



# CPM Key Performance Indicators (KPIs)

September 17, 2013  
David Wood, PMO



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## Agenda

- CPM Performance Evaluation
- How KPIs are Measured
- Details of each KPI
- KPI Roll-out Schedule



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## Key Performance Indicators: An Overview

- Data driven process to measure CPM performance against a standardized, objective list of principles and procedures.
- Alert CPM and PMO of issues in real-time.
- Trigger to correct new and reoccurring issues.



## CPM Performance Evaluation

- Identify the performance of each CPM team using the criteria established by the KPIs.
- There are three possible scores:
  - **Green:** performance meets or exceeds the established standard to achieve green; the District expects the CPM firm to perform at this level for the duration of the agreement.
  - **Yellow:** performance is below the established green standard.
  - **Red:** performance is below the established yellow standard.



## CPM Performance Evaluation

- KPIs assessed as meeting or exceeding the acceptable standard (**green**) will be:
  - Reviewed for best practices
  - Analyzed for sharing with other CPMs
  - Looked at for CPM commendation



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## CPM Performance Evaluation

- KPIs assessed as unfavorable (**yellow** or **red**) could trigger corrective actions by the PMO to closely monitor/resolve the issue, including:
  - Corrective Action Report (CAR).
  - Deploy **Tiger Team** to assist in correcting performance issues.
  - Notice of first termination of staff.



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## Corrective Actions

- The CPM will work with the responsible PMO Manager to implement corrective actions under the following guidelines:
  - PMO or CPM can identify potential issues of concern and resolution methodology.
  - Expect CPM to provide early notification of potential concerns to the assigned Regional Project Liaison if expected to negatively impact performance evaluation.

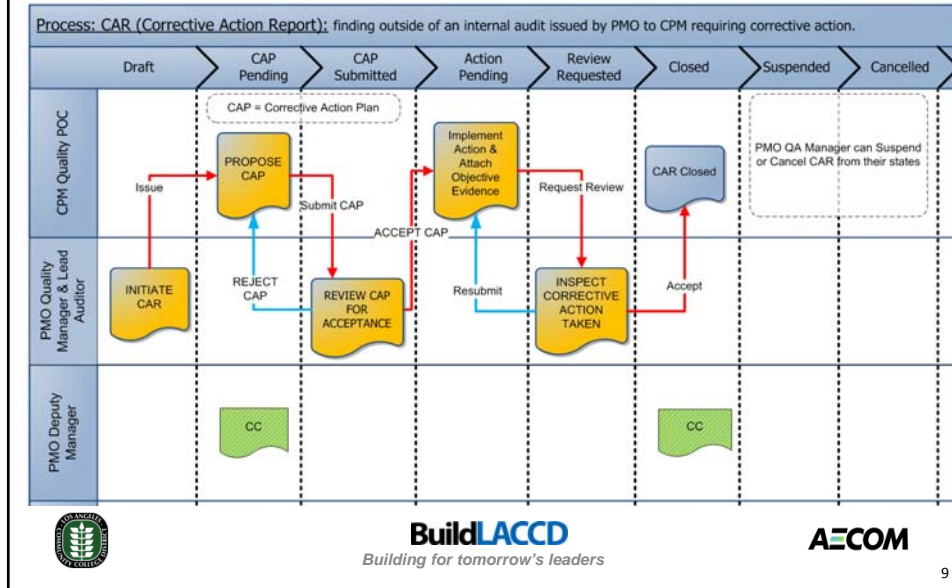


## Corrective Action Report

1. Significant and/or recurring issue identified
2. Corrective Action Report (CAR) issued to CPM in PMIS
3. CPM has 15-30 days to submit corrective action plan to PMO for approval
4. CPM has 60-90 days to implement plan
5. CPM Quality Point of Contact reports progress to RPL and PMO Quality Manager
6. CPM uploads evidence in PMIS to demonstrate implementation of plan
7. PMO Quality Manager reviews evidence and, if acceptable, closes CAR



# Corrective Action Workflow in PMIS



## Tiger Teams

- Tiger Teams will operate under the following guidelines:
  - Deploy to work on significant issues on specific performance areas that are not meeting standards.
  - Team of experts selected by the PMO and directed by the PMO.
  - Report to the RPLs and PMO Program Director on progress.



