



Housing Authority Case Studies Compendium

A selection of examples
of the many different ways that
Housing Authorities are using Covalent
to transform their performance

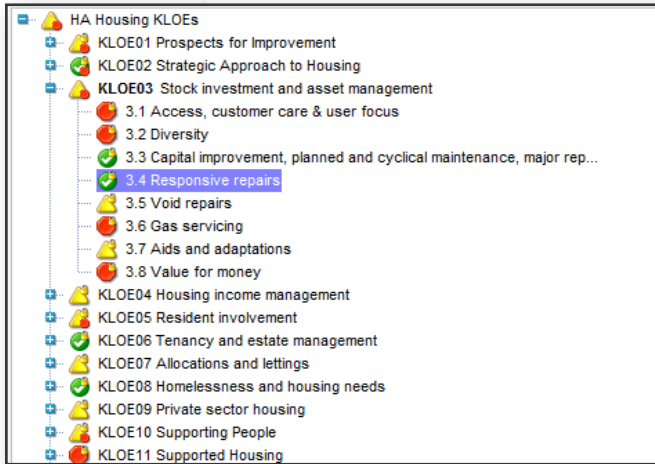


**The simple way to
transform PHA performance**

Using Covalent ... to manage Inspections and Audit processes



"JOHNNIE" JOHNSON
HOUSING



'We use the Housing self-assessment Model on Covalent to track individual improvement actions and for gap analysis. Covalent makes it extremely easy to manage the statutory inspections process.'

We have regular mock inspections and can record and map our improvement plans onto Covalent so we can see immediately what we need to target for improvement.'

Jahanger Hussain, "Johnnie" Johnson Housing Trust

Giving Inspectors direct access to Covalent



'Prior to our recent inspection, we gave auditors remote guest access to Covalent. They were able to log into the system and see our performance management methodology and the evidence to back our assessment of the organization's performance. In fact, the inspectors commented that we have a good performance management system.'

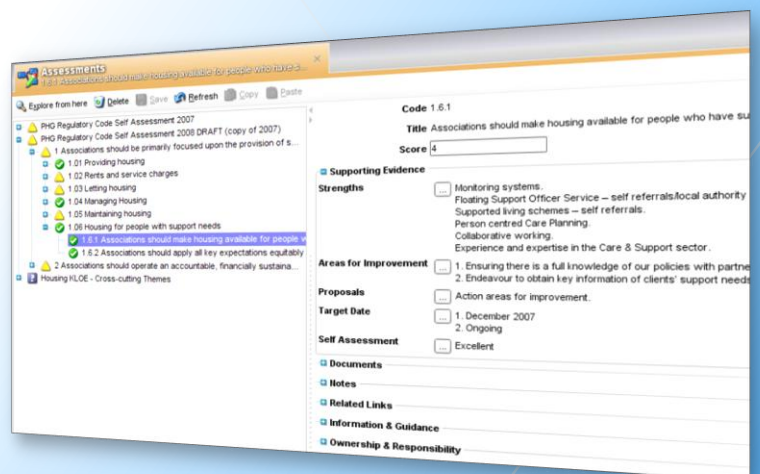
John Chanin, South Essex Homes



'In practice, the self-assessment with Covalent was so easy to use. Within an hour I had cut and pasted last year's self-assessment into Covalent and copied it to create the first draft of this year's. Within two hours I had gone through each question and linked all appropriate PIs and actions plans. Within three hours I had modified a standard report that included all the information I wanted.'

'The report containing the draft self-assessment, current PI data and progress with current action plans was used at an away day for board members, managers and senior management to complete the 2008 self-assessment. This method was significantly better than the blank page approach used in previous years. Immediate access to the data was very useful in arriving at a judgement of current performance in each area. It also made judgements less subjective and more evidence based, making the whole self assessment exercise more robust and efficient.'

