The KPI Institute

Celebrating 10 Years of PERFORMANCE

Certificare Profesională Îmbunătățirea Performanței

Catalog Formulare de Documentare Inițiative

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Unique identification			
Initiative name	Monthly spot survey of staff to assess their satisfaction with the service provided by the HR department		
Organisational initiative no.	4	Departmental initiative no.	12
Description and allocation			
Description	Development of a questionnaire in order to survey to level of staff satisfaction with the service provided by the HR department.		
Organisational area	HR Department	Balanced Scorecard perspective	Customer
Scope			
Strategic objective	Maintain high levels of staff satisfaction		
Current state	0%		
Desired state	100%		
Expected outputs	Primary: A monthly report reflecting the state of staff satisfaction and recommendations for improvement. Secondary: Developed staff satisfaction survey. Developed plan for data gathering.		

Specific Measure (Initiative)	**21. Basic first aid training as a condition for obtaining a learner driver permit (licensing, education and response)**
Outcomes / Benefits	• Reduced fatalities (up to 28 lives in WA alone per annum) • Reduced injury / permanent disablement • Reduced risk taking behaviour
Resources Required (per initiative)	• Approx. $150,000 per state / territory (development)* • Approx. $15,000 - $30,000 p/a/ (ongoing management)* *estimate only N.b if states / territories collaborated, costs could be reduced
Evidence	• Global road safety partnership (first aid: it saves lives on the road (2003) • British Red Cross. Anyone can save a life: road accidents and first aid (2001) • EU directive 2001/56/EC (requires member countries to ensure applicants for learner driver licenses have basic first aid qualifications • World report on road traffic injury prevention (2004)
Risks and issues	• Lack of uptake / resistance of state / territory transport authorities / departments • Lack of leadership federally • Must be compulsory to ensure uptake (if a condition of licensing, is an incentive for participation)
No of votes	5

Template The KPI Institute

The KPI Institute

Organizație: The KPI Institute

Industrie: Management

An: 2015

Aspecte pozitive:
Template-ul are un format structurat, cu 7 arii cheie identificate

Recomandări:
Utilizarea în cadrul companiilor doar a câmpurilor considerate relevante

Comentarii:
Documentarea inițiativei ar trebui realizată de către responsabilul de inițiativă (managerul de proiect)

Sursa:
The KPI Institute (2015), Toolkit Sistem Management al Performanței în Resurse Umane, disponibil la:
http://store.kpiinstitute.org/hr-performance-management-system-toolkit.html

Initiative Description

Unique identification			
Initiative name	**Monthly spot survey of staff to assess their satisfaction with the service provided by the HR department**		
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Scope			
Strategic objective	Maintain high levels of staff satisfaction		
Current state	0%		
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Expected outputs	Primary: A monthly report reflecting the state of staff satisfaction and recommendations for improvement. Secondary: Developed staff satisfaction survey. Developed plan for data gathering.		
Measurement			
KPIs	% Staff satisfaction		
Current result	67%	Target result	90%
Initiative administration			
Initiative owner (title)	HR Specialist	Initiative coordinator (title)	HR Manager
Initiative owner	Ana T	Initiative coordinator	Dan T
Budget	$20,000	Budget source	BS2
Priority	High	Status	Approved
Implementation details			
Start date	01.01.2014	End date	01.12.2014
Major activities	Develop the questionnaire framework. Analyze the data collection solutions and develop a data gathering plan, with identified solutions. Collect data. Generate report.		
Risk profile	Medium Budget overrun		
Interdependencies	Data gathering systems		
Comments			

