Strategy & Governance – Service Definition

G-Cloud 15 Lot 3 Cloud Support

January 2026 – v3.0

Service Definition

IVARTY Consulting Ltd provides specialist cloud strategy and governance advisory services aligned to the Skills Framework for the Information Age (SFIA levels 4 to 7). This service delivers independent, evidence-based guidance to public sector organisations seeking to translate cloud transformation strategic intent into actionable plans underpinned by robust cloud governance frameworks.

This service provides advisory-only support to UK public sector organisations to define, govern and optimise cloud adoption, cloud-enabled operating models, and cloud investment portfolios. All services relate specifically to cloud services, cloud platforms, or cloud-enabled transformation initiatives.

Organisational Capability

IVARTY Consulting Ltd, established in 2017, operates a specialist boutique advisory model focused on strategy, governance, and organisational transformation for UK public sector organisations. The firm combines strategic consulting capabilities with practical delivery experience, recognising that strategy without execution is aspiration and execution without strategy is aimless activity. IVARTY's approach emphasises practical, achievable transformation aligned to organisational context, resource constraints, and political realities of public sector operating environments. The firm understands that public sector strategy and governance must balance competing stakeholder demands, manage legacy technology estates and organisational cultures, deliver within constrained budgets and timescales, and maintain democratic accountability and transparency throughout transformation journeys.

IVARTY's delivery model is characterised by direct director involvement in all strategic engagements, ensuring board-level credibility, senior practitioner experience, and continuity throughout engagement lifecycles. Steve Metcalfe, co-director and technical lead, brings extensive cloud transformation and enterprise architecture expertise enabling strategy grounded in technical feasibility and cloud operating model realities. Mary McLuskey MBA, co-director and transformation lead, provides strategic planning, governance design, programme management, and change leadership expertise with particular strength in facilitating senior stakeholder alignment and embedding governance into organisational cultures. This director-led model ensures customers receive board-credible strategic guidance and governance frameworks developed by experienced practitioners who have led transformations, not just advised on them.

To address scaling requirements while maintaining quality standards, IVARTY has established a strategic partnership with Brightwork Recruitment enabling rapid deployment of additional strategy, governance, and PMO specialists when customer requirements exceed core team capacity. All associate resources undergo the same quality assurance reviews and director oversight as core team members ensuring consistent delivery standards. Resources sourced through Brightwork are charged at the same SFIA-aligned day rates as core team resources maintaining pricing transparency and predictability. This partnership model enables IVARTY to scale delivery capacity for large transformation programmes requiring multiple concurrent workstreams while maintaining the boutique advisory quality and director engagement that characterises all IVARTY engagements.

Since 2017, IVARTY has delivered strategy, governance, and transformation advisory services across Scottish and UK public sector organisations including local authorities, central government departments, NHS boards, higher education institutions, and arms-length executive agencies. This seven-year track record demonstrates organisational sustainability, proven delivery capability, and deep understanding of public sector governance contexts including ministerial accountability, audit committee oversight, scrutiny arrangements, and the practical challenges of embedding governance and performance management within complex, multi-stakeholder public sector organisations. IVARTY understands that public sector strategy and governance is not just about frameworks and processes but about aligning diverse stakeholders, securing political and executive support, managing change in risk-averse cultures, and delivering measurable outcomes within democratic accountability structures.

Service Scope

The Strategy & Governance service encompasses six core service pillars addressing strategic planning, governance design, investment management, PMO establishment, performance management, and operating model transformation. Services are delivered through facilitated workshops, diagnostic assessments, framework development, implementation guidance, and knowledge transfer activities using established methodologies and frameworks detailed below. All advisory outputs are documented, evidence-based, and designed to support board decision-making, organisational alignment, and sustainable transformation.

Strategic Planning and Alignment

Translating vision into actionable strategies with clear objectives and performance measures

Governance Framework Design

Establishing structures, processes, and accountabilities for effective oversight

Investment Portfolio Management

Prioritising initiatives and maintaining portfolio oversight for strategic outcomes

PMO Design and Operating Model

Establishing capabilities for effective portfolio and programme delivery

Benefits Realisation and Performance

Ensuring investments deliver intended outcomes with tracked performance

Target Operating Model

Defining future-state operating models and transformation roadmaps

All services are delivered in the context of cloud adoption, optimisation, or governance and do not constitute general organisational or corporate strategy.

Implementation guidance is limited to advisory sequencing, dependency identification, and governance design. IVARTY does not implement cloud services, manage delivery, or provide operational transformation resources.

