

CLIENT CASE STUDY

West Dunbartonshire Council: Using Covalent to performance manage the Single Outcome Agreement

West Dunbartonshire Council selected Covalent as its corporate performance management solution in November 2007. Following implementation and training, Covalent was rolled out across the organisation.

Covalent has proved an invaluable tool for robust data collection and management within the council. Using the functionality of the software as a catalyst, the council is continuing to work hard to embed a performance management culture throughout the organisation, in order to more effectively monitor, measure and publish performance data for individual, team, corporate and public use.

Using Scorecards to manage the Single Outcome Agreement

The structure of Covalent Scorecards enables the council to view and report on high level outcomes, but also allows them to appropriately evidence their delivery of indicators and actions at a local level as a measurement of outcomes achieved.

Furthermore, managers can quickly determine the traffic-lighted status of each theme, priority and objective with one click, using the status overlay button.

The image displays three overlapping screenshots of the Covalent software interface:

- Left Screenshot:** Shows a 'Scorecards' dashboard with a tree view of objectives. The selected objective is 'SCC1 CC1: Number of attendances per 1,000 population to all pools'. Other visible objectives include 'NO-01 We live in a Scotland that is the most attractive place for doing business in Europe' and 'NO-02 We realise our full economic potential with more and better employment opportunities for our people'.
- Middle Screenshot:** Shows a detailed view of the 'SCC1 CC1' objective. It includes a gauge chart for the '2007/08 result' with a current value of 4,205. The gauge has a red threshold at 2,983, an amber threshold at 4,081, and a current gauge target of 4,077. The description is 'Sport & Leisure Management. Number of attendances per 1,000 population to all pools'.
- Right Screenshot:** Shows a list of national outcomes (NO-01 to NO-15) with their descriptions and status indicators (e.g., green for 'On Track', red for 'At Risk').

'In my opinion, Scorecards are one of the best features of Covalent. We use Scorecards to map to the hierarchical structure of the Single Outcome Agreement (SOA). Under each of the fifteen national outcomes we are able to monitor local outcomes, with relevant PIs and actions linked beneath them.'

David Webster, Section Head Performance Management, West Dunbartonshire Council

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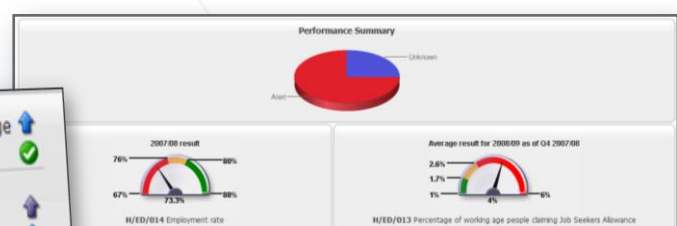
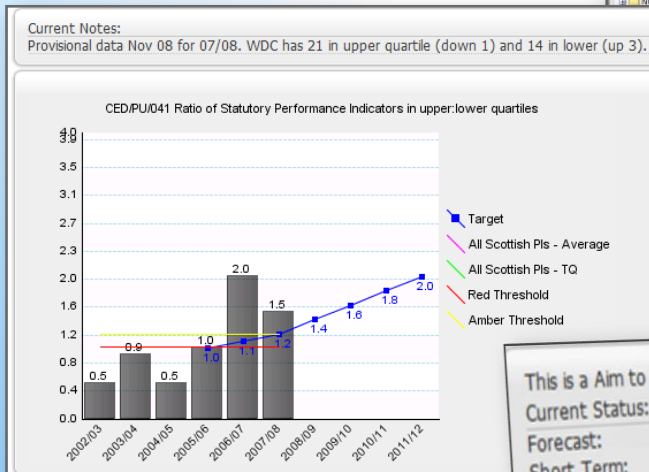
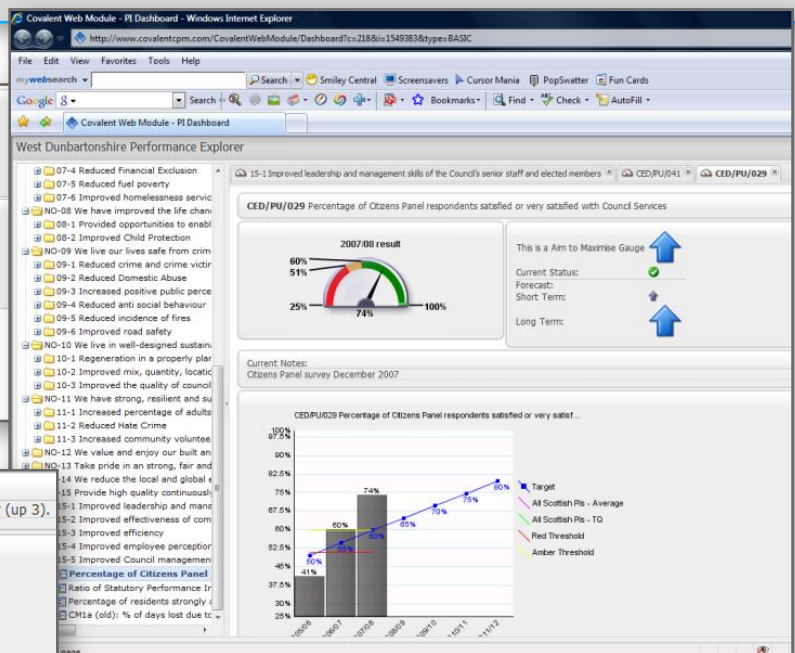
Meeting SOA requirements with the Web Publishing module