## Measuring KPIs

- 13 different KPIs
  - Measure budgets, schedules, PBAs, quality, invoices paid, safety, risk and coming soon close-out.
  - Each KPI has its own objective metrics.
  - Assess CPM performance at the project level, rolling up to report performance at the College level.



## Measuring KPIs

<b>GOOD</b>	- Noted and reviewed for best practices; the minimum level at which the client expects the CPMs to perform.
<b>POOR</b>	- Performing below standard; PMO will closely monitor the issue, requiring CPMs to describe the condition and method of observation.
<b>FAILING</b>	- Performing significantly below standard; PMO will assign corrective actions, deploy Tiger Teams, schedule additional internal audits, or initiate recommendation for termination.



# KPI Dashboard Sample (mock data)



## CPM KPI Monthly Dashboard – College Level

Report Run date: September 11<sup>th</sup>, 2013  
Data As of: August 31<sup>st</sup>, 2013

The following report summarizes KPIs at the College level

College Name / KPIs	Budget Variance	Open Change Orders	Change Order Rate	Invoices Paid	Open Deviations	Corrective Actions Report	ASIs Submitted	QMS Compliance	Reportable Incident Rate	Schedule Vs. Baseline	PSA Compliance	Risk	Close-out
Los Angeles City College	●	●	●	●	●	●	●	●	●	●	●	●	●
East Los Angeles College	●	●	●	●	●	●	●	●	●	●	●	●	●
Los Angeles Harbor College	●	●	●	●	●	●	●	●	●	●	●	●	●
Los Angeles Mission College	●	●	●	●	●	●	●	●	●	●	●	●	●
Pierce College	●	●	●	●	●	●	●	●	●	●	●	●	●
Southwest College	●	●	●	●	●	●	●	●	●	●	●	●	●
Trade-Tech College	●	●	●	●	●	●	●	●	●	●	●	●	●
Los Angeles Valley College	●	●	●	●	●	●	●	●	●	●	●	●	●
West Los Angeles College	●	●	●	●	●	●	●	●	●	●	●	●	●

\*\* Please click the icon to setup for project level data



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# KPI Dashboard Sample (mock data)



## CPM KPI Monthly Dashboard – Project Level

Report Run date: September 11<sup>th</sup>, 2013  
Data As of: August 31<sup>st</sup>, 2013

The following report summarizes KPIs at the project level for East Los Angeles College

Project Name / KPIs	Budget Variance	Open Change Orders	Change Order Rate	Invoices Paid	Open Deviations	Corrective Actions Report	ASIs Submitted	QMS Compliance	Reportable Incident Rate	Schedule Vs. Baseline	PSA Compliance	Risk	Close-out
09W-901 Science and Math Building	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-902 Heidman Learning Resource Center	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-904 Student Services Building	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-905 Parking Structure - Lot 9	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-907 Career Education	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-912 General Classroom	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-940 Allied Health and Wellness	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-941 Physical Education & Dance	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-948 Plant Facilities Center - FMO	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-949 North Parking Structure and PV Farm	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-952 Campus Entry S&M&A	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-953 Central Plant Phase 1 & 2	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-973 RWGPL - Landscape/Hardscape	●	●	●	●	●	●	●	●	●	●	●	●	●
09W-979 Campus Improvements	●	●	●	●	●	●	●	●	●	●	●	●	●

\*\* Please click the icon to setup for document level KPIs



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# KPI Dashboard Sample (mock data)