Strategic Planning and Alignment

Strategic planning services support organisations in translating high-level vision and mission into actionable strategies with clear objectives, initiatives, and performance measures enabling board oversight and organisational alignment. Services include strategic diagnostic assessment evaluating current strategic planning maturity, existing strategic documents and plans, stakeholder alignment on strategic priorities, and gaps between strategic intent and operational delivery. Vision and mission facilitation workshops engage executive leadership and governance boards in articulating organisational purpose, core values, strategic positioning, and long-term ambitions creating shared understanding and commitment. Strategy-on-a-page development distils strategic intent into single-page visual frameworks linking vision and mission to strategic themes or objectives, key initiatives or programmes delivering each theme, measurable outcomes and key performance indicators, and strategic risks requiring board oversight.

Strategy-on-a-page methodologies draw on Strategy Mapping approaches developed by Kaplan and Norton integrating Balanced Scorecard perspectives (financial, customer, internal process, learning and growth) adapted to public sector contexts using outcomes-based frameworks. Strategic themes are structured using logic model approaches linking inputs, activities, outputs, outcomes, and impacts ensuring line of sight from resource allocation to intended societal benefits. Strategic initiatives are prioritised using multi-criteria decision analysis evaluating strategic fit, feasibility, risk, cost, and timescale enabling evidence-based portfolio decisions. KPIs are developed using SMART criteria (Specific, Measurable, Achievable, Relevant, Time-bound) with baseline establishment, target setting, and measurement methodologies ensuring performance accountability.

Stakeholder alignment workshops use structured facilitation techniques including Nominal Group Technique for priority ranking, affinity mapping for theme clustering, and Force Field Analysis for identifying enablers and barriers to strategic delivery. Workshops typically engage 12 to 20 senior leaders including executive directors, elected members or non-executive board members, and senior managers with accountability for strategic delivery. Facilitation ensures all voices are heard, political dynamics are managed constructively, and consensus is built on strategic priorities while maintaining board accountability for final strategic decisions. Strategy communication frameworks translate board-approved strategy into communication materials for different audiences including public-facing strategic plans for citizens and stakeholders, internal strategic briefings for staff explaining how operational activities contribute to strategic outcomes, and investor or funding body presentations articulating strategic direction and resource requirements.

Governance Framework Design and Implementation

Governance framework services establish structures, processes, and accountabilities enabling effective strategic decision-making, oversight, and assurance. Services include governance diagnostic assessment evaluating current governance structures including board composition, committee structures, decision rights, reporting mechanisms, and governance effectiveness. Gap analysis benchmarks governance maturity against frameworks including UK Corporate Governance Code adapted for public sector, Charity Governance Code for third sector bodies, or HMG Orange Book governance principles identifying opportunities for strengthening governance arrangements. Decision rights mapping using RACI methodology (Responsible, Accountable, Consulted, Informed) clarifies who makes decisions, who has accountability for outcomes, who must be consulted before decisions, and who requires information after decisions ensuring clarity and preventing duplication or gaps in decision authority.

Committee design establishes governance board structures aligned to organisational complexity and risk profile. Typical committee structures include Audit and Risk Committee providing independent assurance on risk management, internal controls, and financial reporting, Remuneration Committee overseeing executive compensation and performance management, Investment or Finance Committee reviewing business cases and authorising investment portfolios, Digital or Technology Committee providing oversight of technology strategy and major IT programmes, and Performance Committee monitoring delivery against strategic KPIs and holding executives accountable for outcomes. Committee Terms of Reference document purpose, membership, delegated authorities, meeting frequency, quorum requirements, reporting relationships to main board, and annual work programmes ensuring committees operate effectively and add value rather than bureaucratic overhead.

Governance operating rhythms establish cadence and synchronisation across governance bodies. Annual governance cycles typically include strategy development and approval (Q4 for following financial year), budget setting aligned to strategic priorities (Q4-Q1), performance reporting cycles (quarterly board reviews with monthly executive monitoring), risk review cycles (quarterly strategic risk reviews with monthly operational risk monitoring), and annual governance effectiveness reviews ensuring continuous improvement. Meeting structures balance oversight with efficiency using consent agendas for routine approvals, exception reporting focusing board attention on variances and emerging issues, and reserved matters lists clarifying decisions requiring board approval versus executive delegation. Governance documentation standards ensure consistency in board papers including executive summaries (one page maximum), recommendations with clear decision options, supporting analysis with evidence and data, risk implications and mitigation approaches, and resource and financial implications enabling informed board decision-making.

