



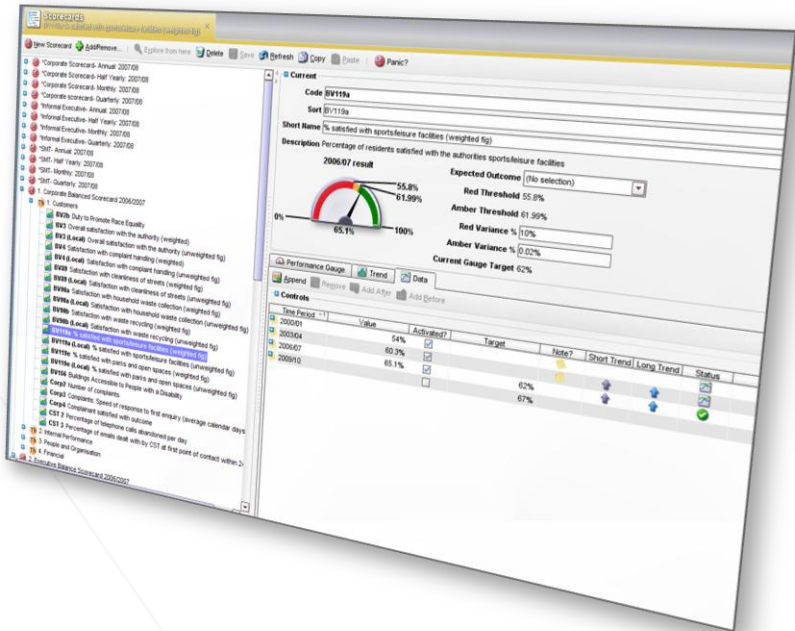
# CLIENT CASE STUDY

## Using Covalent to manage the Balanced Scorecard, and other frameworks

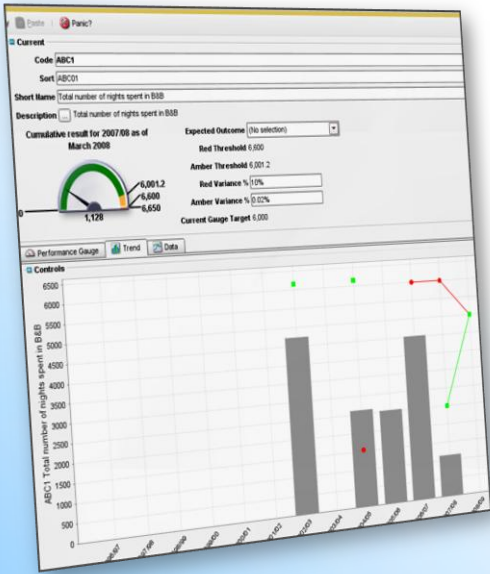
South Hams District Council was Covalent's 15th customer and has over 100 users registered on Covalent, who actively use the software to manage all aspects of performance across the Council.

### Mapping actions to priorities with Scorecards

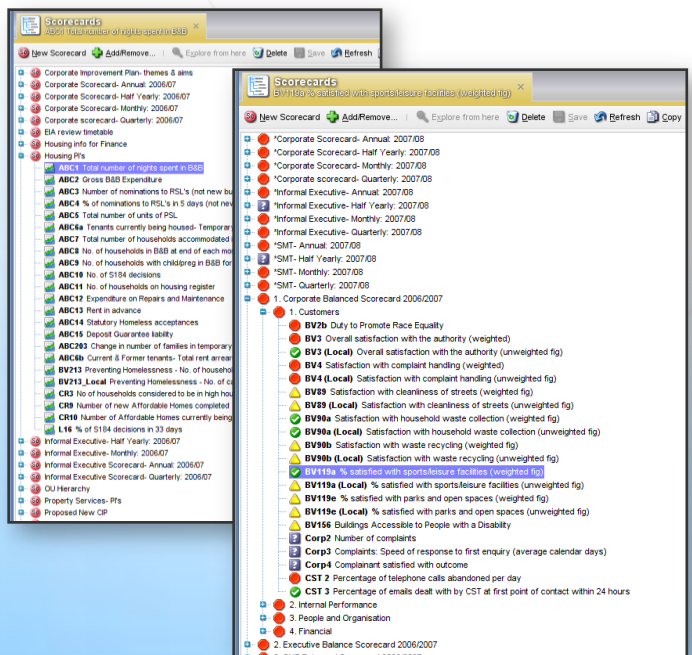
South Hams DC use numerous Scorecards to view performance information, and map actions onto Themes and Strategies that the action is supporting.



This Corporate Balanced Scorecard maps PIs onto each of the priorities in that strategy. The status of those priorities can be tracked at any time, by using the 'status overlay', as with the screenshot on the right below.



