Strategic outcomes planning guidance

May 2021

1 — Develop shared local strategic outcomes for your place — **OUTCOMES**

2 — Understand your community and your place — **INSIGHT**

3 — Identify how the outcomes can be delivered sustainably — **INTERVENTIONS**

4 — Secure commitment to a strategic approach and delivery of outcomes — **COMMITMENT**

Contents

Foreword

This Strategic Outcome Planning Guidance (SOPG) has been successfully utilised by many local authorities since its launch in July 2019.

The impact of Covid-19 has been devastating for communities and means the importance of providing an active environment which supports physical and mental wellbeing has never been more evident. Helping grassroots physical activity, sport and wellbeing recover from the social and economic effects of the coronavirus pandemic and investing time and resources into tackling the key challenges of the next decade are the cornerstones of Sport England's new long-term strategy, Uniting the Movement.

The impact on physical activity levels, sport and wellbeing has highlighted the vital importance and value of active places, partnerships and the active environment to support people's lifestyles and wellbeing. We have also seen an increasing gap in inequalities experienced by many in society and tackling this is at the heart of Sport England's 10-year vision to make being active an essential part of life for everyone in England. Sport and activity are recognised as essential for our physical and mental health and for bringing communities together.

More and more local authorities are talking to us about how their service needs to adapt to meet the needs of communities and how resources can be most effectively deployed given the challenges faced today. The SOPG model describes the stages and approach needed to ensure investment best meets local strategic outcomes and the needs of the community, but importantly recognises the challenges faced in terms of resourcing. We are keen to support local authorities through this journey and to help you make better and more impactful investments in the most challenging of times.

There has never been a more pressing need to secure a sustainable future for local authority leisure and wellbeing facilities and services. This will in many cases require significant reviews of current provision and the outcomes delivered.

We are keen to support local authorities and your partners through your recovery and to help you make often difficult but informed decisions to enable you to take advantage of future opportunities for strategic realignment, investment and longer-term sustainability.

We have long supported local authority leisure and wellbeing services and their partners including Active Partnerships and service delivery partners through the provision of tools and guidance, as well as National Lottery funds for programme and capital investment.

However, following the Covid-19 pandemic, we are seeing an increasing need from local authorities for assistance at an earlier stage – from developing a vision and strategy, through insight and community engagement, identifying and addressing barriers to participation and into implementing the right balance of physical and social assets to meet needs.

What we have learnt through working with local authorities prior to and through responding to Covid-19 is that this approach cannot be 'one size fits all'. However, there are some key principles and this high-level guidance is designed to recognise stages and steps of the journey to meet unique local priorities and considerations.

We have drawn on a number of recent successful case studies with local authorities, who have undertaken a journey using this strategic approach. This has resulted in better outcomes, value for money and return on investment in both financial and social value terms.

We hope you will find the updated guidance helpful in your work to improve local strategic health, social and wellbeing outcomes in your communities and help you meet the challenges we all face.

Kevin Mills
Director of Capital Investment
Sport England

Strategic Outcomes Planning Guidance model

The Strategic Outcomes Planning Model describes the stages and approach needed to ensure investment best meets local strategic outcomes and the needs of the community, but importantly recognises the challenges faced in terms of resourcing.

We're keen to support local authorities through this journey and this guidance will describe the principles and approach that will help support making better and more impactful investments in the most challenging of times.

1 OUTCOMES

Develop shared local strategic outcomes for your place

A Develop an understanding of the wider local strategic outcomes for your place

B Using a cross sector approach, identify local community needs and priorities

C Establish the contribution physical activity, sport and wellbeing can make

D Secure 'buy in' to the shared local **outcomes**

2 INSIGHT

Understand your community and your place

A Gather insight from local community and stakeholders to identify barriers and opportunities for behaviour change

B Consider the contribution from the wider physical and social environment now and in the future

C Establish where you are now and where you want to be in the future

D Agree the **objectives** needed to contribute to shared local outcomes

3 INTERVENTIONS

Identify how the outcomes can be delivered sustainably

A Consider a range of facility & service interventions across the broad range of provision

C Determine the optimal and sustainable mix of facility and service interventions

B Explore and identify effective management option(s) to deliver core sport and physical activity services

D Establish the **key performance indicators (KPIs)** for each intervention

4 COMMITMENT

Secure commitment to a strategic approach and delivery of outcomes

A Agree a sustainable and effective business case

B Identify resource requirements to support implementation

C Secure stakeholder commitment and move to **implementation**

Develop shared local strategic outcomes for your place

Stage 1

1

Develop shared local strategic outcomes for your place

OUTCOMES

Stage 1
Develop shared local strategic outcomes for your place

Developing shared local strategic outcomes is the key starting point in developing an approach for physical activity, sport and wellbeing that can make the biggest contribution to a place.

Understanding from a cross sector perspective what the local needs and priorities are, will enable local authorities and their partners to have a much wider impact on the community. This will enable them to develop sustainable and effective interventions to meet those needs – many of which have been amplified by Covid-19.

Taking time to define and communicate the contribution that physical activity, sport and wellbeing can make to wider local strategic outcomes is the key to securing local political 'buy in' and support for the development of greater insight to inform the emerging strategic approach.

Step 1A
Develop an understanding of the wider local strategic outcomes for your place

1

Develop shared local strategic outcomes for your place

OUTCOMES

A Develop an understanding of the wider local strategic outcomes for your place

B Using a cross sector approach, identify local community needs and priorities

C Establish the contribution physical activity, sport & wellbeing can make

D Secure 'buy in' to the shared local strategic outcomes

Why is this step important?

This first step is extremely powerful as it shapes and contextualizes the strategic approach for physical activity, sport and wellbeing by involving a number of different sectors, partners and stakeholders.

Local authorities have corporate plans/ strategies which collectively:

- set the context for your local authority area
- summarise the local authority's strategy over a period of time
- provide a set of ambitions and actions to deliver the vision and corporate priorities of the local authority
- focus delivery of services
- guide the local authority's work with partners to deliver a common purpose.

In light of Covid-19, many of these strategies are being revisited with a view to considering the future strategic direction, taking account of immediate short to medium term considerations and financial pressures.

What are the key elements that could be considered for this step?

i) Identification and researching key strategic documents

Documents that articulate the local authority's vision and local strategic outcomes can include:

Second tier local authorities	Unitary authorities

• Corporate Plans
• Covid Recovery Plans
• Community Plans Local Plan
• Spatial Plans/Strategies
• Joint Strategic Needs Assessment (JSNA)
• Health and Wellbeing Strategy
• Open Spaces Strategy
• Leisure Built Facilities Strategy
• Leisure and/or cultural strategy
• Town centre master plan
• Playing pitch strategy
	• For unitary authorities, the scope of the council strategic documents should include the list on the left but also:
	  • Sustainability and Transformation Plans (STP) (Health)
	  • Children and Young People's Plan
	  • Adult and Social Care Plan
	  • Youth Offending Plan

These documents will cover all important strategic aspects of a place, for example:

- local economy
- transport
- energy
- environment
- community infrastructure
- education
- housing
- commercial development
- facilities and services
- health and wellbeing.

The Joint Strategic Needs Assessment is a key strategic public health document which should be included in this review.

Sometimes these documents can be subject to review in line with the political cycle of local elections, so it will be important to understand the timescales linked to each document and if the local authority is in the process of reviewing any of its core strategic documents.

These documents should be reviewed to identify the main priorities in relation to health, physical activity, sport and wellbeing and opportunities for co-production of services.

There may be additional documents available which identify the specific impacts of Covid-19 on a community.

Some key themes where there is a synergy include:

- housing
- infrastructure
- economic development
- sustainability
- community safety
- tackling social isolation
- healthy communities

- placemaking
- neighbourhood models
- mass participation events
- lifelong learning
- integrated transport.

ii) Identification of key stakeholders

Mapping a list of key strategic influencers, partners and agencies that have a 'stake' in a place will ensure identification of who should be involved, how they can contribute and at what level. Stakeholders to consider are:

- Public Health/Clinical Commissioning Group
- Health and Social Care Partnership
- Active Partnership
- County Council (for non-unitary authorities)
- Local Secondary and Primary Schools
- Higher and further education
- Voluntary and community service (VCS)
- Housing associations
- Business community
- Police and Crime Commissioner
- Fire and Rescue Service.