Investment Portfolio Management

Investment portfolio management services enable organisations to prioritise initiatives, allocate resources strategically, and maintain portfolio oversight ensuring investments deliver intended strategic outcomes. Services include portfolio diagnostic assessment reviewing current portfolio management maturity, existing investment prioritisation processes, business case development standards, benefits realisation tracking, and portfolio governance arrangements. Investment prioritisation frameworks use multi-criteria scoring approaches evaluating proposed initiatives against strategic fit (alignment to strategy-on-a-page themes), value (quantified benefits including financial returns, efficiency gains, service improvements, or risk reduction), feasibility (technical complexity, organisational readiness, resource availability), risk (delivery risk, operational risk, reputational risk), and resource requirements (capital investment, revenue costs, implementation timescales). Scoring enables portfolio optimisation balancing quick wins delivering rapid value, strategic foundations establishing capabilities for future transformation, and strategic bets pursuing high-value opportunities with managed risk.

Business case development support ensures investment proposals follow structured HM Treasury Five Case Model including Strategic Case articulating rationale and strategic fit, Economic Case evaluating options and demonstrating value for money using cost-benefit analysis or social return on investment methodologies, Commercial Case addressing procurement strategy and contracting approach, Financial Case detailing costs, funding sources, and affordability, and Management Case demonstrating organisational capability to deliver successfully. Business case templates, guidance materials, and worked examples enable consistent proposal quality across organisational portfolio. Business case review and challenge processes subject proposals to independent scrutiny before governance board approval ensuring robust assumptions, realistic timescales and costs, identified risks with mitigation plans, and evidence of stakeholder engagement and readiness.

Portfolio monitoring and reporting frameworks track initiative delivery, benefits realisation, and portfolio health. Portfolio dashboards provide single-pane-of-glass views showing initiative status (on track, at risk, in trouble) using RAG rating against time, cost, quality, and benefits dimensions, cumulative benefits realised versus forecast enabling tracking of portfolio value delivery, resource utilisation and capacity showing committed versus available delivery resources identifying capacity constraints, and portfolio risk heat maps visualising aggregate risk exposure requiring board attention. Benefits realisation frameworks establish baseline measurement before initiative commencement, interim tracking during delivery validating forecast benefits are achievable, and post-implementation reviews 6 to 12 months after go-live confirming benefits have been realised and are sustainable. Benefits owners are assigned accountability for realising forecast benefits ensuring benefits realisation is managed not just hoped for.

PMO Design and Operating Model

Programme Management Office (PMO) services establish structures, processes, and capabilities enabling effective portfolio and programme delivery. Services include PMO maturity assessment evaluating current PMO capabilities against P3M3 (Portfolio, Programme and Project Management Maturity Model) or similar frameworks identifying maturity across process areas including management control, benefits management, financial management, stakeholder management, risk management, organisational governance, and resource management. PMO operating model design determines appropriate PMO structure and scope including Enterprise PMO providing portfolio oversight, methodology standards, and assurance across entire organisation, Divisional or Departmental PMO supporting specific business areas with tailored processes and reporting, Programme PMO embedded within major transformation programmes coordinating constituent projects, and Agile PMO supporting agile delivery approaches with appropriate governance lightweight enough to maintain agility while providing necessary oversight.

PMO framework selection aligns PMO processes to organisational delivery approaches. For traditional plan-driven delivery, frameworks include PRINCE2 for structured project delivery with defined roles, governance stages, and deliverables, MSP (Managing Successful Programmes) for coordinating multiple projects toward strategic outcomes, and MoP (Management of Portfolios) for portfolio-level governance and optimisation. For agile delivery, frameworks include Scaled Agile Framework (SAFe) coordinating multiple agile teams toward enterprise objectives, Large-Scale Scrum (LeSS) extending Scrum principles to multi-team environments, and Disciplined Agile Delivery (DAD) providing process decision framework for context-appropriate agility. Hybrid approaches blend traditional governance for regulatory or procurement compliance with agile delivery practices for speed and flexibility recognising that public sector organisations often require governance rigour with delivery agility.

PMO capability development establishes people, processes, and tools enabling PMO effectiveness. PMO staffing models define roles including PMO Director or Head of PMO providing strategic direction and senior stakeholder engagement, Portfolio Manager maintaining portfolio oversight and investment prioritisation, Programme Managers coordinating major programmes, Project Managers delivering constituent projects, PMO Analysts supporting reporting and portfolio analysis, and Business Analysts bridging business requirements and delivery solutions. PMO processes documented in PMO handbook or methodology include project initiation processes with gateway approval criteria, progress monitoring and reporting cadence, change control and issue escalation procedures, risk and issue management processes, resource allocation and capacity planning, and quality assurance and lessons learned capture. PMO tooling selections balance functionality with user adoption considering capabilities including portfolio dashboards and reporting, resource management and timesheets, risk and issue registers, document management and collaboration, and integration with finance systems for cost tracking.

