What were the key successful or challenging lessons learnt?	Clarity of purpose, Governance, No Business Case, long term ambitions, no clear vision	Lack of understanding of roles, organisations and what they do (DPCC, WMCA, WMP, Mayoral)	Inconsistency of clarity from individuals, disconnect over data transfer	Lack of comms plan, general all staff comms, engagement	No public affairs plan (CA/Mayor)	Different planning approach	Lack of detail in deliverables	Lack of SRO's consistency	More creativity / challenge required	Better understanding of transfer processes (E.U TUPEE, IT)	Different type of transfer from any other - Not appreciated, Senior decision makers understood	Lack of access to, visibility of Gateway reviews required	Politics, Issues, Personal agendas, Management	Calendar, admin issues - need a tool for planning (IT)	Specialists needed to be involved earlier	Lack of time to transfer deadline	Meetings needed better agendas, better reporting	WMCA/Home Office relationship poorly managed	Poor continuity, engagement, feel threatened	Relationships
Clarity of Deliverables																				
No clear statement from the WMCA about the purpose of the merger	x																			
Clarity amongst everyone was inconsistent			x																	
Limited clarity of Governance arrangements	x																			
Objectives were clear																				
No system plan to back up the master plan				x																
No public affairs plan (CA/Mayor)																				
Long term ambitions/deliverables unclear					x															
Lack of business case	x																			
Different planning horizons						x														
Lack of detail in the deliverables																				
Direction /governance required earlier - IT	x																			
SRO's needed consistently across all subject matters								x												
More/earlier creative/debate challenge needed									x											
Communication/data sensitivity needed to be understood			x																	
Lack of sufficient understanding by WMCA of what the DPCC is and does			x																	
Set out a vision of what we wanted to achieve	x																			
Fuller understanding of transfer processes/TUPE										x										
Senior representation/governance was needed in decision making	x																			
This was not like any other transfer which would have been a local government re-organisation. Unlike the LEPs											x									
Clarity of Mayor's role re the role of the CA in areas such as Public affairs/lobbying					x															
Access to senior decision makers needed to be improved													x							
More open Gateway reviews would have supported progress												x								
At the beginning it was too nebulous	x																			
Uncertainty			x																	
Didn't know what 'good' looked like	x																			
Politics/issues														x						
Approach from senior leaders was blurred													x							
What was initially classed as TR & shift and then became full integration	x																			
High level directives clear including legislation																				
Ok at the start, after that it became very opaque			x																	
Lack of understanding of all the organisations and what they do (WMCA, DPCC, WMP, Mayoral)		x																		
Wasn't clear exactly 'what' we were trying to achieve	x																			
We had no options, forced to join																				
We didn't have the 'why' - the purpose Vision, passion, organisational buy-in	x																			
Political lead versus the officers (Mayor, CA board, DPCC, PCC)													x							
Didn't know what future Mayor would want	x																			
Unclear as to who wanted this?	x																			
How well was the project managed More decision-making accountability/engagement was needed												x								
Camilla, Tony and Andy planned, managed and communicated superbly																				
Calendar organisation needs administrative/testing support														x						
May not have involved specialists as needed in all relevant workstreams															x					
Insufficient time up to the point of transfer																x				
Meeting agendas needed to be flexible than they were																		x		
With tools and information available, we did the best we could																				
Needed a 'kick off' meeting with clarity of leadership	x																			
Retro-fit to catch up so passy																		x		
No single version of the truth	x																			
Role of workstream leads - Clarity of roles/responsibilities and what they do required		x													x					
Better use of SME's/specialists in teams instead of hierarchy																		x		
Technical approach/communication of PM and Programme lead																				
Failed to keep to meeting agendas and enabled workstream leads to input highlight reporting																		x		
In meetings we pushed the call down the road, we ran out of time																		x		
Highlighting reporting - workstream leads should have been consistent in updating																		x		
Project governance didn't support PM and programme lead	x																			
Too many fringe conversations/hierarchy made things difficult													x							
Decisions needed to be made by collective leadership													x							
Senior leaders didn't meet that often													x							
Disconnect between CA/DPCC/WMP around data transfer			x																	
CA didn't manage HO, no assumptions with HO - due diligence																			x	
Engagement & prioritisation																				
Capacity, skills sets															x					
Consultation, governance and understanding (by-in from the on-set or process)	x																			
Lack of clarity about ownership and respective responsibilities		x																		
Day to day communication good between those involved																				
Tony did a great job as project lead																				
Good interaction between teams																				
Did we consider best structure/who should lead workstreams	x																			
Some confusion over roles - SROs, project leads		x																		
Lack of understanding of roles/metrics working (especially WMCA develop)		x																		
Home office involvement not always helpful (not helped by iterative influence of WJ/HO)																			x	
Teams site helpful - shared docs - positive, live docs																				

Theme	Item
	Identify who is leading on certain areas
	Part of day job is difficult
	Clarity of who is responsible for delivering tasks
	Keep key deliverables clear at every meeting
	Scope of project was not agreed - how far could we get by 7th May?
