



# CLIENT CASE STUDY

## Tunbridge Wells Borough Council: Assessed as an 'excellent' council by the Audit Commission



In 2004 Tunbridge Wells Borough Council received a rating of 'weak' for their Comprehensive Performance Assessment (CPA) by the Audit Commission. Since that time they have developed an effective performance management framework in order to drive continuous improvement across the council.

As part of their improvement process the council purchased Covalent's corporate performance management tool, later upgrading to a site licence in order to maximise the benefits of the software and improve their overall performance culture.

They volunteered for a CPA reassessment in 2008 and were recategorised as an 'excellent' council, having made – in the words of the Audit Commission – 'exceptional progress' since their previous inspection.

*'Before purchasing Covalent, Tunbridge Wells Borough Council didn't have an effective performance management system at all. We were rated as 'weak' in our 2004 CPA inspection, and were heavily criticised for our lack of effective performance management. We decided that we needed a tool which would bring together performance management procedures at a corporate level across the organisation. We wanted a system with development capabilities, that was easy to use for both complex and basic performance management, and with a comprehensive reporting function. We considered four alternative CPM software products and involved potential users within the decision making process. Covalent was the clear choice for us.'*

**Raymond Warren, Head of Community and Corporate Planning, Tunbridge Wells Borough Council**

### Training and rollout

After an effective training programme carried out by Covalent staff, the software was rolled out across the council. Performance & Improvement Officer, Jo Williams provides tailored training sessions for staff and members either on a one-to-one basis or in groups. She also runs regular workshops to coincide with the launch of each new version of the software to ensure users are kept up to date with the latest product enhancements. This is further enhanced by Tunbridge Wells' users accessing Covalent through the council's intranet.