Understanding what level of direct or indirect influence they have over physical activity, sport and wellbeing services, facilities and provision will be an important part of establishing the tiers of governance and identifying where stakeholders can best contribute to developing a joint strategic approach.

iii) Consultation with key stakeholders

Senior internal stakeholders including elected members, directors, associate directors or heads of service and other external senior stakeholders will contribute to the understanding of where physical activity, sport and wellbeing can contribute to wider local strategic outcomes. The consultation approach can be formal or informal but should explore stakeholders':

- current perceptions of the contribution physical activity, sport and wellbeing makes to their area of work
- objectives
- key milestones
- timescales
- strengths, weaknesses, opportunities, threats
- resources – financial and in kind.

Securing commitment from stakeholders to engage with the process can be supported by:

- providing a briefing paper to provide context
- securing political commitment to the process
- detailing aims of the consultation approach
- establishing an inception meeting.

This will maximise the potential of getting the right level of stakeholders to engage early on.

This will also prepare the ground for establishing a governance model to oversee the development of a strategic approach.

iv) Establish governance models

The consultation will enable a steering group/programme board to be established with senior stakeholders. This will enable this strategic approach to 'be on the agenda' and prioritised accordingly.

Inviting a senior officer or elected member to chair the process and act as the project sponsor/champion is strongly recommended.

The local authority will typically have existing structures and governance models that it can use. Typically, this group would meet on a quarterly basis and have responsibility for overseeing the programme linked to key milestones such as procurement/partnership agreements coming to an end, service transformation and facility developments etc.

Key stakeholders that will have a positive influence on the development of the strategic approach should be invited. These could include representatives from the local authority's directorates, key strategic partners such as public health, health and social care, Active Partnership, voluntary sector, education, police and housing associations etc. Securing senior representatives'

attendance to the first meetings is vitally important to ensure cross sector senior level 'buy in'. This will deepen working relationships and optimise the potential synergies from working more collaboratively.

There are also benefits in establishing a more operational project group which is likely to be more officer based and focused on key tasks and project management. Typically, this group would meet more frequently, e.g. on a monthly basis and have responsibility for project management of individual workstreams such as; research, community engagement, feasibility studies, pre-procurement planning and/or service redesign.

What are the key enablers to support this step of the process?

Establishing a governance model

Cross sector senior 'buy in' to the process from key stakeholders

What are the key outputs from this step of the process?

Strategic Documents Review highlighting areas where physical activity, sport and wellbeing have a direct/indirect influence

Stakeholder mapping identifying who should be involved and at what level

Key findings from senior stakeholder consultation

Terms of reference for a governance model and establishment of the steering group (and any supporting project group) to oversee (and develop) the strategic approach

Programme of meetings for the steering group and any supporting project group

Further guidance, materials and case studies

Strategic Commissioning Guidance
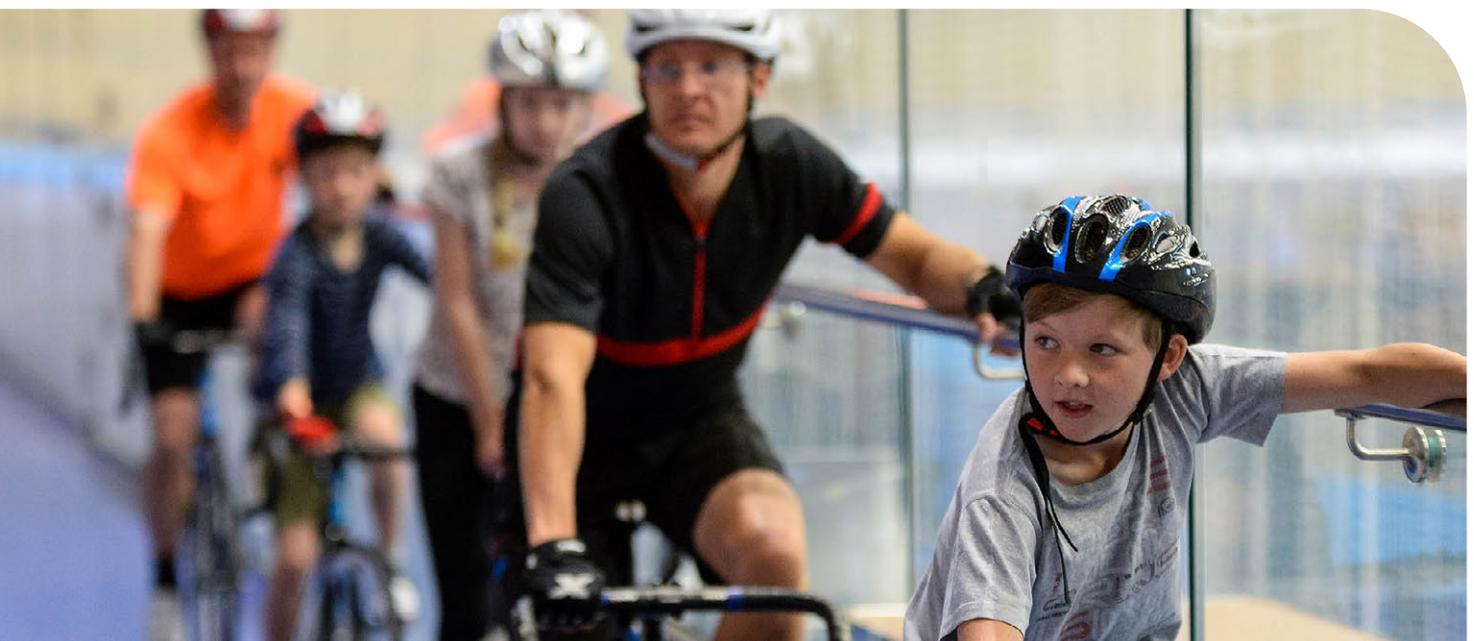
Step 1B
Using a cross sector approach, identify local community needs and priorities

1

Develop shared local strategic outcomes for your place

OUTCOMES

A Develop an understanding of the wider local strategic outcomes for your place

B Using a cross sector approach, identify local community needs and priorities

C Establish the contribution physical activity, sport & wellbeing can make

D Secure 'buy in' to the shared local strategic outcomes
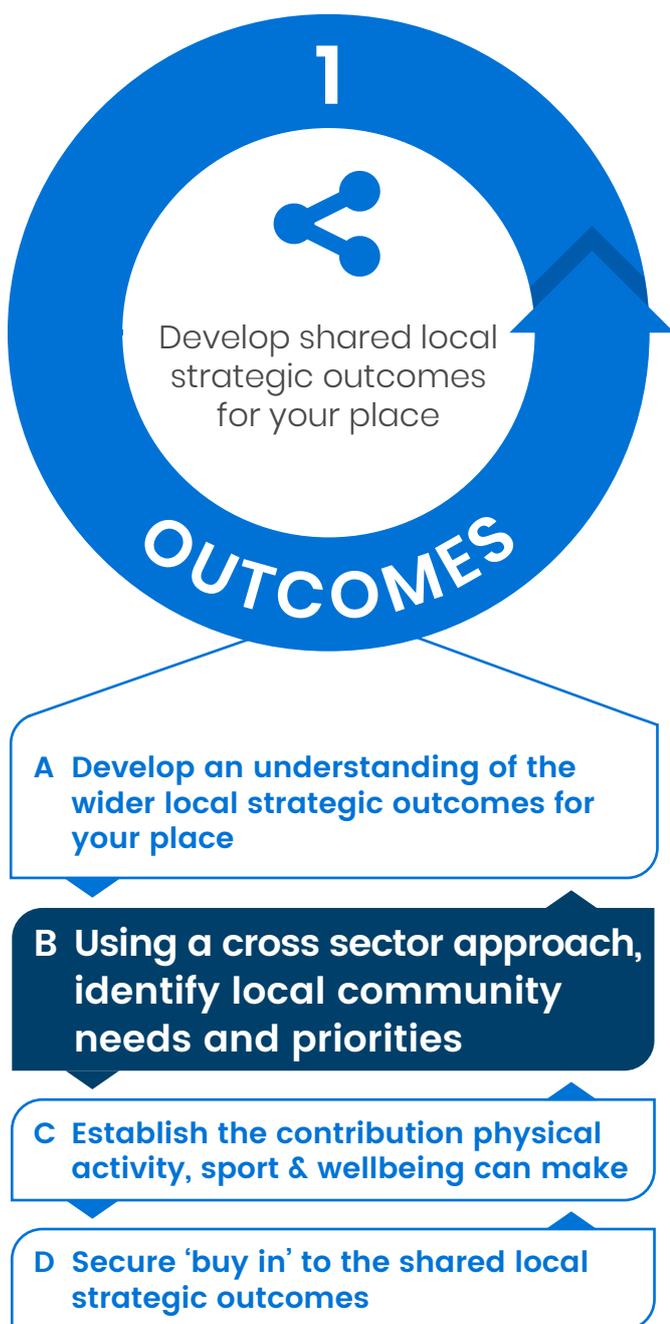
Why is this step important?