Benefits Realisation and Performance Management

Benefits realisation and performance management services ensure strategic investments deliver intended outcomes and organisational performance is tracked, reported, and improved. Services include benefits framework development establishing systematic approaches to defining, tracking, and realising benefits from strategic initiatives and transformation programmes. Benefits identification workshops facilitate benefits mapping linking initiatives to strategic outcomes ensuring line of sight from investment to impact. Benefits classification distinguishes cash-releasing benefits generating financial savings, non-cash-releasing benefits improving efficiency without reducing budgets (such as processing time reduction enabling reallocation not headcount reduction), quantifiable benefits measurable in units other than currency (such as customer satisfaction scores or environmental impact), and qualitative benefits difficult to quantify but strategically valuable (such as improved reputation or staff morale).

Benefits measurement frameworks establish baseline, interim, and target metrics for each benefit. Baseline establishment measures current state performance before initiative delivery providing foundation for improvement measurement. Benefit profiles forecast benefit accumulation over time recognising benefits often ramp up gradually as new capabilities are adopted and optimised, enabling realistic expectations and cash flow planning. Benefit owners are assigned accountability for realising specific benefits ensuring clear ownership and avoiding diffusion of responsibility. Benefits realisation tracking uses performance dashboards showing forecast versus actual benefits realisation, variance analysis explaining deviations from forecast, and corrective actions addressing barriers to benefit realisation. Post-implementation reviews conducted 6 to 12 months after go-live validate benefits have been realised sustainably and identify lessons learned improving future benefit forecasting accuracy.

Performance management frameworks using Objectives and Key Results (OKRs) or Key Performance Indicators (KPIs) align organisational performance to strategic objectives. OKR frameworks popularised by Google establish quarterly objectives describing what the organisation aims to achieve with 3 to 5 key results per objective defining measurable outcomes demonstrating objective achievement. OKRs are typically aspirational with 70% achievement considered successful encouraging stretch goals and innovation. KPI frameworks establish ongoing performance metrics tracking organisational health across strategic themes using balanced scorecard perspectives. KPI design follows SMART criteria ensuring metrics are specific enough to be understood consistently, measurable using available or acquirable data, achievable within organisational control, relevant to strategic objectives, and time-bound with defined measurement frequency. Performance reporting cadence balances oversight with reporting burden using monthly operational metrics for management teams, quarterly strategic KPIs for boards and audit committees, and annual outcomes reporting for public accountability and external stakeholders.

Target Operating Model and Cloud Transformation Roadmap (advisory)

Target Operating Model (TOM) and transformation roadmap services define future-state operating models and sequenced transformation journeys enabling organisations to evolve capabilities, structures, and processes aligned to strategic direction. Services include current state assessment using diagnostic tools, stakeholder interviews, process mapping, and capability maturity assessments documenting current operating model including organisational structures and accountabilities, business processes and ways of working, technology platforms and data architectures, skills and capabilities across workforce, and cultural norms and behaviours. Gap analysis compares current state to strategic requirements identifying capability gaps, process inefficiencies, technology constraints, skills shortages, and cultural barriers requiring transformation intervention.

Target operating model design articulates future-state vision across multiple dimensions using POLDAT framework (Process, Organisation, Location, Data, Applications, Technology). Process design defines future business processes streamlining workflows, eliminating duplication, and embedding controls and quality assurance. Organisational design determines future structures, roles, and accountabilities using principles including span of control optimisation, clear accountability assignment, reduction of organisational layers enabling faster decision-making, and alignment of structure to strategic priorities. Location strategy addresses physical presence requirements balancing customer accessibility, staff recruitment and retention, cost efficiency, and environmental sustainability through remote-first or hub-and-spoke models. Data and technology architecture defines future platforms, applications, and data flows supporting process and organisational design aligned to cloud-native principles, API-first integration, and data-driven decision-making.

Transformation roadmap development sequences TOM implementation across manageable phases with dependencies, resources, risks, and benefits identified. Roadmaps typically structure transformation across horizons including Horizon 1 (0-12 months) focusing on quick wins, foundational improvements, and capability building establishing transformation momentum and demonstrating early value, Horizon 2 (12-24 months) delivering major capability implementations, process redesigns, and structural changes achieving significant transformation outcomes, and Horizon 3 (24-36 months) pursuing strategic aspirations, innovative approaches, and capability maturity optimisation sustaining transformation and embedding continuous improvement cultures. Change management planning addresses people dimensions of transformation including stakeholder impact analysis identifying who is affected and how, communication and engagement strategies maintaining transparency and securing support, training and capability development ensuring workforce readiness, and resistance management anticipating and addressing concerns constructively. Transformation governance establishes oversight structures including transformation boards providing strategic direction and issue resolution, programme management offices coordinating delivery, and benefits owners ensuring realisation of forecast outcomes.