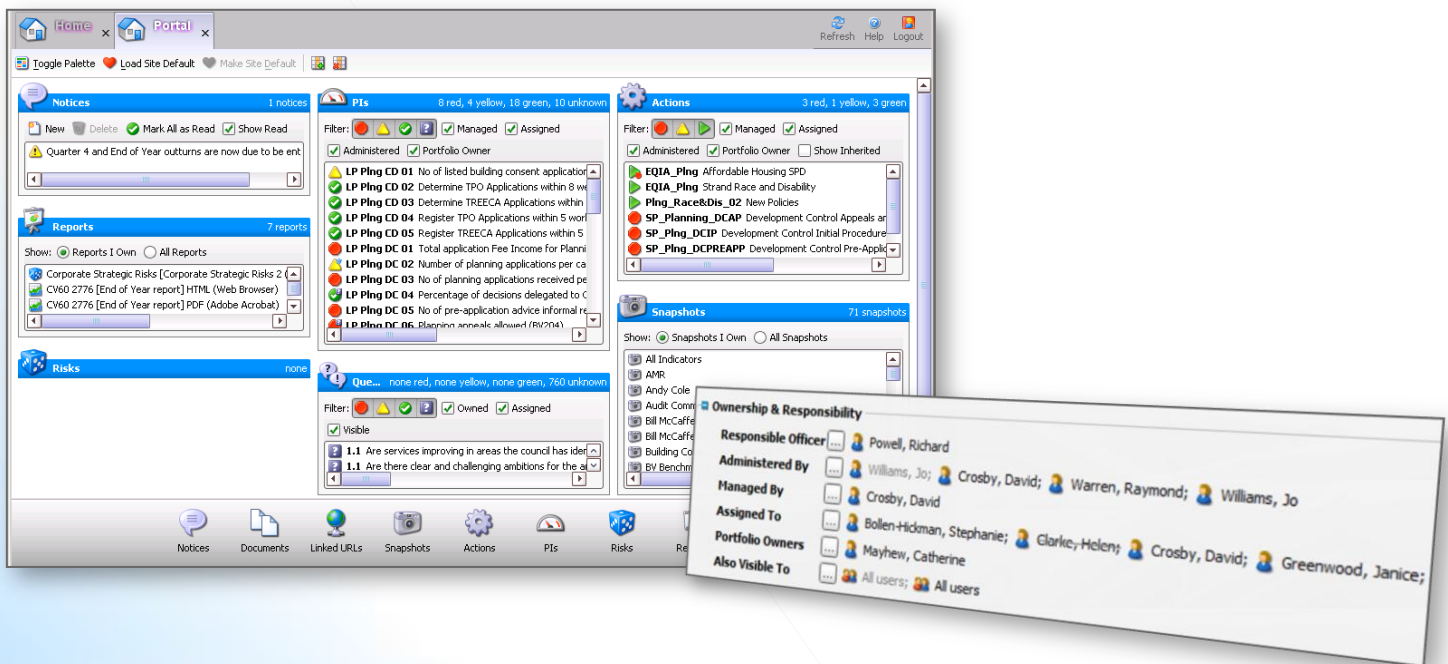
### Accessing the system online

A web page dedicated to performance management provides links to the council's Covalent site, online help and training lessons, as well as a Jargon Buster, Data Quality Performance Checklist, Methodology Statement and other areas important to users. Performance & Improvement Officer, Jo Williams said that this works very well, especially as it allows users remote access to these areas.

## Ownership and permissions

'The option to assign ownership to items and individualise permissions for each user on the system is extremely useful. It means that the view that each individual has when they log into Covalent is appropriate and relevant for them to do their job, without getting bogged down with all the data on the system. For example, members are given read-only access to Covalent, and can view just what they need – the home page and reports. By effectively managing permissions across all users, we find that it is an ideal way to keep sensitive information confidential, wherever it may be needed.'

**Jo Williams, Performance & Improvement Officer, Tunbridge Wells Borough Council**



## Customer support

'Having a dedicated Covalent Account Manager is fantastic. When I joined the council I was new to performance management as well as being new to Covalent. I have a great working relationship with our Account Manager, and she really helped me to understand both the system and performance management as a concept. She has a great knowledge of the authority and ideas on how the software could be used by the council. It was my job to roll out Covalent across the organisation and thanks to our Account Manager and the Covalent Helpdesk I have always felt supported in my role. I think it is crucial for software companies to have a helpdesk like Covalent has. They are always friendly and willing to help.'

**Jo Williams, Tunbridge Wells Borough Council**

## Covalent Community

Regional and sector-specific user groups are one of the mechanisms Covalent provides so that customers can share experiences, exchange best practice, make enhancements suggestions, explore new ideas, network and so on. Tunbridge Wells are keen advocates of these meetings and enjoy being an active part of the Covalent Community.

'We find Covalent User Groups really helpful. We get so much from them, including innovative ways to use Covalent. We find it useful to see other Covalent customers demonstrate live on their Covalent site how they are tackling the performance challenges that are relevant to us all. It is also a great way to build new relationships with and encourage like-minded people.'

**Raymond Warren, Tunbridge Wells Borough Council**

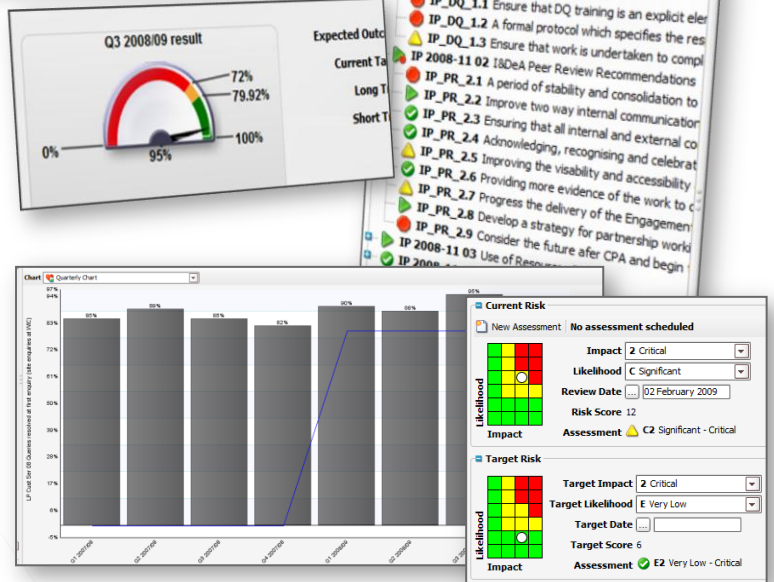
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| Action   | Status         | Progress | Due Date |
|--|----------------|----------|----------|
| IP_PR_2.1 A period of stability and consolidation to ensur...  | Overdue        | 50%      |          |
| IP_PR_2.2 Improve two way internal communication               | Assigned       | 75%      |          |
| IP_PR_2.3 Ensuring that all internal and external commun...    | Completed      | 100%     |          |
| IP_PR_2.4 Acknowledging, recognising and celebrating th...     | Completed      | 100%     |          |
| IP_PR_2.5 Improving the visibility and accessibility of the... | Check Progress | 40%      |          |
| IP_PR_2.6 Providing more evidence of the work to deliver...    | Completed      | 100%     |          |
| IP_PR_2.7 Progress the delivery of the Engagement Stra...      | Check Progress | 33%      |          |
| IP_PR_2.8 Develop a strategy for partnership working an...     | Assigned       | 50%      |          |