'Covalent's Web Publishing module is ideal for the council! It is very simple to use and enables us to quickly and easily publish performance information to our public website.

'I set up the SOA Scorecard as a one-off exercise and in one click the whole Scorecard was recreated as a public web page. Now whenever Covalent is updated, the web page is automatically updated, with no need for manual entry. This has undoubtedly saved the council time and money. Furthermore, we can always display the latest information, rather than an annual view which is quickly out of date.

'For each of the fifteen national outcomes of the SOA, customers and partners can see an overview of performance with summary data represented with graphs and gauges, and then can drill down to examine detailed trend charts, commentary and status and forecast icons for each PI.'

David Webster, West Dunbartonshire Council



'Web Publishing has been very effective for West Dunbartonshire Council. We no longer produce hard copy reports, but instead direct the public to our website, where they can find all performance data for all statutory PIs, including the SOA. I have included a notice in our council newsletter, directing the public to our website to view the latest indicators.

'I have received excellent feedback from Councillors and our Corporate Management Team about the Web Publishing module. It has certainly helped us to streamline our SOA reporting processes.'

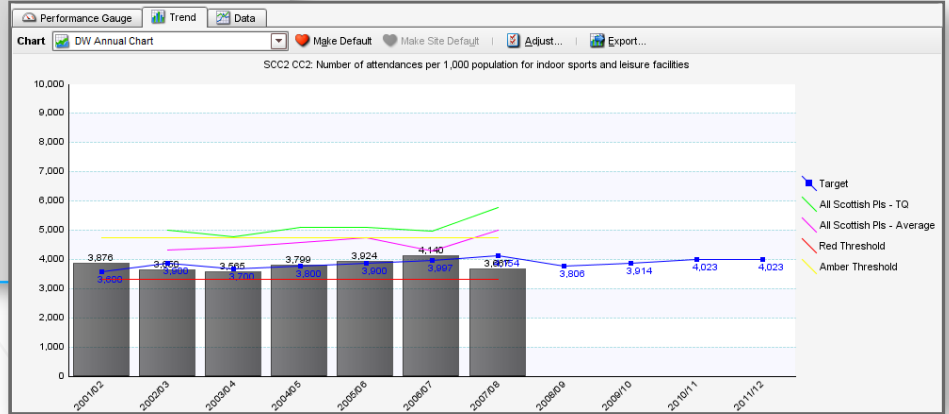
David Webster, West Dunbartonshire Council

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Target setting with trend graphs and benchmarking data

'Covalent's trend graphs help us to carry out target setting exercises based on forecast. We use the live system at our regular Single Outcome Agreement Workshops to discuss current trends and set appropriate targets.'