Educație

Colegiul Central Piedmont Community

Organizație: Colegiul Central Piedmont Community

Industrie: Educație

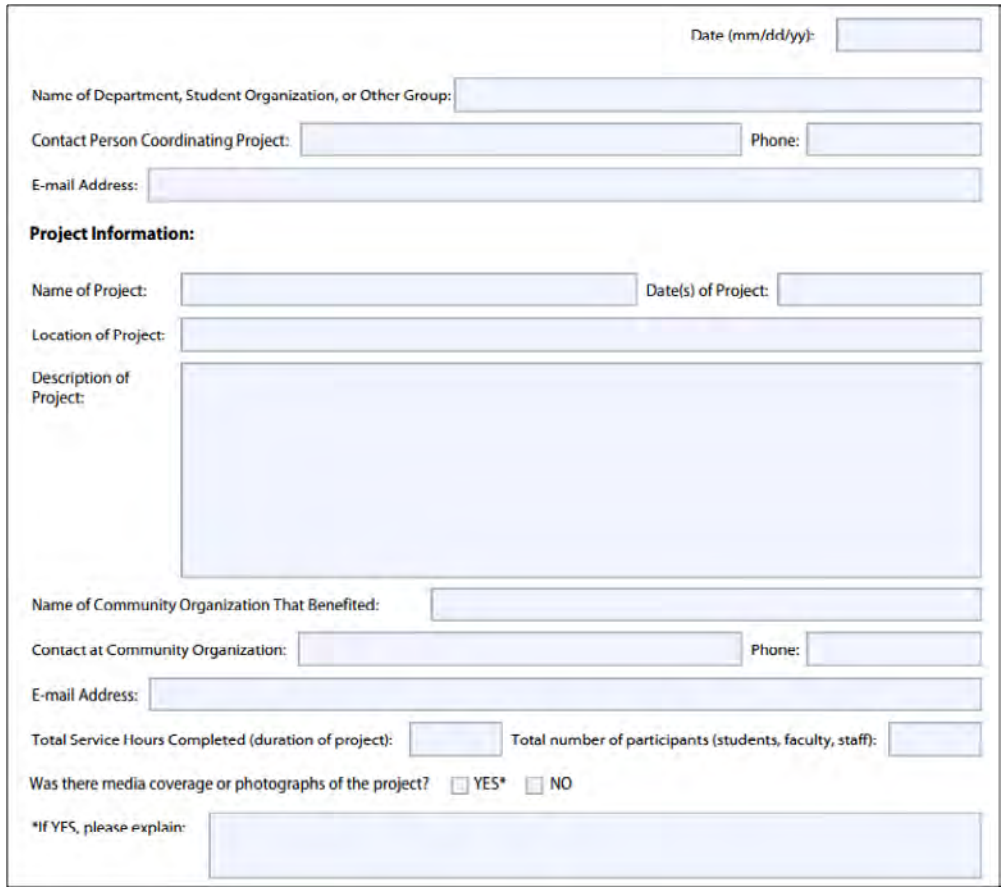
An: n.d.

Aspecte pozitive:
Template-ul este ușor de completat și asigură necesarul de informație cu privire la proiect

Recomandări:
Utilizarea milestones pentru o evaluare periodică a proiectului, astfel încât acesta să fie livrat corespunzător

Comentarii:
Compania care a beneficiat de proiectul implementat este luată în considerare în formular, pentru a verifica măsura în care proiectul a fost livrat conform așteptărilor

Sursa:
Colegiul Central Piedmont Community (n.d.), Formular de documentare a proiectului, disponibil la:
http://www.cpcc.edu/service-learning/faculty-staff/serviceprojectdocumentationform.pdf



Date (mm/dd/yy):

Name of Department, Student Organization, or Other Group:

Contact Person Coordinating Project: Phone:

E-mail Address:

Project Information:

Name of Project: Date(s) of Project:

Location of Project:

Description of Project:

Name of Community Organization That Benefited:

Contact at Community Organization: Phone:

E-mail Address:

Total Service Hours Completed (duration of project): Total number of participants (students, faculty, staff):

Was there media coverage or photographs of the project? ☐ YES* ☐ NO

*If YES, please explain:

Educație

Departamentul de Educație Michigan

Organizație: Departamentul de Educație Michigan

Industrie: Educație

An: 2012

Aspecte pozitive:
Formularul conține un volum ridicat de informații, cu detalii specifice privind acțiunile luate