This step will develop an understanding and an awareness within a place of:

- local health profiles by identifying health inequalities, in particular those exacerbated by Covid-19
- socio-economic and demographic profiles
- population trends
- current levels of physical activity and sport
- any significant gaps and inequalities.

It is an important baselining process to support the development of a strategic approach that is driven by local needs. Cross sector engagement is essential in order to ensure a balanced view of need and inequalities.

The Covid-19 pandemic presents an opportunity for physical activity, sport and wellbeing to play a major role in recovery for a place.

What are the key elements that could be considered for this step?

i) Understanding the local health profile of the community

Typical health indicators to review include:

- excess weight in adults
- obesity levels in children
- life expectancy
- health indicators, for example levels of reported type 2 diabetes
- smoking prevalence in adults
- mental health
- hospital admissions for preventable conditions.

Public Health England Local Health Profiles are available and will review many of these indicators and allow comparisons to be made across a district, region and nationally. Further information and analysis on particular health inequalities within the local area can be found in a Joint Strategic Needs Assessment (JSNA) which will focus on differences in health outcomes in relation to age, sex and areas where citizens live. It can be a very powerful tool to highlight where targeted interventions would have the most impact.

ii) Understanding socio-economic and demographic profiles and population trends

Identifying trends in age groups, population growth linked to new developments or shifts in the ethnic mix of an area can support better alignment and targeting of resources and ultimately, impact on outcomes. Data sources can include census reports covering age, gender, ethnicity and social grade as well as market segmentation tools and local surveys.

iii) Understanding current levels of physical activity, sport and wellbeing

Sport England's Active Lives Survey analyses non-traditional activities as well as traditional physical activity, sport and wellbeing levels across an activity spectrum ranging from inactive to active. Furthermore, Sport England Local Sports Profiles as well as information from the Active Partnerships and local partners/operators can build on Active Lives data to assess the level of 'reach' or 'gaps' that has been achieved in relation to target groups and specific localities.

Key considerations are:

- What additional impacts has Covid-19 had on local population health?
- Are there any local areas that appear not to be well represented in terms of users?
- Are those who are active representative of the community or only attracting 'easy to reach' groups?
- Explore the reasons why certain communities are inactive in a place and any additional considerations as a result of Covid-19.

iv) Consultation with the community, community leaders and organisations

Identifying representatives from community groups working with specific target groups is a key step to determine the network of possible stakeholders. The aim of the consultation is to identify what are their particular barriers and issues to participation. These group representatives are often easier to identify and often willing to share their insight rather than targeting the individuals themselves.

v) Focus Groups with representatives who work with under-represented groups

Focus groups can identify key areas to explore through more targeted primary research with the support of community leaders. This can also create an opportunity for different specialists within the local authority to collaborate on exploring shared issues for residents – e.g. housing, probation, adult social care etc. This can then allow barriers to be addressed in more innovative ways.

vi) Research to understand local issues preventing participation for sections of the community

Following the identification of particular groups in the community (e.g. young people on inner city estates or isolated older people in rural communities), consideration of some more in-depth primary research could be considered to explore in greater detail the needs of a group. This would identify how these barriers and issues can be addressed and what would have the biggest impact.

Example: addressing barriers for disabled people

A community leader who works with disabled people highlighted some typical barriers they experience:

- access to appropriately paced and accessible exercise and physical activity
- ability to reach locations providing exercise and physical activity
- symptoms making journeys challenging
- Being able to access the correct equipment for the type of disability and the specialist training for our coaches.

In terms of ways of addressing these barriers, the following were identified by the leader:

- a welcoming can-do attitude from all the coaches and trainers
- regular sessions
- running come rain or shine
- no last-minute cancellations or changes to sessions
- a consistent staff team to build trust and good relationships with users
- sessions to run at times that fit in with support workers' shift patterns and weekend sessions to suit family needs.
- we run on a drop-in basis as sometimes it's very difficult to manage time keeping due to a person's condition
- accessible toilet facilities
- easy access by public transport
- low cost of sessions.

This insight is now being used to influence the physical activity strategy and future leisure services specification.

What are the key enablers to support this step of the process?

Accessing robust local, regional and national data sources.

Engaging with community representatives, local groups and target groups, particularly those under-represented groups.

Commissioning specialist research where there are gaps to gain a greater level of insight.

What are the key outputs from this step of the process?

Identification of barriers and issues to increased participation in physical activity, sport and wellbeing.

Research findings from focus groups and any primary research undertaken.

Identification of ways to address the barriers and issues.

Further guidance, materials and case studies

Example Needs Analysis Questionnaire

Sport England Active Lives Survey

Public Health England – health indicators.

Sport England Insight Packs

Step 1C
Establish the contribution physical activity, sport and wellbeing can make

1

Develop shared local strategic outcomes for your place

OUTCOMES

A Develop an understanding of the wider local strategic outcomes for your place

B Using a cross sector approach, identify local community needs and priorities

C Establish the contribution physical activity, sport & wellbeing can make

D Secure 'buy in' to the shared local strategic outcomes

Why is this step important?

Using the evidence gathered in Steps 1A and 1B, this step will enable physical activity, sport and wellbeing to be positioned alongside key existing priorities and local strategic outcomes. This will aim to highlight the significant contribution it makes at a political and senior stakeholder level. This will support a more holistic approach to a place and a coordinated response to recovery from Covid-19 across the system.

What are the key elements that could be considered for this step?

i) Mapping key contributions that physical activity, sport and wellbeing can make against each individual local strategic outcome

Developing a simple matrix of local strategic outcomes against direct or indirect contributions made by physical activity, sport and wellbeing will highlight their importance for a place.

Typically, this will demonstrate a direct or indirect contribution towards a number of key local priorities and local strategic outcomes such as:

- placemaking
- increasing social value
- improving community cohesion
- supporting economic development
- reducing crime and anti-social behaviour
- improving physical and mental health
- reducing health inequalities
- improving educational standards
- reducing hospital attendances
- help young people with employment opportunities
- supporting older people to combat isolation
- supporting independent living by older people
- regeneration of town centres
- Covid-19 recovery.

ii) Use of the Outcomes Framework developed by the LGA

The Local Government Association (LGA), working with partners including Sport England, has developed a web resource to provide guidance for councils and their partners on how to create a local outcomes framework for culture and sport. The framework will help:

- measure and evidence the difference your service makes and its contribution to local priorities
- make the case for continued investment of public money
- demonstrate to other organisations who they should be working with
- help influence the commissioning process
- focus business and service plans on the priorities for an area
- communicate the value of culture and sport to opinion-formers and decision-makers
- promote improvement by identifying what works in delivering better outcomes.

iii) Developing case studies to 'tell the story'

The research and consultation can generate some powerful case studies, testimonials and stories relating to local communities or individuals whose lives have been improved or transformed through physical activity, sport and wellbeing. Capturing these and using them as influencers and to bring the emerging future vision to life is a powerful tool to support a strategic approach.

What are the key enablers to support this step of the process?

Consulting with stakeholders responsible for wider local strategic priorities and outcomes to get their support in the mapping work.

What are the key outputs from this step of the process?

Matrix of key contributions of physical activity, sport and wellbeing to wider strategic outcomes

Outcomes Framework

Further guidance, materials and case studies

LGA Outcomes Framework

Sport England: Physical Activity and Health: Your Stories

Example: physical activity and health – your stories

Ellie, 64, Peterborough

Ellie was diagnosed with Alzheimer's in 2014. She had a very complex job, teaching adults ICT in two colleges, has a very busy life and is the sort of person that would remember everything.

She became very aware that she had to write things down because she was starting to forget and everything started to become a struggle.

She was concerned and booked an appointment with her GP – whom she says is brilliant and regularly visits him because she has type 2 diabetes.

He suspected that it would be Alzheimer's and referred Ellie to a memory clinic straight away, where she underwent comprehensive testing.

In a matter of months she was diagnosed with Alzheimer's.

Ellie claims she was able to swim before she could walk and has continued to swim throughout her adult life.

She believes it benefits her physical and mental wellbeing.

Ellie visits her local swimming pool, in a nearby hotel, at least twice a week and says the hotel staff are great and that small things – like the entrance to the pool being right by the car park – make things really easy for her to continue going.

Ellie credits her love of swimming and keeping fit with helping her to manage her dementia.

Example: physical activity and health – your stories

David, 69, Manchester

David had just become a new grandad and was very excited to be able to go for walks with his grandchild.

