



CASE STUDY

# Mobilising Caerphilly Council





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Like many authorities across the UK, Caerphilly County Borough Council (CCBC) was grappling with the increased demand on services alongside significant funding gaps.

They needed to save money and adapt to meet changing community needs and expectations.

To make sure that they continued to meet the needs of their communities while reducing spend by over £65 million, CCBC embarked on a comprehensive portfolio of change.

#### THE CHALLENGE

CCBC approached Perago to support the delivery of this transformation with a focus on mobilisation, creating a strategic narrative, leadership coaching and portfolio management.

During the two-year partnership, Perago's remit expanded to project managing the delivery of change initiatives.

The Council and Perago mobilised a team to work across the whole organisation, focusing on transformation, innovation, and modernisation.

This was more than an exercise to generate savings; it was about everything Caerphilly does and how the team works together to deliver better services and outcomes for residents.

#### THE RESULTS

- Realised savings of over £20 million within the first two years with a roadmap for delivery of £65 million efficiency savings.
- Transformed how the Council delivers change via a structure to support delivery, governance and benefits realisation.
- A new approach to change, based on agile ways of working and user-centred service design.
- Buy-in from the leadership team and cabinet members.

This case study outlines the key initiatives undertaken, progress made, and outcomes achieved during the two-year partnership.





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We couldn't continue to run our services the way we always had – we needed to explore all options and consider new ways of working. Investing £1.9 million in this project was an investment in Caerphilly's future, transforming how we operate and deliver services while also unlocking over £20 million in savings.

This approach with Perago has shown us what's possible. I would recommend them to any organisation looking for real, impactful change, with the caveat that the leadership of any organisation must be fully committed to the project. Change on this scale is hugely challenging and commitment to it from the top must be unwavering.

→ **Sean Morgan**, Council Leader

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Collaboration has been key to this partnership. Transforming at this scale and speed isn't easy, so we teamed up with Perago to drive big financial savings while laying the groundwork for better services for the people of Caerphilly.

Perago aren't your typical consultants – they've been right there with us, working as part of our team. They've provided support, challenge, and hands-on delivery, helping us navigate this complex transformation. By combining our strengths, we've made real, transparent, and lasting change happen.



→ **Ed Edmunds**, Caerphilly CEO

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## Perago were initially engaged to:

- Lead a discovery to identify potential savings and service improvement.
- Secure buy-in internally and with members.
- Create a change narrative.
- Introduce agile ways of working and user-centred service design.