	Difficult conversations should have happened earlier
	Good work in individual teams
	Making the best of it - stymied by lack of clarity of scope
	Could of involved stakeholders more
	Areas of healthy challenge was useful - people felt able to do it
Project team relationships	Mixed Ups & downs
	Project management software not good enough
	Time constraints on front end projects
	Poor continuity, commitment & engagement
	People felt threatened
	No vision of what it would look like on day one
	Overall relationships were good with shared decisions, right skills sets to get the job done
	Resources escalations not clear
	Managed conflicts well
	Difficult time constraints
	Legal challenge offered moments of relationships
	Willingness of everyone in terms of what was needed if legal challenge doesn't go through
	Strained at times with poor behaviours consistently throughout project
	Lack of autonomy
	Steers that influenced disengagement
	Experiences of being welcomed and comfortable at times
	Directional and supportive leadership from CA & OPCC
	Networking and relationships should continue after the project
	Individual relationships build and will continue long term
	Political relationships and objectives may have had unwelcome impacts
	At a senior level, incorrect assumptions about cultures were made
	Meddling - individuals dipping in and out of work/teams
	Poor visibility of senior leadership to wider teams
	OPCC staff wanted to come over more (physically)
	OPCC staff would have liked more info and better understanding of where they might sit, been organised etc
	Communicating phasing about changes and boundaries (e.g. who people will let in on and lines) would
	Senior level decision making needed to be more decisive and timely
	Unclear if the right decisions were made by the right people at the right time e.g. IT governance
	More visibility of the project Gantt chart needed
Communication-Engagement, Intel Sharing	A lot of activity to made sure engagement possible
	Fear and mixed messages
	Communication from senior leaders needed to be more than visibility - needed to sort out issues and then
	Lack of awareness, understanding of CA & OPCC by each side
	Some people saw opportunities to join the CA and progress
	Personal agendas took over what the transfer was about and what it could achieve
	Lack of clarity of who were the stakeholders
	Mapping out processes before the project began
	Public affairs comms
	What counts as a decision (thresholds differed between OPCC and CA offices)
	Engagement for OPCC delivered, not so forthcoming from CA
	Workshops particularly for governance were beneficial from CA perspective. Summary early on would have been beneficial
	Early conversations with OPCC/CA, wider teams would have been beneficial
	People needed to feel comfortable saying 'I don't know' to encourage conversation
	Weekly comms were in place internally
	Informed intel sharing
	Clearer comms from both CA & OPCC for employee engagement within their teams about what specific functions will look like in the future
	No single version of the truth
	Jonathan's positivity talking to staff was great for OPCC
	Availability of project teams staff was excellent
	There was some scrutiny messaging that made information sharing perspectives harder to determine for WMCA
	Political and practical messages needed to be clearly understood
	Jargon not managed well
	Language - we should not have used the term 'merger' and used 'transfer of function'
	Language needed to be consistently maintained
	Could Officers have supported political relationships conversations better?
	Political and practical conversations needed managing
	Political messages needed proper reframing to ensure project work could continued unabated
	There was a lot of interest in the potential transfer within the WMA

Subject Area	Lesson Description	Cause	Consequence	Mitigating Actions
	What were the key successful or challenging lessons learnt?	What triggered this lesson?	What were the challenging/successful impacts of this?	What do you think could be done differently next time?