Brian Wooster, Pennaf Housing Group

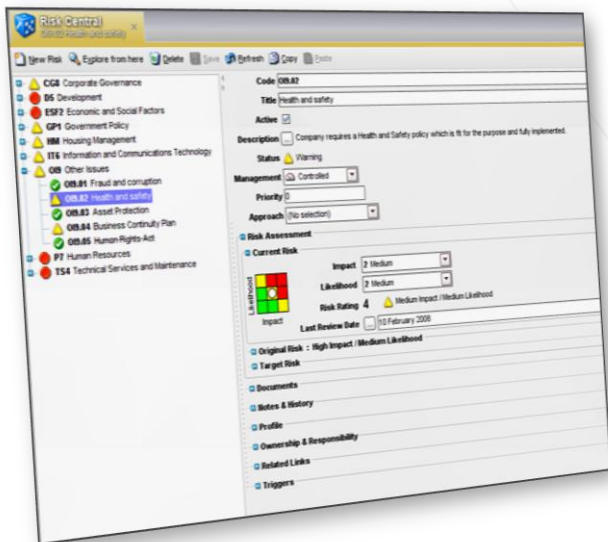
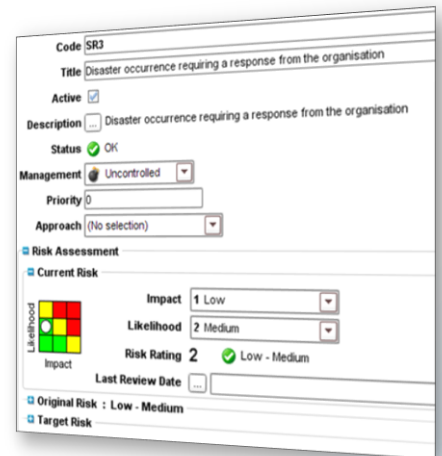


Using Covalent ... for Risk Mitigation Planning



'Covalent has improved the discipline and structure of our processes. To use one example, we wanted to mainstream our risk management, to determine and to mitigate risks, and to link them with our relevant action plans and PIs. When we uploaded our risk plans onto Covalent, we found that there were a number of weaknesses to our current approach. Covalent systematically highlighted a number of areas that didn't 'fit' and we were able to make positive improvements to our risk management approach as a result.'

Brian Wooster, Pennaf Housing Group



Similarly West Devon Homes are using Risk Central to consolidate their risk registers, and manage them from one place. Strategic and Operational Risks are scored on a color-coded matrix and assigned to relevant officers.



Consolidating risk registers to proactively control risks

KHT has grouped over 250 individual risks into a series of 'theme-based' registers. Each risk is scored based on its Likelihood of occurrence and its Impact, resulting in a traffic-lighted status that quickly highlights potential problem areas.

Each risk is assigned to a specific owner with triggers set to send e-mail reminders to assignees when a risk is due for reassessment.

Full profile information is held, detailing the risk factors, potential impacts and the range of internal controls that are in place.

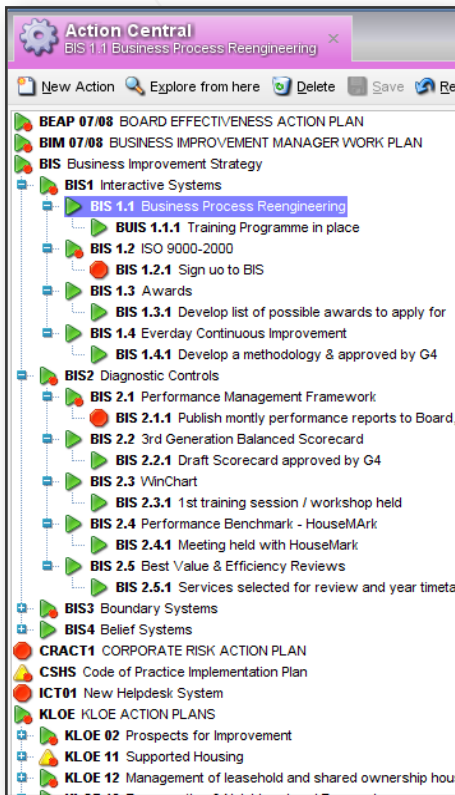
Actions designed to mitigate risks can be set up in Action Central and linked to individual risks.



Using Covalent ... for tracking Action Plans & Project Management



JOHNNIE JOHNSON
HOUSING



'Linking related actions to organizational objectives has further embedded "Johnnie" Johnsons's Golden Thread approach to ensure strategic alignment of everything we do to ensure better outcomes for our residents and customers.'

'Action planning, self-assessments and the ability to upload appropriate evidential documents has helped us to better evidence our improvements and delivery. This will be beneficial for providing evidence for Audit Commission inspectors, as well as Board members and senior managers, on how specific criteria have been met. It is effectively a one-stop-shop for all elements of performance, risk and project management.'

