifying the best measurement criteria to develop the **Project Evaluation Statements** for the project, including **typical key goals** and **key issues** for monitoring construction projects.

The project management team can use the **Creating Your Project Scorecard™** information package as a guideline to develop the project goals and identify key challenges. Allan Lowe & Associates Inc. then works with the management team to finalize the measurement criteria for the **Project Scorecard™** for their project.

What type of report is issued for each Project Scorecard™?

Within one week of receiving all responses to the **Project Scorecard™**, a report will be issued that includes a **summary of the ratings** and comments for each scorecard item, and a **graph showing the trends for each item** (to identify progression or regression).

Items that show a strong negative trend since the last report or a **"Poor"** rating will be **highlighted to identify areas that the team should focus on**.

Who receives the Project Scorecard™ report?

Reports are provided to each individual that is on the **Project Scorecard™ Participant List**.

At the team's request, **Project Scorecards™** are also provided to **senior team members** who are not actively involved in the day-to-day project activities. **Project Scorecards™** enable Senior Management to monitor emerging project trends and allows for early identification and intervention on problem areas.

What is done with the results of the Project Scorecard™ report?

The **Project Scorecard™ Report** should be thoroughly discussed at the next Project Management Meeting. Based on the **Project Scorecard™ Report**, Senior Management from the **Project Scorecard™ Participant List** may also wish to provide input to their respective project representatives.

What do Project Scorecard™ users say?

"Project Scorecards™ provide feedback on challenges or frustrations that may not be communicated in other forums."

"The Scorecards help all stakeholders stay focused on agreed-upon goals and priorities."

"The Project Scorecards™ help with keeping the project team talking about issues before they become huge problems."

"Having the trends identified over time helps to keep the project on track."

"The Scorecards highlight the significant issues on large projects and get all parties thinking about these issues."

"Being able to revise the Project Scorecards™ as the project progresses helps us to practice continuous improvement on the project."

"Completing the Project Scorecards™ takes minimal effort compared to the benefit we get from them."

"As a Senior Project Manager who is not on site, the Project Scorecards™ are invaluable in monitoring the project. They identify both positive and negative trends, and enable me to take suitable actions in a preventative manner."



Typical On-line Screen of Project Scorecard™

Project Scorecard Sample [Exit this survey >>](#)

3. Project Goals

At the Partnering Workshop, a number of Project Goals have been identified as being key to the success of the project.

On a scale of 1-5, with 1 being "Very Poor" and 5 being "Very Well", please rate the current adherence to each of the Project Goals listed below.

If you are uncertain or not involved with the specific question, you may answer "Not Applicable".

Feel free to comment on any of the goals.

If you wish, you may add your name and/or your organization's name to your comments.

6. SAFETY

- We will create a safe project culture.
- All parties will place a high priority on safety and show due diligence to protect all workers and the public on this project.

☐ Very Poor
 ☐ Quite Poor
 ☐ Average
 ☐ Quite Well
 ☐ Very Well
 ☐ N/A

7. Do you have any comments about this area, or suggestions for improvement?

How do I get started with a Project Scorecard™?

The **Project Scorecard™** process is straight forward:

- Contact Allan Lowe & Associates Inc. about your project
- You will be provided with a **Creating Your Project Scorecard™** information package
- You meet with your project stakeholder team, and use the **Creating Your Project Scorecard™** package to develop project goals, identify key challenges, and identify the **Project Scorecard™** participants.
- Return this information to Allan Lowe & Associates Inc.
- Allan Lowe & Associates Inc. will contact you to schedule your **Project Scorecards™**

To learn more about
*Project Scorecards™,
contact Allan Lowe.



About Allan Lowe & Associates Inc.

Allan Lowe & Associates is committed to providing construction teams with Construction Team Collaboration information, tools, processes, expertise and training to improve their projects and enjoyment and effectiveness working on them.

Allan Lowe, Principal of Allan Lowe & Associates, offers his clients a broad experiential background including management consultant, senior executive and C.E.O., engineering technologist, construction project supervisor and manager, and construction small business owner.

Allan is a respected professional throughout Canada. He holds a Master of Business Administration degree, a Bachelor of Commerce degree, and is a Certified Engineering Technologist.

In addition to Project Scorecards™ and Construction Partnering, Allan Lowe & Associates services include Construction Team Dynamics training in Teambuilding, Communications, and Stress Management, and corporate and conference speaking on Construction Team Collaboration.

Project Scorecards™ is a registered trademark in Canada to Allan Lowe & Associates Inc.

Project Scorecard™ Report Sample Page

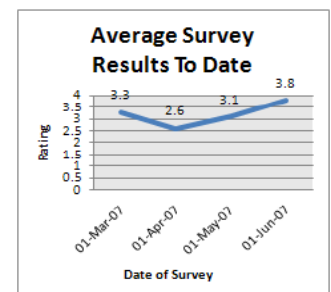
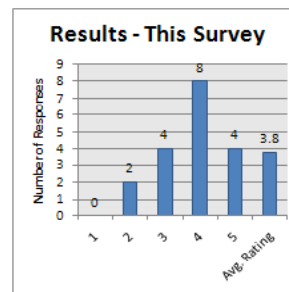
Note: It is recommended that special attention be given to average ratings of 2 or lower, and/or to any average ratings that have decreased since the last survey. These ratings are marked with an asterisk*.

Ratings:

- 1 – Very Poor
- 2 – Somewhat Poor
- 3 – Average
- 4 – Quite Well
- 5 – Very Well

Safety

- We will create a safe project culture.
- All parties will place a high priority on safety and show due diligence to protect all workers and the public on this project.



Comments Received:

- It's sometimes a challenge to keep the "safety culture" focus
- The daily safety meetings seem to be working – no incidents this year!
- We need to be sure that all new sub- contractors are properly certified
- Getting the whole team together at the same time to discuss safety concerns has helped a lot
- We've come a long way since April – well done!