

## Contractors - Performance Monitoring Form

Please complete the form below for each contractor working on a project, using the scoring criteria below. Please leave blank if no comment / not applicable.

Project	Contractor	Time Management	Financial Management	Health and Safety	Management of Sub-contractors	Quality of Workmanship	Progress in Making Good Defects	Collaborative Approach	Contractor Performance	Contractor Design (If Applicable)	Customer Satisfaction	Total Project Score	Overall Project Percentage
<i>Example</i>	<i>Example</i>	5	4	3	3	4	2	3	2	2	2	<b>30</b>	<b>60%</b>
												<b>0</b>	<b>0%</b>
Project	Contractor	Comments / justification for low scoring											
<b>Form completed by:</b>						<b>Quarter:</b>				<b>Date:</b>			

Performance Measure	Definition		Scoring Criteria
<b>Time Management</b>	How well did the contractor plan and progress the works? Was the contractor proactive in resolving or	5	<b>Excellent;</b> significant savings in time realised by contractor
		4	<b>Good;</b> proactive approach, potential delays minimised by contractor
		3	<b>Average;</b> delays neither caused nor minimised by contractor

<b>Time Management</b>	Contractor proactive in resolving or minimising programme issues or delays?	2	<b>Below Average</b> ; minor programme issues/delays possibly caused by contractor
		1	<b>Poor</b> ; programme issues/delays caused or exacerbated by contractor
		0	<b>Unacceptable</b> ; major programme issues/delays caused by contractor
<b>Financial Management</b>	How well did the contractor manage costs? Was cost reporting timely and accurate? Was change agreed expeditiously? Was there prudent management of the provisional sums and/or risk?	5	<b>Excellent</b> ; contractor was proactive, identified major cost savings through innovation
		4	<b>Good</b> ; contractor was proactive in managing all cost issues
		3	<b>Average</b> ; contractor was fairly proactive in managing cost issues
		2	<b>Below Average</b> ; cost management was neither proactive nor reactive
		1	<b>Poor</b> ; cost management was reactive and at times antagonistic
		0	<b>Unacceptable</b> ; cost management was antagonistic resulting in major cost issues
<b>Health and Safety</b>	How well did the contractor manage health and safety? Consider quality of H&S documentation, management of H&S on site, compliance with H&S plan, accidents and incidents, site safety checks and audits.	5	<b>Excellent</b> ; H&S management was exemplary with no issues or concerns throughout the project
		4	<b>Good</b> ; only very minor issues or concerns
		3	<b>Average</b> ; few minor incidents not caused by contractor
		2	<b>Below Average</b> ; few minor incidents due to poor site management
		1	<b>Poor</b> ; reportable incident resulting in contractor being placed on additional monitoring
		0	<b>Unacceptable</b> ; contractor suspended following major incident
<b>Management of Sub-contractors</b>	Were sub-contractors appointed at the right time, did the contractor manage performance and quality of work and co-ordinate different sub-contractors?	5	<b>Excellent</b> ; sub-contractors involved early, mostly through established supply chains. Excellent co-ordination and management.
		4	<b>Good</b> ; sub-contractors involved at right time; well co-ordinated/managed
		3	<b>Average</b> ; late appointments and/or lack of co-ordination/management
		2	<b>Below Average</b> ; some issues due to late appointments and/or lack of co-ordination/management
		1	<b>Poor</b> ; several issues due to late appointments and lack of co-ordination/management
		0	<b>Unacceptable</b> ; major issue(s) due to late appointments and/or lack of co-ordination/management

