



CABINET 3RD APRIL 2024

SUBJECT: RESOURCING MOBILISING TEAM CAERPHILLY - DELIVERY

REPORT BY: CORPORATE DIRECTOR EDUCATION AND CORPORATE SERVICES

1. PURPOSE OF REPORT

- 1.1 To seek Cabinet approval to transfer £897k of uncommitted capital earmarked reserves into the Invest to Save Reserve in order to provide ongoing one-off external support to the Council's Mobilising Team Caerphilly Transformation Programme.

2. SUMMARY

- 2.1 In July 2023, Cabinet agreed that the Council's Invest to Save Reserve be repurposed to provide additional one-off support to the ongoing transformation programme and that delegated authority for the use of the budget be given to the Chief Executive in consultation with the Leader, relevant Cabinet Member and Section 151 Officer.
- 2.2 Since then, the Council's approach to transformation has developed at pace and scale with a significant amount of internal staffing resource having been released from the 'day job' to work alongside a number of external providers and some dedicated project management resource.
- 2.3 The transformation programme, known as Mobilising Team Caerphilly, has a target of delivering £5m of savings in year throughout 2024/25 and work is underway. The savings required over future years remains significant (circa £45m for the two-year period 2025/26 to 2026/27) and the Council will need to extend the existing resource arrangements as well as bolster them at certain points.
- 2.4 The absolute focus at present is to maximise the Council's potential to deliver recurring, year on year savings, over the medium to long term and, in doing so, to minimise the impact of diminishing budgets on services to the public and jobs.
- 2.5 As the programme is now moving into the critical Delivery Phase, further short-term support will be required from external resources while longer term internal resources will be needed over the years ahead to ensure the Transformation Programme learning remains embedded in the organisation. Delivering large scale transformation

such as this cannot happen without investing in the change, be that internal resource, external resources, or a mix of both as has been the case to date.

- 2.6 On this basis, Cabinet are asked to agree to top up the Invest to Save Reserve with £897k from the Council's uncommitted capital earmarked reserves.

3. RECOMMENDATIONS

3.1.1 That Cabinet:

- 1) Agree to transfer £897k of uncommitted capital earmarked reserves into the Invest to Save Reserve to support the Council's Mobilising Team Caerphilly transformation programme
- 2) Approve that delegated authority on the use of the Invest to Save Reserve continues to be granted to the Chief Executive in consultation with the Leader, relevant Cabinet Member and Section 151 Officer

4. REASONS FOR THE RECOMMENDATIONS

- 4.1 The Mobilising Team Caerphilly Programme is moving into the critical Delivery phase with a target of realising £5m in cashable and recurring savings throughout 2024/25. In addition to this further savings of circa £45m will be required for the two-year period 2025/26 to 2026/27.
- 4.2 In order to maximise the opportunities for the Council to achieve these savings and noting the capacity challenges currently being faced, the Council needs to continue investing in the transformation programme and is seeking to do so from transferring additional one-off funding into the Invest to Save Reserve.

5. THE REPORT

- 5.1 The Invest to Save Reserve has been fundamental to driving the progress of Mobilising Team Caerphilly. It has enabled officers to access high quality external capacity and capability through which the foundations of the programme have been established and new ways of working have become increasingly embedded.
- 5.2 The Council has now defined, resourced and launched a Portfolio Management Office (PMO), gained Cabinet approval for a transformation narrative that describes how the Council will approach this challenge, as well as agreeing a suite of transformation principles.
- 5.3 Mobilising Team Caerphilly has been scoped and defined and centres on two core programmes, Service Transformation and Place Shaping. Within these programmes there are four workstreams and within these workstreams are a multitude of now prioritised and resourced projects.
- 5.4 Since the summer, a significant number of officers from across the Council have been contributing to the development and progression of transformation projects using an agile project management methodology by participating in multi-disciplinary review teams. This work has been led by a team of appointed external resources.

- 5.5 The Council has now established a 'single view of change' and embedded governance arrangements geared towards 'working in the open' and ensuring that corporate resources can focus on the agreed priority projects. The Council's Leadership Team keep those priorities under review on a weekly basis.
- 5.6 Finance and HR Baselineing has been undertaken with support from our external provider and a tailored business case and benefits tracking approach has been developed. This enables decisions to be taken in the knowledge of the potential benefits and costs defined and then tracked through to implementation.
- 5.7 The Council has set up a Service Transformation Board, a Place Shaping Board and an umbrella Mobilising Team Caerphilly (MTC) Portfolio Board which meet monthly.
- 5.8 An extensive communication and engagement approach has been developed and embedded across the organisation. Aside from daily project 'stand ups', a weekly stand up now regularly receives around 100 attendees enabling every part of the organisation to remain apprised of progress as well as any challenges that emerge.
- 5.9 A number of specific staff engagement sessions have been held over the last four months, through which around 600 staff have been brought up to speed on the Mobilising Team Caerphilly portfolio. Management Network now meets monthly to ensure engagement across the Council's service managers.
- 5.10 Elected Members, aside from the opportunity to attend the weekly stand ups have also received presentations within their political groups and the second in a series of Members seminars will take place beyond Easter.
- 5.11 The Council is continuing to expand its knowledge of Agile Project Management techniques through its work with an external provider as well as a wide range of digital transformation techniques such as user centred design. A full day training session has been delivered to over 50 members of staff in December and, all staff deployed within multi-disciplinary teams are continuing to grow in confidence with these new skills and techniques.
- 5.12 Corporate Management Team, Leadership Team and Cabinet have been able to access coaching, learning and development in respect of the implementation of a whole authority transformation programme and the development and introduction of new ways of working across staff populations.
- 5.13 Within the Service Transformation Portfolio, a wide range of projects are now in flight with some nearing the end of the Discovery Phase and some moving into the Delivery phase. Through April, Cabinet will be presented with a range of business cases that will include options appraisal for the future configurations of:
- Contact Management
 - School Transport
 - WCCIS
 - Fleet
 - Building Cleaning
 - Catering and Meals Direct
 - Leisure
 - Parks
 - Tourism

