

CLIENT CASE STUDY

Managing the Strategic Plan using Covalent at Lichfield District Council

Lichfield District Council selected Covalent as its corporate performance management solution in August 2005. Following an effective implementation and training programme, Covalent was rolled out across the organisation.

Covalent is now being used across all departments within Lichfield DC and has proved an invaluable tool for the Council, saving time and resources and creating a streamlined performance management approach.

The business challenge

'We initially purchased Covalent for managing PIs. We had been using a MS Access database to record performance data before purchasing Covalent, and as the volume of information stored on Access increased, it became progressively more difficult to manage.'

The business benefits

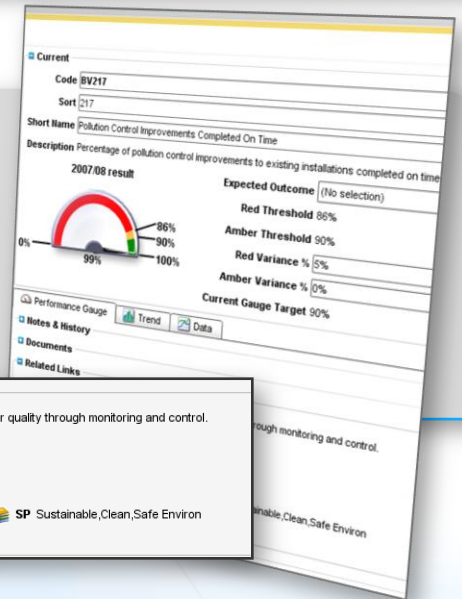
'The implementation process was very straightforward, and users found the system particularly easy in practice because Covalent uses public sector terminology and is not commercially-oriented.'

Tim Ray, Principal Policy & Performance Officer, Lichfield DC

Linking actions to the Strategic Plan

'Our first task was to load all of our PIs onto Covalent. The software enabled us to determine how we could measure and achieve PIs by linking them to relevant actions. This approach helped us to quickly and easily drive improvement at Lichfield DC. Covalent allowed us to advance from simply having a basket of PIs to making our Strategic Plan the focal point, and using the performance data on Covalent to monitor and achieve that plan.'

Tim Ray, Lichfield DC



Related Links

- Actions: SP1 2.07 Improve local air quality through monitoring and control.
- Pis: (None)
- Risks: (None)
- Questions: (None)
- Categories: 2P Priority 2 indicators; SP Sustainable, Clean, Safe Environ
- Snapshots: ALL PIs

Status: Alert

Management: Controlled

Priority: 0

Approach: (No selection)

Risk Assessment

Current Risk

Impact	3 Significant
Likelihood	3 Significant
Risk Rating	9 Severe
Last Review Date	10 March 2008

Original Risk: Severe

Target Risk: Material

Linking risks to the Strategic Plan

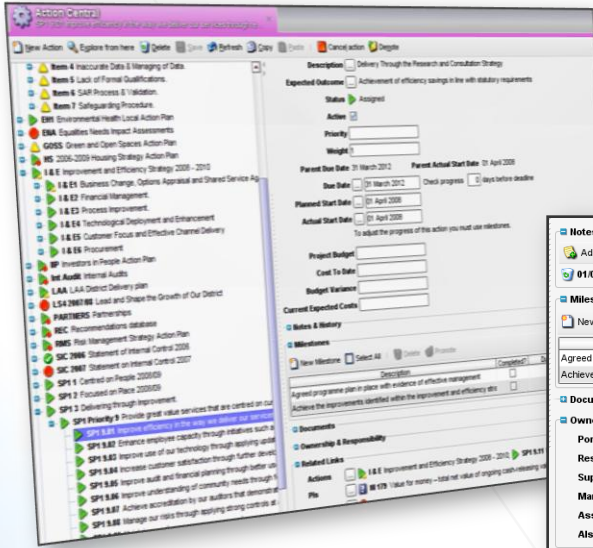
Once Lichfield's Strategic Plan was uploaded onto Covalent, the Council linked in its related risks. This allowed managers to immediately see the RAG status of each risk and quickly drill down to Risk Central to identify those that could stop them from achieving their goals.

Related Links

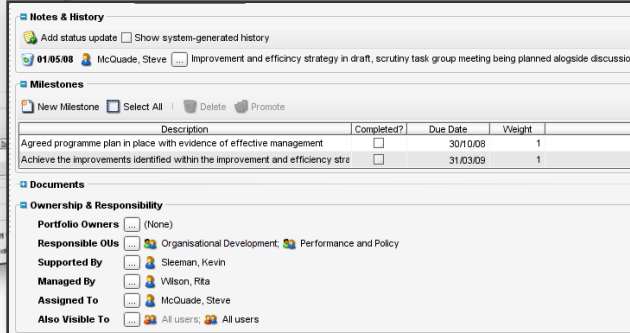
- Actions: I & E Improvement and Efficiency Strategy 2008 - 2010; SP1 9.11 With partners reduce pr
- Pis: 1179 Value for money - total net value of ongoing cash-releasing value for money gains that
- Risks: C OD P&P 01 Efficiency savings target
- Questions: (None)
- Categories: (None)
- Snapshots: (None)

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Tracking audit recommendations



Lichfield DC uses Action Central to track both internal and external audit recommendations. Actions are assigned to individual managers for accountability. Responsible managers regularly review and update the progress, adding notes and finally ticking actions as complete. This provides a real-time view of progress against audit recommendations and their RAG status.



Saving time with Covalent Triggers

E-mails are automatically sent from Covalent to those responsible with a personalised message where necessary. Triggers can be sent to remind that an action is due for review or a PI is due for update as well as to highlight changes in RAG status.

'Using Covalent triggers across the Council has saved us a huge amount of time. Previously each action and PI had to be checked manually and a reminder sent out to the relevant member of staff, but this process is completely automated within Covalent.'

Tim Ray, Lichfield DC



Plans for the future

'I would like to use Covalent to its full potential in the future. Covalent makes it much easier to determine how the actions, risks and PIs we are measuring relate to what we are trying to achieve and so we can be much more focused in managing and reviewing performance as a result.'

'Firstly, I would like to further develop the way we manage our Strategic Plan on Covalent and overtly link all of our supporting projects, PIs and risks. I would also like to use Scorecards to a greater extent – Scorecards can show at a glance the status of our Strategic Plan based on PIs listed against actions and risk and this is a powerful reporting tool.'

Tim Ray, Lichfield DC