Recomandări:
Un template mai structurat, cu overview clar asupra modului în care progresează proiectul și care sunt rezultatele lui

Comentarii:
Deoarece implementarea proiectului durează 2 ani, un asemenea proiect necesită raportare granulară

Sursa:
Departamentul de Educație Michigan (2014), Michigan partea B: Raportul Anual de Performanță, disponibil la:
http://www.michigan.gov/documents/mde/MI_PartB_APR_FFY_2012_446666_7.pdf

Discussion of Improvement Activities Completed:

Timelines	Activities	Status
	PROVIDE TECHNICAL ASSISTANCE	
2011-2013	1. Use graduation, dropout, secondary transition and postsecondary outcomes data to develop and implement technical assistance (TA) and personnel development to increase graduation rate.	Reference Improvement Activity details below.

Improvement Activity 1 Details:

In fall 2012, Michigan required Priority and Focus schools to participate in the Superintendent's Dropout Challenge as an activity of Michigan's ESEA flexibility waiver (https://www.michigan.gov/mde/0,4615,7-140-37818_60094---,00.html). Michigan Department of Education (MDE) staff distributed two surveys; sent in January and May. Staff in these schools were encouraged to report on their use of the early warning signs to identify youth, including students with an IEP, at risk for dropout and disengagement.

The early warning signs data, promoted by the National High School Center (www.betterhighschools.org), is a set of metrics that identify student risk factors in the areas of attendance, behavior, and course proficiency, which are predictive of both negative exits and on-time graduations. In addition, staff reported their use of any and/or all of the six Institute for Education Sciences (IES) *Practice Guide for Dropout Prevention Recommendations* which can be found at the following: http://www.michigan.gov/documents/mde/IES_Dropout_Practice_Guide_293427_7.pdf.

In the January 2013 survey, 269 schools reported (99 percent response rate) the following top ten student dynamics in which they intervened:

- poor course proficiency/low grades
- family related factors
- lack of classroom participation
- attendance related factors
- repeated behavior referrals
- peer pressure leading to poor decision making
- psychological issues
- lack of connections with classmates
- frequent suspension/expulsions
- lack of access to specific interventions.

Educație

Programul Educațional de Mediu Port Blakely Tree Farms

Organizație: Programul Educațional de Mediu Port Blakely Tree Farms

Industrie: Educație

An: 2015

Aspecte pozitive:
Template-ul are și o secțiune narativă care oferă mai multe informații cu privire la proiect

Recomandări:
Includerea timpului necesar derulării proiectului, pentru a înțelege complexitatea lui și data estimată de finalizare

Comentarii:
O practică bună de urmat atunci când se documentează proiecte este să se identifice nu doar costurile necesare, ci și sursele de venit capabile să acopere acele costuri

Sursa:
Programul Educațional de Mediu Port Blakely Tree Farms (2015), Aplicarea pentru granul 2015, disponibil la: http://portblakely.s3.amazonaws.com/2015/02/20/2015%20Grant%20Application%20form-52f858b6.pdf

Project overview

Project title	
Project type (supplies, curriculum materials, project, school enhancements, etc)	
Grade level(s) involved	**Number of students involved**
Amount requested	**Matching funds (if any)**
$	$

Project Narrative (limit response to each question to 200 words)

Provide a narrative of your proposed project (who, what, when, why).
Explain how this project is tied to environmental education and/or sustainability.
Describe how your project will benefit the students involved.

Budget

Item	Cost	Funds Requested

Guvernamental

Biroul de Infrastructură, Transport și Economie Regională

Organizație: Biroul de Infrastructură, Transport și Economie Regională

Industrie: Guvernamental

An: 2014

Aspecte pozitive:
Template-ul este bine structurat, cu un format simplu, dar care se concentrează pe cele mai importante aspecte

Recomandări:
Includerea de milestones pentru a arăta progresul spre finalizarea proiectului, precum și a persoanelor responsabile pentru finalizarea lui

Comentarii:
Necesitatea implementării inițiativei este foarte bine documentată sub secțiunea de „evidence"