David noticed a little trouble swallowing when eating and following tests was diagnosed with oesophageal cancer and referred to the Prehab4Cancer programme.

David's treatment plan involved chemotherapy before and after the surgery to remove the tumour. David was aware that this treatment would be a challenge and was surprised when his consultant offered the gym.

David attended his local gym and was assessed by one of the Prehab4Cancer exercise specialists. The specialist put together a tailored gym programme and David was attending the gym 3 times a week (1 with his exercise specialist and 2 independently).

David's exercise programme was constantly adjusted to allow for his chemotherapy cycles.

> " The cancer surgery was quite daunting and took over 10 hours. I was told I would be in hospital for two, three or four weeks. Well, I was out within nine days. I could not believe it."

Following his surgery David returned to the gym for his rehab programme and credits his gym work as a huge factor in his ease and speed of recovery.

He reports the best thing about being back fit and strong is that he now gets to care for his grandson twice a week and is able to take him to the park.

Step 1D
Secure 'buy in' to the shared local outcomes

1

Develop shared local strategic outcomes for your place

OUTCOMES

A Develop an understanding of the wider local strategic outcomes for your place

B Using a cross sector approach, identify local community needs and priorities

C Establish the contribution physical activity, sport & wellbeing can make

D Secure 'buy in' to the shared local strategic outcomes
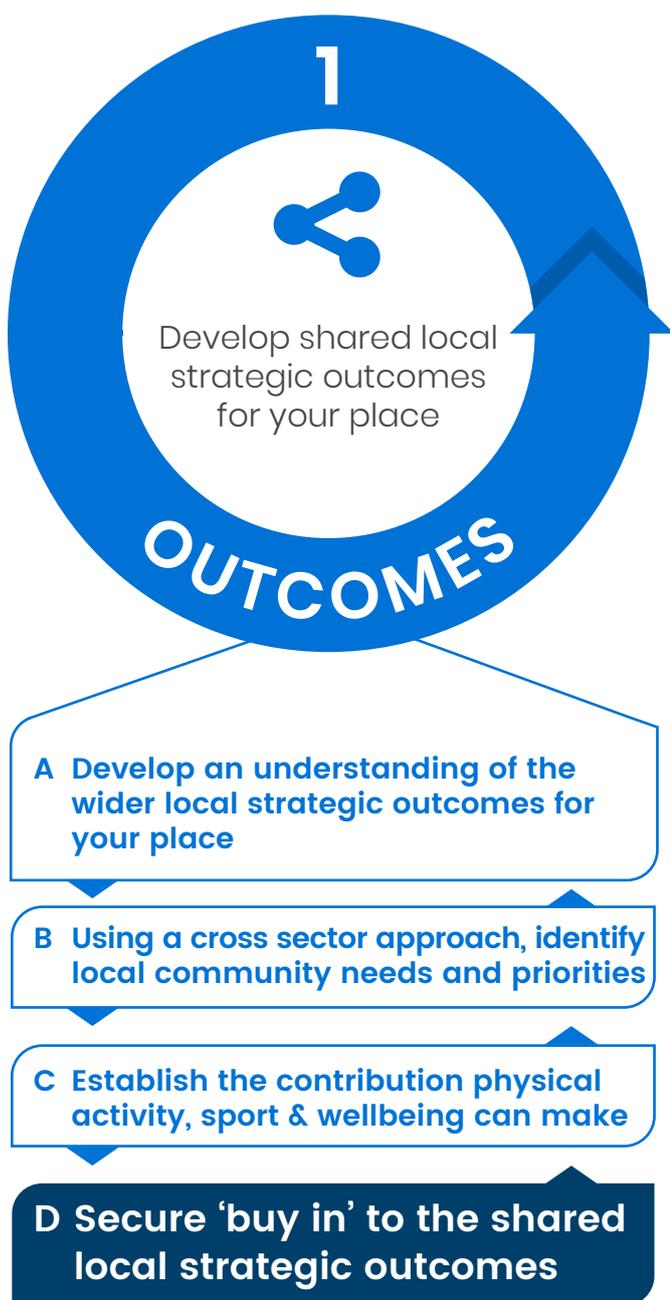
Why is this step important?

Establishing early 'buy in' from political leaders within the local authority and key strategic stakeholders will secure the contribution and role of physical activity, sport and wellbeing in the context of shared local outcomes for your place.

The evidence gathered from previous steps can help to develop a consensus on the overall strategic direction for a local authority and their partners and form a context against which further development and decision making can be based.

A local authority and its partners may wish to seek to develop a vision statement with a short summary that showcases the shared local outcomes as the basis for their approach moving forward. Covid-19 may act as a catalyst to consider a review of this vision.

This step provides a firm basis on which approval for future stages of work can be granted, starting with Stage 2 'Insight' which will define realistic objectives that will clearly contribute to the local shared outcomes defined by the end of Stage 1.

What are the key elements that could be considered for this step?

i) Steering group briefing meeting to launch the development of the strategic approach

A briefing meeting for the steering group can be an effective way of initiating the project and gathering momentum as it will allow the project leads to:

- begin to develop a shared vision
- summarise this process
- highlight key stages
- establish timescales
- request resources
- confirm involvement of the steering group.

The briefing meeting should typically involve the following representatives:

- Portfolio holder(s) responsible for physical activity, sport/health and wellbeing, (or equivalent)
- Strategic Director responsible for physical activity, sport/health and wellbeing (or equivalent)
- Head of service(s) responsible for physical activity, sport/health and wellbeing (or equivalent)
- Public Health lead
- Adult Social Care lead
- Children and Young People's Service lead
- Planning lead
- Parks and Open Spaces/Streetscene lead
- Active Partnership lead
- Voluntary Sector lead.

ii) Workshops and feedback sessions

Developing an approach focused on shared local strategic outcomes requires time and resources to ensure consistent understanding and implementation. Briefings and workshops with the steering group and project group can build on previous work to develop an understanding of issues and opportunities for the local authority and its partners.

What are the key enablers to support this step of the process?

Securing appropriate resource to provide leadership, governance and project management.

What are the key outputs from this step of the process?

Realistic programme of meetings for steering group (and supporting project group)

Clear time-framed programme that will ensure that Stage 2, 3 and 4 activities take place in the right order and are given sufficient time and resources

Committee report setting out the strategic approach and seeking approval to progress to Stages 2, 3 and 4.

Vision statement showing shared local outcomes

Draft local strategic objectives and contribution towards outcomes for further refinement in Stage 2

Further guidance, materials and case studies

Example Strategy – Bristol City Council Sport and Physical Activity Strategy 2020-2025

Stage 1 Case Studies

1. CV19 - A moment to pivot review – Greater Manchester Chief Executives

Stage 1
Case study 1

Greater Manchester Moving > ∧ < ∨

Greater Manchester Chief Executives Group

CV19 - A moment to pivot review

Description of SOPG-related work

Greater Manchester Chief Executives commissioned a Build Back Better Review to achieve two aims:

1. To sustain the public sector leisure infrastructure through the pandemic and beyond.

2. To maximise the future contribution of the leisure providers to the population health picture in Greater Manchester (GM) as we seek to Build Back Better.

This case study describes how stakeholders across the Greater Manchester system were engaged to support the review, which was commissioned to work towards the shared GM Moving ambition.

Relevant stages/ steps

A. Develop an understanding of the wider local strategic outcomes for your place.

B. Using a cross sector approach, identify local community needs and priorities.

C. Establish the contribution physical activity, sport and wellbeing can make to achieve local strategic outcomes.

D. Secure 'buy in' to the shared local strategic outcomes by cross-sector stakeholders.

Understand the wider local strategic outcomes for your place ▶ Identify local community needs and priorities ▶ Establish the contribution of physical activity, sport and wellbeing ▶ Secure cross sector buy-in to the shared strategic outcomes
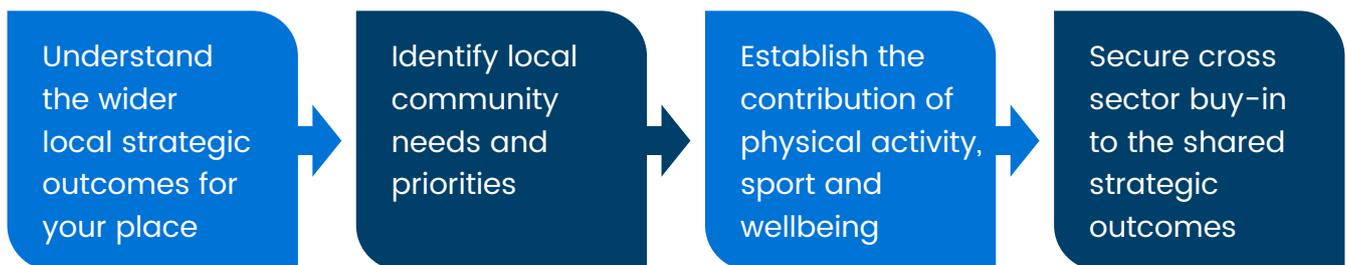
Activity and output

1. Core strategic information on GM Active Partners and GM Moving stakeholders was collated to support the review, including examples of best practice and commissioned projects with the potential for growth across clusters in GM.

