

# CLIENT CASE STUDY

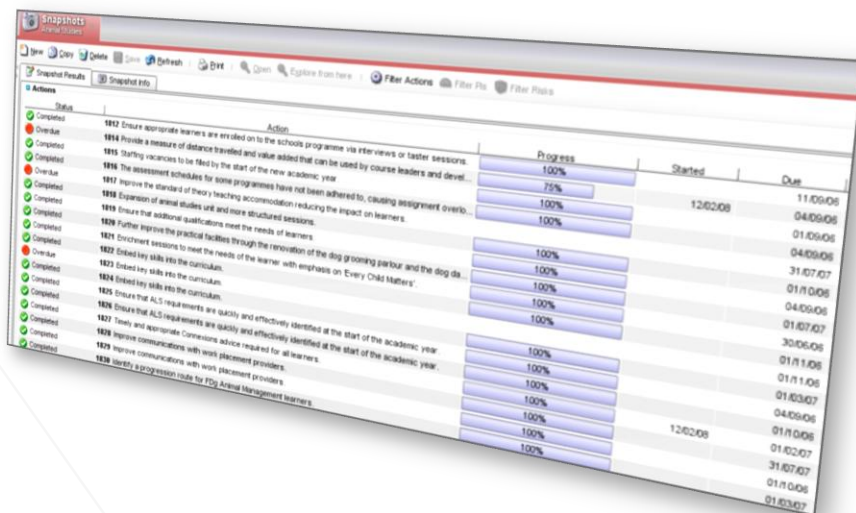
## Managing Actions, Risks, Assessments and KPIs at Otley College



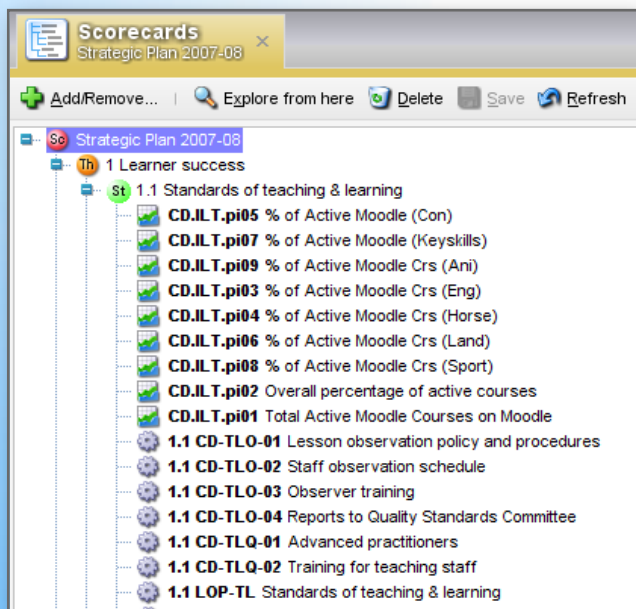
Otley College selected Covalent as its corporate performance management solution in early 2007. Following a short, effective implementation and training programme, Covalent was rolled out across the organisation. With 40 users now registered on the system and most of these users logging onto the system at least once a month, Otley has now developed into one of the most active customers on Covalent.

### Snapshots: summarising performance with personalised views

One of the key uses for Covalent within Otley is reporting performance in a meaningful and interesting way to individual managers. Snapshots are one way in which Covalent provides personalised views to key users that summarise performance from many different perspectives. This is illustrated in the Animal Studies action plan shown on the screenshot opposite.



### Scorecards: mapping strategies, priorities and objectives



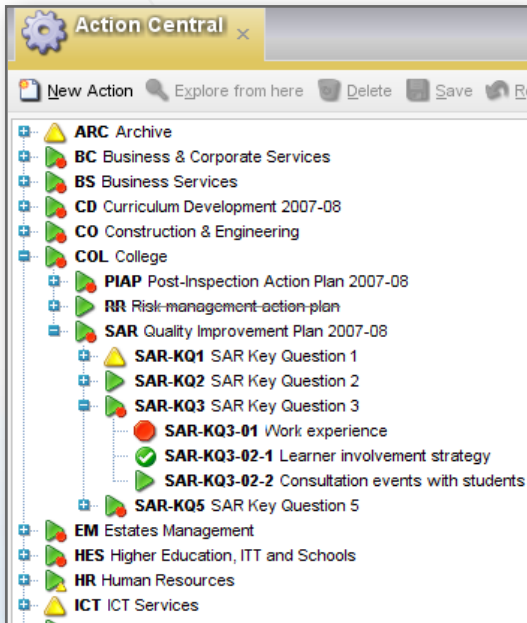
Otley has also set up a large number of Scorecards that map different aspects of performance to the College's strategies, priorities and objectives. This allows managers to see progress against plan at any time, using the traffic-lighted Scorecard view, as shown alongside in the College's Strategic Plan.

### Pre- and post-Covalent

'Before Covalent, our PM system was a standalone MS Access database which was effective but not as "interactive". Covalent have been extremely helpful for the College (with financial support from our local LSC) to pull together in **one location** the whole range of action plans, risk registers and performance indicators that were spread across the institution.

Covalent enables us very simply to map all of these to our **Strategic and Development Plans**, to the **Common Inspection Framework** and **Every Child Matters** criteria, and to external accreditation standards. We can also attach evidence sources to them. The traffic light system for monitoring progress against targets is a very useful tool, and the reporting structure should make pulling together the evidence for the **Self-Assessment Report** a much speedier process.'

**Dr Jed Bultitude,**  
Director of Quality Improvement, Otley College



## Managing action plans more effectively

Otley now manages over 1350 actions from plans across the organisation, in Covalent's Action Central. Examples are **SAR Improvement Plan, Curriculum Development plans, post-inspection plans and the Quality Improvement plan.**

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.



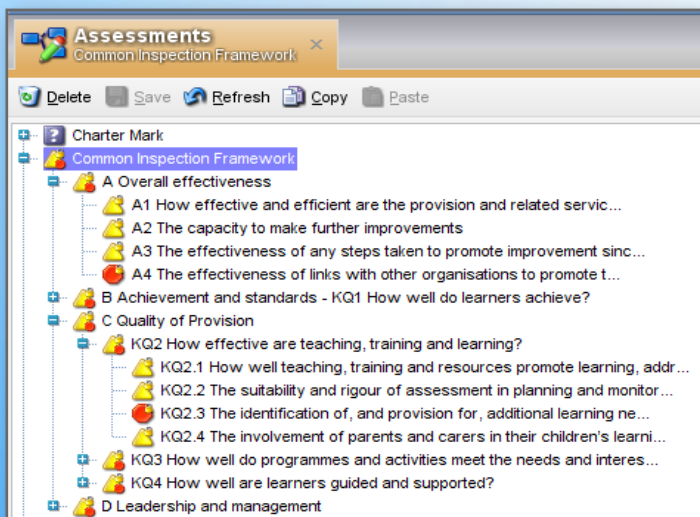
## Consolidating risk registers to proactively control risks

Otley is managing over 140 individual risks on Covalent with each risk score 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.



## Consolidating supporting evidence for inspections

Otley has greatly simplified the process of conducting self-assessments and consolidating supporting evidence for inspections in areas such as **Every Child Matters** and the **Framework for Excellence.**

Using Covalent's template, users can score achievement on each key question and provide **supporting commentary** and link all relevant **documents/files.** The traffic-lighting quickly highlights potential problem areas which can then be addressed in advance of an inspection.