Sursa:
Biroul de Infrastructură, Transport și Economie Regională (2014), Review-ul traumelor pe de drumurile naționale: Analiza chestionarelor și a rezultatelor workshopurilor, disponibil la: https://bitre.gov.au/events/2014/files/National_Road_Trauma_Review.pdf

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No of votes	5

Guvernamental

Departamentul de Finanțe și Personal

Organizație: Departamentul de Finanțe și Personal

Industrie: Guvernamental

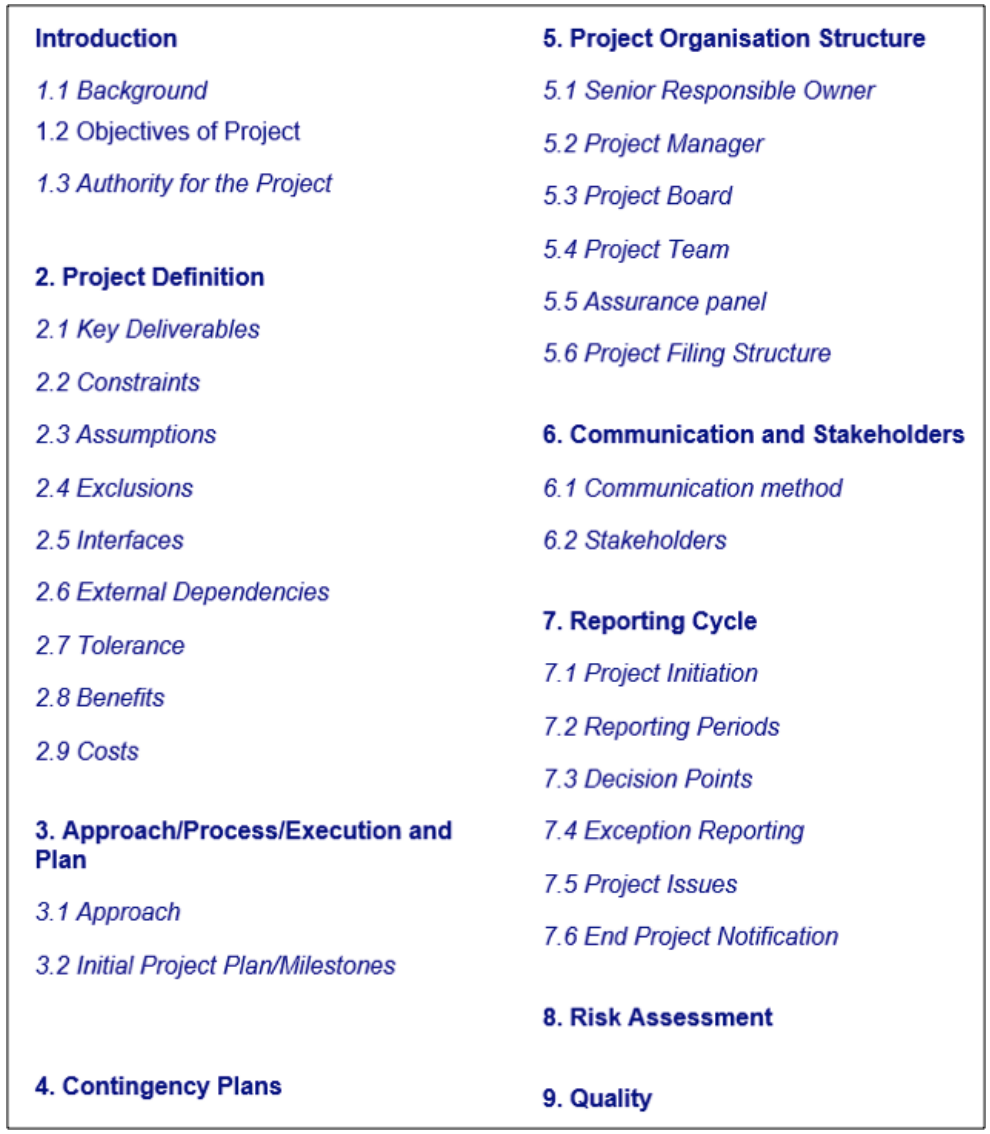
An: 2014

Aspecte pozitive:
Template-ul oferă acces la un volum ridicat de informații cu privire la proiect, începând cu obiectivele acestuia, livrabilele, costurile și persoane responsabile, și continuând cu frecvența de raportare și aspecte legate de calitate și managementul riscului

