

LGR Implementation Planning and Prioritisation

20 May 2026

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Our values



Ambitious



Collaborative



Compassionate



Empowering



Innovative

Jo Atkinson – Pre Vesting Day



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Programme Scope

The scope of the Local Government Reorganisation (LGR) programme was to replace the six District, City and Borough Councils (Carlisle City, Copeland District, Allerdale Borough, Barrow-in-Furness Borough, Eden District and South Lakeland District Councils) and Cumbria County Council with two unitary councils and transfer the Cumbria Fire and Rescue Service to the Office of the Police, Fire and Crime Commissioner.

All seven councils contributed to an implementation reserve of £18.9m to fund the programme.

The vision for LGR in Cumbria was to:

- Create two new unitary authorities that are able to operate safely and legally from Day 1 – April 1, 2023.
- Create conditions for the new organisations to transform and improve outcomes for residents, businesses, partners and the environment on a journey which is likely to take five to seven years.
- Create governance structures that enable the two new councils to raise ambitions and become more successful, so the economy is transformed and the opportunities and life chances of all residents are significantly improved.
- Create new ways of working that deliver local, responsive, accessible, high quality services efficiently and in collaboration with our communities and partners.



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Delivery Approach

- The programme was split into **Seven Thematic areas**, each managed by a **Theme Board**.
- Within Themes, work was split between **workstreams** and captured in individual **delivery plans**.
- The programme initially identified over 2,500 **Day 1 requirements**. Following review and assessment to keep only requirements for the new authorities to be safe and legal, the number was reduced to 204.
- Completion of these requirements was broken down to 1,285 milestones over three levels and were achieved by over 4,700 actions.
- The overall programme was supported and managed by a **Programme Director** and **dedicated PMO team**, utilising automated reporting to enable daily tracking of progress against delivery plans, Day 1 requirements and milestones.

Theme Board	Corporate and Enabling	Customer and Digital	Finance and Commercial	Fire	ICT	People	Place	Total
Day 1 reqs.	69	10	29	36	16	28	16	204
Milestones	330	47	75	90	583	93	67	1,285

Table below shows the number of Day 1 requirements and milestone for each of the 7 theme Boards



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Governance



Officer Governance

- The Programme was governed by a **Programme Board** which included all current Chief Executives, the Chief Fire Officer and Programme Director.
- The Theme Boards, the Day 1 Board and the Unitary Boards all fed into the Programme Board, reporting by exception.
- A **Day 1 Board** managed the interdependencies across Themes and provided oversight of the whole programme.
- **Unitary Boards** for Cumberland Council and Westmorland and Furness Council and the Fire Programme Board focused on organisation specific priorities and requirements.

Elected Member Governance

- Members from the previous councils provided oversight through the Cumbria Leaders Oversight Forum.
- When elected, **shadow authority** members provided guidance and oversight through a **joint Members Implementation Board**.
- The unitary councils held monthly **Shadow Executive** (Cumberland) and **Shadow Authority** (Westmorland and Furness) Cabinet meetings, focusing on Council Plans and budgets as well as programme performance.
- The programme was also monitored through regular sovereign council and **Shadow Authority Overview and Scrutiny Committees**.

Achievements and Outcomes of the Programme

- Both unitary councils went live and the Fire Service transferred to the Police, Fire and Crime Commissioner successfully on 1st April 2023.
- The programme achieved 96.8% of the planned milestones by Day 1.
- The programme was delivered within budget, with £18.5m of the £18.9m implementation reserve committed at the end of March 2023, and at the lower end of the estimated cost range submitted in the LGR proposal (£17.6-£23.6m).
- Given the primary focus of delivering safe and legal services for Day 1, efficiencies are expected to be realised as part of future transformation programmes within both unitaries and the Fire Service.