David Webster,
West Dunbartonshire Council



'We also use Covalent's benchmarking figures to show how we are performing relative to other Scottish councils. Where we don't have targets for a new action or PI, we use this benchmarking data, along with comparative data from national databases, to create an aspirational target, which we then add to the Notes field under each action or PI as a guiding performance value.'

David Webster, West Dunbartonshire Council

	All Scottish PIs - BQ	All Scottish PIs - TQ	Education Authority - Av...	Education Authority - BQ	Education Autho
	188.28	405.95	250.4	177.2	
	451.15	765.6	562.14	444.7	
	528.28	882.55	651.7	532.9	
	619.53	1,042.05	741.22	621.5	
	569.2	1,097.1	750.8	609.5	
	555.7	1,136.5			

Time Period	Value	Activated?	Note?	Short Trend	Long Trend	Status
2002/03	210	<input checked="" type="checkbox"/>				●
2003/04	481	<input checked="" type="checkbox"/>		↑	↑	●
2004/05	766	<input checked="" type="checkbox"/>		↑	↑	●
2005/06	990	<input checked="" type="checkbox"/>		↑	↑	●
2006/07	1,071	<input checked="" type="checkbox"/>		↑	↑	●
2007/08	1,079	<input checked="" type="checkbox"/>		↑	↑	●

Exception reporting with Report Central and Queries

West Dunbartonshire Council uses Covalent's integrated reporting function to produce high level monthly exception reports to show which elements of their service plans are at red and amber. A full report is also produced each quarter, which enables managers to drill down to monitor individual performance items.

The Performance Team also uses Covalent to run queries on departmental PIs and actions, based on specific criteria, such as red and amber status, or by assignee.

CE Action Plan - Progress of Actions & Milestones

Generated on: 14 January 2009

Theme: 2-Health & Well-Being										
Priority: C2-2 Improve health and reduce health inequality										
Objective: Support Council departments and partners to deliver health improvement outcomes										
Action	Status	Progress	Due Date	Assigned To	Managed By	Comments	Milestone	Comments	Milestone Due Date	Completed
Contribute to reports on progress of Health Improvement Strategy Group for Community Planning Partnership Board	●	0%	31/03/2009	Bobby Jones	Liz Cochran	Host recruit an Equally Well project in Whitecrook	Attend first meeting of HISG	Awaiting reconvening of CP Groups	14/01/2009	No

Theme: 6-An Improving Council										
Priority: C6-3 Improve governance and resource management										
Objective: C6-04 Improve accountability to all stakeholders										
Action	Status	Progress	Due Date	Assigned To	Managed By	Comments	Milestone	Comments	Milestone Due Date	Completed
Develop and Implement Corporate Media Plan	●	80%	31/12/2008	Joe Coru Louisa Mahon	Louisa Mahon		Develop annual media plan with each department	Currently being collated into one Annual Media Strategy		Yes
							Develop programme of media training		Yes	
							Review media protocol	For CE/C Feb 25	No	
							Develop case studies Database		Yes	
Review media release template	Agreed.		Yes							

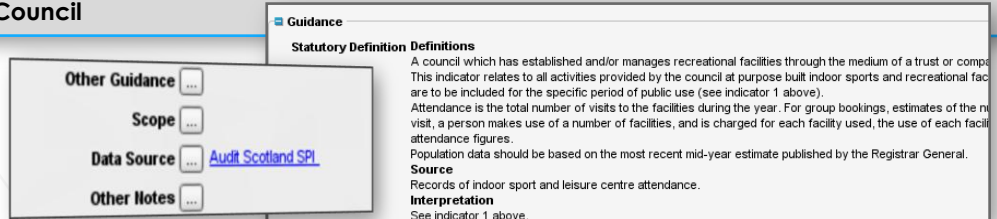
Theme: 6-An Improving Council										
Priority: C6-4-Value our employees										
Objective: Improve and develop the department's workforce										
Action	Status	Progress	Due Date	Assigned To	Managed By	Comments	Milestone	Comments	Milestone Due Date	Completed
Implement PDP for all employees within Chief Executive's Unit	●	50%	31/12/2008	David McMillan	David McMillan		Complete initial PDP for all employees		31/05/2008	Yes
							Review PDP for all employees		31/12/2008	No