Recomandări:
Automatizarea pe cât posibil a acestui template, deoarece este foarte complex și completarea lui consumă timp

Comentarii:
Planuri de contingență sunt luate în calcul, pentru situația în care rezultatele obținute nu vor fi cele așteptate. Acest lucru este foarte util pentru managementul riscului

Sursa:
Departamentul de Finanțe și Personal (2014), Document de Inițiere a Proiectului, disponibil la: http://www.dfpni.gov.uk/index/procurement-2/successful-delivery/project-management/content_-_successful_delivery-project_initiation_document.htm



Introduction

1.1 Background
1.2 Objectives of Project
1.3 Authority for the Project

2. Project Definition

2.1 Key Deliverables
2.2 Constraints
2.3 Assumptions
2.4 Exclusions
2.5 Interfaces
2.6 External Dependencies
2.7 Tolerance
2.8 Benefits
2.9 Costs

3. Approach/Process/Execution and Plan

3.1 Approach
3.2 Initial Project Plan/Milestones

4. Contingency Plans

5. Project Organisation Structure

5.1 Senior Responsible Owner
5.2 Project Manager
5.3 Project Board
5.4 Project Team
5.5 Assurance panel
5.6 Project Filing Structure

6. Communication and Stakeholders

6.1 Communication method
6.2 Stakeholders

7. Reporting Cycle

7.1 Project Initiation
7.2 Reporting Periods
7.3 Decision Points
7.4 Exception Reporting
7.5 Project Issues
7.6 End Project Notification