## Reviewing the landscape

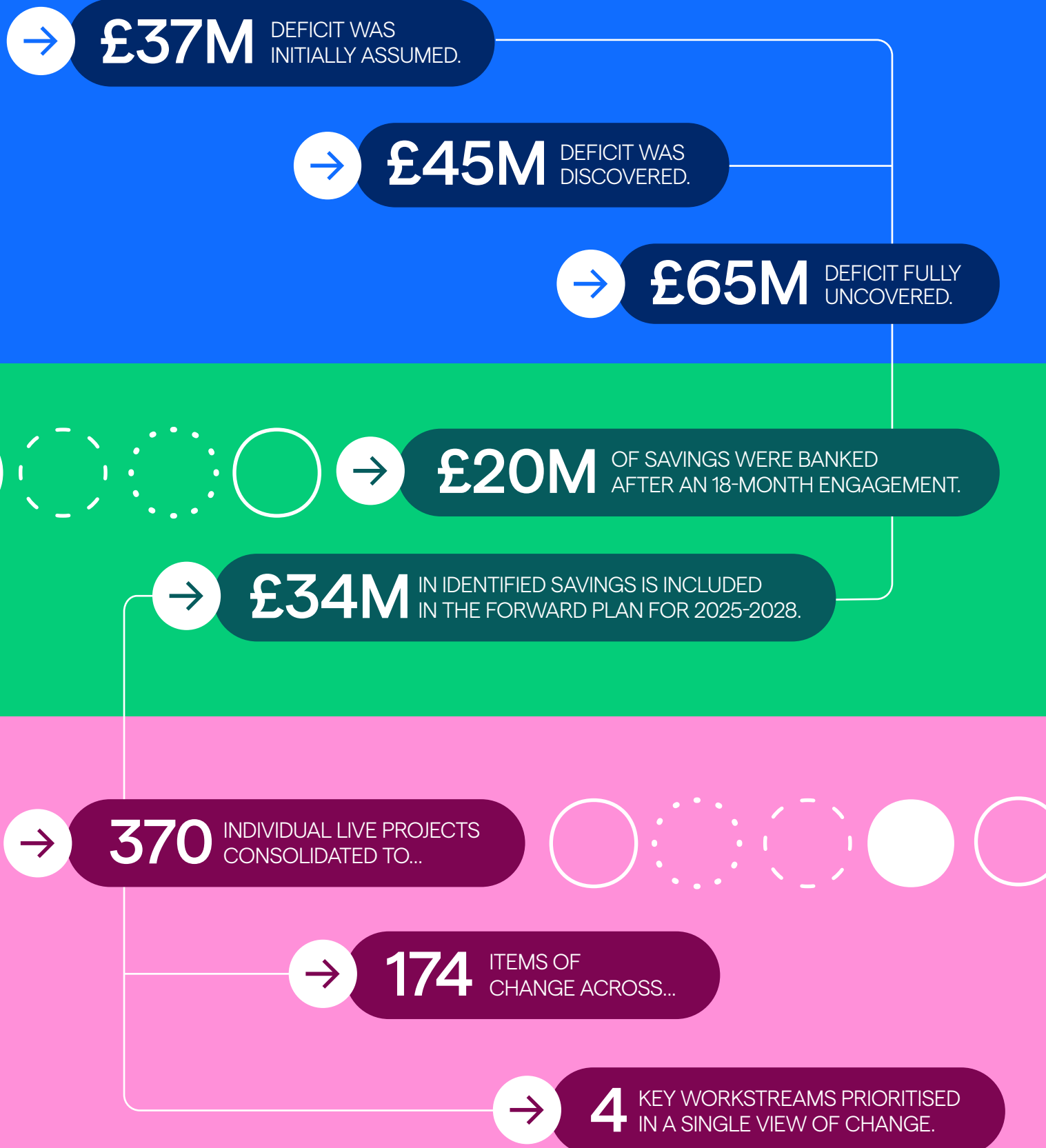
We initially worked with the leadership team to create a single view of change and understand their current landscape. We needed to work quickly in response to the budgetary deadline.

The first step was a 6-week discovery to understand the landscape fully, explore how the council distributed its money, look at the processes and procedures and review how current projects and change were managed.

We also defined a change narrative to reflect both the current situation and the future ambition to support communication to staff, stakeholders and those who work, live, and visit Caerphilly.



# Caerphilly project timeline



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## Creating a portfolio

### → PLACESHAPING

Delivery of capital spend projects including the build of new schools, housing developments, sports facilities, building upgrades and infrastructure maintenance and development.

### → CONTACT MANAGEMENT

Exploring all front facing customer contact services to identify opportunities that could contribute to improved service delivery and financial efficiencies.

### → TOURISM

Exploring options for tourism venues, including alternative delivery models, to identify an approach for cost neutrality and removal of council subsidies.

### → HOME TO SCHOOL TRANSPORT

Exploring options for delivery of home to school transport within the Borough to bring delivery within statutory requirements and reduce spend.

### → LIBRARIES

Exploring ways to provide a sustainable library service from fewer locations aligned to customer contact, maintaining professional standards and improving overall service provision whilst generating savings.

### → THIRD PARTY SPEND

Review of existing expenditure and ways of working to minimise duplication of spend and realise efficiencies where possible including contracted and non-contracted spend.

### → CATERING

Exploring all options to find an appropriate approach for the service while meeting needs of users with a focus on options for non-statutory aspects of the service.

### → HOUSING

Reviewing time and money spent on the housing repairs service, including reviewing analogue processes, efficiency of practices and material costs.

### → PARKS

Reviewing delivery of parks services including consideration of community asset transfer of sports pitches, bowling greens and facilities to local clubs.

### → FINANCIAL MANAGEMENT

Delivery of better outcomes associated with spend across Caerphilly looking at centralisation, effective and efficient invoicing processes, budget monitoring and management and stricter compliance.

### → SICK ABSENCE

To review current CCBC sickness policy to alleviate pressures and deliver financial savings in frontline services through reducing the average daily loss to sickness.