2. A broad programme of stakeholder consultation was conducted with commissioners responsible for leisure and directors of public health in the 10 local authorities to identify the challenges and opportunities ahead. This engagement was used to shape the plan for engagement with the delivery partners.

3. Delivery partners from the 11 leisure trust organisations in GM were consulted to identify their challenges, potential synergies, short term and longer-term opportunities for recovery and to Build Back Better.

4. In line with the Greater Manchester whole-system approach, consultation also involved strategic leads in the GM Health and Social Care Partnership, 10 GM (Voluntary, Community and Social Enterprise Sector), GreaterSport, GM Combined Authority and Sport England.

5. The review process identified a number of deliverable short-term interventions that could be mobilised within 12 months to sustain the leisure infrastructure and contribute further to population health.

6. Several longer-term opportunities (12-36 months) were identified to meet the two aims of the review as well as propel GM towards their future vision for leisure.

7. An action plan was developed with the project working group to assign internal leads and establish the immediate actions required to kickstart or progress each workstream.

8. The resourcing required to activate six priority recommendations was developed in greater detail for the 10 local authority chief executives.

Outcome

- The cross-system conversations and exploratory workshops highlighted the key challenges for the sector and helped to articulate the future vision and direction of travel for public sector leisure in Greater Manchester.

- As an aspiring Marmot City Region, the 10 authorities of GM share common strategic objectives to tackle health inequalities. The review explored several opportunities to achieve this through cross-border and cross-system collaboration whilst retaining the local control required to bespoke services to meet local community needs.

- The review identified a package of workstreams that will support GM to advance their vision to pivot the public sector leisure towards a greater focus on health and wellbeing.

Stage 1 Key learning

- Consultation took place with representatives from the whole system including local authority commissioners, health and social care commissioners, local pilots and GM Active partners. This enabled co-produced opportunities to support the GM leisure infrastructure and contribute to wider population health.

- Project sponsorship and leadership by the Chief Executive of Tameside Council, Steven Pleasant, enabled the emerging vision to be embraced across GM and to secure 'buy in' from key decision makers.

" **Our vision is to change lives through physical activity and sport and help to make Greater Manchester the most active region in England.** "

Greater Manchester Moving > ∧ < ∨

Understand your community and your place

2

Understand your community and your place

INSIGHT

Stage 2
Understand your community and your place

Identifying current barriers to participation and opportunities for behaviour change in a place will inform where future interventions will make the biggest sustainable impact.

Covid-19 has led to significant changes in behaviour with restrictions in place and through the recovery period and beyond, understanding the opportunities to build on and maintain positive behaviour change should be considered.

Taking time to understand what contribution the wider physical environment and infrastructure in a place can make is important and has been recently highlighted through the pandemic. Investment in infrastructure such as recent government investment in cycle lanes can enable even more people to get active through active design.

Bringing all the elements developed to date together to identify a 'current state position' for a place is a valuable exercise particularly in light of Covid-19. This supports a needs analysis that can be used by a local authority and its partners to identify where they want to be in the future – possibly as part of a 'reset' or to build back better in their place.

This will enable tangible objectives to be identified that contribute towards wider local strategic outcomes in a place and provide the foundation to support the development of asset-based interventions – physical and social.

Step 2A
Gather insight from the local community and stakeholders to identify barriers and opportunities for behaviour change

2

Understand your community and your place

INSIGHT

A Gather insight from the local community and stakeholders to identify barriers and opportunities for behaviour change

B Consider the contribution from the wider physical and social environment

C Establish where you are now and where you want to be in the future

D Agree the objectives needed to contribute to shared local strategic outcomes

Why is this step important?

Using the initial research and consultation from Stage 1, further work may be required to better understand specific barriers and issues in a local place. It can define the underlying causes of lower levels of physical activity within particular communities, areas or target groups. This could include the particular impact Covid-19 has had on activity levels in communities.

Considering the wider whole system with partners such as education, health, adult social care and youth offending can enable a more joined up response to tackling longstanding barriers and inequalities faced by specific groups in the community.

What are the key elements that could be considered for this step?

i) Research specific local barriers experienced by identified target groups and communities

Following the research and consultation in Step 1B, further engagement will be necessary to understand in detail particular issues and barriers to participation impacting on behaviours. The approach to how further consultation is undertaken should depend on the audience. The size of the sample needs to be sufficient to ensure it is representative of the local community.

Target group representatives could be invited to attend a focus group or a consultation meeting, ideally where these communities would regularly attend other activities or sessions.

Working with community workers, housing officers and third sector community leaders can facilitate bringing groups together and establish the context for the consultation. Exploring issues which were cited and highlighted through Stage 1 will develop greater understanding of what impacts on their lives and participation. This will present a chance to explore potential solutions that are developed 'bottom up'. For example:

Potential issues and barriers	Potential target group representatives
• Confidence • Motivation • Age • Injury and illness • Awareness • Family and childcare commitments • Time • Affordability • Physical Environment	• Young single parents • Disabled people and their carers • Young people aged 16–24 from a BAME community • Socially isolated elderly people • Existing active users of clubs/schools/ facilities

Questionnaires or surveys could be completed by target group representatives to provide an alternative cost-effective means of engagement. Suggestion boxes in community settings can also work to provide anonymous feedback and may drive alternative comments. Web pages with comment boxes can also provide a useful source of feedback to a wider audience.

ii) Identify possible opportunities to support behaviour change

Working with cross sector partners who have a real interest in supporting particular target groups within a local community is ideal. It can provide insight and create opportunities to identify a more joined up approach to tackling longstanding barriers to participation. This may be through leveraging existing local networks but may also be creating new relationships and partnerships.

There are also a number of published research guides that will provide evidence that supports behaviour change in relation to levels of physical activity, sport and wellbeing. This will help gain an understanding of the wider barriers and motivators that impact on participation. This evidence can provide a useful context in which to examine specific issues and share common themes. Creating a long list of potential opportunities for behaviour change can be beneficial as an output from the consultation and research. The refinement of this takes place in Stage 3 – Interventions.

What are the key enablers to support this step of the process?

High quality data and analysis from Stage 1

Continued engagement with community groups and stakeholders in regular contact with target groups and communities

Working closely with cross sector partners

Building trust and showing commitment to those parties engaged in this step

What are the key outputs from this step of the process?

Key findings from further research

Prioritised ideas, opportunities and potential long list solutions to support behaviour change

Regular communications showing progress and how target group and stakeholder input is shaping future policy decisions and programming

Further guidance, materials and case studies

- Sport England Research Guide

- Sport England Understanding Audiences

- Tackling Inactivity – What we know: Key insights from our Get Healthy Get Active pilots

- Applying Behaviour Change Theories – Real World Examples from the Get Healthy Get Active Projects

- Measuring Impact – Social and Economic Value of Community Sport and Physical Activity

- Coronavirus – Research into how the coronavirus crisis has affected people's activity levels and attitudes towards exercise

- Sport England – Data (Active Lives)

Step 2B
Consider the contribution from the wider physical and social environment

2

Understand your community and your place

INSIGHT

Why is this step important?

The environment where people choose to be active can be any place or space. Covid-19 has highlighted the full value of parks and open spaces in supporting recovery. How the whole physical environment is described and designed can have a significant impact on behaviour. This is in terms of how the environment is used but also how it is perceived by the community so it is important to explore your local place and its neighbourhoods in detail.

This place-based thinking around the strategically planned physical environment is termed active environment and it can in itself encourage physical activity and drive impact on local strategic outcomes.

A Gather insight from the local community and stakeholders to identify barriers and opportunities for behaviour change

B Consider the contribution from the wider physical and social environment

C Establish where you are now and where you want to be in the future

D Agree the objectives needed to contribute to shared local strategic outcomes

What are the key elements that could be considered for this step?

i) Understanding the local area

Often different parts of a local area, such as parks, streets, leisure facilities, civic space and schools, deliver in silos and are not 'joined up' as a neighbourhood offer.