Key achievements of the programme

- Maintenance of service delivery to over half a million customers and residents.
- Setting up the core ICT infrastructure and enabling access to 319 ICT systems and applications.
- Successful TUPE transfer of 8,649 employees across the three organisations.
- Management of approximately 10,000 contracts across the seven sovereign councils, with an annual spend of between £500-£550m.
- Establishing an inter authority agreement to manage hosted and shared services between the unitary councils.
- Transferring the Fire and Rescue Service to the Office of Police, Fire and Crime Commissioner and providing corporate support via service level agreements.
- New brand identities for all three organisations created and rebranding undertaken.

Our Learning

What worked well throughout the LGR programme

- Overall collaboration and working together across all organisations to support the programme.
- Dedicated PMO team and allocated Programme and Project Managers to support workstreams.
- Early set up of the Shadow Unitary Boards to support service development.
- Regular monitoring of delivery plans and holding colleagues accountable for delivery through the Day 1 Board.
- Engagement with elected cabinet members to understand their priorities.
- Communication and engagement with members, customers and residents throughout the process.



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What's the one piece of advice you would give to another council who is just starting out on a similar journey?

- > **Embrace the change** as soon as you can throughout the organisation.
- > **Start the process** as soon as you can.
- > Take the time to do the **detail design** of the programme of activity upfront – it will save you time later in the process.
- > Focus effort from the start on **the enabler services** – ICT, HR, Customer, Finance and Digital.
- > You won't have all the answers all the time and that's **ok**.
- > Appoint your chief officers into their **shadow authority roles** as soon as you can to allow them to shape and drive future service delivery.
- > If your model is to separate all services, put all your efforts in to achieving this ahead of Day 1.
- > From a Fire perspective, clarify with the Home Office where you're going to end up and what you will need to get there as soon as you can.
- > **Prioritise communications** across the organisation from the very start and take staff on the journey with you – this will take time, but it's time well spent!

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What's the one piece of advice you would give to another council who is just starting out on a similar journey?

- > Pay more attention if you need to **disaggregate staff teams**- what does that mean in reality
- > Be mindful of roles that will be **hard to recruit** to
- > Be careful about existing vacancy levels
- > Assure yourself of the **quality of your HR and finance data**
- > **Visible staff support and engagement**- you will need the good will
- > Assure yourself of any ongoing/legacy issues that may not materialise until post vesting day, litigation equal pay, inquests, enquiries
- > Identify areas of **poor or challenging performance**, make sure **members are aware**- this lands twice as hard post vesting day



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**Westmorland
& Furness
Council**

Alison Hatcher – Post Vesting Day



1 April 2023 – Day 1!

- High Level Council plan agreed
- Constitution and draft Budget / MTFP agreed
- Senior Leadership Team in place
 - CEX, S151, chief legal/monitoring officer – (from Dec 22)
 - Directors and ADs in post (from vesting day)
- Staff transferred in from 4 organisations
- Inter-authority agreement for hosted services

Many decisions through Shadow Authority established May 2022

- Business continuity of services as before – rebadged as W&F externally
- Teams structures internally had overlaps and gaps
- Draft Target Operating model developed but not fully agreed or understood.
- Reliance on legacy policies and strategies
- Services still using legacy ICT systems (except Leadership team)
- 30+ (county) services still to be disaggregated

New Westmorland and Furness Council (Shadow Authority ends)



Phases of Change for Westmorland & Furness Council



Stabilisation

- Day 1
- Service Planning

Integration & Improvement

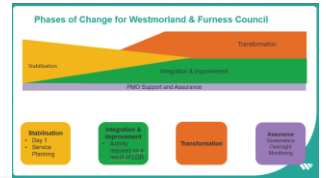
- Activity required as a result of LGR

Transformation

Assurance
Governance
Oversight
Monitoring



What Next – From Day 1 to now



		2023/24	2024/25	2025/26	2026/27 +	
Stabilisation and transition	<ul style="list-style-type: none"> Transition BAU Getting the basics right 					
Wider Organisational Change	<ul style="list-style-type: none"> Integration and Improvement priority programmes Delivery Priorities Operating model 					
Transformation Plan	<ul style="list-style-type: none"> 3-year transformation plan (Agreed March 26) 					
			Programme review	Programme review	Programme review	
Joint Disaggregation Programme	<ul style="list-style-type: none"> Disaggregation of xx hosted services 					