Jahanger Hussain, "Johnnie" Johnson Housing



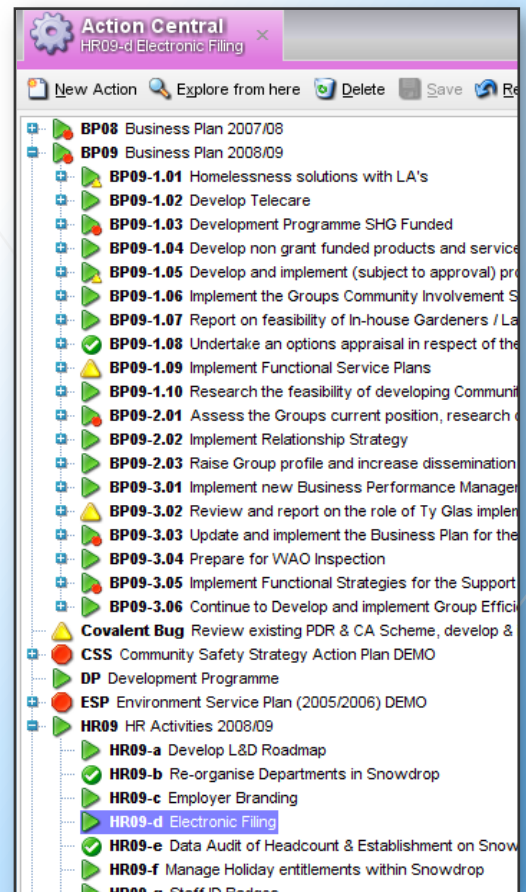
Improving capacity planning

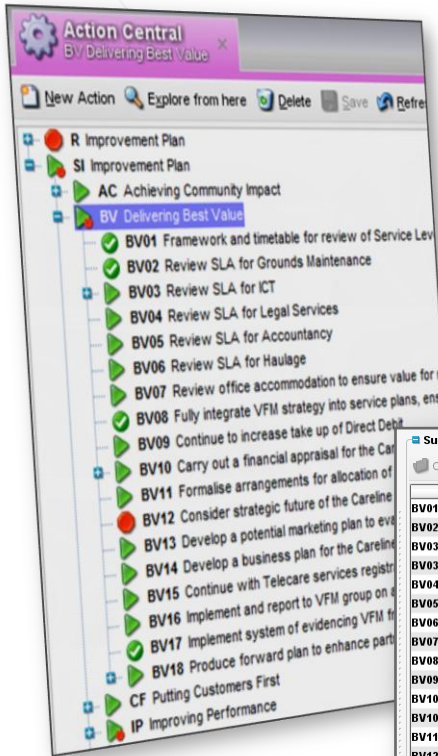
'Implementing Covalent helped us to realise that we were not as good at action planning as we thought.'

'As an organization we produce lots of action plans, but when we tried to input them in to Covalent we found they were not very SMART. We tended to monitor activity rather than outcomes, resource planning was limited and actions either complete or not complete.'

'We recognised that Covalent's ability to monitor how complete actions are was a big step forward. We understood that progress at project level was driven by the weighting and percentage complete at leaf and milestone level. We considered using percentages for leaf level action and milestone weightings but quickly realised that using the estimated number of person days to complete the task would provide some basic capacity planning. It would also take account of the relative size of different projects.'

Brian Wooster, Pennaf Housing Group





'We have added our main service plan to **Action Central** in order to manage it using the software and link it to other relevant areas of performance for a holistic view. We also use the progress bar within each sub-action and find the aggregated traffic-lighted status for each parent action useful.'