An active environment can be anywhere in the local area; homes, streets, parks, leisure and community centres and schools are all integral elements.

It should explore these aspects:

- **Physical** – the actual environment, its characteristics, design and how it may have positive or negative impacts on how people use that space (including perceptions)
- **Social/activation** – the activity that takes place in that environment including events and campaigns.

Mapping particular needs and priorities of a local place against the active environment can identify opportunities to contribute to increased participation in sport and physical activity as well as wider local outcomes.

For example, physical design principles like co-location, walkable neighbourhoods and integrated cycle networks can be implemented to drive community cohesion and social development. Activation such as parkrun or community run programmes can further boost physical activity in a space, particularly when targeting certain groups. Covid-19 has highlighted the seasonal opportunities to maximise participation.

Finally, understanding how these environments work together collectively to provide a seamless journey for the user through active travel will ensure the active environment is more than the sum of its parts.

ii) Existing stakeholders who have an interest in the active environment

Working with existing stakeholders who have an interest in the active environment could provide you with the resources needed to explore particular opportunities further.

They could work in planning, regeneration, placemaking, parks and open spaces or street scene etc.

What are the key enablers that could be considered for this step?

Support from the stakeholders with an interest in the active environment

What are the key outputs from this step of the process?

Map of existing and future environments with associated physical activity, sport and wellbeing activation opportunities

Further guidance, materials and case studies

Active Design Guide

Step 2C
Establish where you are now and where you want to be in the future

2
Understand your community and your place

INSIGHT

A Gather insight from the local community and stakeholders to identify barriers and opportunities for behaviour change

B Consider the contribution from the wider physical and social environment

C Establish where you are now and where you want to be in the future

D Agree the objectives needed to contribute to shared local strategic outcomes

Why is this step important?

It is now possible to identify a 'current state position' for a place using the work completed to date. This will then enable your organisation to identify where it wants to be in the future and what interventions can be developed to contribute to local strategic outcomes.

This process can be very powerful in communicating the current strengths as well as where opportunities for improvement lie. Covid-19 has highlighted for many local authorities and their partners the need to consider a review of their strategic approach and this step can play a key role in shaping the future.

This paves the way in the next stage for what interventions can enable achievement of the strategic objectives and contribute to local strategic outcomes.

This is often summarized in a user-friendly needs analysis document at the end of this step.

What are the key elements that could be considered for this step?

i) Consolidate your research and analysis

Bringing all the elements developed to date together into a succinct, easy-to-read document can support the communication of the developing strategic approach and present needs-based evidence to shape future policy decisions, funding applications and investment.

Some local authorities and their partners have called this document a 'needs analysis'. The detailed analysis and supporting information can be provided in a supporting document or appendices. There is a risk that too much information is provided and the target audience is overwhelmed by data, so key core content must be presented to make the biggest impact.

As a guide the needs analysis document may be structured as:

1. **Introduction**
   - Strategic vision
   - Scope of the study

2. **Background**
   - Introduction
   - Physical activity and its benefits
   - Campaigns to increase participation in physical activity, sport and wellbeing
   - Physical activity rates
   - Demographics
   - Priority groups for the needs analysis
   - Existing physical activity landscape
   - The purpose of the needs analysis research
   - What enables behaviour change?
   - Known attitudes towards physical activity

3. **Consultation**
   - Methodology
   - Online survey findings
   - Street interviews findings
   - Stakeholder consultation findings
   - Focus group findings
   - Summary findings and analysis

4. **Barriers to participation**

- Target groups
- Physical environment
- Social environment

5. **Opportunities**

- Introduction
- Confidence
- Motivation
- Age, injury and illness
- Awareness
- Families and childcare
- Time
- Affordability
- Physical environment

6. **Summary**

7. **Considerations for a strategy**

- Introduction
- Potential solutions to meet physical activity needs
- How will the changing population impact future provision?
- Areas for further exploration
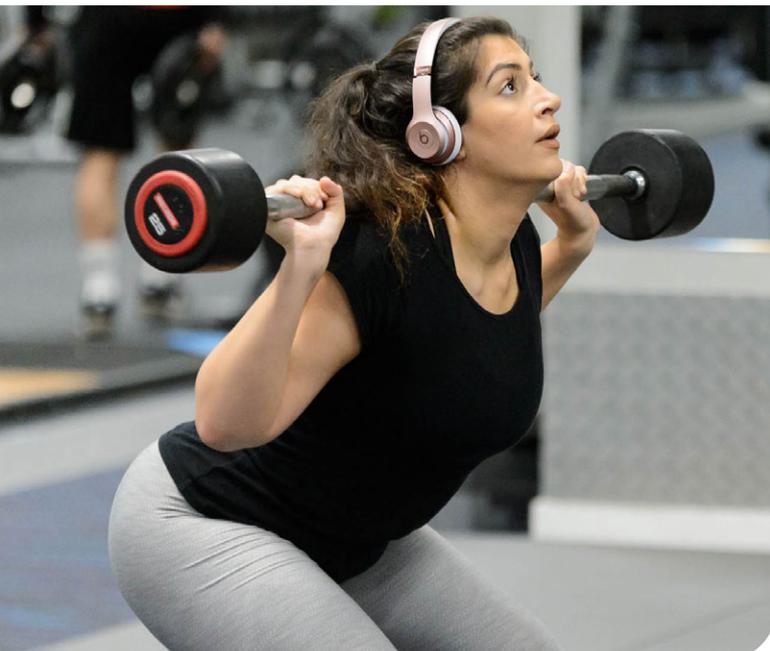
Appendix A: Participation rates

Appendix B: Demographic profile

Appendix C: Sport and physical activity provision

Appendix D: Consultee list

It is important to remember that this step of the process focuses on identifying the priority areas that need to be addressed linked to the wider local strategic outcomes which physical activity and sport can contribute to.

Many local authorities are using this opportunity to redefine their focus from 'leisure' to 'wellbeing' to support the future re-prioritisation of resources.

This step does not explore solutions on how to address these gaps. This will be developed in Stage 3 – interventions.

ii) Identifying a long list of priority areas to address in the future

The potential opportunities highlighted in the needs analysis can be developed into a long list of draft priority areas to support addressing the barriers, issues or gaps. This step should cross reference the areas mapped in Step 1C as well as using insight from Steps 2A, 2B and 2C to help shape the long list of priority areas.

What are the key enablers to support this step of the process?

Establishing a project team to complete the needs analysis

Securing support, time and resources for this process from the steering group

What are the key outputs from this step of the process?

Needs analysis report

Long list of priority areas to address gaps and inequalities, issues and opportunities

Step 2D
Agree the objectives needed to contribute to shared local strategic outcomes

2

Understand your community and your place

INSIGHT

A Gather insight from the local community and stakeholders to identify barriers and opportunities for behaviour change

B Consider the contribution from the wider physical and social environment

C Establish where you are now and where you want to be in the future

D Agree the objectives needed to contribute to shared local strategic outcomes

Why is this step important?

Developing a clear set of evidence-based strategic objectives, will help articulate a clear policy position for the local authority. It will help shape the local authority and its partners' approach to the active environment, exploring and selecting asset-based interventions – both physical and social in the next stage.

By taking senior stakeholders on this journey, there will be a growing enthusiasm and understanding of the potential impact physical activity and sport can have on a place and its wellbeing.

# What are the key elements that could be considered for this step?

i) Undertake an exercise to identify strategic objectives

The steering group should now consider the relative importance of a long list of potential strategic objectives which have emerged through the previous stages. This prioritisation exercise can be supported using agreed evaluation criteria, which is often based around the extent to which:

- the objective is addressing an evidenced need in a community that is experiencing inequalities and barriers preventing regular physical activity
- the objective can be delivered sustainably
- the objective supports wider local strategic outcomes in a place
- the objective can be measured, monitored and evaluated in a cost-effective way.

Covid-19 has placed significant pressures on local authority budgets and this will inevitably result in some difficult decisions having to be made.

It may well be that some current priorities are no longer affordable, important or relevant and thus will not be taken forward. This could result in decommissioning those interventions and reallocating resources to greater priorities as part of Stage 3. This is normal and should not be avoided. The evidence developed will be able to provide strategic leaders with the reason why they wish to stop supporting a particular intervention.

What are the key enablers to support this step of the process?

Needs analysis as an evidence base

Clear and consistent evaluation criteria

What are the key outputs from this step of the process?