<b>Quality of Workmanship</b>	Did the contractor achieve a high quality of work first time or was a need for re-work prompted by other parties?	5	<b>Excellent;</b> workmanship, 'right first time'
		4	<b>Good;</b> workmanship, minor snagging required
		3	<b>Average;</b> workmanship, but some isolated areas requiring re-work
		2	<b>Below Average;</b> workmanship, but several minor issues requiring re-work
		1	<b>Poor;</b> workmanship, some significant issues requiring re-work
		0	<b>Unacceptable;</b> workmanship, major re-work required.
<b>Progress in Making Good Defects</b>	How quickly did the contractor resolve defects after practical completion?	5	<b>Excellent;</b> all defects resolved within 1 week of practical completion
		4	<b>Good;</b> all defects resolved within 1 month of practical completion
		3	<b>Average;</b> all defects resolved within 3 months of practical completion
		2	<b>Below Average;</b> majority of defects resolved within 3 months of practical completion
		1	<b>Poor;</b> some defects outstanding after 3 months; contractor reluctant to attend site
		0	<b>Unacceptable;</b> major defects outstanding after 3 months; contractor unwilling to resolve
<b>Collaborative Approach</b>	Did the contractor take on their responsibilities as a team player enthusiastically? Were they an active participant in the decision making or issue resolution processes throughout the project, or did they prefer to wait to be instructed?	5	<b>Excellent;</b> contractor took the lead in collaborative team working
		4	<b>Good;</b> contractor was a positive, proactive member of the team
		3	<b>Average;</b> contractor worked well with the team but did not add value
		2	<b>Below Average;</b> contractual approach
		1	<b>Poor;</b> required instruction in collaborative team working
		0	<b>Unacceptable;</b> adversarial approach resulting in ongoing dispute or claim
<b>Contractor Performance</b>	Consider the contractor's communication, planning and	5	<b>Excellent;</b> contractor performance was exemplary in all these areas
		4	<b>Good;</b> contractor performance was good in all these areas
		3	<b>Average;</b> contractor performance was average in all these areas

<b>Contractor Performance</b>	organisation; site management; consideration for other site users.	2	<b>Below Average</b> ; issues/room for improvement in some areas
		1	<b>Poor</b> ; several issues due to poor performance in one or more of these areas
		0	<b>Unacceptable</b> ; major issue(s) due to poor performance in one or more of these areas
<b>Contractor Design</b>	How well did the contractor fulfil their responsibilities, including the quality and timeliness of information? For design and build projects - how well did the contractor manage and co-ordinate the design contractors? How good was the quality of the design information?	5	<b>Excellent</b> ; quality, contractor was proactive and design provided well in advance of construction
		4	<b>Good</b> ; quality, design provided in accordance with agreed programme
		3	<b>Average</b> ; quality, design provided in sufficient time to avoid delay to construction
		2	<b>Below Average</b> ; quality, design provided on time but putting pressure on programme
		1	<b>Poor</b> ; quality, design provided late putting pressure on programme
		0	<b>Unacceptable</b> ; quality, design information only provided when pressure applied by other parties with subsequent delays to programme
<b>Inclusive Access &amp; Corporate Standards</b>	Confirmation that reasonable provision has been made for people to (a) gain access to; and (b) use the building / building extension and its facilities. Any reasons for departing from KCC's Technical Standards, Approved Document M or BS8300 have been fully justified in the Access Statement.	5	<b>Excellent</b> ; reasonable provision has been made for people to gain access to and use the building/building extension and its facilities. Also excellent understanding of KCC's requirements.
		4	<b>Good</b> ; performance good throughout project with regards to inclusive design
		3	<b>Average</b> ; Inclusive design provided throughout each stage of project
		2	<b>Below Average</b> ; several minor issues resulting in delays and further advice to be given
		1	<b>Poor</b> ; lack of understanding leading to management issues surrounding inclusive design
		0	<b>Unacceptable</b> ; no consideration of inclusive design
<b>Customer Satisfaction</b>	Customer satisfaction.	5	<b>Excellent</b>
		4	<b>Good</b>
		3	<b>Average</b>
		2	<b>Below Average</b>
		1	<b>Poor</b>
		0	<b>Unacceptable</b>