

FY 2004

Project/Facilities and Construction Management

Performance Assessment Model

Lawrence Berkeley National Laboratory

University of California Laboratory Management Office

Department of Energy - Berkeley Site Office

February 23, 2004

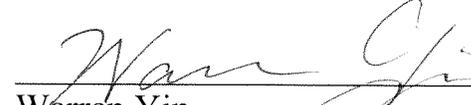
Background Information

Contract No.: DE-AC03-76SF00098

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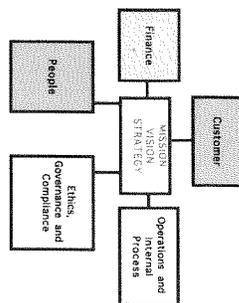
Introduction

The Facilities Management Functional Managers from the Lawrence Berkeley National Laboratory (LBNL), the Department of Energy (DOE) Berkeley Site Office, and the University of California Laboratory Management Office have agreed to assess the Performance Measures in Appendix F according to the methodology described below.

Performance Assessment Components

The following Balanced Scorecard metrics will be used for the evaluation of the FY04 Appendix F Performance Measures.

BALANCED SCORECARD
PERSPECTIVES AND
EXPECTATIONS



MISSION:
Provide facilities services that support excellence of science.

VISION:
Deliver best value service consistent w/ scientific priorities, DOE policy and national interests

STRATEGY:
Change culture to a customer-driven model based on principle-centered management, business ethics, and continuous improvement measures

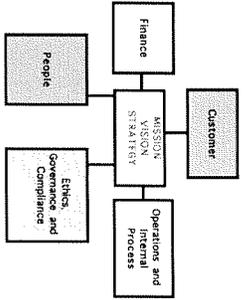
Achieved Through

Five Perspectives

PERFORMANCE PERSPECTIVES	PERFORMANCE EXPECTATIONS	PERFORMANCE MEASURES	APPENDIX F WEIGHTING	MILESTONES
Customer Customer satisfaction Value added for science	Customers needs met Science advanced	Comprehensive Integrated Planning Process (Criterion 1.0)	8	C1
		Space Utilization (Criterion 1.0)	5	C2
		Utility Service Reliability and Demand Control (Criterion 3.0)	5	C3
Financial Optimum cost efficiency Good stewardship of resources	Cost goals met Financial integrity	Project Delivery Costs (Criterion 2.0)	12	F1
		Achieve the Maintenance Investment Index Goal: 1.4% of RPV (Criterion 3.0)	10	F2
		Building Energy Usage (Criterion 3.0)	5	F3
Internal Process Internal controls Workforce management Utilization of alternative approaches Streamlined processes Good corporate citizenship	On-time delivery Compliance with customer & stakeholder requirements Reengineered/redesigned/revalidated critical processes Reduced cycle times Accountability	Asset Condition/Suitability Assessment (Criterion 1.0)	5	O1
		Real Property Leases (Criterion 1.0)	5	O2
		Facilities Information Management System (FIMS) Completeness (Criterion 1.0)	5	O3
		Project Work Performed (Criterion 2.0)	12	O4
		Maintenance Program Implementation (Criterion 3.0)	9	O5
		Energy Management Plan Goals Accomplished (Criterion 3.0)	9	O6
Ethics/Governance/Compliance External requirements (DOE) Audits Ethical behavior External regulations	Compliance with DOE and regulator requirements Responsive to external audit findings	Initiate practices/procedures to support the implementation of Project Management Manual (DOE M 413.3-1) (Criterion 2.0)	5	E1
		Revise Project Call process to enhance financial controls (Criterion 1.0)	1	E2
		Develop Business Ethics Training for managers (Criterion 1.0)	1	E3
People Employee satisfaction Employee alignment Information availability	Employee needs met Employees aligned with key success factors Work groups have data to do jobs	APRA and IRMA membership for managers (Criterion 3.0)	1	P1
		Develop curriculum for facility supervisor training (Criterion 2.0)	1	P2
		Advance Maximo utilization (Criterion 3.0)	1	P3

LBNL Alignment with DOE Mission, Vision & Strategy
Facilities Management
Balanced Scorecard

BALANCED SCORECARD
PERSPECTIVES AND
EXPECTATIONS



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VISION:
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STRATEGY:
Change culture to a customer-driven model based on principle centered management, business ethics, and continuous improvement practices.

Achieved Through
Five Perspectives

LBNL Alignment With DOE Mission, Vision & Strategy
Facilities Management
Balanced Scorecard

PERFORMANCE PERSPECTIVES	PERFORMANCE EXPECTATIONS	PERFORMANCE MEASURES	APPENDIX F WEIGHTING	MILESTONES
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		Building Energy Usage (Criterion 3.0)	5	F3
Internal Process Internal controls Workforce management Utilization of alternative approaches Streamlined processes Good corporate citizenship	On-time delivery/ Compliance with customer & stakeholder requirements Reengineered/reengineered/re-audited critical processes Reduced cycle times Accountability	Asset Condition/Suitability Assessment (Criterion 1.0)	5	O1
		Real Property Leases (Criterion 1.0)	5	O2
		Facilities Information Management System (FIMS) Completeness (Criterion 1.0)	5	O3
		Project Work Performance (Criterion 2.0)	12	O4
		Maintenance Program Implementation (Criterion 3.0)	9	O5
		Energy Management Plan Goals Accomplished (Criterion 3.0)	9	O6
Ethics/Governance/Compliance External requirements (DOE) Audits Ethical behavior External regulations	Compliance with DOE and regulator requirements Responsive to external audit findings	Initial practices/procedures to support the implementation of Project Management Manual (DOE M-41.3.3-1) (Criterion 2.0)	5	E1
		Revise Project Call process to enhance financial controls (Criterion 1.0)	1	E2
		Develop Business Ethics training for managers (Criterion 1.0)	1	E3
People Employee satisfaction Employee alignment Information availability	Employee needs met Employees aligned with key success factors Work groups have data to do jobs	APPA and IJMA membership for managers (Criterion 3.0)	1	P1
		Develop curriculum for facility supervisor training (Criterion 2.0) Advance Maximo utilization (Criterion 3.0)	1	P2 P3