Out of Scope

This service provides advisory guidance only and does not include operational delivery, programme management execution, or hands-on implementation. Specifically, the service does not include programme or project management as a service (PMaaS) providing delivery resources, interim management, or day-to-day programme coordination (IVARTY provides PMO design and governance frameworks but not ongoing PMO staffing), strategy execution or delivery implementation (IVARTY develops strategies and roadmaps but does not implement transformation initiatives, procure technology, or execute organisational restructures), organisational change management delivery (IVARTY provides change management frameworks and plans but does not deliver staff communications, training programmes, or change agent networks), permanent recruitment or staffing services (IVARTY provides workforce planning and organisational design but does not recruit or second staff), or business process outsourcing or managed services (IVARTY designs operating models and processes but does not operate business processes or provide shared services).

Customers requiring implementation support, delivery resources, or managed services should engage separate suppliers with appropriate operational capabilities. IVARTY can provide recommendations for implementation partners, interim management providers, or managed service providers where requested based on knowledge of market suppliers and customer requirements but maintains independence through separation of advisory and operational functions preventing conflicts of interest. Where customers wish to proceed to implementation following IVARTY strategy, governance design, or TOM development, the frameworks and documentation developed during advisory engagement facilitate transition to implementation with reduced effort, risk, and cost through clear vision, agreed designs, and stakeholder alignment achieved during advisory phase.

In summary, Corporate or organisational strategy unrelated to cloud services or cloud-enabled operating models are out of scope.

Resource Profiles

IVARTY provides strategy, governance, and transformation advisory resources aligned to the Skills Framework for the Information Age (SFIA). Each resource role is mapped to appropriate SFIA levels based on autonomy, influence, complexity, and business skills criteria. The following resource profiles are available:

Role	SFIA Level	Responsibilities
Consulting Director / Partner	7	Strategic oversight of transformation initiatives and quality assurance of all strategy and governance deliverables. Board-level strategic direction, oversight of multiple engagements, senior stakeholder engagement, and independent peer review. Typically allocates 10-15% time to each engagement for QA review and strategic guidance.
Enterprise Architect	6-7	Enterprise architecture leadership ensuring business strategy, operating models, and technology architectures are aligned. Enterprise architecture framework development, target operating model design, architecture governance, business capability modelling, and technology strategy development. Typically holds TOGAF certification.
Programme Delivery Lead	6	Programme-level coordination across multiple projects, manages programme governance, coordinates dependencies, manages programme risks and issues, and oversees programme reporting. Typically holds MSP, PgMP, or equivalent programme management qualifications.
Delivery Lead / Project Manager	5-6	Manages day-to-day delivery of strategic initiatives, develops project plans, coordinates teams, monitors progress, manages scope and change control, and provides customer liaison. Typically holds PRINCE2 Practitioner, PMP, AgilePM, or equivalent qualifications.
Business Engagement Manager	6	Stakeholder management and alignment, supports business case development, facilitates stakeholder workshops, manages communications, and provides change management guidance. Valuable in politically complex environments requiring skilled facilitation.
Business Analyst	4-5	Supports analysis of business processes and requirements, conducts current and future state process mapping, supports benefits identification and quantification, and conducts stakeholder analysis. Provides analytical foundation ensuring recommendations are evidence-based.

Specific resource allocation and SFIA level assignments are confirmed in the Statement of Work. All resources at the same SFIA level are charged at the same day rates. Day rates are set out in the Pricing Document v3.0.

Specialist IVARTY Consulting role titles are mapped to the closest equivalent Digital Marketplace roles for pricing purposes, based on SFIA level and responsibility.

Engagement Process

IVARTY follows a structured four-stage engagement process ensuring clear expectations, effective delivery, and measurable outcomes. This process applies to all Strategy & Governance engagements with stage activities scaled to engagement scope and complexity.

1

Stage 1: Discovery and Scoping

Establishes engagement scope, confirms resource requirements, and aligns expectations. Initial stakeholder discussions, documentation review, stakeholder identification, scope definition, and access requirements confirmation. Typically requires 2 to 4 person-days and concludes with detailed Statement of Work.

2

Stage 2: Mobilisation

Prepares for effective engagement delivery. Establishment of engagement governance, completion of security vetting where required, confirmation of workshop logistics, stakeholder briefings, and development of engagement plan. Resource mobilisation typically commences within 10 working days of Statement of Work signature.

3

Stage 3: Delivery

Executes agreed engagement activities and produces specified deliverables. Facilitated workshops, diagnostic assessments, framework and artefact development, iterative review cycles, and board presentations. All deliverables undergo internal quality assurance by the Consulting Director before submission to customer.

4

Stage 4: Closure and Transition

Ensures effective handover and supports customers in implementing recommendations. Final deliverable review and acceptance, knowledge transfer sessions, identification of follow-on activities, documentation of lessons learned, and formal engagement closure.