PIs trend graphs can be displayed within Scorecards (as in the screenshot above), and managers can also see long and short term trends at a glance using the Data tab.



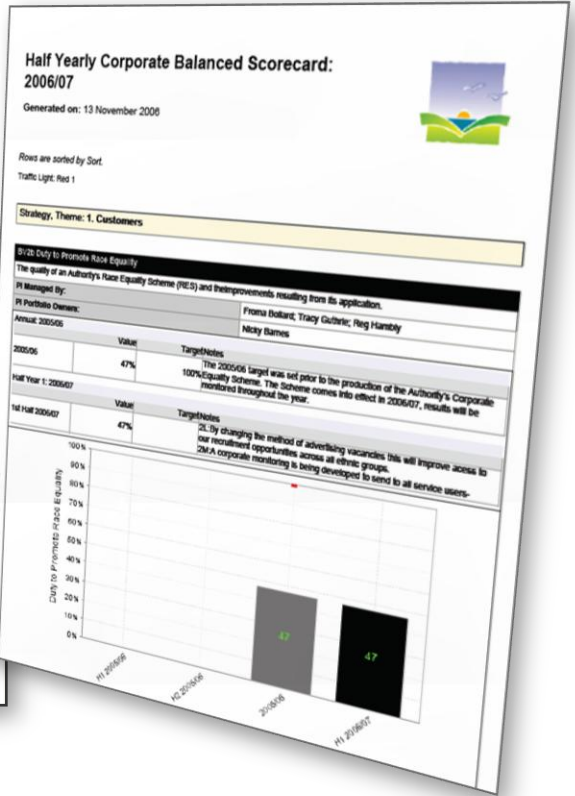


South Hams  
District Council

# CLIENT CASE STUDY

## Straightforward and comprehensive Balanced Scorecard reporting

South Hams DC have produced a number of professional looking formats for reporting on Scorecards.



**Corp Balanced Scorecard report**  
Report Author: Admin Admin  
Report Type: Scorecard Report  
Generated on: 13 January 2007

Item	Parent Item	Name	Traffic Light	PI Code & Short Name	Last Update	Current Value	Current Target	Short Term Trend	Long Term Trend	Alerts
1. Customers										
		BV2B Duty to Promote Race Equality	Red	BV2B Duty to Promote Race Equality (weighted)	2006/7	47	100	Down	Down	
		BV3 Overall satisfaction with the authority (weighted)	Green	BV3 Overall satisfaction with the authority (weighted)	2003/4	84	70	Up	Up	
		BV3 (Local) Overall satisfaction with the authority (unweighted)	Green	BV3 (Local) Overall satisfaction with the authority (unweighted)	2005/6	81	70	Up	Up	
		BV4 Satisfaction with complaint handling (weighted)	Green	BV4 Satisfaction with complaint handling (weighted)	2003/4	32	45	Down	Down	
		BV4 (Local) Satisfaction with complaint handling (unweighted)	Green	BV4 (Local) Satisfaction with complaint handling (unweighted)	2005/6	39	45	Down	Down	
		BV9 Satisfaction with cleanliness of streets (weighted)	Green	BV9 Satisfaction with cleanliness of streets (weighted)	2003/4	80	82	Down	Down	
		BV9 (Local) Satisfaction with cleanliness of streets (unweighted)	Green	BV9 (Local) Satisfaction with cleanliness of streets (unweighted)	2005/6	79	82	Down	Down	
		BV9a Satisfaction with household waste collection (weighted)	Green	BV9a Satisfaction with household waste collection (weighted)	2003/4	90	92	Down	Down	
		BV9a (Local) Satisfaction with household waste collection (unweighted)	Green	BV9a (Local) Satisfaction with household waste collection (unweighted)	2005/6	82	92	Down	Down	
		BV9b Satisfaction with waste recycling (weighted)	Green	BV9b Satisfaction with waste recycling (weighted)	2003/4	74	90	Down	Down	
		BV9b (Local) Satisfaction with waste recycling (unweighted)	Green	BV9b (Local) Satisfaction with waste recycling (unweighted)	2005/6	79	90	Down	Down	
		BV119a % satisfied with sports/leisure facilities (weighted)	Green	BV119a % satisfied with sports/leisure facilities (weighted)	2003/4	60	60	Stable	Stable	
		BV119a (Local) % satisfied with sports/leisure facilities (unweighted)	Green	BV119a (Local) % satisfied with sports/leisure facilities (unweighted)	2005/6	62	62	Stable	Stable	
		BV119b % satisfied with parks and open spaces (weighted)	Green	BV119b % satisfied with parks and open spaces (weighted)	2003/4	78	78	Stable	Stable	
		BV119b (Local) % satisfied with parks and open spaces (unweighted)	Green	BV119b (Local) % satisfied with parks and open spaces (unweighted)	2005/6	78	78	Stable	Stable	
		BV194 Buildings Accessible to People with a Disability	Green	BV194 Buildings Accessible to People with a Disability	2003/6	57	75	Down	Down	

## Key information at a glance with Snapshots

South Hams DC are intensive users of Snapshots, including one for each councillor and each risk register.