What next... Stabilisation and transition

Transition

- Focus on business-as-usual requirements

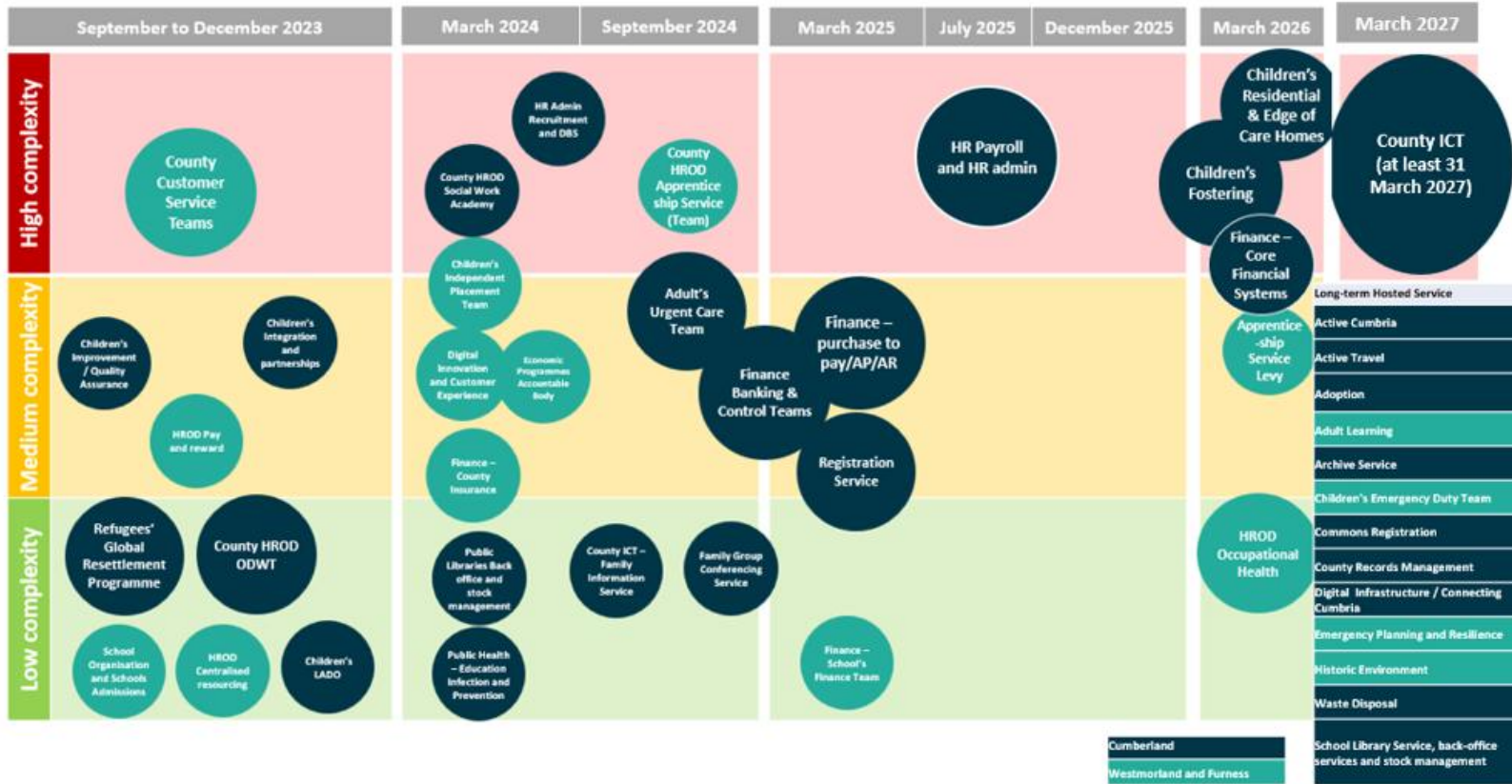
Getting the basics right

- Employee Feedback – surveys / change champions / team meetings
- 15 key things that needed to improve quickly.