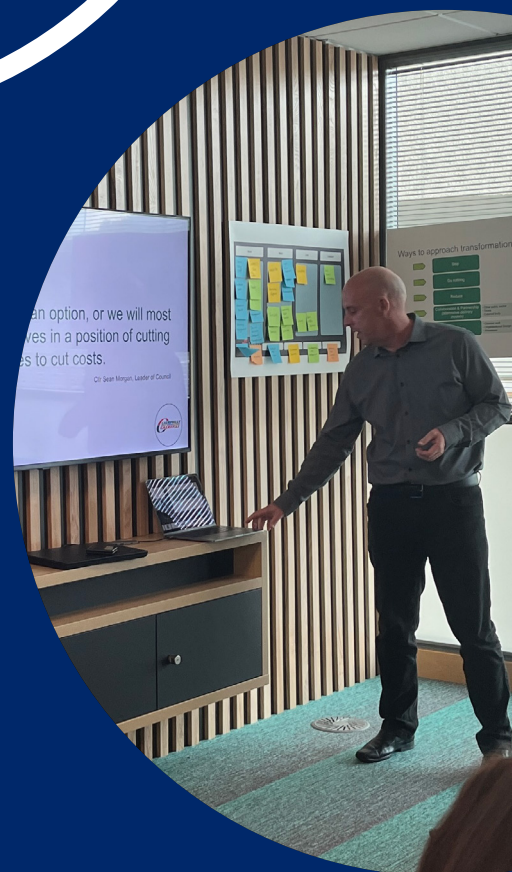
### → CLEANING

Exploring strategic options for the Council to meet the minimum statutory requirement to the minimum legal standard whilst considering user needs.





# What we found and what we did





## Creating a change narrative and putting communication at the centre of change

### WHAT WE FOUND

From the start, we recognised a lack of communication around the programme. Without knowing why the Council had decided to invest in this change programme, or in Perago, it proved challenging to get buy-in to the transformation vision and support for change initiatives.

### WHAT WE DID

We facilitated workshops with the Council's leadership team to develop a strategic narrative, creating a shared vision for the transformation. We created a strategic communications strategy covering internal and external audiences, focusing on buy-in, delivery and understanding of user needs.

This was backed up with approaches and plans for communication to be implemented by the Council with our support. With the strategic narrative in mind, we advised on several communication campaigns aimed both at residents of the Borough and colleagues at the Council, aligning CCBC toward a common goal.

We launched a new flagship campaign called 'Your Council. Explained', aimed at residents and businesses in the Borough. At its core, the campaign aimed to explain commonly misunderstood topics, often perceived to be complex, such as the structure of the council budget and the use of reserves.

## Taking a portfolio approach and working with leadership

### WHAT WE FOUND

The pace of change required to deliver the financial and service level improvements needed was not supported by the change processes and governance in place.

When service areas requested changes whether new initiatives or business-as-usual improvements – the lack of agility in the process and governance caused delays, putting the council at risk of falling behind and becoming vulnerable to Section 114 measures.

### WHAT WE DID

Focus of this initial phase was creating a portfolio approach to change delivery, establishing and maintaining project and programme management standards, processes and good practice to ensure change was delivered efficiently to deliver agreed benefits.

We worked with the leadership team to define the portfolio's goals and organised the change to be delivered into two core programmes.

Alongside this, we reviewed the council's existing governance and decision-making processes. We created a leaner governance approach that gave the portfolio the rigour and scrutiny it needed with the agility to support delivery at pace.

We ran several workshops with senior leaders, elected members and subject matter experts to prioritise the change against the business need to deliver the initial target of £50m of efficiencies, with £5m within year one. Once the prioritised portfolio had been agreed, we worked with leads in the organisation to introduce kick-off sessions for each prioritised project, identifying key delivery goals, risks, benefits, resource requirements, and a high-level delivery roadmap that allowed each project to move into delivery.

With a number of critical projects in progress, it was important to maintain focus, pace and visibility across all the changes underway. We created a single view of change (SVOC) to support prioritisation and ensure an understanding of the collective impact of the change on residents and communities, while prioritising and managing against portfolio objectives.

