



# CLIENT CASE STUDY

## Producing reports 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.

The Council uses Covalent's integrated Reports module to report back on their progress, quickly generating customised reports to display data in tabular and graphical formats, and fitting the layout and content to suit the audience.

*'Before purchasing Covalent, Lichfield DC produced basic reports using Microsoft Office which had little visual appeal. We were pleased to discover that Covalent gave us the ability to quickly and easily produce customised, visually striking reports which displayed trends and historical data.'*

**Tim Ray, Principal Policy & Performance Officer, Lichfield DC**

### PI reports at the click of a button

*'There is no need for us to manually produce PI reports. Instead, we run a report for our selected PIs using Covalent. We used to cut and paste information from Government documentation but Covalent saves us hours of work.'*

*'The Land Charges Manager is delighted with the new 'Local Land Charges' report, for example, which was created entirely within Covalent. He is particularly impressed that he can simply click the "generate" button to create an up-to-date report as necessary.'*

*'We produce an Audit Trail Template for each PI directly from Covalent. This is a covering report for statutory PIs, in which internal management data, descriptions, results and targets are displayed together. The report also includes a blank text field for manual editing. The report is exported into Rich Text Format after generation within Covalent, and this field allows managers to sign off reports and add explanatory notes to back up calculations, results, updates and other such information.'*

**Tim Ray, Lichfield DC**

*Procedures for data capture, processing and storage must be reviewed and updated regularly - normally annually. These procedures must include specific arrangements for ensuring data quality at the point of data capture, during the processing of that data, and appropriate data quality checks before data information is released. Responsibility for this will primarily rest with the service manager responsible for the data capture or data processing system.*

*Please detail below the full details of how the 2007/08 result was calculated, including details of base data, formula and sources of data, and attach any supporting documents.*

**I certify that the result shown above has been calculated in accordance with the statutory guidance.**

Completed by: \_\_\_\_\_

Checked by: \_\_\_\_\_

**Local Land Charges**  
Report Author: Tim Ray  
Generated on: 30 April 2008

**Lichfield District Council**  
www.lichfielddc.gov.uk

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**LAND CHARGES MONTHLY PERFORMANCE MEASUREMENT AND INDICATOR REPORT**

**Performance Indicator:**  
The figure is reported by Land Charges on a monthly basis. It is published externally.  
This report is produced for the month of: **Mar 2008**

**Speed of Service**  
The percentage of CD2026 enquiries completed in 14 calendar days. This figure is reported cumulatively from 1st April (and monthly) at the end of each month.  
PI = Number of CD2026 enquiries completed in 14 calendar days / (Number of CD2026 received - Number of CD2026 not yet completed) x 100

Indicator description	Current Value
Number of CD2026 received since 1st April	1,243
Number of CD2026 not yet completed	24
Number of CD2026 enquiries completed since 1st April	1,219
Number of CD2026 since 1st April completed in 14 calendar days	1,243

**Performance Indicator:**

Indicator description	Current Value	Current Target
Percentage of Reported Searches carried out in 14 calendar days	78.8%	92.0%

PI Current Status	Short Term Trend	Long Term Trend
●	↓	↓

**PERFORMANCE MANAGEMENT APPROXIMATION**  
Performance management information is used internally to manage the performance of the service. This information is not usually published externally.

**Key to Symbols:**

PI Status	Long Term Trends	Short Term Trends
● This PI is significantly above target	↑ The value of the PI has increased in the long term	↑ The value of the PI has increased in the short term
● This PI is slightly above target	↑ The value of the PI has increased in the long term	↑ The value of the PI has increased in the short term
● This PI is on target	↔ The value of the PI has not changed in the long term	↔ The value of the PI has not changed in the short term
● This PI cannot be calculated		
● This PI is significantly below target	↓ The value of the PI has decreased in the long term	↓ The value of the PI has decreased in the short term