8. Risk Assessment

9. Quality

Guvernamental

Consiliul Metropolitan

Organizație: Consiliul Metropolitan

Industrie: Governmental

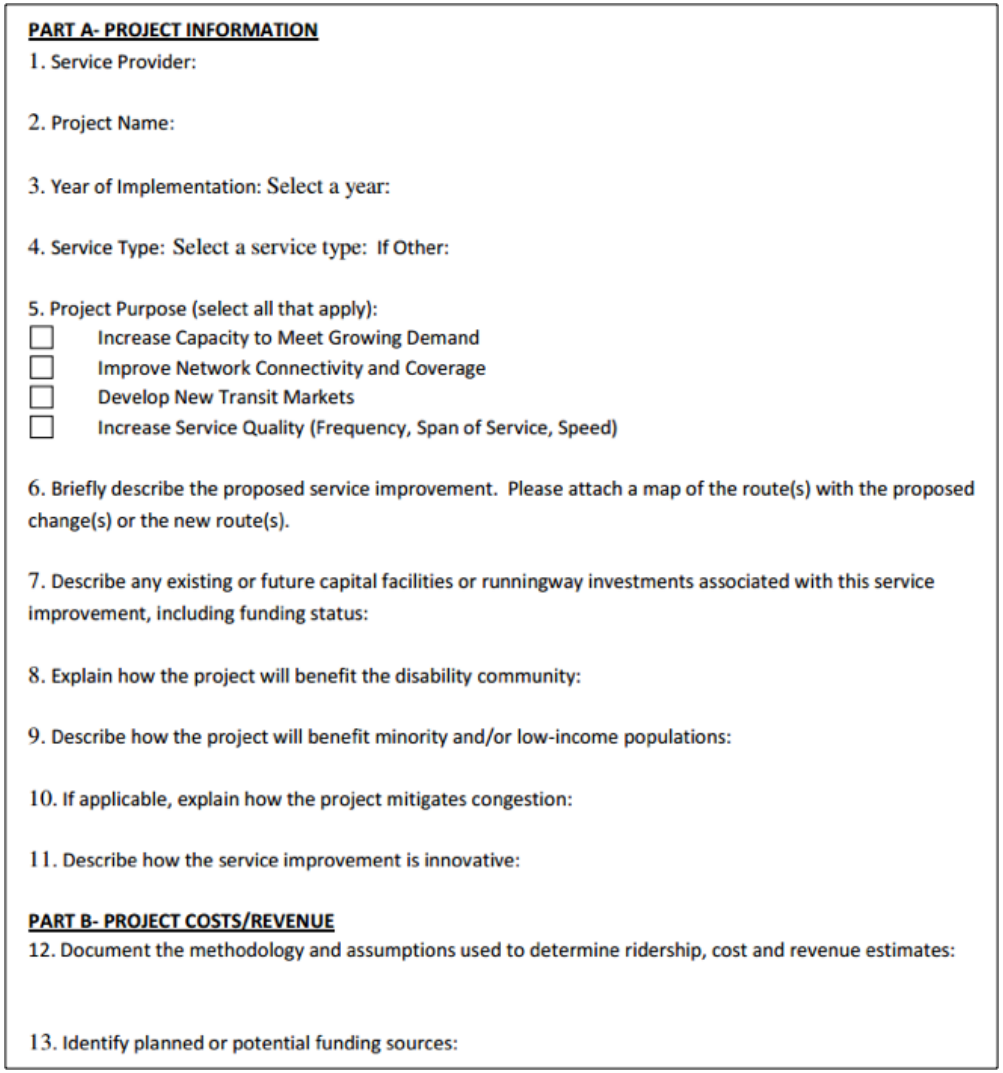
An: 2012

Aspecte pozitive:
Formatul online al acestui formular de documentare permite a completare ușoară, deoarece unele secțiuni au meniu drop-down

Recomandări:
Includerea frecvenței întâlnirilor de raportare a statusului proiectului, pentru a stabili încă de la început cât de des se raportează evoluția proiectului

Comentarii:
Acest format tabelar este urmat de o parte narativă, cu instrucțiuni clare pentru fiecare secțiune

Sursa:
Consiliul Metropolitan Council (2012), Planul de îmbunătățire a serviciilor regionale 2012-2016, disponibil la:
http://www.metrocouncil.org/METC/files/68/68d373e3-d886-4f86-afd9-37fcad57cc39.pdf



PART A- PROJECT INFORMATION

1. Service Provider:

2. Project Name:

3. Year of Implementation: Select a year:

4. Service Type: Select a service type: If Other:

5. Project Purpose (select all that apply):

- ☐ Increase Capacity to Meet Growing Demand
- ☐ Improve Network Connectivity and Coverage
- ☐ Develop New Transit Markets
- ☐ Increase Service Quality (Frequency, Span of Service, Speed)

6. Briefly describe the proposed service improvement. Please attach a map of the route(s) with the proposed change(s) or the new route(s).

7. Describe any existing or future capital facilities or runningway investments associated with this service improvement, including funding status:

8. Explain how the project will benefit the disability community:

9. Describe how the project will benefit minority and/or low-income populations:

10. If applicable, explain how the project mitigates congestion:

11. Describe how the service improvement is innovative:

PART B- PROJECT COSTS/REVENUE

12. Document the methodology and assumptions used to determine ridership, cost and revenue estimates:

13. Identify planned or potential funding sources:

Transport

Departamentul de Transport, S.U.A.

Organizație: Departamentul de Transport, S.U.A.

Industrie: Transport

An: n.d.