Throughout delivery, regular progress checkpoints maintain customer visibility, enable early identification of issues or dependencies, support scope management through change control, and maintain stakeholder engagement. Workshops typically run 2 to 4 hours with senior executives recognising time constraints and ensuring productive use of expensive executive time. Documentation balances comprehensiveness with usability providing enough detail for implementation while remaining accessible to busy executives requiring executive summaries and visual frameworks rather than lengthy reports.

Where strategies or operating models require significant organisational change, IVARTY provides clear implementation guidance with step-by-step procedures, timescales, resource requirements, and governance arrangements. Where organisations require implementation support beyond IVARTY advisory scope such as programme management, change communications, or technology delivery, recommendations for specialist suppliers are provided. The transition approach maximises customer capability and independence, reduces dependency on external advisory support, and enables sustained improvement through knowledge transfer, capability building, and provision of tools and templates supporting ongoing strategy execution, governance operation, and performance management.

Evidence of Capability

The following anonymised case studies demonstrate IVARTY's strategy and governance advisory delivery and outcomes achieved:

Case Study 1: Scottish Local Authority Strategic Planning and Governance

Customer Context: Scottish local authority with 1,400 FTE facing financial pressures (£18M budget gap over 3 years), outdated strategic plan (last updated 2018), unclear governance arrangements with overlapping committee remits, and limited performance visibility. Elected members and executive leadership sought strategic clarity, prioritised investment portfolio, strengthened governance, and performance framework enabling evidence-based decision-making.

IVARTY Activity: Conducted strategic diagnostic over 4 weeks including stakeholder interviews (12 elected members, 8 executive directors, 15 senior managers), review of existing strategies and governance papers, and benchmarking against similar authorities. Facilitated 3 executive workshops (20 participants each) developing vision, strategic themes, and priorities using Nominal Group Technique and affinity mapping. Developed strategy-on-a-page linking 4 strategic themes (inclusive economic growth, sustainable communities, effective services, organisational resilience) to 16 strategic initiatives with KPIs. Created governance framework including restructured committee system (from 8 to 5 committees), decision rights matrix using RACI, and performance reporting framework with quarterly scorecards. Supported 2 board presentations securing elected member approval.

Outcomes: Strategy-on-a-page approved unanimously by Full Council providing clear direction for next 5 years. Investment portfolio prioritised with 16 initiatives ranked using multi-criteria scoring, enabling £18M budget reduction through stopping low-value activities (3 initiatives deprioritised saving £4.2M) and efficiency improvements (5 initiatives generating £6.8M savings). Governance reforms implemented within 6 months reducing committee meeting time by 35% (from 160 to 104 hours annually) while strengthening oversight through focused agendas and exception reporting. Performance framework established with 28 KPIs across strategic themes, quarterly reporting to Performance Committee, and annual public accountability report. 12-month review showed 87% of KPIs on track or improving.

> "IVARTY brought clarity to complexity. The strategy-on-a-page gave us shared direction after years of fragmented plans. The governance reforms cut meeting time while improving oversight - we now focus on what matters. The performance framework means we manage by data not anecdotes." — Chief Executive, Scottish Local Authority

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Case Study 2: NHS Board PMO Establishment and Portfolio Management

Customer Context: NHS Scotland Health Board with £680M budget and 5,200 FTE managing major transformation portfolio including digital patient record (£45M), estate rationalisation (£120M), workforce reform, and service redesign. Limited portfolio visibility, inconsistent business case quality, unclear benefits tracking, and no formal PMO. Board audit committee seeking assurance on programme delivery and value realisation.

IVARTY Activity: Conducted PMO maturity assessment over 6 weeks evaluating against P3M3 framework establishing baseline maturity Level 1 (awareness of processes but inconsistent application). Developed PMO operating model including Enterprise PMO structure (PMO Director, 2 Portfolio Managers, 3 Programme Managers, 2 PMO Analysts), PMO methodology based on MSP and PRINCE2 adapted to NHS context, portfolio governance with Investment Committee reviewing business cases and Portfolio Board monitoring delivery, business case template following HM Treasury Five Case Model, and benefits realisation framework with benefit profiles, owner assignment, and tracking dashboards. Supported PMO mobilisation including recruitment specification for PMO Director (appointed within 3 months), training for programme managers (MSP certification for 5 managers), and PMO tooling selection (Microsoft Project Online for portfolio dashboards).

Outcomes: Enterprise PMO established within 6 months with 8 FTE (internal recruitment and backfill). Portfolio governance operational with Investment Committee reviewing 18 business cases in first year (12 approved, 4 returned for rework, 2 declined) demonstrating improved quality and challenge. Benefits framework implementation tracking £82M forecast benefits across portfolio with quarterly benefits realisation reports to Board. 12-month assessment showed PMO maturity improvement to Level 2-3 (defined and managed processes with quantitative control emerging). Portfolio delivery performance improved with 71% of milestones achieved on time (vs 48% pre-PMO baseline). Audit committee annual review noted significant improvement in portfolio oversight and assurance.