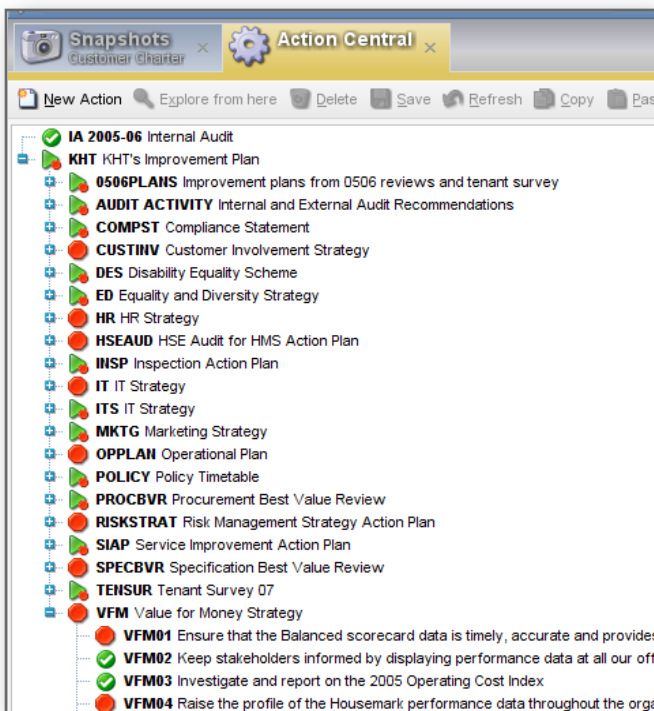
'We aim to add organizational and sectional service plans to the system, so that we can monitor and report on them regularly.'

John Chanin, South Essex Homes

| Action | Status | Progress | Due Date |
|--|-------------|----------|----------|
| BV01 Framework and timetable for review of Service Level | Completed | 100% | 31/07/08 |
| BV02 Review SLA for Grounds Maintenance | Completed | 100% | 30/09/08 |
| BV03 Review SLA for ICT | In Progress | 66% | 31/12/08 |
| BV03.1 Review Housing Management element of ICT SLA (Northgate) | Assigned | 66% | 31/12/08 |
| BV04 Review SLA for Legal Services | Assigned | 50% | 31/12/08 |
| BV05 Review SLA for Accountancy | Assigned | 30% | 31/03/09 |
| BV06 Review SLA for Haulage | Assigned | 27% | 31/03/09 |
| BV07 Review office accommodation to ensure value for money | Assigned | | 31/03/09 |
| BV08 Fully integrate VFM strategy into service plans, ensuring VFM indicators are outcome focu... | Completed | 100% | 31/07/08 |
| BV09 Continue to increase take up of Direct Debit | Assigned | 50% | 31/03/09 |
| BV10 Carry out a financial appraisal for the Careline service | In Progress | 50% | 31/12/08 |
| BV10.1 Liaise with SBC on action to be taken following financial appraisal of Careline service | Assigned | 50% | 31/12/08 |
| BV11 Formalise arrangements for allocation of funds generated by new business | Assigned | 50% | 31/03/09 |
| BV12 Consider strategic future of the Careline service, using financial information from business... | Overdue | 82% | 30/11/08 |
| BV13 Develop a potential marketing plan to evaluate other funding sources | Assigned | 18% | 31/03/09 |



Managing action plans more effectively



KHT now manages over 2000 actions from plans across the organization, in Covalent's Action Central. Most of those are consolidated into a Corporate Improvement Plan comprising sub-projects in areas such as Audit Recommendations, Equality and Diversity strategy, Inspection Action Plan and actions arising out of Best Value reviews.

At a glance managers can see a traffic-lighted status of each action from which they can drill down to supporting information such as status commentaries, attached documents and percentage progress complete against key milestones.

Triggers are set to send e-mail reminders to assignees when an action is approaching its due date.

Using Covalent ... to monitor Key Performance Indicators

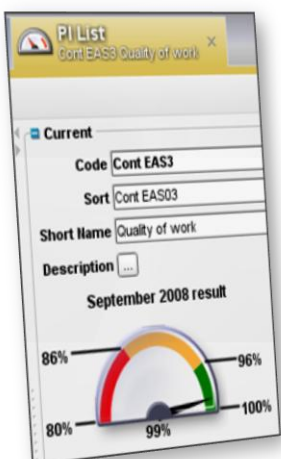
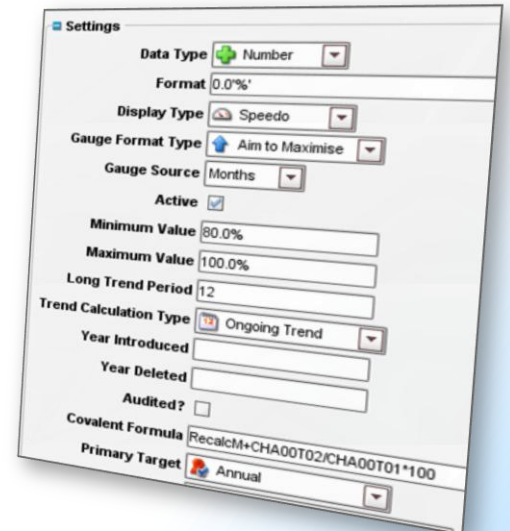


Pennaf use Covalent to record not only the PI values but also the numerators and denominators that make up the PI. This provides greater context for the PI and improves understanding of performance, as well as aiding validation.