## CPM KPI Monthly Dashboard – KPI Level

Program Name: West Los Angeles College

Project: Campus Improvements - Signage for Safety and Public Information

Document Type: ANR

Health	Number	Link to Project Document	Title	Current State	Issued Date	Category/Location	Received Date	Due Date	Closed Date	Schedule impact note	Reported By	Assigned To
●	ANR-000160	<a href="#">Exemption</a>	Exemption in Prequalification Procedures for Contracts - "" Mock Data ""	CAP Pending	Jul 15, 2013		Aug 15, 2013	Aug 15, 2013			Kumar Radhakrishnan	

Document Type: PBA

Health	Number	Link to Project Document	Title	Current State	Issued Date	Category/Location	Received Date	Due Date	Closed Date	Schedule impact note	Reported By	Assigned To
●	PBA-0004W01046	<a href="#">Exemption</a>	Authorize Amendment to Design Build Agreement - "" Mock Data ""	Accepted	Jun 27, 2013			Aug 20, 2013	Aug 13, 2013		Kumar Radhakrishnan	



## List of KPIs

1. Balanced Budget	8. QMS Compliance
2. Open Change Orders	9. Reportable Incident Rate
3. Change Order Percentages	10. Schedule vs. Baseline
4. Invoices Paid	11. PBA Compliance
5. Number of Open Deviations	12. Risk
6. Audit Non-conformance Reports	13. Closeout
7. Corrective Action Reports	- Coming soon - Would like your input





# KPI #1: Balanced Budget

Functional Lead: David Wood

Status: Phase 1

Description: Measures ability to complete a project within the approved budget. Compares the Estimate at Completion (EAC) with the current Uii budget at Project level. Data source is currently Uii, will be Proliance in the future.

<b>GOOD</b>	- EAC less than 95% of approved budget
<b>POOR</b>	- EAC greater than 95% but less than approved budget
<b>FAILING</b>	- EAC greater than approved budget



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# KPI #2: Open Change Orders (COs)

Functional Lead: Steve Galloway/Larry Hubler

Status: Phase 2

Description: Measures timeliness to convert CPM issued Field Orders and Contractor issued Change Order Proposals to an approved Change Order.

<b>GOOD</b>	- No open COs over 90 days
<b>POOR</b>	- 1 or more open COs over 90 days but less than 120 days
<b>FAILING</b>	- 1 or more open COs over 120 days



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## KPI #3: Change Order Percentages

Functional Lead: Steve Galloway/Larry Hubler

Status: Phase 2

Description: Measures management over controllable change for construction contracts. Measured as a percentage of change against Original Contract value. Change Orders tagged with the following reason code will be used in the calculation:

- Unforeseen conditions - Existing conditions that should have been discovered
- Design - errors & omissions
- Owner – scope changes

<b>GOOD</b>	- Total CO is 5% or less than Original Contract Value
<b>POOR</b>	- Total CO is greater than 5% but less than 10% of Original Contract Value
<b>FAILING</b>	- Total CO is 10% or greater than Original Contract Value



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## KPI #4: Invoices

Functional Lead: Ray Loving

Status: Phase 1

Description: Measures number of calendar days to review, approve and forward invoices to the PMO for payment. Assessment period will be 90 days.

<b>GOOD</b>	- All invoices in assessment period processed $\leq 20$ days
<b>POOR</b>	- Any invoice in assessment period $> 20$ days, but $< 30$ days
<b>FAILING</b>	- Any invoice in assessment period $\geq 30$ days



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## KPI #5: Open Deviations

Functional Lead: [Daynard Tullis](#)

Status: Phase 2

Description: Measures timeliness to resolve construction related Deviations issued from the inspection agencies. Uses total number of Open Deviations issued from IOR/PI and DSA Field Inspector and compares that to the number of days open. Any deviation open over 30 days counts against you.