## Introducing agile ways of working and user-centered service design

### WHAT WE FOUND

The Council was primarily based around a large-scale waterfall delivery approach, separated by service area. The lack of a unified project delivery approach and Portfolio Management Office (PMO) role meant that at times, projects with links across service areas experienced delays or inconsistency of prioritisation against authority-wide objectives. There was opportunity to explore alternative delivery approaches with leadership and operational colleagues to support quicker and smoother, iterative delivery of change.

The team recognised the need to strengthen the relationships between those responsible for change and the need for a more robust rhythm and routine to maintain the pace of delivery. Escalation routes were not routinely followed, often leading to bottlenecks at various delivery stages.

### WHAT WE DID

We demonstrated how user-centred service design thinking could deliver better and more cost-efficient service delivery. We worked as a blended team to build capability, developing customer journeys and identifying opportunities for service improvement based on user need. We introduced agile working methods, working in the open through fortnightly sprints and daily stand-ups to inject pace and transparency.

We also introduced a weekly standup, open to the full council, including officials, councillors, and external guests including other local authorities. This gave the projects being delivered a platform to showcase their achievements, challenges and learning.

Linked with setting up the PMO and broader governance structure, clear lines of responsibility in the day-to-day running of projects were instilled in the multidisciplinary teams.



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## Benefits realisation

### WHAT WE FOUND

The council is well versed in project managing change with a focus on budget, time, political impact and, most importantly, benefit to residents and businesses.

Business case development and benefit realisation were commonly presented as papers for Cabinet consideration or approval, along with required documentation such as Integrated Impact Assessments.

We found an opportunity to strengthen and transform the case for change to be better aligned with UK and Welsh Government good practice, focused on evidence-based decision-making and data-based benefits tracking.

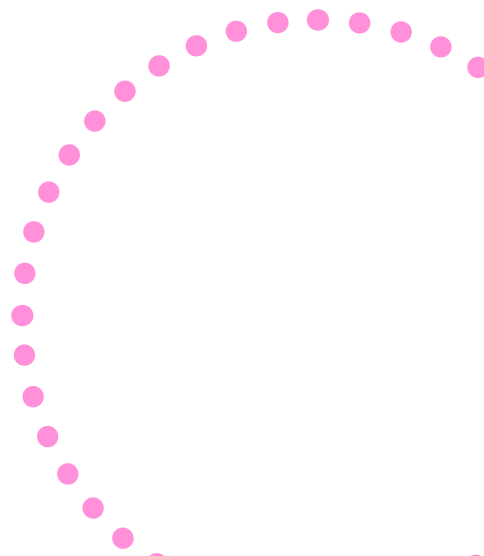
### WHAT WE DID

By developing a stronger relationship between the PMO and Finance leads, we implemented a 5-case model for business cases that focused on identifying, quantifying and tracking benefit delivery.

This approach is endorsed by His Majesty's Treasury (HMT) Green Book guidance, which states that a case for change is needed where public money is concerned.

Change would be measured and monitored against the benefits metrics for which the relevant head of service would be accountable.

The delivery of each benefit is tracked by leadership using a RAG indicator for both risk to benefit realisation and confidence to deliver. This was also used to help prioritise the portfolio pipeline.







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## Leadership

### WHAT WE FOUND

As the council worked to define its broader transformation programme, it experienced a period of leadership instability.

This meant there was a reliance on the broader Corporate Management Team to provide direction and drive engagement with political and operational leaders at the pace needed for a transformation of this scale.

Clear accountability and regular interaction were not always in place leading to delays in decision making and delivery.

### WHAT WE DID

We supported the Leader of the Council, elected Cabinet members and the Corporate Management Team as well as the heads of service with a structure aimed to encourage open, frequent communication that provided dedicated time to discuss and debate what were often challenging decisions and options for change.

We facilitated meetings with pre-arranged agenda items to make sure progress was measured, and responsibilities for delivery were clear. We supported creation of a forum for decisions to be made quickly and based on evidence. The Management Network forum was reintroduced to help distribute and engage middle management layers in the change.

We also provided executive coaching and counsel to the interim Chief Executive, Council Leader, Corporate Director, senior leaders and political leaders, throughout our involvement.



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## Engaging the organisation

### WHAT WE FOUND

We found that individual teams tended to focus on their own service areas, sometimes without fully considering the wider impact on other work streams and the organisation as a whole.