Clarity of Deliverables				
	No clear statement from the WMCA about the purpose of the merger	Lack of due diligence	The Pro's of the merger to allow effective comms to the public and for the project team	Agreed project purpose in place for other deliverables to be built on
	Clarity amongst everyone was inconsistent			
	Limited clarity of Governance arrangements			
	Objectives were clear			
	No comms plan to back up the master plan			
	No public affairs plan (CA/Mayor)			
	Long-term ambitions/deliverables unclear			
	Lack of business case	No responsibility (Who)		
	Different planning horizons			
	lack of detail in the deliverables			
	Direction /governance required earlier - IT	Lack of clarity of what data would /wouldn't be transferred over		
	SRO's needed consistently across all subject matters			
	More/earlier creative/debate challenge needed			
	Communication/data sensitivity needed to be understood			
	Lack of sufficient understanding by WMCA of what the OPCC is and does			
	Set out a vision of what we wanted to achieve	Reliance on reacting to legislation		
	Fuller understanding of transfer processes/TUPE			
	Senior representation/governance was needed in decision making			
	This was not like any other transfer which would have been a local government re-organisation. Unlike the LEPs transfer			
	Clarity of Mayor's role vs the role of the CA in areas such as Public affairs/lobbying			Introduce RACI from the start and review regularly
	Access to senior decision makers needed to be improved			
	More open Gateway reviews would have supported progress			
	At the beginning it was too nebulas		Frustration and demoralising due to uncertainty	
	Uncertainty			
	Didn't know what 'good' looked like			
	Politics/issues		Caused friction between officers	
	Approach from senior leaders was blurred			
	What was initially classed as 'lift & shift' and then became full integration			
	High level directives clear including legislation			
	After that it became very opaque			
	Lack of understanding of all the organisations and what they do (WMCA, OPPC, WMP, Mayoral)			
	Wasn't clear exactly 'what' we were trying to achieve.			
	We had no options, forced to join			
	We didn't have the 'why' - the purpose Vision, passion, organisational buy-in			
	Political lead versus the officers (Mayor, CA board, OPCC, PCC)			
	Didn't know what future Mayor would want			
	Unclear as to who wanted this?			
How well was the project managed	More decision-making accountability/engagement was needed			
	Cynthia, Tony and Andy planned, managed and communicated superbly			
	Calendar organisation needs administrative/tooling support			
	May not have involved specialists as needed in all relevant workstreams			
	Insufficient time up to the point of transfer			
	Agendas needed to be flexible then they were			
	With tools and information available, we did the best we could			
	Needed a 'kick-off' meeting with clarity of leadership			
	Retro-fit to catch up vs pacey			
	No single version of the truth			
	Role of workstream leads - Clarity of roles/responsibilities and what they do required			
	Better use of SME's/specialists in teams instead of hierarchy			
	Technical approach/communication of PM and Programme lead			
	Failed to keep to meeting agendas and enabled workstream leads to input-highlight reporting			
	In meetings we pushed the call down the road, we ran out of time			
	Highlighting reporting - workstream leads should have been consistent in updating			
	Project governance didn't support PM and programme lead			
	Too many fringe conversations/hierarchy made things difficult			Go to the right people not the highest people
	Decisions needed to be made by collective leadership	Lack of Snr leaders involvement		
	Senior leaders didn't meet that often			
	Disconnect between CA/OPCC/WMP around data transfer			
	CA didn't manage HO, no assumptions with HO - due diligence			
	Engagement & prioritisation			
	Capacity, skills sets			
	Consultation, governance and understanding (buy-in from the on-set re process)			
	Lack of clarity about ownership and respective responsibilities			
	Day to day communication good between those involved			
	Tony did a great job as project lead -		Kept group on track as far as possible - open, supportive, 'bit of a laugh'	
	Good interaction between teams			
	Did we consider best structure/who should lead workstreams			
	Some confusion over roles-- SROs, project leads			
	Lack of understanding of roles/matrix working (especially WMCA-develop)			
	Home office involvement not always helpful (not helped by invisible influence of DLUHC)			
	Teams site helpful - shared docs - positive, live docs			
	Identify who is leading on certain areas			
	Part of day job is difficult			Needed a dedicated project team
	Clarity of who is responsible for delivering tasks			
	Keep key deliverables clear at every meeting			
	Scope of project was not agreed - 'how far could we get by 7th May'?			
	Difficult conversations should have happened earlier.			