List of clear objectives with supporting evidence available as required

Sign off from the steering group

Further guidance, materials and case studies

- A Sport and Physical Activity Strategy for Bristol City 2020-2025

- Active Westminster- Physical Activity, Leisure and Sport Strategy 2018-2022

- Manchester's Sport and Physical Activity Strategy 2019-2028 (MCRactive)

Stage 2 Case Studies

1. Bristol City Council Sport and Physical Activity Strategy

2. Waltham Forest Council - Mini Hollands

Bristol City Council (BCC)

SOPG Diagnostic, Sport and Physical Activity Strategy and Business Case

Description of SOPG-related work

A diagnostic exercise was undertaken using Sport England's Strategic Outcomes Planning Guidance (SOPG) to identify how BCC could secure a sustainable future for its leisure services and align them to the City's overall One City Plan.

Relevant stages/steps

A. The SOPG diagnostic exercise was used to identify the additional work the Council needed to undertake, building on work to date, and was followed by a number of additional workstreams including:

B. **Stage 1 and 2**: Development of a needs assessment and development of a high-level physical activity, sport and wellbeing strategy

C. **Stage 3**: Development of work to support a future leisure investment strategy and development of a management options appraisal

D. **Stage 4**: Development of work to support a future outline business case.

Activities and outputs

Key outputs of the initial diagnostic work included the development of a brief advising the Council on future work needed, an idea on a future programme and an indicative budget for future consultancy work.

The Council then selected a consultant to support them through open competition and subsequently, with light touch input from the consultant, developed a needs assessment to support the workstreams. Based on the needs assessment, BCC commissioned a high-level physical activity, sport and wellbeing strategy for Bristol.

The development of the strategy was informed by subsequent workshops with over 30 key stakeholders from across the City.

Following the development of work to help inform a future leisure investment strategy BCC and their consultants undertook work to support the development of an outline business case for the future of the leisure service in the city.

Outcome

The Council developed a clear direction of travel to support its new Sport and Physical Activity Strategy, with a renewed collective focus on partnership working. This led to the development of a proposed four-stage implementation plan for the Council to realise their ideal procurement strategy.

Following the Covid-19 pandemic – this work is being used and further developed.

Testimonial

" **A methodical process underpinned by needs analysis. Bringing together lots of insight and evidence has enabled Bristol to clearly focus on the contribution that sport and physical activity makes towards achieving the city's strategic outcomes. The identification of place-based interventions through the development of a Sport and Physical Activity Strategy and understanding our facility investment needs has supported Bristol in building a blueprint for future work. Our leisure consultants have supported us through this process bringing with them a range of disciplines and extensive experience. Engaging multiple stakeholders throughout they have been a pleasure to work with."**

Guy Fishbourne Sport & Physical Activity Development Manager

Stage 2 Key learning

- Bristol City Council and its partners used an evidenced-based approach to establish a clear understanding of need across the City. This supported a collaborative process to develop a Physical activity, sport and wellbeing Strategy, clearly identifying strategic objectives and how they can contribute to local strategic outcomes.

- Building in time to engage with key stakeholders and explore opportunities for collaboration, shared learning and development of shared objectives strengthens working relationships and optimises long-term use of resources across a place.

Waltham Forest Council

Mini-Hollands

Background

The London Mini-Hollands scheme was developed as part of the Mayor's Healthy Streets Approach with the aim of making target boroughs as cycle-friendly as Dutch equivalents.

The scheme is specifically aimed at outer boroughs of London, as they are more car-dependent than inner London. The scheme helps to promote active travel, improving residents' health, and reducing air pollution and risks associated with traffic.

The three participating boroughs, Enfield, Kingston and Waltham Forest were each awarded £30 million of funding to transform their local cycling and walking infrastructure.

Activities/outputs

The Mini-Hollands scheme aims at making cycling safer and more pleasant for residents in the participating boroughs. This is done through improvements of the local cycling infrastructure:

• Segregated cycle lanes
• Measures to calm motor traffic
• Cycle hubs
• Community bike rides
• Re-designed town centres.

The scheme also tries to improve local environments for walking by creating new pedestrian crossings and engaging public spaces with seating and green features, such as flowerbeds and trees.

The scheme is currently ongoing, with all interventions due to be completed by March 2021.

Outcomes

A study undertaken by Aldred et al. in 2019 shows an increase in active travel among those living in areas defined as 'high-dose' neighbourhoods. The study defines those areas that have undergone substantial changes to the local walking and cycling infrastructure as 'high-dose'.

Those living in high-dose areas were 24% more likely to have participated in past-week cycling at follow-up.

Furthermore, positive changes in views on local environments were recorded amongst those living in areas with interventions.

The study concluded that the interventions of the Mini-Holland scheme have a measurable early impact on the active travel behaviour of residents as well as perceptions of their cycling environment.

Stage 2 Key learning

- This active environment initiative linked to capital investment in active travel infrastructure highlights the broad range of opportunities to use insight to enable behaviour change and improved activity levels.

- The wide range of outcomes supported through this investment highlight the importance of the wider system to support physical activity and healthier lifestyles.

Identify how the outcomes can be delivered sustainably

Stage 3

Stage 3
Identify how the outcomes can be delivered sustainably

Having used insight to identify strategic objectives, the focus in Stage 3 is on what interventions will have the greatest impact on the strategic objectives to make the greatest contribution to local strategic outcomes.

By considering the active environment, facilities and service interventions across a broad range of place-based provision, this stage will identify the optimal and most sustainable mix of facilities and interventions. It is likely to require investment in resources, officer time and potentially external consultancy support. This up-front investment is valuable and will typically be recovered quickly following implementation.

Local authority commissioners may also wish to review the management model(s) being used to deliver their core physical activity, sport and wellbeing services. This will ensure they have the most acceptable, effective and efficient model for their local area and one that is sustainable and resilient in the future.

Finally, the development of key performance indicators (KPIs) will ensure policy makers and strategic stakeholders can monitor progress and take action when required to ensure interventions continue to have an impact over the long term.

Step 3A
Consider a range of facility and service interventions across the broad range of provision

3

Identify how the outcomes can be delivered sustainably

INTERVENTIONS

A   **Consider a range of facility and service interventions across the broad range of provisions**

B   **Determine the optimal and sustainable mix of facility and service interventions**

C   **Explore and identify effective management option(s) to deliver core facility and service interventions**

D   **Establish the key performance indicators (KPIs) for each intervention**
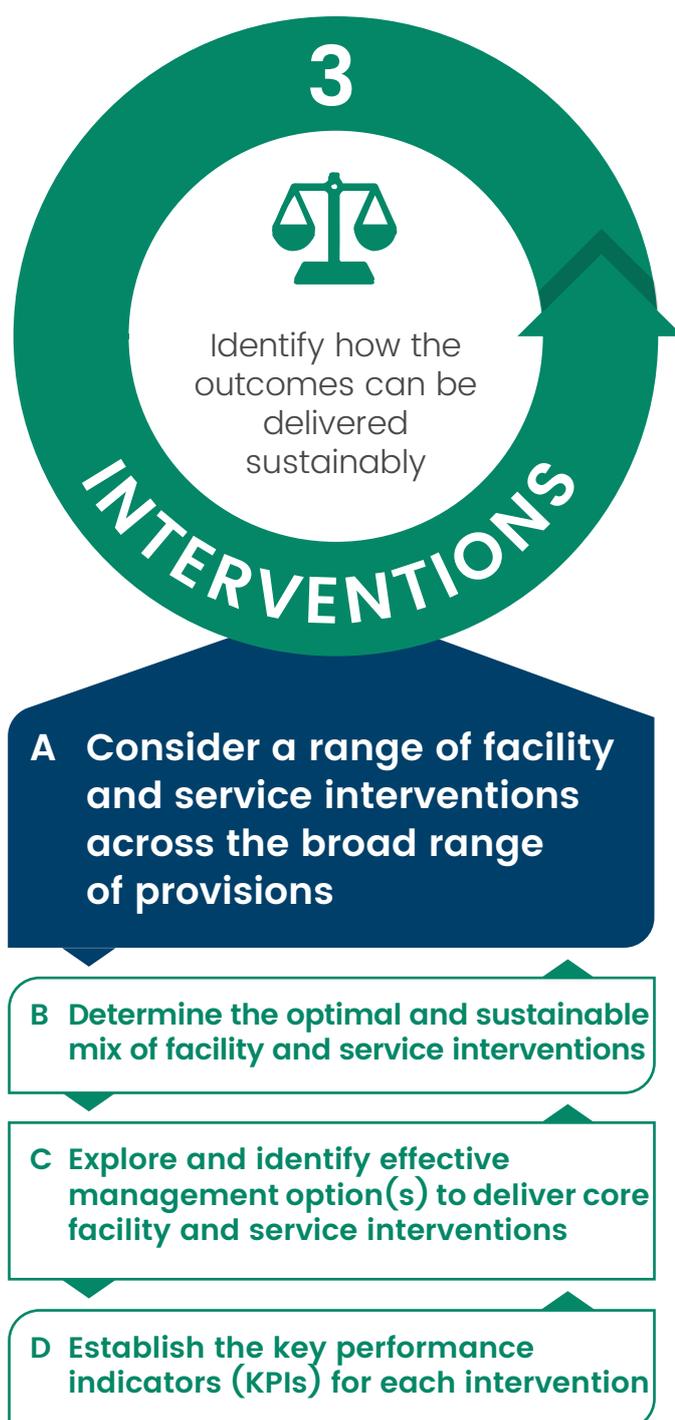
Why is this step important?