<b>GOOD</b>	- Greater than 90% of all open deviations closed in less than 30 days
<b>POOR</b>	- Between 75% to 90% of all open deviations closed in less than 30 days
<b>FAILING</b>	- Less than 75% of all open deviations closed in less than 30 days



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## KPI #6: Audit Nonconformance Reports (ANRs) Timeliness

Functional Lead: [Kathleen Copus](#)

Status: Phase 1

Description: Measures timeliness to resolve findings identified during an internal quality audit. Closed ANRs report until next audit.

<b>GOOD</b>	- Level I (major) ANR closed within 60 days; Level II (minor) ANR closed within 90 days.
<b>POOR</b>	- Level I ANR closed between 61 and 75 days; Level II ANR closed between 91 and 105 days.
<b>FAILING</b>	- Level I ANR closed greater than 75 days; Level II ANR closed greater than 105 days.



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## KPI #7: Corrective Action Reports (CARs) Timeliness

Functional Lead: Kathleen Copus

Status: Phase 1

Description: Measures timeliness to resolve issues or findings identified outside of an internal quality audit (from external performance audits, process review, poor performance on a KPI). Closed ANRs report until next audit.

<b>GOOD</b>	- Level I (major) CAR closed within 60 days; - Level II (minor) CAR closed within 90 days.
<b>POOR</b>	- Level I CAR closed between 61 and 75 days; - Level II CAR closed between 91 and 105 days.
<b>FAILING</b>	- Level I CAR closed greater than 75 days; - Level II CAR closed greater than 105 days.



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## KPI #8: QMS Compliance

Functional Lead: Kathleen Copus

Status: Phase 1

Description: Measures compliance with quality and risk audits through calculated audit score. Internal audits will consider three attributes:

- Commitment to the quality management system;
- Compliance to the quality management system procedures (SOPs); and
- Risk management compliance for risk register and mitigation action maintenance and subcontractor management

<b>GOOD</b>	- $\geq 90\%$ compliance with procedures
<b>POOR</b>	- Between 75% and 89% compliance with procedures
<b>FAILING</b>	- $< 75\%$ compliance with procedures



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## KPI #9: Recordable Incident Rate (RIR)

Functional Lead: Charbel Sfeir/Brian Beltz

Status: Phase 1

Description: College RIR compared to Bureau of Labor Statistics (BLS).

RIR = Number of injuries and illnesses X 200,000/ Employee hours worked

RIR calculated monthly for an assessment period of thirty days. **The current 2011 BLS construction RIR = 3.9.**

<b>GOOD</b>	- RIR less than 3.5 (10% less than the current BLS rate)
<b>POOR</b>	- RIR greater than 3.5 but less than or equal to 4.4
<b>FAILING</b>	- RIR greater than 4.4, <b>and/or</b> any incident which was not reported timely.



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## KPI #10: Construction Schedule

Functional Lead: David Wood

Status: Phase 1

Description: Measures current milestones against baseline milestones for all active construction projects. Starts with Notice to Proceed through Substantial Completion. Compares for each milestone, a baseline against planned dates. Variance Calculation = (Baseline Date – Current Planned Date). Baseline is set at award of contract.

<b>GOOD</b>	- No milestones slipped more than 15 days.
<b>POOR</b>	- Up to 2 milestones slipped more than 15 days but less than 30.
<b>FAILING</b>	- One or more milestone(s) slipped more than 30 days – or – 3 or more milestones slipped 15 to 30 days.



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# KPI #11: PBA Compliance

Functional Lead: Brent Hurwitz

Status: Phase 2

Description: PBAs will be evaluated using objective criteria. Metrics include: Timely draft and final PBA submissions, intensity of revisions, spelling/grammatical errors.

<b>GOOD</b>	- >80% compliance with PBA metrics
<b>POOR</b>	- >60% but <80% compliance with PBA metrics
<b>FAILING</b>	- <60% compliance with PBA metrics



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# KPI #11: PBA Compliance, cont.