Westmorland & Furness Council		Getting The Basics Right - Dashboard Report			Programme Manager: Kathryn Nicol	Board Date: April 2024
Executive Summary						
Position Statement						
Ref	Basic	Lead Officer	Overall Target Completion Date	BRAG	Direction of Travel (improving, stable, declining)	
GBR01	Diaries / visibility of diaries for everyone	Stefan Sabuda	Early Sept 2023	Blue - Complete	✓	
GBR02	Single address book including phone numbers	Stefan Sabuda	Early Sept 2023	Blue - Complete	✓	
GBR03	Distribution lists for directorates finalised	Stefan Sabuda	Sep-23	Blue - Complete	✓	
GBR04	Tier 4 managers in post	Luci Robb	Dec-23	Blue - Complete	✓	
GBR05	'Who's who' guide produced	Sara Turnbull	18/08/2023	Blue - Complete	✓	
GBR06	Access to buildings	Allan Harty	30/09/2023	Blue - Complete	✓	
GBR07	Westmorland & Furness approach to car parking	Luci Robb	End Mar 2024 Proposed completion date now May-24	Green	↑	
GBR08	Westmorland & Furness intranet up & running	Craig Barker	Sep-24	Green	↔	
GBR09	Templates for CMT papers, briefing papers, etc.	Linda Jones	Sep-23	Blue - Complete	✓	
GBR10	Being able to share documents (SharePoint)	Stefan Sabuda	End of Sept / Early Oct 2023	Blue - Complete	✓	
GBR11	Conversation toolkit (appraisal) available for use	Luci Robb	Oct-23	Blue - Complete	✓	
GBR12	Improving recruitment process for applicants and managers to use	Luci Robb	End Mar 2024	Blue - Complete	✓	
GBR13	Mandatory training completed	Luci Robb	Aiming for 90% completion by Dec-23	Amber	↔	
GBR14	Accountable budget holders & authorisers to have access to E5 and	Susan Roberts	End Sept 2023	Blue - Complete	✓	
GBR15	ADs to have a confirmed budget with staffing costs & income	Susan Roberts	Early Dec 2023 To move into BA11	Amber	↔	

Supported through PMO with governance via CMT Transition board

What next...Disaggregation



- Inter-authority Agreement
- Joint Governance arrangements
- 16 services disaggregated in 2023/24
- 9 services disaggregated in 2024/25
- 3 services disaggregated in 2025/26
- 4 services still to be disaggregated in 2026/27, including ICT
- Some services partially disaggregated
- Some disaggregation dates brought forward from original, some moved back to later
- Standard tool-kit (Project Management)

Significant commitment from both authorities

- officer time (leadership, enablers, PMO and individual services)
- member time
- support to governance arrangements.



Working for Cumberland Council and Westmorland & Furness Council

LGA Review of Lessons Learned

Define and embrace the **change** needed as a new organisation as soon as you can

Communications is a priority before and post day 1 for new organisations

Spend time on developing positive organisational cultures for the new organisation

Strong leadership and management teams are critical

Be **open** and honest with staff about the challenges

Staff feedback early in the life of the new authority is critical, but you must act on it

Minimise the number of services that might need to be disaggregated after vesting day

Manage **expectations** of Members, prepare them for the scale of the work needed from day 1

You won't have all the answers all the time and that's ok

Don't put off things that you can do early on

Benefit of Hindsight



Stabilisation:
it takes longer than
anticipated



ICT, ICT, ICT!



**Appoint senior
leadership team in
advance**



HR and finance data



**Clear budgets
at manager level**



Focus on Employees:
basic things make a big
difference



**Honeymoon period
doesn't last long!**

QUESTIONS?



For Further Information please contact



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