'Covalent has allowed us to accomplish all the things we wanted to achieve and more besides. Using the software has highlighted gaps in our approach and we have now developed a much stronger performance management process as a result.'

'We bought Covalent because we thought it was the best tool to help performance management across the Group and this is proving to be the case. Covalent brings structure and discipline to performance management. A key and unexpected advantage has been that the implementation process has highlighted several areas where our performance management was not as good as we thought it was. Addressing these weaknesses has helped us develop a more robust performance management framework.'

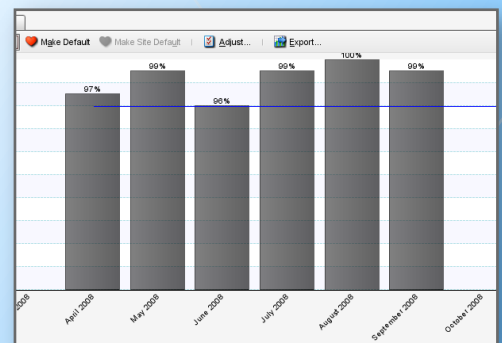
Brian Wooster, Pennaf Housing Group



'The advantages that Covalent brought to our performance management processes became apparent quickly. Before implementing the software, performance information was stored within a variety of sources by each department. Covalent has provided structure and unity for our performance management processes, providing up-to-date, readily accessible information in a central location.'

'We now have a well-developed set of indicators, which are updated and viewed in real time with a clear focus on supporting commentary and data quality. We also use Covalent to chart trends and performance against target, as in the Quality of Work PI opposite.'

John Chanin, Business Analysis Manager, South Essex Homes



Using Covalent ... to manage the Strategy Plan *Scorecard*



'For the first time, we are able to view key aspects of our strategy and operations in one place, with remarkable ease. This ready 'window' on performance informs our Senior Staff group meetings, and has enhanced our reporting processes, saving Managers' time and creating reports that have an immediate visual impact.'

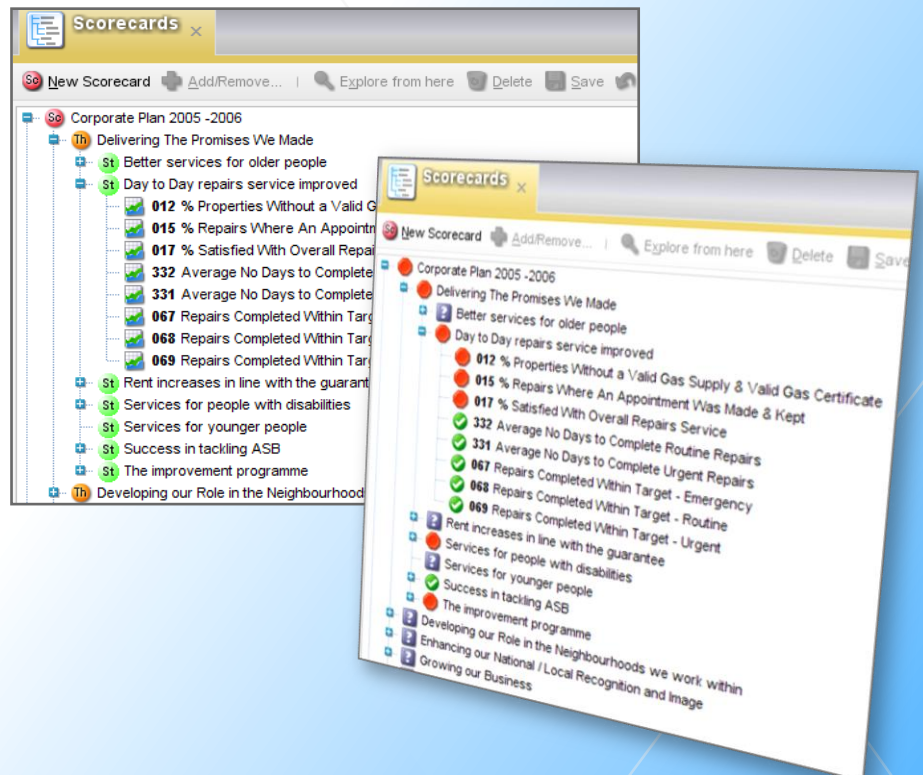
Covalent has created a more focused performance orientated approach to the way we work. The implementation has highlighted to everyone in the organization that they have an important role to play in reaching targets, completing actions and managing risks.'