Indicator description	Current Value	Current Target	Status	Trend	Source
Number of CD2026 since 1st April completed in 14 calendar days	1,243		●	↓	CD2026 report from 30/04/08
Number of additional enquiries received since April 1st	313		●	↓	CD2026 report from 30/04/08
Number of additional enquiries received since April 1st	1,243		●	↓	CD2026 report from 30/04/08
Number of additional enquiries received since April 1st	0		●	↓	CD2026 report from 30/04/08
Incomes from CD2026 searches from April 1st	£221,814.00	£150,000.00	●	↓	CD2026 report from 30/04/08
Average turnaround time of completed searches in calendar days from 1st April	11.6		●	↓	CD2026 report from 30/04/08
Average turnaround time of completed searches in calendar days from 1st month	11.6		●	↓	CD2026 report from 30/04/08
Number of CD2026 received - agreed month	89	21*	●	↓	CD2026 report from 30/04/08
Number of L202 searches received from 1st April	264		●	↓	L202 report from 30/04/08
Incomes from L202 searches from April 1st	£1,596.00		●	↓	L202 report from 30/04/08
Number of Personal Searches received from 1st April	1,871		●	↓	
Incomes from Personal Searches from 1st April	£20,000.00		●	↓	
Number of CD2026 and L202 searches with number of data system failures NOT yet completed	24		●	↓	CD2026 and L202

### Customised reporting

The Council began by using simple tabular report layouts and has now developed a series of bespoke reports. The reporting function can be accessed by all users, which makes reporting simple and efficient.

*'Covalent Report Central makes reports so much more visually impacting. Our leadership team and executives are very impressed with Covalent reports, particularly as they can view performance at a glance with long and short-term trend arrows and status icons. In this way, they can immediately see whether key PIs are on target. At the click of a button users can generate an updated report, which saves so much time.'*

**Tim Ray, Lichfield DC**

# CLIENT CASE STUDY

## Data Quality Self-Assessment Reports

'We manage our Data Quality self-assessments using the Covalent Models module, which acts as an action plan with RAG status displayed at a glance. During our Data Quality audit recently, we were able to show the auditor a Models assessment report. **The auditor was very impressed**, as Covalent gave him all the information he needed to begin his inspection.'

Tim Ray, Lichfield DC

**Data Quality self assessment 2008**  
Report Author: Tim Ray (tim.ray@lichfielddc.gov.uk)  
Generated on: 21 May 2008

Lichfield  
district Council  
www.lichfielddc.gov.uk

Model	Data Quality KLOE 2008		
Status	▲	Score	3.35
Due Date	28/04/2008	Closed Date	

  

Code	DQ1.2	Question	The council has clear data quality objectives and these are formally documented.
Status	▲	Score	3
Assigned To			
Examples of Evidence	Level 2	1. Arrangements for data quality management are developing, but may not yet be formalised in strategic or planning documents. 2. The organisation has begun to focus on data quality, but this work has so far been driven departmentally rather than corporately. 3. The organisation is working to improve data quality, but there may be no defined milestones, targets or monitoring. 4. There is evidence of a strategic approach to data quality in one or more key council documents. 5. Corporate objectives for data quality are formally defined and are linked to business objectives. These have been agreed and adopted at top management level. 6. There are plans to deliver quality data, with clearly identified actions, responsibilities and timescales to support improvement. This is reflected in an appropriate document, the corporate plan.	
Examples of Evidence	Level 3	7. A formal strategy for data quality is in place and has been approved at top management level. The strategy covers all departments and functions. 8. Challenging data quality objectives have been set for all individual departments or functions. 9. Regular monitoring of the delivery plan can demonstrate that data quality objectives are being achieved. 10. Data quality objectives are reflected in partnership arrangements.	
Examples of Evidence	Level 4	1. Data quality arrangements are set out in the Council's Data Quality procedures. 2. There is an increasing focus on data quality, driven corporately by the Policy and Performance team. This team drew up the procedure and has provided supporting training and documentation. 3. Data quality is actively monitored through the Policy and Performance team in conjunction with internal audit.	
Supporting Evidence	Evidence of compliance - level 2	<b>Full compliance.</b> 4. The Leadership Team have adopted a Data Quality policy document. Improvements in IT data and in relation to financial management. 5. The authority is comfortable with its present approach. Importance stressed in Performance Management Framework.	
Supporting Evidence	Evidence of compliance - level 3	<b>Full compliance.</b> 6. Internal Audit reviews of services specifically cover processes for collecting IT data. The 2007/08 internal audit of Performance Management looked at DQ issues and included specific recommendations on improving data quality and these have been actioned. 2008/09 service plans have been required to include a statement identifying the key sources and uses of data and how quality is maintained.	

