

## CLIENT CASE STUDY

### Managing KLOEs and improvement plans at "Johnnie" Johnson Housing Trust



"Johnnie" Johnson Housing Trust selected Covalent as its corporate performance management solution in February 2006. Following implementation and training, Covalent was rolled out across the organisation.

Covalent has proved an invaluable tool for the Trust, saving time and resources and allowing effective management of KLOEs and improvement plans. The software is now being used across all departments within "Johnnie" Johnson.

### Initial implementation

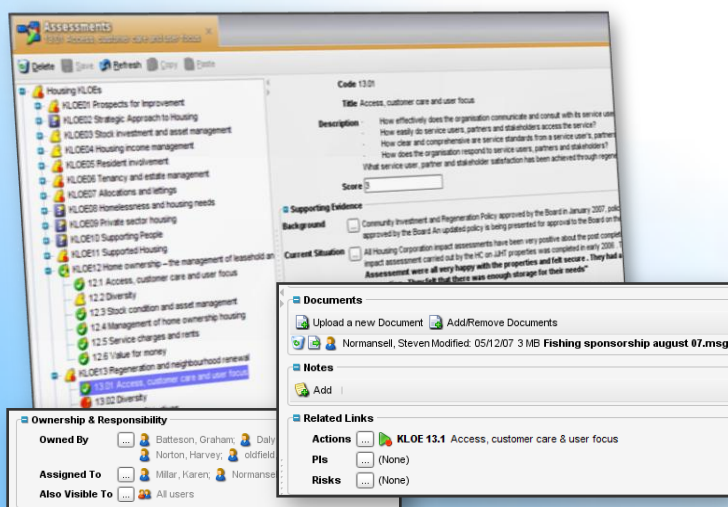
'Before Covalent, each department had their own performance monitoring methods, all of which differed considerably and were not easy to tie up and made reporting difficult. We needed a way to **consolidate and manage** all elements of performance in one place and a mechanism to create a **corporate dashboard**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

### Embedding Covalent

Covalent has been rolled out across the Trust, starting with the Senior Management Team, all of whom have their own log-ins to the system, to enable them to drill down to check progress and update elements as appropriate. Covalent has been embedded throughout the organisation by nominating **departmental 'champions'**. They carry out data entry on a regular basis, and managers check progress status and update the system frequently. In this way, users can see a 'live' view of performance across the Trust and effect change in a timely manner.



### Managing Housing KLOEs self-assessments

Covalent pre-loads and updates the guidance on all statutory PIs and Key Lines of Enquiry (KLOEs), which provide staff with **clear definitions and guidance** for completing self-assessments.

Covalent lays out the statutory framework in hierarchical format. Questions are positioned under each theme, showing the judgement criteria for each level. This format ensures that data is **relevant** and is recorded **consistently and accurately** every time, and users are able to quickly and conveniently answer each question based on guidance and link all forms of evidence in support of the score.

'We use the Housing KLOEs self-assessment template on Covalent to track individual actions and for gap analysis. Covalent makes it extremely easy to manage the KLOE 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. We can easily track and monitor performance through the software, enabling a better focus on staff resources and therefore manage our improvement plans accordingly.'

**Jahanger Hussain, "Johnnie" Johnson Housing Trust**

### Monitoring KLOEs at corporate level with progress reports

The ease of producing reports from Covalent has allowed staff to track progress and enabled cross-cutting KLOEs to be monitored corporately.

**KLOE 4 Housing Income Management**  
Report Author: Jahanger Hussain  
Report Type: Mofidy Assessment Report  
Generated on: 19 June 2008

**Description**  
Title: Housing KLOEs  
Status Icon:   
Score: 2.57

**Score**  
Score: 2.57

**Linked Documents Name**  
An Related Organisation  
A Fair Organisation

**Notes**

**Code & Title**  
KLOE 4.1 Access, customer care & user focus

**Latest Rule**

**Description**  
How effectively does the organisation communicate and consult with its service users and stakeholders about housing income management?  
How easily do service users access the service?  
How clear and comprehensive are service standards from a service user's perspective?  
How does the organisation respond to service users?  
What service user satisfaction has been achieved with this service area?

**Start Date**  
01/04/2007

**Due Date**  
31/03/2011

**Progress Bar**  
Managed By:

**Code & Title**  
4.2 Diversity

**Description**  
How does the organisation respond to the diversity of its community to ensure that all users, or potential users, have fair and equal access to housing income management service area?