This led to challenges, such as a limited strategic corporate view of all ongoing changes and activities. Without a unified perspective, it was difficult to fully assess the potential affects of projects across service areas.

Success relied on collaboration with people in the business who had a deep understanding of how their services operated and what was needed to maintain them.

### WHAT WE DID

We identified the need for a designated space to serve as a progress hub where team members from across separate service areas could collaborate openly and display their work.

A whole floor was designated as an agile working area and encouraged the team to work openly. We invited everyone to attend weekly stand-ups, often seeing around 150 in person and upwards of 170 attendees online, creating a sense of pace and positive momentum while keeping stakeholders updated about capacity, change implications, and potential blockers.

These sessions became so popular, the programme director had regular requests for other organisations to attend such as Welsh Government, the Centre for Digital Public Services, Audit Wales and representatives from all 22 Welsh local authorities.

The space also allowed colleagues from across service areas to see the work in progress first-hand. We also supported the Interim Chief Executive, Leadership Team, Corporate Management Team and heads of service in adopting new ways of working and creating a unified corporate view.

## Financial and spend control

### WHAT WE FOUND

Spend and budget management tended to happen at a service level making it difficult to understand the full impact of the proposed transformation at an organisational level.

The impact of public sector financial constraints was not fully understood by officers who were still working to approaches put in place to support flexibility during the Covid pandemic.

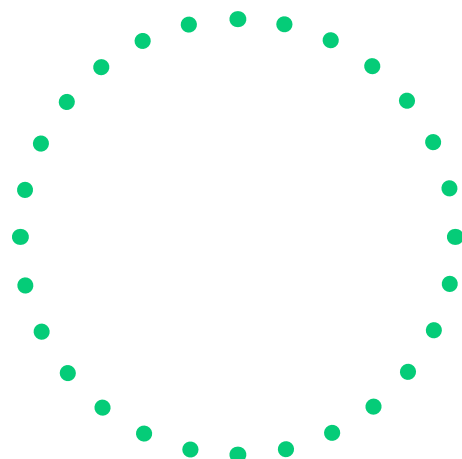
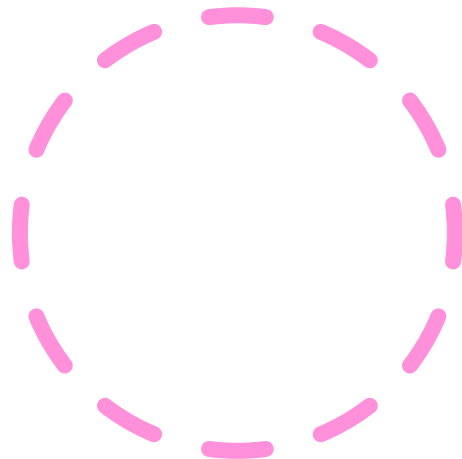
There was insufficient data available to evaluate spending patterns with decisions being made at a service or team level. This lack of awareness meant spend controls were rarely considered and there was a need to put in place a different mindset to budgets and spending, starting with visibility.

### WHAT WE DID

We successfully established an open and transparent relationship between Finance and the service areas and programme leads. We embedded a structured change approvals process to assess the impacts of change and funding requests centrally via the PMO function with the input and guidance of finance subject matter experts.

With the support of the newly created Transformation Programme Director role, we created and introduced a New Initiative Process (NIP), to support and adhere to the governance model. This ensured that a cost-benefit analysis and financial model supported decisions to realise both monetary and qualitative benefits.

We assigned finance team members to support projects through delivery and the business case lifecycle. We prioritised projects to form a Spend Control workstream leading on tactical changes such as the removal of pre-paid cards and Amazon accounts, as well as more strategic changes to tighten financial control.



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## Securing buy-in internally, with members and full cabinet

### WHAT WE FOUND

The relationship between officers and leaders was collaborative, and as individuals worked well to meet the needs of services and the needs of the public.

As we progressed through the MTC programme, it became clear that there was a need to develop a shared understanding of the goals and objectives of the programme as well as introduce some new ways of working.

The traditional and well-embedded processes and democratic governance was not conducive to meeting the programme's requirement of pace and scale.