	Good work in individual teams			
	Making the best of it - stymied by lack of clarity of scope			
	Could of involved stakeholders more			
	Areas of healthy challenge was useful - people felt able to do it			
Project team relationships	Mixed Ups & downs			
	Project management software not good enough			Bespoke software required to meet the need
	Time constraints on front-end projects			More time required to develop mutual understanding of how we work
	Poor continuity, commitment & engagement			
	People felt threatened			
	No vision of what it would look like on day one			
	Overall relationships were good with shared decisions, right skills sets to get the job done			
	Recourses escalations not clear			
	Managed conflicts well			
	Difficult time constraints		Frustrations and impacts on legal challenge	
	Legal challenge offered moments of relationships			
	Willingness of everyone in terms of what was needed if legal challenge doesn't go through			
	Strained at times with poor behaviours consistently throughout project		Frustrations, dismissive relationships	
	Lack of autonomy			
	Steers that influenced disengagement			
	Experiences of being welcomed and comfortable at times			
	Directional and supportive leadership from CA & OPCC			
	Networking and relationships should continue after the project			
	Individual relationships build and will continue long term			
	Political relationships and objections may have had unconscious impacts			
	At a senior level, incorrect assumptions about cultures were made			
	Meddling - individuals dipping in and out of workstreams			
	Poor visibility of senior leadership to wider teams			
	OPCC staff wanted to come over more (physically)			
	OPCC staff would have liked more info and better understanding of where they might sit, been organised etc.			
	Communicating phasing about changes and boundaries (e.g. who people will to an red lines) would have been helpful			
	Senior level decision making needed to be more decisive and timely			
	Unclear if the right decisions were made by the right people at the right time e.g. IT governance			

		More visibility of the project Gantt chart needed
Communication- Engagement, Intel Sharing		A lot of activity to make sure engagement possible
		Fear and mixed messages
		Communication from senior leaders needed to be more than visibility - needed to sort out issues and then communicate
		Lack of awareness, understanding of CA & OPCC by each side
		Some people saw opportunities to join the CA and progress
		Personal agendas took over what the transfer was about and what it could achieve.
		lack of clarity of who were the stakeholders
		Mapping out processes before the project began
		Public affairs comms
		What counts as a decision (thresholds differed between OPCC and CA offices)
		Engagement for OPCC delivered, not so forthcoming from CA
		Workshops particularly for governance were beneficial from CA perspective. Summary early on would have been beneficial
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		People needed to feel comfortable saying 'I don't Know' to encourage conversation
		Weekly comms were in place internally
		Informed intel sharing
		Clearer comms from both CA & OPCC for employee engagement within their teams about what specific functions will look loke in the future
		No single version of the truth
		Jonathan's positivity talking to staff was great for OPCC
		Availability of project teams staff was excellent
		There was some scratchy messaging that made information sharing perspectives harder to determine for WMCA
		Political and practical messages needed to be clearly understood
		Jargon not managed well
		Language - we should not have used the term 'merger' and used 'transfer of function'
		Language needed to be consistently maintained
		Could Officers have supported political relationships conversations better?
		Political and practical conversations needed managing.
		Political messages needed proper refereeing to ensure project work could continued unabated
		There was a lot of interest in the potential transfer within the WMA

Main Key learnings	
Projects require the following from the outset:	Clarity of purpose
	Governance structure in place
	A clear vision with long term ambitions
Clarity of understanding:	Roles
	Organisation structures
	What the stakeholder organisations do (WMCA, OPCC, WMP
Ensure individuals in the project team are:	Consistent in the understanding
	Ensure mechanisms are in place to provide the proper connections of supporting data
Set boundaries	Remove political bias
	No personal agendas
Communications requirements	Must have a Comms plan
	Structured, transparent general comms for all
Decision making Senior leaders support	Snr Leaders must be accessible
	Greater visibility
Structured meetings and reporting	Meetings must have agendas
	Strong chairing/facilitation
	Actions and reviews
	Qualitative focused reporting
Focus on relationships	Create an inclusive safe environment
	Free to speak up without fear
	Cut out meddling early to stop disruption
	Cut out disruptive steers
	Give individuals autonomy and trust to do the job
	Agree agreed and disagreeable behaviours at the start
	Regularly review how behaviours are affecting relationships

Support systems and processes	Appropriate systems tools and processes in place prior to project commencement
Third party external management	Agree how, who and what need to be in place to manage external influences
Planning	Ensure single standard of planning
	One source of the truth