**Version F 31/1/23**

**Table 1 – Key Performance Indicators**

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| --- | --- | --- | --- | --- | --- | --- |
| **Kpi No** | **Performance measure** | **What is measured?** | **When** | **How collected (report / scorecard)** | **Target Score** | **Case for Action** |
| 1 | Project Programme | Project progress. Variance between actual progress achieved against agreed timescale milestones as agreed at pre-start meeting. | Monthly | Monthly scorecard for monthly contract meeting. Consultants and PM to monitor | Score of 10 (performance met expectations – see scorecard) | > or equal to -5 score time overrun on a single project, inclusive of agreed/signed off client change(s) Core group meeting will be called.  > or equal to -5 score for two consecutive months, the Service Provider will be required to provide an action plan to remedy performance issues within one month of the second issued failing score scorecard. This may result in a core group meeting to discuss failures.  Where, after an action plan request and implementation, performance continues to be below the above targets for three subsequent months, matter to be escalated to senior management level. This may include the issue of a RBKC formal notice by Director of Housing Management/AD of Property Services  This may result in contract termination on grounds of poor performance. |
| 2a | Quality (Works on Site) | Works meeting/exceeding quality standard | Monthly | Monthly scorecard for monthly contract meeting. Consultants and PM to monitor | Score of 10 (performance met expectations – see scorecard) | > or equal to -5 single score:  This may result in a core group meeting to discuss failures.  > or equal to -5 score for two consecutive months:  The Service Provider will be required to provide an action plan to remedy performance issues within one month of the second issued failing score scorecard. This may result in a core group meeting to discuss failures.  Where, after an action plan request and implementation, performance continues to be below the above targets for three subsequent months, matter to be escalated to senior management level.  This may result in contract termination on grounds of poor performance. |
| 2b | Quality (Defects at Handover) | Clerk of Works/Project Manager/Quality Assessment. Quality assessment outcome. The number of defects identified at end of Defects Period and inspection and gravity/nature of defects. All defects recorded in defect documentation. | Project on site up to practical completion | Monthly scorecard to monthly contract meeting. Consultants and PM to monitor | Score of 10 (performance met expectations – see scorecard) | > or equal to -5 single score:  This may result in a core group meeting to discuss failures.  > or equal to -5 score for two consecutive months:  The Service Provider will be required to provide an action plan to remedy performance issues within one month of the second issued failing score scorecard. This may result in a core group meeting to discuss failures.  Where, after an action plan request and implementation, performance continues to be below the above targets for three subsequent months, matter to be escalated to senior management level. This may include the issue of a RBKC formal notice by Director of Housing Management/AD of Property Services  This may result in contract termination on grounds of poor performance.  Retention monies not released until satisfactory completion of all Defects Liability works. |
| 2c | Quality (time taken to complete defects) | To record the average time across the whole project, it takes to complete a defect (avoiding lengthy snagging at project end). | Monthly | Monthly scorecard for monthly contract meeting. Consultants and PM to monitor | Score of 10 (performance met expectations – see scorecard) | > or equal to -5 single score:  This may result in a core group meeting to discuss failures.  > or equal to -5 score for two consecutive months:  The Service Provider will be required to provide an action plan to remedy performance issues within one month of the second issued failing score scorecard. This may result in a core group meeting to discuss failures.  Where, after an action plan request and implementation, performance continues to be below the above targets for three subsequent months, matter to be escalated to senior management level. This may include the issue of a RBKC formal notice by Director of Housing Management/AD of Property Services  This may result in contract termination on grounds of poor performance.  Retention monies not released until satisfactory completion of all Defects Liability works. |
| 2d | Access into Properties Success Rate (Kpi measured only on applicable schemes requiring access into homes) | To record the success rate or otherwise of gaining access into homes to undertake work | Monthly | Monthly scorecard for monthly contract meeting. Consultants and PM to monitor | Score of 10 (performance met expectations – see scorecard) | > or equal to -5 single score:  This may result in a core group meeting to discuss failures.  > or equal to -5 score for two consecutive months:  The Service Provider will be required to provide an action plan to remedy performance issues within one month of the second issued failing score scorecard. This may result in a core group meeting to discuss failures.  Where, after an action plan request and implementation, performance continues to be below the above targets for three subsequent months, matter to be escalated to senior management level. This may include the issue of a RBKC formal notice by Director of Housing Management/AD of Property Services.  This may result in contract termination on grounds of poor performance. |