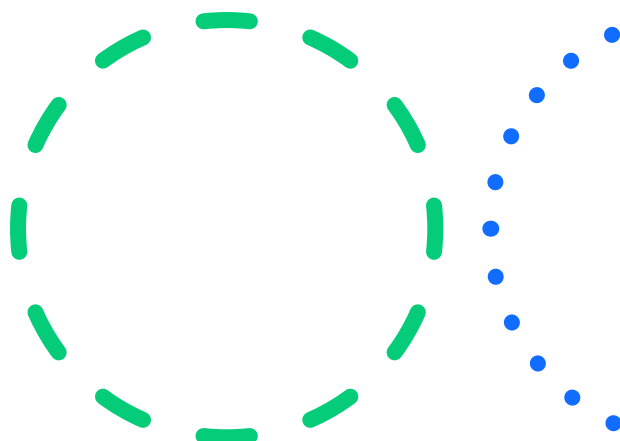
### WHAT WE DID

We spent time to get to know each of the audience segments within the organisation as well as working with individual cabinet members to establish their own needs and understand their motivations to contribute to the change.

We recognised the need to think differently about engaging different audiences because of the diversity of opinions, responsibilities and understanding of the portfolio. We invited teams and individuals to our office in Swansea to hold individual sessions to make sure that we captured what was important for each group and for elected members.

This helped us understand both the political and leadership direction that would need to be conveyed to the rest of the organisation to maintain engagement.

Where officers needed assurance from politicians to proceed, we encouraged political involvement in the project standups to provide steer, direction and support to maintain momentum.







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## Supplier management

### WHAT WE FOUND

In common with all councils, Caerphilly relies on a vast range of suppliers and contracts to fulfil the delivery of its services.

During discovery across several workstreams, we identified multiple products not being used to their full potential. Suppliers of varying sizes were providing products and packages that could deliver more than was currently configured.

As well as giving the option to work with suppliers to scale back on existing agreements, there was also an opportunity to capitalise on features and modules that were not being used. Within Capita alone, four modules were found to be unused either at all or to their full potential.

### WHAT WE DID

We accelerated delivery on two key, previously unused, features for Council Tax; Direct Debit and Paperless Bills. Our team took ownership of developing a marketing campaign across all existing digital channels to encourage channel shift in Caerphilly residents to use the new system.

We worked with the Council's communications team to implement this campaign which resulted in a service with 72% digital take-up and transactions moving away from more traditional channels. This identified immediate cashable savings of approximately £160k. We also supported the launch of Caerphilly's new digital platform based on GOSS.

Working closely with the teams at GOSS and the Council, we used our experience to help guide the onboarding process, supporting the prioritisation and approach to migrating toward the new platform in a user-centred way. More than a lift and shift, we wanted to make sure the new content and customer journeys were aligned with user needs across other contact channels, including face-to-face and telephony.



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## Governance

### WHAT WE FOUND

One of the key priorities during the development of the PMO was how decisions were made, documented, and tracked throughout the process from identification to delivery.

We found that the decision making, which relied on formal forums and long standing governance, led to delays between meetings and decisions and was conflicting with the new ways of working, which focused on delivering collaboratively and at pace.

This also led to issues with adequate documentation and a lack of accountability for delivery. There needed to be an approach that aligned the new way of working with the well embedded, legal and democratic governance of the Council.

### WHAT WE DID

We provided support in setting up the frameworks, processes, forums and opportunities for decisions to be made at varying levels. These aligned with the open and transparent approach we had introduced to support portfolio delivery.

We provided training to help build confidence to make decisions at the right stages of project governance using adequate data and information. We provided advice and guidance to make sure that smaller decisions didn't use the bandwidth of the decision making forums, allowing them to focus on properly discussing, challenging and developing the often complex decisions that needed to be made.

At one point, we managed 12 change requests in parallel, complete with business cases and indicative benefits, to make sure that decisions were being presented with interdependencies between them at the forefront of consideration.

This gave the Cabinet the assurance and confidence they needed to make the decisions that would go on to form the Caerphilly 2027 vision.



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Caerphilly County Borough Council (CCBC) had big ambitions to improve services and make a real impact, all while facing significant financial pressures and growing demand. They came to us looking for a fresh approach and, working in partnership, we set out to rethink how they work. By focusing on service improvement, user-centred design and culture we worked with the CCBC team to transform its approach to change. Backed by leadership, this wasn't just about cutting costs – it was about everything Caerphilly does and how they work together to deliver better services and outcomes for residents.