Aspecte pozitive:
Formularul este structurat în arii cheie, cuprinzând: obiective, costuri, beneficii, participanți, oportunități de finanțare, prioritizare și implementare

Recomandări:
Includerea unor milestones, pentru a monitoriza mai eficient progresul proiectului

Comentarii:
Instituțiile guvernamentale trebuie să fie foarte transparente cu publicul, și deci, să raporteze mai multe detalii cu privire la proiectele pe care le derulează

Sursa:
Departamentul de Transport, S.U.A. (n.d.), Ghid pentru arhitectura regională ITS, disponibil la: http://ops.fhwa.dot.gov/publications/regitsarchguide/6imp.htm#s6.1

Project Title	U.S. Route 7-Shelburne Road Smart Corridor
CCMPO Project Number	ITS-001
Project Objectives	Provide traveler information to increase user-friendliness
	Mitigate construction-phase traffic impacts
	Collect traffic planning and operations data
	Monitor operation of median U-turn lanes
	Expedite movement of emergency vehicles (Phase II)
	Improve long-term traffic management (Phase II)
ITS Functional Areas	Advanced Traffic Management Systems
	Advanced Traveler Information Systems
	Emergency Management Systems
	ITS Planning and Data Archiving
Geographic Extents	U.S. Route 7 corridor, Towns of Shelburne and South Burlington. Subsequent phases might include key traffic signals in the southern portion of the City of Burlington.
Estimated Cost	Phase I: $207k + $25k O+M/year
	Phase II: $653k + $65k O+M/year
Anticipated Benefits	Mitigation of construction congestion
	Improved construction management
	Real-time traveler information
	Improvement in travel time reliability
	More effective incident detection and management
	Reduced travel times and vehicle emissions
	Increased modal split to commuter rail
	Emergency vehicle prioritization
	Enhanced planning data collection

Non-profit

Programul de Dezvoltare al Națiunilor Unite

Organizație: Programul de Dezvoltare al Națiunilor Unite

Industrie: Non-profit

An: n.d.

Aspecte pozitive:
Raportul este unul complex, care oferă o varietate de informații cu privire la proiect

Recomandări:
Utilizarea unei structuri pe bază de tabel pentru a monitoriza rezultatele proiectului

Comentarii:
Sunt identificate „lecții cheie învățate" din derularea proiectului, pentru a servi următoarelor proiecte

Sursa:
Programul de Dezvoltare al Națiunilor Unite (2011), Evaluarea guvernanței din China: Evaluarea proiectului, disponibil la: http://www.undp.org/content/dam/undp/library/Democratic%20Governance/Democratic%20Goverannce%20Thematic%20Trust%20Fund/china-governance%20assessment.pdf

Context and Strategy

For some years, China has been shifting from a development model based on economic growth to one that incorporates equity, inclusion, and balanced development. While

Activities

i. Three national and one international workshop were held to review international experience of governance assessments and indicators and develop the governance assessment framework for China. Chinese scholars, government officials, and representatives of CSOs

Efficacy

The project did contribute to the achievement of Country Programme Outcomes and Outputs, although indirectly and partially[6]:

Efficiency

The project was implemented efficiently. It was executed nationally through the China International Centre for Economic and Technical Exchanges (CICETE), which reports to the Ministry of Commerce with CCCPE responsible for implementation. The budget was fully disbursed to support a large number of quite complex activities involving many participants from many organizations, in a short implementation period of, effectively, eight months.