## Using Covalent across the organisation

Tunbridge Wells Borough Council now has a strong performance management framework in place. The authority uses Covalent to manage corporate priorities, service plans and team targets, creating clear and visible links between individual actions, PIs and risks to ensure an holistic approach to their corporate improvement.

Up-to-date summary information is provided in the form of graphs, trend charts, gauges and traffic-lighted status based on deadlines set. This is regularly reviewed online by service managers and senior managers. Periodic reports – showing key high-level data – are quickly and simply generated through Covalent for the council's overview and scrutiny committees, allowing the clear targeting of areas of underperformance and areas of particularly high risk.



**Quarter 3 2008/09 Performance - Corporate Priorities**

Rows are sorted by PI Code.

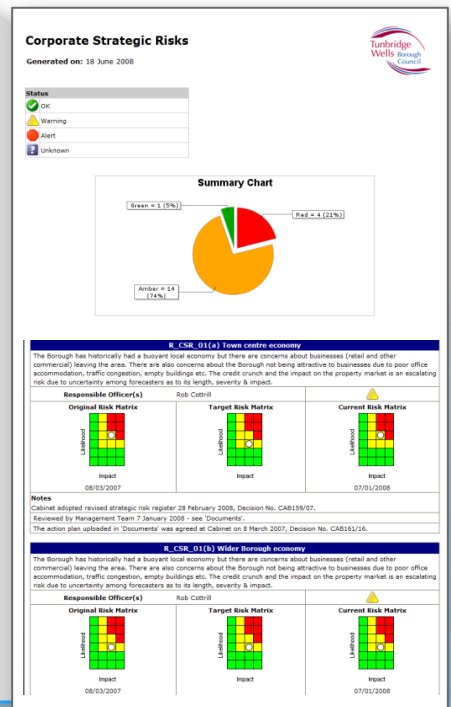
| PI Code   | Short Name   | 2007/08 Annual Outcome |               | Quarter 2 2008/09 |               | Quarter 3 2008/09 |         | 2008/09 Annual Target | Traffic Light |
|-----------|--|------------------------|---------------|-------------------|---------------|-------------------|---------|-----------------------|---------------|
|           |  | Value                  | Target        | Value             | Target        | Value             | Target  |                       |               |
| IP_ESB_01 | Cost contribution that the TIC makes to accommodation providers in the Borough | 240,155                | 240,800       | 237,761           | 244,800       | 248,070           | 249,000 | 251,500               | Amber         |
| IP_ESB_02 | Number of new businesses advised to return                                     | no data returned       | 14            | 18                | 20            | 18                |         | 25                    | Green         |
| IP_ESB_04 | Number of existing businesses advised to return                                | no data returned       | 22            | 15                | 27            | 27                |         | 27                    | Green         |
| IP_ESB_05 | Conversion of new businesses (businesses - return)                             | no data returned       | Not Collected | Not Collected     |               |                   |         | 15%                   | Amber         |
| IP_ESB_06 | Percentage of tourism in the Borough increased                                 | 91%                    | 91%           | Not Collected     | Not Collected |                   |         | 95%                   | Green         |
| IP_ESB_07 | Percentage contribution to overall total of tourism in the Borough             | 15%                    | 15%           | Not Collected     | Not Collected |                   |         | 15%                   | Green         |
| IP_ESB_08 | Percentage TIC   | no data returned       | Not Collected | Not Collected     |               |                   |         | 90%                   | Amber         |

## Managing and reporting on risks

'The software is particularly useful for recording and reporting on our strategic risk register. Our members really like the risk reports we produce through Covalent, and we are able to show complex risks in a simple visual format, with risk matrices, direction of travel, current traffic-light status, ownership and review information, and notes.'