> "The PMO transformed how we manage transformation. Business cases are robust, benefits are tracked not hoped for, and the Board has real-time visibility of portfolio health. We've professionalised programme delivery while maintaining NHS flexibility and patient focus." — Director of Strategy and Performance, NHS Scotland Health Board

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Case Study 3: Central Government Department Target Operating Model and Cloud Transformation Roadmap

Customer Context: UK central government department with 3,800 FTE undergoing major restructure following ministerial priority reset. Needed future-state operating model aligned to digital-first strategy, cloud migration programme, and efficiency targets (15% cost reduction over 3 years). Complex stakeholder landscape including ministers, permanent secretary, 6 directorates, trade unions, and Treasury oversight.

IVARTY Activity: Conducted current state assessment over 10 weeks including process mapping for 12 core business processes, capability maturity assessment across 8 domains, stakeholder interviews (45 participants from permanent secretary to frontline staff), and technology landscape review. Developed target operating model using POLDAT framework defining future-state processes (end-to-end process redesign eliminating 4 handoffs and 18 approval stages), organisation structure (from 6 to 4 directorates, reduction of 2 management layers, clearer accountabilities), location strategy (hub-and-spoke model closing 3 regional offices, remote-first for 65% of roles), data architecture (single customer data platform replacing 7 legacy systems), and technology platform (cloud-native applications on AWS). Created 3-year transformation roadmap with 5 programmes, 22 projects, sequenced across 3 horizons. Supported ministerial submissions and Treasury business case achieving £42M transformation funding.

Outcomes: Target operating model approved by ministers and permanent secretary providing clear direction for transformation. Transformation roadmap established implementation sequence with Horizon 1 (quick wins including process streamlining and cloud migration readiness), Horizon 2 (major capability delivery and structural changes), and Horizon 3 (optimisation and maturity). Efficiency targets quantified with £38M forecast savings through headcount reduction (280 FTE through automation and process efficiency), technology costs (£12M from cloud migration and application rationalisation), and property costs (£8M from office closure and remote working). Transformation governance established with Transformation Board (permanent secretary chair), 5 programme boards, and monthly ministerial updates. 18-month review showed Horizon 1 delivered (85% of milestones achieved), £14M savings realised (37% of 3-year target), and Horizon 2 on track.

> "IVARTY designed an operating model that's ambitious but achievable. The roadmap balanced efficiency with service continuity, and stakeholder engagement secured ministerial and Treasury support. We're 18 months in and transformation is delivering - efficiency targets on track, digital capability improved, and staff engaged in the journey." — Transformation Director, Central Government Department

Quality Assurance, Security, and Contact Information

Quality Assurance

All Strategy & Governance deliverables undergo internal quality assurance before submission to customers. Strategies, operating models, and governance frameworks are reviewed by the Consulting Director or Enterprise Architect ensuring consistency across engagements, alignment to recognised strategic planning and governance frameworks, appropriateness to customer context and maturity, coherence across strategy, governance, and operating model components, and suitability for intended purpose including board approval and organisational implementation.

Quality assurance reviews verify that strategies are evidence-based with stakeholder alignment documented, achievable within organisational constraints and timescales, appropriately ambitious balancing stretch with realism, and aligned to public sector accountability and governance requirements. Operating models and governance frameworks are reviewed for completeness covering required dimensions, internal consistency with aligned processes, structures, and accountabilities, implementability considering change capacity and capability, and sustainability ensuring ongoing operation without continuous external support.

IVARTY maintains Professional Indemnity Insurance exceeding G-Cloud 15 Lot 3 requirements with aggregate cover of £7,000,000 comprising Professional Indemnity Insurance £1,000,000 per claim, Public Liability Insurance £1,000,000 per claim, and Employers Liability Insurance £5,000,000. Insurance certificates demonstrating compliance are available on request. The company operates in accordance with ISO 27001 principles and holds Cyber Essentials certification (certificate number CE-2024-1147-IVARTY, valid until 15 March 2026). Customer data is processed in accordance with UK GDPR with encryption, access controls, and secure deletion upon engagement completion.

Security and Compliance

IVARTY Consulting Ltd holds Cyber Essentials certification (certificate number CE-2024-1147-IVARTY, valid until 15 March 2026, renewed annually) demonstrating implementation of baseline cybersecurity controls. The company operates information security management practices aligned to ISO 27001:2013 principles including risk assessment, access controls using role-based permissions and multi-factor authentication, incident management, business continuity, and secure development practices.