Jean Peters, CEO, West Devon Homes



Mapping strategies, priorities & objectives

Knowsley has also set up a large number of Scorecards that map different aspects of performance to the Trust's strategies, priorities and objectives. This allows managers to see progress against plan at any time, using the traffic-lighted Scorecard view, as shown opposite on the Trust's Corporate Plan.



www.covgov.com

Using Covalent *Snapshots*... to summarize performance with personalized views

| Status | Performance Indicator | Last Update | Current Value | Target | Short Trend | Long Trend |
|--------|--|---------------|---------------|--------|-------------|------------|
| 015 | % Repairs Where An Appointment Was Made & Kept | December 2007 | 98.6% | 99.3% | ↓ | ↑ |
| 031 | % Complaints Resolved Within Target Time (of those resolved) | January 2008 | 90% | 95% | ↓ | ↑ |
| 471 | % of customers who feel they have been treated with courtesy and respect | January 2008 | 96.85% | 95% | ↑ | ↓ |
| 473 | % of telephone calls answered within 3 rings (10 seconds) - Customer Co... | January 2008 | 85% | 80% | ↑ | ↓ |
| 475 | % of customer e-mails acknowledged within 1 working day | November 2007 | 100% | 95% | ↑ | ↓ |
| 476 | % of customer e-mails responded to within 5 working days | January 2008 | 100% | 95% | ↑ | ↓ |
| 479 | % of offices displaying up to date performance information for the quarter | December 2007 | 67% | 100% | ↓ | ↓ |



'Covalent has transformed the way we manage performance at Knowsley Housing Trust by unifying what were previously many different systems across the organization. We now do all our reporting of PIs, Risks and Actions on Covalent so every manager knows what they've got to do. The Board now has all the detail they need in their Covalent performance reports, with a trend view that makes it very easy to pick out what's happening. In particular, we can now easily track progress on action plans and key projects to quickly identify potential problem areas. Covalent is simple to learn, and staff have reacted very positively and like using the software, to the extent that user adoption has been widespread with no significant issues!'

Janet Daniels, Assistant Director: Corporate Services, Knowsley Housing Trust



'I am encouraging managers to use Snapshots, which provide them with a personalized, summarized view of performance data from different perspectives. Snapshots helps to make information meaningful and interesting and shows at a glance which actions, PIs and risks need most attention using RAG status.'

John Chanin, South Essex Homes

| Status | Performance Indicator |
|--------|--|
| ? | KP 1 III 160 Overall Satisfaction of tenants |
| ? | KP 2 Overall satisfaction of sheltered tenants |
| ✓ | KP 3 Careline calls answered in 30 seconds |
| ✓ | KP 4 Occupancy rate for Hostels |
| ✓ | KP 7 Void turnaround time |
| ✓ | KP 8 Calls answered in 30 seconds (Contact Centre) |
| ✓ | KP 9 Quality of call handling |
| ✓ | KP10 Satisfactory Block Inspections |
| ✓ | KP11 Anti-Social Behaviour cases successfully resolved |
| ⚠ | LSS 1 Percentage of Initial Tenancy Visits carried out |
| ✓ | LSS 2 Initial Meetings in 10 days (TA) |
| ⚠ | LSS 3 Support plans in target time (TA) |

| Last Update | Current Value | Target | Short Trend | Long Trend | PIs | Actions | Risks | Notes |
|---------------|---------------|--------|-------------|------------|-----|---------|-------|-------|
| 2008/09 | | 73% | | | | | | |
| 2008/09 | | 90% | | | | | | |
| November 2008 | 98.6% | 97.0% | ↑ | ↓ | | | | |
| November 2008 | 46% | 26.0 | ↓ | ↓ | | | | |
| November 2008 | 23.8 | 26.0 | ↓ | ↓ | | | | |
| November 2008 | 95.1% | 80.0% | ↑ | ↓ | | | | |
| November 2008 | 88.0% | 80.0% | ↑ | ↓ | | | | |
| October 2008 | 89% | 70% | ↑ | ↓ | | | | |
| November 2008 | 55.4% | 70.0% | ↓ | ↓ | | | | |
| November 2008 | 92.7% | 95.0% | ↓ | ↓ | | | | |
| Q2 2008/09 | 100% | 85% | ↑ | ↓ | | | | |
| Q2 2008/09 | 70% | 85% | ↓ | ↓ | | | | |
| Q2 2008/09 | 100% | 95% | ↑ | ↓ | | | | |