'We are now planning to implement risk management at operational level on Covalent right across the authority. As we have monitored risks for over a year at a strategic level, users know how easy it is to add data and link relevant actions, PIs and documentation to individual risks within Covalent, so we are confident that this process will run smoothly.'

**Raymond Warren, Tunbridge Wells Borough Council**



## Access for auditors

*'During our CPA inspection, we carried out a demonstration of our Covalent site to a performance specialist from the CPA team. He was very impressed with the software and how we had used it to meet our performance management needs.'*

**Raymond Warren, Tunbridge Wells Borough Council**

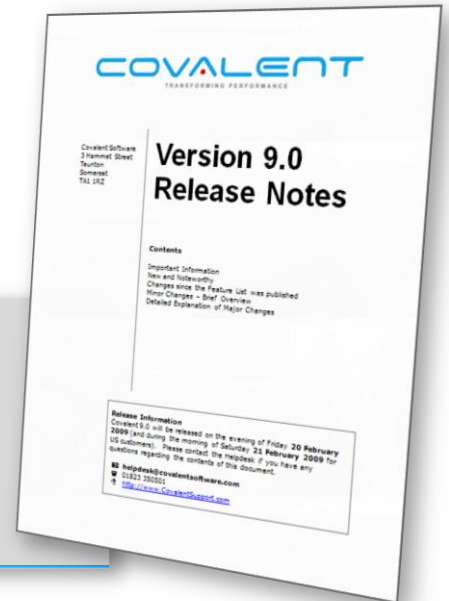
At their next inspection by the Audit Commission – the new Comprehensive Area Assessment (CAA) – Tunbridge Wells will give auditors a log-in to their Covalent site so that they see the data first-hand. This has been used by other Covalent customers very effectively.

## The product enhancement process

Covalent are committed to continually developing and enhancing their software in line with customer suggestions and ideas for improvement. A new version of Covalent is released every quarter with additional features, usability enhancements, performance improvements and at least one new module a year.

*'We continue to be impressed by the way in which Covalent empowers its customers to make enhancement requests. There is a clear, simple process in place for making improvement suggestions and substantial product changes can be easily traced back to customer requests. Covalent informs its customers in advance about planned software developments so we know exactly what to expect. The functionality is really impressive. Covalent does what it says it will do, and that's a rare thing.'*

**Raymond Warren, Tunbridge Wells Borough Council**



## Innovation

The council will soon start using Covalent innovatively to monitor their community grants programme for local organisations, reporting periodically on grant allocations and how effectively grants have been used by recipients.

## Plans for the future

*'Covalent has become very much embedded in the council's performance management processes, to the point where departments are now approaching me to say that they want to use Covalent to monitor a particular aspect of performance and asking for advice on how to do so.'*

*'Across the authority, staff can see the potential within Covalent and we are beginning to use the system to even greater effect. Our Overview and Scrutiny function is now using Covalent to monitor recommendations from their meetings, and Heads of Service would like to start using the software to record information from appraisals. We are now using automated report dossiers, which saves time pulling our Covalent reports together manually each time. We are also looking to use the Strategy Maps module, which will allow us to summarise performance status visually on one page in dashboard format for management meetings.'*

*'We are also starting to look at partnership working using Covalent. The plan for the future is to have all of our partners logging into Covalent and recording all of their performance data, from which we can then produce regular partnership reports.'*

**Jo Williams, Tunbridge Wells Borough Council**

*'From the outset, what has really impressed me is how flexible and adaptable Covalent is in helping us to achieve required outcomes. It works well at every level, from day-to-day data updates to management reviews. We now have a system in place that allows our senior officers to carry out a top-level review from Covalent biannually, whilst the hands-on management is taken care of consistently at operational level. It suits the needs of everyone.'*

**Raymond Warren, Tunbridge Wells Borough Council**