**Score**  
3.52

**Status Icon**

**Cross Cutting Value for Money**  
Report Author: Jahanger Hussain  
Generated on: 12 June 2008

**Parent Code & Title: KLOE 11 Supported Housing**

**Parent Code & Title: KLOE 11.9 Value for Money**

**Parent Code & Title: KLOE 4.6 Value for Money**

**Parent Code & Title: KLOE 5 Resident Involvement**

**Action Central**  
BIS 1.1 Business Process Reengineering

- BEAP 07/08 BOARD EFFECTIVENESS ACTION PLAN
- BIM 07/08 BUSINESS IMPROVEMENT MANAGER WORK PLAN
- BIS Business Improvement Strategy
  - BIS1 Interactive Systems
    - BIS 1.1 Business Process Reengineering
      - BIS 1.1.1 Training Programme in place
      - BIS 1.2 ISO 9000-2000
      - BIS 1.2.1 Sign up to BIS
      - BIS 1.3 Awards
        - BIS 1.3.1 Develop list of possible awards to apply for
        - BIS 1.4 Everyday Continuous Improvement
          - BIS 1.4.1 Develop a methodology & approved by G4
      - BIS2 Diagnostic Controls
        - BIS 2.1 Performance Management Framework
          - BIS 2.1.1 Publish monthly performance reports to Board
        - BIS 2.2 3rd Generation Balanced Scorecard
        - BIS 2.3 WinChart
        - BIS 2.3.1 1st train
        - BIS 2.4 Performance B...
        - BIS 2.4.1 Meeting F...
        - BIS 2.5 Best Value & Ef...
        - BIS 2.5.1 Services
      - BIS3 Boundary Systems
      - BIS4 Belief Systems
    - CRACT1 CORPORATE RISK ACT...
    - CSHS Code of Practice Implement...
    - ICT01 New Helpdesk System
    - KLOE KLOE ACTION PLANS
      - KLOE 02 Prospects for Impro...
      - KLOE 11 Supported Housing
      - KLOE 12 Management of leas...
      - KLOE 13 Regeneration & Neig...
      - KLOE 3 Stock Investment & B...

**Code** BIS 1.1  
**Title** Business Process Reengineering  
**Description** A methodology for focused change in a business process achieved in which simplification/rationalization/automation may be added to res...  
**Expected Outcome** All senior staff gain qualification in BPR  
**Status** In Progress  
**Active**   
**Priority**   
**Weight** 1  
**Parent Due Date** 31 March 2011  
**Due Date** 31 March 2010  
**Planned Start Date** 27 March 2008  
**Actual Start Date** 27 March 2008  
**Project Budget**   
**Cost To Date**   
**Budget Variance**   
**Current Expected Costs**

### Using Action Central for effective improvement planning

'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.

'Covalent's **functionality** has benefitted the Trust considerably. For example, by linking related actions to organisational objectives further embedding "Johnnie" Johnson's Golden Thread approach to ensure strategic alignment of everything we do to ensure better outcomes for our residents and customers.

'Action planning, KLOE 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 Trust**

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### Making milestones fluid for an evolving picture of performance

'Milestones are a great way to enable managers to track an action's percentage complete and at "Johnnie" Johnson, milestones are altered in response to regular **mock inspections and subsequent progress charts**, to show a truer picture of how performance is being managed and how our improvement plans evolve.'

Jahanger Hussain, "Johnnie" Johnson Housing Trust

Milestones				
New Milestone <input type="checkbox"/> Select All <input type="checkbox"/> Delete <input type="checkbox"/> Promote <input type="checkbox"/>				
Description	Completed?	Due Date	Weight	
Training programme in place	<input type="checkbox"/>	31/07/08	1	

### Plans for the future

Now that Covalent has been implemented and is starting to be rolled out throughout the Trust, "Johnnie" Johnson plans to use this **feature-rich system** to a greater extent in future, starting with the generation of exception reports. These reports will provide a brief summary for Board members of where immediate issues lie that can be targeted for improvement.

'I would like to use the system to produce **short, snappy reports on exceptions**, rather than just headline figures. We currently display a "live" site in the conference room at meetings and double-enter data on a separate report. I know that Covalent can help us to **save time and resources** in future and I am looking forward to generating exception reports on the system, which will be far more efficient for us. We follow a thematic work pattern and I also plan to produce **report dossiers** which group all themed KLOEs within one document.'

'Overall, the software has improved the **quality, robustness and accuracy** of our performance data and I plan to continue to manage performance effectively and efficiently with Covalent.'

Jahanger Hussain, "Johnnie" Johnson Housing Trust