Functional Lead: Brent Hurwitz

Status: Phase 2

Metric
1. On-time Submittal of Draft PBA
2. Back-up Documentation Submitted with Draft PBA
3. Research Needed for PBA
4. Pre-approval obtained for any Ratify component
5. Funding is available
6. Correct Project Name and Correct Project Number
7. Spelling/Grammar/Punctuation
8. Late Addition PBA requested after Draft II
9. Final, Signed PBA Submitted On Time
10. Change Made to PBA on Published Report



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## KPI #12: Risk

Functional Lead: Kelly Cauvel

Status: Phase 2

Description: Compliance with Risk Management Program by measuring the CPM's level of activity in updating and maintaining the risk register. The level of activity is measured against a "baseline" risk register approved by the PMO.

<b>GOOD</b>	- 100% of risk register entries have been updated with relevant info in the last 30 days
<b>POOR</b>	- Less than 100% but greater than 50% of risk register entries have been updated with relevant information in the last 30 days
<b>FAILING</b>	- Less than 50% of risk register entries have been updated with relevant info in the last 30 days



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## KPI 'Roll-Out' Schedule

- September/October
  - Used to accurately collect data
  - Orient / Train CPMs with the process
  - Mock audits
- Starting in November
  - CPM Performance Evaluation Report created and reported to District and Presidents monthly
  - Live audits with corrective action reports and Tiger Teams utilized, as needed, to improve performance
  - Recognize high achievement at CPM Roundtable monthly
  - Discuss common areas of poor performance at CPM roundtable



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## Who's Involved

- CPM
  - Lead
  - Quality Point of Contact
    - Ensures accurate and timely data, and receives reports
- PMO
  - KPI Lead
    - Collects and verifies data
    - Ensures timely reports
    - Works with KPI owners



## Who's Involved, cont.

- District
  - Receives reports – and provides comments and guidance
- College Presidents
  - Receives reports – and provides comments and insight





# CPM KPI Owners

<p><b>Brian Beltz</b> brian.beltz@build-laccd.org 213-593-8793</p> <ul style="list-style-type: none"> <li>• KPI #9 (Safety)</li> </ul>	<p><b>Kelly Cauvel</b> kelly.cauvel@build-laccd.org 213-593-8219</p> <ul style="list-style-type: none"> <li>• KPI #12 (Risk)</li> </ul>	<p><b>Kathleen Copus</b> kathleen.Copus@aecom.com 213-593-8518</p> <ul style="list-style-type: none"> <li>• KPI #6 (ANR)</li> <li>• KPI #7 (CAR)</li> <li>• KPI #8 (QMS)</li> </ul>
<p><b>Steve Galloway</b> steve.galloway@aecom.com 213-593-8721</p> <ul style="list-style-type: none"> <li>• KPI #2 (OCO's)</li> <li>• KPI #3 (CO's)</li> </ul>	<p><b>Larry Hubler</b> lhubler@pacificaservices.com 231-593-8395</p> <ul style="list-style-type: none"> <li>• KPI #2 (OCO's)</li> <li>• KPI #3 (CO's)</li> </ul>	<p><b>Brent Hurwitz</b> brent.hurwitz@build-laccd.org 213-593-8161</p> <ul style="list-style-type: none"> <li>• KPI #11 (PBA)</li> </ul>
<p><b>Ray Loving</b> ray.loving@aecom.com 213-593-8455</p> <ul style="list-style-type: none"> <li>• KPI #4 (Invoices)</li> </ul>	<p><b>Charbel Sfeir</b> charbel.sfeir@build.laccd.org 213-593-8095</p> <ul style="list-style-type: none"> <li>• KPI #9 (Safety)</li> </ul>	<p><b>Daynard Tullis</b> daynard.tullis@build-laccd.org 213-593-8470</p> <ul style="list-style-type: none"> <li>• KPI #5 (Deviations)</li> </ul>
	<p><b>David Wood</b> david.wood@aecom.com 213-593-8257</p> <ul style="list-style-type: none"> <li>• KPI #1 (Budget)</li> <li>• KPI #10 (Schedule)</li> </ul>	



Thank You!  
Questions?