- Library Services
- Corporate Landlord
- Print and Design Services
- Financial Management
- IT Services
- Agency Spend
- Third Party Spend

- 5.14 Some early projects have also been delivered which have focussed on improving financial management and internal controls. These include spend control projects focussed on centralising and coordinating the use of Amazon Accounts across all aspects of the business, and also reviewing purchase card usage. These projects will reduce costs, drive customer improvements, and enhance financial discipline across services.
- 5.15 In addition to this, a Council Tax project (which is the first of over 900 processes to be reviewed) has just concluded with the outcome being customer service improvements and financial efficiencies of circa £177k (consisting of recurrent savings as well as cost avoidance).
- 5.16 Working with an external provider the Council has baselined the time and effort being expended by staff across some 37 categories. The work has provided detailed insight into where opportunities exist to streamline processes and service delivery approaches. The baseline data is feeding directly into the contact management review and will provide the basis for a People Project.
- 5.17 The Council has also managed to migrate several of its business-critical IT solutions to the Cloud and, in doing so, developed the foundations for significant business improvements over the coming years. The solutions that support Council Tax and HR are now in the Cloud and, despite the complexity of the migrations, the implementations have gone extremely smoothly thanks in no small part to the commitment of staff, and the addition of high calibre external project management resources.
- 5.18 Should Cabinet decide to progress the projects set out in 5.13 through to delivery and implementation, they will require resourcing over the medium term. This resourcing will be a continuation of the mix of internal and external resources that have supported the projects to date, albeit the exact make up will need to be determined by project requirements.
- 5.19 Over time, the Council will have sufficiently developed and fully embedded the transformation skills and approaches necessary across a wide enough staff base to continue its transformation journey using a majority of internal resources.
- 5.20 With the urgency of delivering £5m of savings in year and the knowledge and transformation capability not sufficiently well developed, continued access to external resources remains critical, at least in the short term. Replenishing the Invest to Save Reserve will support this transition without an untimely loss of pace.

5.21 Conclusion

The Council has made strong progress over the last six months in terms of developing and embedding the necessary programme infrastructure and resourcing

the varying transformation projects but is not yet at a stage where it can lead the programme without additional external support.

As Caerphilly moves into the critical Delivery phase, a decision is sought to bolster the resources available to continue the programme at pace, maximising the opportunity to deliver both in year savings and further savings over the medium to long term.

6. ASSUMPTIONS

6.1 None.

7. SUMMARY OF INTEGRATED IMPACT ASSESSMENT

7.1 No Integrated Impact Assessment is required for this report as it simply seeking support from Cabinet to top up the Invest to Save Reserve to further support the Council's Transformation Programme.

8. FINANCIAL IMPLICATIONS

8.1 The proposal in the report is that £897k is transferred from unallocated capital earmarked reserves into the Council's Invest to Save Reserve to provide external support for the Transformation Programme over the medium term.

9. PERSONNEL IMPLICATIONS

9.1 There are no direct personnel implications in relation to the decision to top up the Invest to Save Reserve.

10. CONSULTATIONS

10.1 The views of all consultees set out below have been added to the content of the report.

11. STATUTORY POWER

11.1 Local Government Act 1998 and 2003

Author: Richard Edmunds, Corporate Director Education and Corporate Services

Consultees: Dave Street, Deputy Chief Executive,
Cllr Sean Morgan, Leader of the Council
Mark S Williams, Corporate Director Economy and Environment
Gareth Jenkins Interim Director for Social Services
Lisa Lane, Head of Democratic Services and Deputy Monitoring Officer
Lynne Donovan, Head of People Services,
Stephen Harris, Head of Financial Services and S151 Officer

Liz Lucas, Head of Customer and Digital Services
Sue Richards, Head of Education Planning and Strategy, Transformation
and Strategy
Cllr Jamie Pritchard, Deputy Leader of the Council and Cabinet Member
for Prosperity, Regeneration and Climate Change
Cllr Eluned Stenner, Cabinet Member for Finance and Performance
Cllr Nigel George, Cabinet Member for Corporate Services, Property and
Highways
Cllr Carol Andrews, Cabinet Member for Education and Communities
Cllr Shayne Cook, Cabinet Member for Housing
Cllr Chris Morgan, Cabinet Member for Waste, Leisure and Green Spaces
Cllr Phillipa Leonard, Cabinet Member for Planning and Public Protection
Cllr Elaine Forehead, Cabinet Member for Social Care
Cllr Gary Johnston Chair of the Corporate and Regeneration Scrutiny
Committee
Leadership Team