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Knowledge Bank: guidance and best practice from source

'I have used Covalent to create a Knowledge Bank for each PI by creating hyperlinks within the Guidance tab to websites which provide additional guidance on the topic in question. I also upload any relevant documentation to Covalent, which provides a source of further guidance to help each service area understand the best practice guidelines behind each element of the SOA. This has a direct impact on the overall standard of our data quality.'

David Webster, West Dunbartonshire Council



The screenshot shows a user interface for a Knowledge Bank. On the left, there are four menu items: 'Other Guidance', 'Scope', 'Data Source' (with a link to 'Audit Scotland SPI'), and 'Other Notes'. The main content area is divided into two sections: 'Guidance' and 'Statutory Definition Definitions'. The 'Statutory Definition Definitions' section contains text explaining that the indicator relates to recreational facilities managed by a council, and provides details on how attendance is calculated and the source of the data.

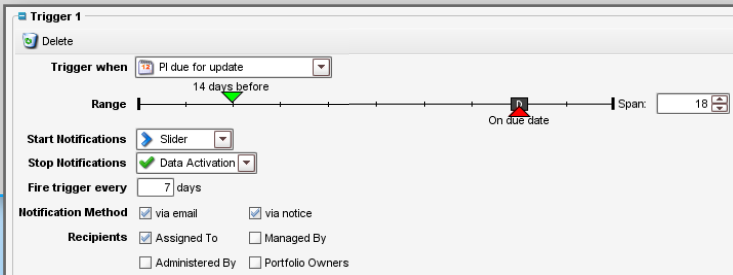
User responsibility and accountability

'If I were to give new Covalent customers one piece of advice it would be to aim to embed the software by getting individual users involved in using Covalent and taking accountability for their own actions, PIs and risks.'

'When a new item is set up, we assign it to particular users within the council who are responsible for managing or updating it. Each user's home page is customised, which means that only relevant information is displayed. Users find this very helpful, as it means that they don't have to wade through numerous actions, PIs and risks to find the ones that are applicable to them. Seeing the items that they are accountable for encourages users to take responsibility for managing or updating those items.'

'Furthermore, managers are starting to use Covalent to set up triggers to remind their staff to review and update items, and to alert specific users when the status of an action, PI or risk changes. Triggers are a great feature of the system which we hope to use throughout the council in the future.'

David Webster, West Dunbartonshire Council



The screenshot shows the configuration for a trigger named 'Trigger 1'. It includes a 'Delete' button, a 'Trigger when' dropdown set to 'PI due for update', and a 'Range' slider set to '14 days before'. There is also an 'On due date' trigger point and a 'Spans' dropdown set to '18'. The 'Start Notifications' is set to 'Slider', and 'Stop Notifications' is set to 'Data Activation'. The 'Fire trigger every' is set to '7 days'. Under 'Notification Method', both 'via email' and 'via notice' are checked. Under 'Recipients', 'Assigned To' and 'Administered By' are checked, while 'Managed By' and 'Portfolio Owners' are not.

The business benefits

'Introducing Covalent into West Dunbartonshire Council has led to a marked change for the better in our performance and improvement focused culture. We now have a clearer and more proactive approach to communicating our performance outcomes, particularly around the SOA, to our many stakeholders and electorate. As a result we are seeing a steady improvement in our overall performance as a Council, and I will continue to recommend Covalent as a key corporate performance management tool.'

David Webster, West Dunbartonshire Council