Root Action Code & Title: SP1.3 Delivering through Improvement.  
Parent Code & Title: SP1 Priority 9 Provide great value services that are centred on customers' needs.  
Status: Assigned 4

Action Code & Title	Expected Outcome 2008/09	Milestones	Due Date	Complete?	Milestone Note	Managed By	Assigned To	Linked Risks	Current Value	Current Target	PI Status
SP1.9.03 Improve use of e-CHN technology through	Increased e-implementation plan for Storage Area Network in ordering/booking place	To have gone live with commissioning	01/09/08	Yes	Commitment accounting system went live 1.4.08	Rita Wilson	Kevin Sheehan	LC08H9 Number of online forms completed through the LDC website	731		▲
SP1.9.04 Improve audit and financial planning through better use of systems	Improvement in use of resource assessment score	To have upgraded Oracle Finance systems to supported status	01/04/08	Yes	Business case has been prepared. option appraisal complete	Jane Kitchan	Helen Spawley	UFS Percentage of audit recommendations that should have been implemented by this time of the follow-up review.	82.1	90	▲
SP1.9.05 Improve audit and financial planning through better use of systems	Improvement in use of resource assessment score	To have upgraded Oracle Finance systems to supported status	01/12/08	Yes	Business case has been prepared. option appraisal complete	Jane Kitchan	Helen Spawley	UFS Percentage of audit recommendations that should have been implemented by this time of the follow-up review.	75.78	76	▲

## Top-level and lower-level data in one report

Lichfield DC uses reports to provide executives and managers with detail about each top-level action or PI. Actions and their milestones as well as the PIs that measure the actions' planned outcomes can be shown against the Council's Strategic Plan, all in one report.

## Covalent's Report Dossiers

Covalent's Report Dossiers enables users to join multiple Action, Risk and PI reports of different types together to produce a single document so fitting the needs of multiple audiences at the press of a button. One such report dossier that Lichfield DC has created is the 'Local Land Charges Dossier' which combines a range of text, tabular and graphic elements into a single comprehensive report, and the corporate risk registers dossier, a section of which is shown opposite.

Status	Risk Code & Title	Description	Potential Effect	Managed By	Assigned To	Impact	Likelihood	Current Rating	Current Risk Matrix	Last Review Date	Notes
▲	COD REP 02 Planning and resourcing the Strategic Plan	Robust planning to assess the actions needed to meet Strategic Priorities and ensuring that the correct resources are in place	1) The non delivery of elements of a commitment in the Strategic Plan 2) Loss of reputation with the community, regulators, stakeholders and Central Government 3) The future sustainability of Council Services 4) The inability to provide minimum or essential services in line with statutory requirements	Nina Davies	Richard King Jane Kitchan Ruth Plant Helen Spawley Rita Wilson	Medium	Medium	4	 Impact	01/08/2007	Updated as per Finance Revenue and Benefits Department Management Team approval

## Why Covalent?

'I believe that the main advantage of Covalent is that it allows us to comprehensively monitor and produce customised reports on our corporate performance, showing the status of each action against plan, an explanation of our achievements, our current performance focus and our projected targets, all in a visually striking way. This has helped us to keep a much keener focus on what is important to the organisation

We also find that, being a hosted system, Covalent facilitates home-working thereby contributing to our flexible working and business continuity arrangements. This is a significant advantage.'

Tim Ray, Lichfield DC