→ **Victoria Ford**, MD Perago

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## Outcomes

This first part of the project successfully laid the groundwork for change, achieving key milestones in the mobilisation and definition phase. The initial six-month project was extended to two years to allow Perago to continue supporting the change portfolio.

By implementing new ways of working, strict governance processes and innovative change strategies, the Council achieved substantial financial efficiencies, realising savings of over £20 million within the first two years, with a roadmap poised to deliver an impressive £65 million in total efficiency savings.

By embracing agile methodologies and placing user-centred service design at the forefront of all its initiatives, the Council has revolutionised its approach to change, ensuring responsiveness and adaptability.

Crucially, this ambitious vision received wholehearted support from the leadership team and cabinet members, demonstrating a unified commitment to progress and innovation.



## Working beyond the brief: working with existing suppliers to optimise delivery

Initially, we focused on redesigning and optimising existing processes to align with the Council's strategic goals. However, as the programme progressed, it became evident that implementation of new modules would support programme outcomes.

Recognising this need, we extended our support to include the implementation and optimisation of new modules of two platforms, **GOSS** and **Engage Process**, both of which were ideally suited to complement the Council's transformation objectives.

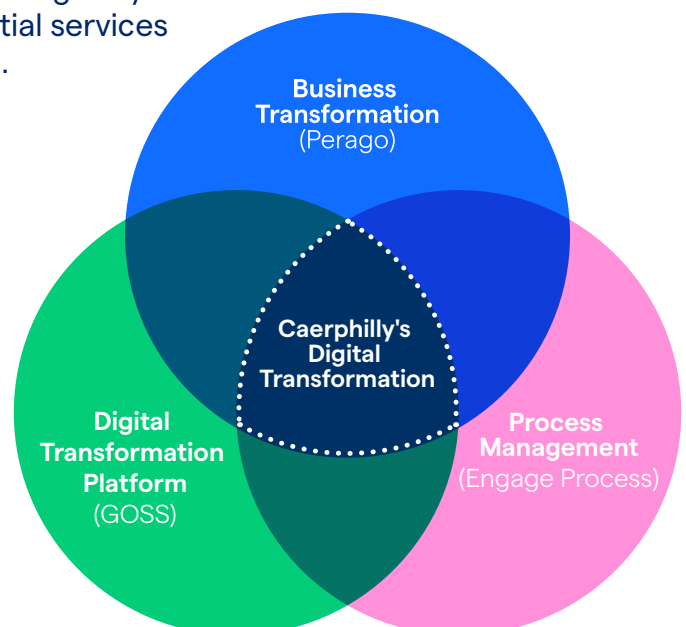
The GOSS Digital Platform, known for its flexibility and user-friendly interface, will allow the council to create and manage end to end digital services effortlessly.

By using the integral, dual language Content Management System from within the GOSS Platform the Council teams are able to create a new, engaging, fully accessible council website.

This platform has the capability to create unlimited sub-sites for other council services as well as partner organisations, creating a richer, more secure, joined up user experience for customers and staff alike.

This platform provides the Council with a seamless online experience for residents, facilitating easy access to essential services and information.

By using GOSS as a platform of choice, Caerphilly is able to migrate from the maintenance of three separate digital platforms, removing the associated running costs, as well as reducing the contract management overhead for service heads and providing a better customer experience for users.





## Engage Process provided robust process mapping and improvement tools, allowing the Council to visualise, analyse, and optimise workflows effectively.

By mapping out key touchpoints and user pain points – we worked with the Caerphilly team to support the streamlining of processes and accessibility of services. This approach helped identify areas for transformation and improved communication, which will ultimately make it easier for residents to navigate services, submit requests and receive timely support.

An integral part of our engagement was to upskill and give confidence to Council employees. We conducted a series of training sessions to give the teams the necessary skills and knowledge to effectively leverage the new platforms' features.

These sessions were designed to be interactive and hands-on, fostering a culture of continuous learning and improvement within the Council. This holistic approach to training and upskilling was crucial in successful adoption and use of the new platforms.

The integration of these specialised services helped streamlined processes, reducing the time and resources needed and supporting delivery of financial savings.

The unified approach also minimised risks associated with disparate systems and processes, ensuring a cohesive and secure operational environment.





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working with us, email:

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