Using Covalent Reports ... time-saving, audience-appropriate integrated reporting

'One of the reasons we chose Covalent is because we wanted to strengthen our reporting capabilities. We were very impressed with Covalent's integrated reporting function.'



'Users only need to input data once and yet we can report out on it in many different ways. The reports are easy to set up but in fact we rarely need to do this as the pre-loaded report templates on the system cover most of our needs for producing a variety of reports for departments, managers and directors. An example of this is our reports for Landlord Services and Team Status Updates (see opposite).'

Brian Wooster, Pennaf Housing Group

C&S Team Status Update - by Action
Report Type: Action Report
Generated on: 01 July 2008

| Action Status |
|--|
| Completed |
| Assigned: In Progress |
| Unassigned: Check Progress Not Started |
| Ongoing |
| Cancelled |

Summary Chart

Parent Code & Title: BP09-1.09 Implement Functional Service Plans
Status: Check Progress 1

| Action Code & Title | Due Date | Latest Status Update | Progress | Assigned To |
|--|------------|---|----------|--|
| BP09-1.09a Implement Functional Service Plans for Care and Support | 31/03/2008 | 12/9/08: Year end report was completed on time and is anticipated to be presented to Current Service Committee on 19/10/08 and then to O&M in July 2008, after which, could be presented as an information item to C&M Board. | 33 % | Andy Scahill, Simon Quinn, Andy Quinn, Steven Robb, Steven Robb, Steven Robb |

Parent Code & Title: BP09-1.09 shm 5 Community based training project / tenant involvement & engagement
Status: Assigned 2

| Action Code & Title | Due Date | Latest Status Update | Progress | Assigned To |
|---|------------|----------------------|----------|----------------|
| BP09-1.09 shm 5a Sheltered Tenants Food Hygiene Certification project | 31/03/2008 | | 0 % | Steven Robbman |
| BP09-1.09 shm 5b Sheltered Tenants capacity-building training | 31/03/2008 | | 0 % | Steven Robbman |
| BP09-1.09 shm 5c Sheltered Tenants 25 training project | 31/03/2008 | | 0 % | Steven Robbman |

Parent Code & Title: BP09-1.09 shm 6 Carbon neutral strategy options
Status: Assigned 2

| Action Code & Title | Due Date | Latest Status Update | Progress | Assigned To |
|--|------------|----------------------|----------|----------------|
| BP09-1.09 shm 6a Sheltered Tenants completing home project | 31/03/2008 | | 0 % | Steven Robbman |
| BP09-1.09 shm 6b Sheltered Tenants boiler project | 31/03/2008 | | 0 % | Steven Robbman |
| BP09-1.09 shm 6c New Group Homes recycling requirements | 31/03/2008 | | 0 % | Steven Robbman |

Parent Code & Title: BP09-1.09a (C&R) Implement Functional Service Plans for Care & Repair
Status: Assigned 10

| Action Code & Title | Due Date | Latest Status Update | Progress | Assigned To |
|---|------------|----------------------|----------|---------------|
| BP09-1.09a(C&R)1 Produce Annual Funding Bid and Business Plan | 31/10/2008 | | 0 % | Gloria Rouben |
| BP09-1.09a(C&R)2 Training Needs | 31/03/2008 | | 33 % | Gloria Rouben |
| BP09-1.09a(C&R)3 Monitor the Agency's Workload | 31/03/2008 | | 0 % | Gloria Rouben |
| BP09-1.09a(C&R)4 Environmental Policy | 31/03/2008 | | 0 % | Gloria Rouben |
| BP09-1.09a(C&R)5 Service Contracts | 31/03/2008 | | 0 % | Gloria Rouben |
| BP09-1.09a(C&R)6 Publicity | 31/03/2008 | | 33 % | Gloria Rouben |
| BP09-1.09a(C&R)7 Governance / Best Value Review | 31/03/2008 | | 0 % | Gloria Rouben |
| BP09-1.09a(C&R)8 Performance Standards and New Database | 31/12/2008 | | 0 % | Gloria Rouben |