Snapshots to bring together key elements in terms of actions, performance indicators and risks for a service or key theme issues, which at a glance summarises the key information.

**Performance Indicators**

Status	Performance Indicator	Last Update	Current Value	Target	Short Term Trend	Long Term Trend	PI	Alerts
Green	ABC7 Total number of households accommodated in BB	2007/08	25	120	Down	Down		
Green	ABC8 No. of households in BB at end of each month	2007/08	2	0	Down	Down		
Red	ABC9 No. of households with child in BB for 5 weeks	2007/08	81.9%	75%	Down	Down		
Green	BV3 Overall satisfaction with the authority (weighted)	2007/08	96.15%	90.0%	Up	Up		
Green	BV3 % of Council Tax collected	2007/08	98.72%	8.00	Down	Down		
Green	BV10 Percentage of Non-domestic Rates Collected	2007/08	8.87	48.00	Down	Down		
Green	BV12 Working Days Lost Due to Sickness Absence	2007/08	58.50	24.0	Down	Down		
Green	BV76c Housing Benefits Security number of fraud investigations	2007/08	16.7	8.0	Down	Down		
Green	BV78a Speed of processing - new HECTIC claims (Total to date figure in av...)	2007/08	9.6	8.0	Down	Down		
Green	BV78b Speed of processing - changes of circumstances for HECTIC claims (...	2007/08	30.82%	44.00%	Down	Down		
Green	BV78c Speed of processing - changes of circumstances for HECTIC claims (...	2007/08	29.42%	27.00%	Down	Down		
Green	BV79a) HB overpayments recovered during the period as a percentage of t...	2007/08	77.1%	70%	Down	Down		
Green	BV72a % of Household Waste Recycled	2006/07	71%	80%	Down	Down		
Green	BV9 Satisfaction with cleanliness of streets (weighted)	2006/07	75.9%	65.0%	Down	Down		
Green	BV9a Satisfaction with household waste collection (weighted)	2006/07	71.4%	65.0%	Down	Down		
Green	BV9b Satisfaction with waste recycling (weighted)	2006/07	68.0%	65.0%	Down	Down		
Green	BV900 Number Major planning applications: Major applications	2007/08	10.00	10.00	Stable	Stable		
Green	BV105a) Number of planning applications determined	2007/08	14.00	14.00	Stable	Stable		
Green	BV105b) Number of Major applications determined within 13 weeks	2007/08	14.00	14.00	Stable	Stable		

**Actions**

Status	Action	Progress
Completed	CST 0607a-07 Ensure effective out of hour coverage for Council Services	100%
Completed	CST 0607a-08 Produce monthly customer Management Information reports and monitor new L...	100%
Completed	CST 0607a-09 Complete all urgent Equality Impact Assessments for CST functions, policies and...	100%
Completed	CST 0607a-10 Redesign and relaunch new website homepage	100%
Completed	CST 0607a-11 Ongoing development of website, including introducing e-forms	100%
Overdue	CST 0607a-14 Ensure all Priority Outcomes and any government initiatives are incorporated in...	10%
Completed	CST 0607a-15 Use of public transport to training events/conferences/seminars wherever pos...	100%
Completed	CST 0607a-16 Recycle all waste paper within the office	100%
Completed	CST 0607a-17 Use of recycled products wherever possible	100%
Completed	CST 0607a-18 Encourage citizens to use electronic communication methods wherever possible...	100%
Completed	CST 0607a-19 KEY Complete all urgent Equality Impact Assessments for CST functions, policies...	100%

**Risks**

Status	Code & Short name	Current
OK	OP-CST-01 CST handling customer queries	Low
OK	OP-CST-02 CST managing customer responses in relation to agreed service standards	Low
OK	OP-CST-03 CST taking payments	Low
OK	OP-CST-04 CST updating and managing the South Hams website	Low
OK	OP-CST-05 Failure of CST	Low
OK	OP-CST-06 Failure of CST	Low
OK	OP-CST-07 Failure of CST	Low
OK	SL-G-05 Failure of performance management	Low
OK	SL-G-06 Failure of individual service change	Low