Utilități

Loudoun Water

Organizație: Loudoun Water

Industrie: Utilități

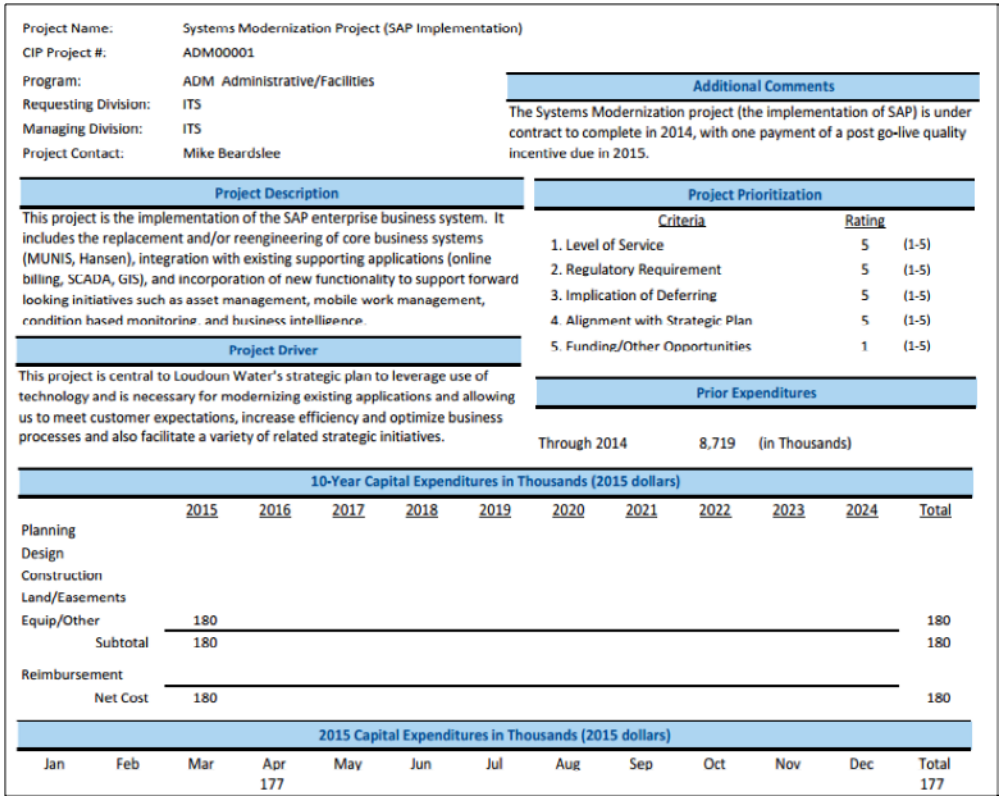
An: 2015

Aspecte pozitive:
Proiectul are alocat un număr de identificare, pentru o monitorizare facilă

Recomandări:
Utilizarea KPIs pentru a prioritiza proiectele, în locul celor 5 criterii actuale, deoarece indicatorii sunt mai puțin subiectivi

Comentarii:
Secțiunea de cheltuieli este foarte complexă, oferind informații cu privire la cheltuielile anterioare, la cele curente, și la cele previzionate pentru 10 ani

Sursa:
Loudoun Water (2015), Plan de îmbunătățire a capitalului 2015 - 2024, disponibil la: http://www.loudounwater.org/uploadedFiles/Loudoun%20Water%2010-year%20CIP%202015%20-%202024%20view%20w%20bookmarks.pdf



Project Name: Systems Modernization Project (SAP Implementation)
CIP Project #: ADM00001
Program: ADM Administrative/Facilities
Requesting Division: ITS
Managing Division: ITS
Project Contact: Mike Beardslee

Additional Comments
The Systems Modernization project (the implementation of SAP) is under contract to complete in 2014, with one payment of a post go-live quality incentive due in 2015.

Project Description
This project is the implementation of the SAP enterprise business system. It includes the replacement and/or reengineering of core business systems (MUNIS, Hansen), integration with existing supporting applications (online billing, SCADA, GIS), and incorporation of new functionality to support forward looking initiatives such as asset management, mobile work management, condition based monitoring, and business intelligence.

Project Prioritization

Criteria	Rating	
1. Level of Service	5	(1-5)
2. Regulatory Requirement	5	(1-5)
3. Implication of Deferring	5	(1-5)
4. Alignment with Strategic Plan	5	(1-5)
5. Funding/Other Opportunities	1	(1-5)

Project Driver
This project is central to Loudoun Water's strategic plan to leverage use of technology and is necessary for modernizing existing applications and allowing us to meet customer expectations, increase efficiency and optimize business processes and also facilitate a variety of related strategic initiatives.

Prior Expenditures

Through 2014	8,719	(in Thousands)

10-Year Capital Expenditures in Thousands (2015 dollars)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Total
Planning											
Design											
Construction											
Land/Easements											
Equip/Other	180										180
Subtotal	180										180
Reimbursement											
Net Cost	180										180

2015 Capital Expenditures in Thousands (2015 dollars)

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
			177									177





The KPI Institute

Celebrating 10 Years of PERFORMANCE

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