| 3 | Expenditure cumulative (based upon monthly committed spend) to date against agreed project forecast cashflow | Variance between cumulative committed expenditure to date against the agreed project cashflow | Monthly | Commercial Team Monthly Financial Reporting | + / - 5% | Case for action to be taken where variation + or – 10% |
| 3a | Forecast annual expenditure (based upon projected expenditure) against the latest quarterly forecast | Variance between annual forecast expenditure and the latest quarterly forecast | Monthly | Commercial Team Monthly Financial Reporting | + / - 5% | Case for action to be taken where variation + or – 10% |
| 4 | Resident Satisfaction | Resident satisfaction throughout all the different project stages | Quarterly | Number of Compliments received  % Complaints upheld | Zero |  |
| 4a | Resident Satisfaction Communication Levels | Level of comms taking place | Quarterly | No of / level engagements | TBC |  |
| 4b | Resident Satisfaction Survey Response Levels | Level of Resident satisfaction survey response | Scheme end | Record of response levels | 70% | Managed and monitored by RLO Team |
| 4c | Resident Satisfaction Survey | Level of Resident Satisfaction | Scheme end | Record of Satisfaction level | 90% | Satisfaction score obtained via completion of a satisfaction survey by residents |
| 5 | Considerate Contractor Scheme | Industry standard score no less than 35 maintained for the duration of the project. | Monthly | CCS Report/Return | Score > 40 | Preferred approach single score value, presented monthly with brief details behind any variation from previous month. Return submitted to PM by contractor |
| 6 | Reportable (RIDDOR) Accidents / Reportable Accidents and Near Misses | Number of reportable accidents on site until practical completion.  **Reportable if**  Death has occurred  Over-seven-day incapacitation of a worker Over-three-day incapacitation must be recorded in the site Accident BookReportable incidents Specified injuries  * Fractures, other than to fingers, thumbs, and toes * Amputations * any injury likely to lead to permanent loss of sight or reduction in sight * any crush injury to the head or torso causing damage to the brain or internal organs * serious burns (including scalding) which:   covers more than 10% of the body  causes significant damage to the eyes, respiratory system or other vital organs   * any scalping requiring hospital treatment * any loss of consciousness caused by head injury or asphyxia * any other injury arising from working in an enclosed space which:   leads to hypothermia or heat-induced illness  requires resuscitation or admittance to hospital for more than 24 hours  Near Misses  HSE Non-Conformances raised  Timelines and competency of Contractors response to incident and mitigations arising from incidents and near misses. | Monthly | Immediate Reporting | 0 | Scorecard approach recommended. Performance measure on reportable incidents and how responded to. Reference to CDM toolkit. Raised with H&S (I Walkling) awaiting response |
| 7 | Social Value | Progress of delivery on jointly agreed Social Value initiatives. | Quarterly | Quarterly report | 100% | To be set on an individual project basis. Agreed at appointment stage forming part of contract service delivery. |
| 8 | Waste Management | Provide waste management plan and waste certificates including audit trail of waste | Quarterly | Report | 100% | Link to CDM toolkit. Clear, evidenced audit trail required covering both waste management and what is being diverted from landfill |
| 8a | Waste Recycling | Recycling of site materials rather than just disposal. This would be a percentage based upon the total waste management | Quarterly | Report | 80% | Target figure sourced from Project Union. Responsibility for setting target levels? At corporate or project level? |
| 9 | Energy efficient retrofit/  Low energy retrofit | No. of homes have been upgraded to EPC C | Quarterly | Scorecard | 300 / year | This is minimum target requirement to meet EPC C by 2030 for social housing providers, on failing to meet this target, PMs will be required to provide an action plan to remedy target meeting. This may result in a core group meeting to discuss failures.  Where, after an action plan request and implementation, performance continues to be below targeted, matter to be escalated to senior management level. |
| 9a | Net zero target  (Caveat on cost) | CO2 emission savings compared to pre-project | Quarterly | Scorecard | 20% CO2 savings | On failing to meet this target, PMs will be required to provide an action plan to remedy target meeting. This may result in a core group meeting to discuss failures.  Where, after an action plan request and implementation, performance continues to be below targeted, matter to be escalated to senior management level. |