Personnel undergo security vetting appropriate to customer requirements. Directors and core team members hold or can obtain Baseline Personnel Security Standard (BPSS), Security Check (SC), or Developed Vetting (DV) clearance as required for access to board papers, strategic plans, or classified information. Clearance processing timescales are typically 4 to 6 weeks for BPSS, 8 to 12 weeks for SC, and 18 to 26 weeks for DV. Security clearance requirements are confirmed during discovery stage and factored into engagement mobilisation planning.

Data protection practices comply with UK GDPR and Data Protection Act 2018. Customer data accessed during strategy engagements including strategic plans, board papers, financial forecasts, organisational charts, and stakeholder information is processed under legitimate interest or contractual necessity legal bases. Data is retained only for duration required to deliver agreed services (typically engagement period plus 30 days) and securely disposed of using certified data destruction services. Cloud-based tools used for data processing (Microsoft 365, secure file transfer) are UK or EU hosted with data residency guarantees.

Social Value Commitments

IVARTY delivers measurable social value through environmental sustainability (remote-first delivery avoiding 45,000 miles and 12 tCO2e annually), charitable partnerships (£12,000+ to Down's Syndrome Scotland and Oor Club since 2019), comprehensive EDI commitments (minimum 20% delivery hours by underrepresented groups defined as women in technical roles, ethnic minorities per ONS census data, LGBTQ+ individuals, disabled persons per Equality Act 2010 definitions, monitored quarterly via timesheet analysis), and skills development focus (5% workforce from disadvantaged backgrounds defined as care leavers, long-term unemployed per DWP classifications, ex-military veterans, disabled affecting employment; 2 apprenticeships/graduate placements annually; pro bono mentoring for individuals entering strategy and governance sector). Service-specific value includes all strategy engagements resulting in documented strategic plans supporting evidence-based organisational direction, free strategic planning assessment for one Scottish public sector SME annually (value £5,000), annual strategy and governance seminar for Scottish public sector organisations providing free CPD and networking (120+ attendees 2024), governance and performance management training included in all engagements at no additional charge, mentoring for customer strategy officers providing ongoing support beyond formal engagement periods, templates and toolkits for ongoing strategic planning and performance management, priority access for Scottish public sector organisations to pro bono support, and partnership approach with Scottish public sector strategy community through knowledge sharing and collaboration.

Conflict of Interest and Independence

IVARTY operates an independent advisory model with separation between strategy development and implementation delivery. The firm does not provide implementation resources, delivery management, or operational services where IVARTY would benefit financially from recommending specific transformation approaches, technology platforms, or organisational structures. This independence ensures strategy, governance design, and operating model recommendations are objective and aligned to customer best interests rather than supplier commercial objectives. Where strategies identify need for implementation support, customers are free to engage any qualified supplier. IVARTY does not mandate or receive referral fees from specific implementation partners. Strategic recommendations and governance designs are determined objectively based on customer context, stakeholder input, and evidence-based assessment, not influenced by potential implementation revenue.

Constraints and Dependencies

Effective delivery depends on customer providing timely access to senior stakeholders for strategy workshops and governance design sessions (executives, governance board members, elected members where applicable), documentation including existing strategic plans, governance papers, board minutes, performance reports, and organisational charts, performance data for baseline establishment and KPI development, and premises for workshops where face-to-face facilitation required (boardrooms or suitable venues for senior stakeholder workshops). Resource mobilisation typically commences within 10 working days for standard engagements. Additional lead time required for security vetting where access to board papers or classified information necessary.

Assessor capacity is managed through advance booking with peak periods September-November and January-March for annual planning cycles potentially limiting availability. Advisory services are exactly that - advisory only. Implementation of strategies, governance frameworks, or operating models remains customer responsibility. Where customers lack internal capability, IVARTY can recommend implementation partners. Significant organisational changes (machinery of government changes, ministerial resets, major restructures) occurring during strategy development may require scope adjustment to maintain strategic alignment.

Contractual Framework

Services are delivered under CCS G-Cloud 15 Framework Agreement supplemented by Call-Off Contracts and Statements of Work. Document hierarchy: G-Cloud 15 Framework Agreement, Call-Off Contract, Statement of Work, Pricing Document, Service Definition, Terms & Conditions. Variations managed through formal change control. Payment terms are monthly arrears for time and materials or upon deliverable acceptance for fixed-price. Strategy development engagements typically fixed-price with staged payments. Intellectual property in bespoke deliverables (strategies, governance frameworks, operating models) is assigned to customer on final payment. IVARTY retains IP in methodologies, frameworks, and templates. Statutory compliance includes UK GDPR, Health & Safety at Work Act 1974, Equality Act 2010, Modern Slavery Act 2015.

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Customer references available on request for verification purposes.