Customer Services Report
Generated on: 16 October 2008

Rows are sorted by PI Sort Code.

| PI Status | Long Term Trends | Short Term Trends |
|---|--|---|
| ● This PI is significantly below target. | ↑ The value of this PI has improved in the long term. | ↑ The value of this PI has improved in the short term. |
| ▲ This PI is slightly below target. | ↓ The value of this PI has worsened in the long term. | ↓ The value of this PI has worsened in the short term. |
| ● This PI is on target. | ↔ The value of this PI has not changed in the long term. | ↔ The value of this PI has not changed in the short term. |
| ■ This PI cannot be calculated. | | |
| ■ This PI is a data-only PI. | | |

PI Code: KP 7

KP 7 Void turnaround time

| Year to Date | Value | Status |
|--------------|-------|--------|
| 2008/09 | 24.8 | |

| Month | Value | Status |
|----------------|-------|--------|
| April 2008 | 26.0 | ● |
| May 2008 | 27.8 | ▲ |
| June 2008 | 24.0 | ● |
| July 2008 | 20.8 | ● |
| August 2008 | 21.8 | ● |
| September 2008 | 29.3 | ● |

Current Target: 26.0

Current Performance:

Aim To Minimize

Short Term Trend: ↓ Long Term Trend: ↓



'Using the integrated reporting tool, Report Central, we are able to report on information in a variety of ways to suit the purpose and audience, and the data need only be input once (one such example is our Customer Services Report [opposite]).'

'We currently create performance reports in pdf format within Covalent and publish them on our external website. Using Report Central saves time and money and has improved on the process that we used to go through to produce reports using Microsoft software.'

John Chanin, South Essex Homes

Using Covalent ... to transform the performance culture across the organization



'Prior to Covalent, although performance reporting to senior management and the Board was sufficient to prompt the right questions to be asked, reporting at manager, team leader and individual level was not sufficiently developed to easily provide the answers. We needed the ability to drill down from a top level overview of performance and to quickly identify and rectify areas of poor performance. Performance of individuals in the same activity varies considerably so we wanted a system that would help us to understand the reasons for these variances and help us set appropriate targets. Furthermore, we wanted to strengthen our 'Golden Thread' - the link between the Group's vision, high-level objectives and individual objectives.'

'Before purchasing the software, we made some independent enquiries with existing Covalent customers. They were delighted with the system and with the service provided by Covalent. In fact their endorsements of Covalent made us confident that we weren't just buying a system; we were identifying a partner to work with.'

'We chose Covalent because we knew that it had the functionality to allow us to achieve our aims. It is graphically rich, intuitive and simple to use. This was important because we aimed to role it out to all our staff as the tool to manage their own objectives. Moreover it was good value for money.'

Brian Wooster, Business Improvement Manager, Pennaf Housing Group



'Covalent is a very visual tool, allowing users to get instant feedback on the status of actions, PIs and risks, which is not only helpful for target setting but has also directly improved performance and data quality assurance at "Johnnie" Johnson, which is reflected in the quality of reporting back to our Board members and Senior Management Team.'

'Before Covalent, each department had their own performance monitoring methods, all of which differed considerably and were not easy to tie up and made reporting difficult. We needed a way to consolidate and manage all elements of performance in one place and a mechanism to create a corporate dashboard to communicate our key PIs and action plans to the rest of the organization. Covalent proved the ideal solution.'

'I have worked with similar software in the past and, by comparison, Covalent was extremely simple to implement and not at all laborious to set up. As with any new process, there was some initial scepticism to Covalent at the outset but, as a tangible part of the performance management process, trained users quickly felt empowered. I noticed a genuine shift in attitudes to this new software when users saw for themselves how the use of Covalent could help to improve their productivity on a daily basis by quickly identifying areas of weakness and opportunities to rebalance resources to best effect.'

Jahanger Hussain, Business Improvement Manager, "Johnnie" Johnson Housing Trust



**The simple way to
transform PHA performance**

Talk to us...

**Call us to discuss how Covalent can help you to
transform your PHA's performance**

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