Understanding the current range, status and condition of local provision, facility and service interventions is vitally important in light of Covid-19. How they collectively meet the identified needs, objectives and outcomes from previous stages will identify opportunities for improving the integrated offer within a place. Key elements to consider in the context of their location, age and condition, include:

- playing pitches
- outdoor sports and physical activity facilities
- school and community facilities
- the active environment, e.g.
  - infrastructure including walking and cycling routes/facilities
  - parks
  - open spaces
- sports and community clubs
- voluntary groups
- physical activity, sport and wellbeing programmes in
  - community venues
  - schools (primary and secondary)
  - care homes
  - GP surgeries and hospitals
- transport for the community to access programmes or places
- volunteer coordination
- events.

What are the key elements that could be considered for this step?

i) Identifying the resources and specific roles from the council, partners and external advisers to support the process

Working out what level of support is required from which stakeholders and partners as well as understanding the resources needed to undertake this stage will provide important context and boundaries within which to work.

This can feed into the local authority's committee and governance cycles to influence budgets and programming.

It is recommended that Stage 3 be formally project managed given the range of workstreams that may be running concurrently. This can be resource intensive so, if client resources are limited, the local authority and partners as appropriate may wish to consider some external project management support. Key activities where support is often needed include:

1. Audits of services and facilities

2. Consultation with stakeholders, user groups and the community

3. Commissioning of specialist strategies if required (new or updating):

   a   leisure-built/leisure and wellbeing investment (Including feasibility studies)

   b   playing pitches

   c   open space

4. Coordination of input from several departments within the local authority and other key stakeholders

5. Coordination with the leisure operator(s) to access key data and information to support workstreams

6. Workshops, member engagement and wider stakeholder communications.

ii) Exploring indoor and leisure provision

Undertaking a detailed audit of indoor leisure facility provision is vitally important. This is to identify issues and opportunities in relation to supply and demand and will support the exploration of key strategic issues and opportunities that will have been brought into greater focus s a result of Covid-19. This could include:

- facility investment
- facility repurposing
- rationalisation
- co-location/integration of blended services.

These must be carefully considered, based on the insight gained from previous stages and in light of the local strategic outcomes and objectives and short and medium-term financial position in light of Covid-19. Challenges around timing and budgets for co-location of organisations can potentially hinder progress and may not always be achievable. Our Assessing Needs and Opportunities Guidance (ANOG) can provide advice on possible approaches. Developing leisure-built facility strategies can support local authorities in identifying what their investment priorities are at a high level. They can also provide a strong evidence base in developing more detailed leisure and wellbeing investment strategies and supporting business cases informed by more detailed feasibility studies which are covered in Step 3B.

iii) Exploring open spaces and playing pitches

Local authorities are encouraged to have up to date and comprehensive Open Space and Playing Pitch Strategies. This is firstly to support their statutory planning role. Secondly, this is to provide clarity on the issues and opportunities and future actions to support active communities in a local area. Detailed guidance is available from us on how to commission and undertake this work.

iv) Exploring community and education facilities

Community centres, schools, higher education facilities, village halls, civic spaces and places of worship play a key role in providing local indoor infrastructure for active communities. Understanding what facilities are available, their location, offer and condition can support opportunities to improve access and quality of provision in a strategic way, working in partnership with these key stakeholders. This can also support the planning process linked to Section 106 developments and Community Infrastructure Levy (CIL) funding.

Undertaking a simple audit of community facilities and spaces can provide a balanced view of the potential additional indoor local provision. These facilities are often run by town councils, schools, places of worship as well as the local authority. Key areas to include in an audit include:

1. type of facility
2. ownership
3. management arrangements
4. core user groups
5. lease details
6. age and condition
7. opening times
8. programme
9. level of occupancy
10. contact details.

This process can identify and facilitate engagement with existing facilities that could be shared with the community but are currently not available. In particular, new school developments should be identified early to ensure that community use is 'designed in' at concept stage. This enables the facility mix to not only meets the needs of pupils but provide community access to indoor sports facilities and spaces and outdoor facilities. We provide guidance on designing community use facilities and community use agreements.

v) Consider the current mix of facilities and services and what changes are required to deliver strategic priorities and contribute to local strategic outcomes

Exploring the current mix of active environments, partnerships, facilities and services in light of the local authority's response to recovery from Covid-19 informed by its medium-term financial strategy (MTFS) to identify what is affordable in the future is encouraged. In supporting this the local authority should have:

- taken account of the impact of population growth and new housing developments which will impact on supply and demand for facilities and services

- explored opportunities for joined-up management, governance and co-location of services and whether there are opportunities for rationalisation of assets

- explored its approach to partnership working as part of a whole system approach with a view to further strengthening it

- considered service integration and rationalisation in response to their strategic approach to physical activity and sport which should have already been developed

- explored, if appropriate, if there are cross boundary opportunities for shared services or clustering of client or delivery functions and capability

- ensured there is a market or appropriate management models available for each aspect of the services within the optimal mix

- taken account of the local authority's obligations under the Social Value Act (2012).

If revenue savings are required in the future (particularly in light of the local authority's response to Covid-19), this can inform the focus of the Stage 3 work. Understanding the role and contribution of other providers in the locality is important to identify what market intervention would potentially be the most effective to support increasing participation in light of reduced resources. A mixed economy of provision will often be able to provide a more resilient supply of services to a place.

This stage considers the extent to which the existing physical activity, sport and wellbeing service can deliver the identified local strategic objectives and contribute towards local strategic outcomes in the context of significant financial implications on local government and the local economy as a result of Covid-19.

A list of potential service, partnership, facility and active environment infrastructure interventions to best support and deliver the above should be set out.

Service interventions might simply re-focus what is currently being delivered or may involve a more fundamental change of approach. This may be within an updated service specification, changes to existing in-house service delivery, or the use of facility revenue surpluses to deliver targeted neighbourhood outreach and service interventions.

Partnership interventions might identify the current effectiveness of partnership working and collaboration with a view to strengthening it as part of the local authority's strategic approach to collaborative leadership with its partners within the community.

Facility interventions might identify the need for new or refurbished/repurposed facilities or enabling greater community access to existing facilities.

All interventions must be considered within the capital and revenue parameters of the local authority and its stakeholders. The objective is to ensure the best outcomes are achieved through optimized use of limited resources available as a result of Covid-19.

Changes to the current service and facility mix are likely to have long-term revenue implications and need to be understood.

These need to be assessed and prioritised in order of which achieve the best outcomes and are affordable and sustainable.

To deliver or enable new service interventions, local authorities will need to consider:

- partnerships
- funding applications
- re-allocation of resources (decommissioning and commissioning)
- client capacity to commission and oversee such service interventions.

What are the key enablers to support this step of the process?

Resources to support the various work strands

Involvement and input from steering group

Positive relationship with current partner operator and wider partners to identify opportunities for investment, co-location or joint working

Assessing Needs and Opportunities Guidance (ANOG)

Existing planning work and use of planning tools

Condition Surveys of core facilities

What are the key outputs from this step of the process?

Scope of the review of capital and revenue interventions

Identification of resources required (internal and external) to support workstreams

Condition surveys of facilities in scope – mechanical and electrical and structural

Playing pitch strategy

Open spaces strategy

Further guidance, materials and case studies

🔖 [Forward Planning Guide and Complementary Guidance](#)

🔖 [Assessing Need and Opportunities (ANOG) Guide](#)
This guidance has very useful checklists on pages 26-27, 53-54 and 69-70, supporting the three-stage approach of ANOG.

🔖 [Playing Pitch Strategy Guidance](#)

🔖 [Playing Fields Policy and Guidance Document](#)

🔖 [Active Places Power](#)

🔖 [Facilities Planning Model](#)

🔖 [Sports Facility Calculator](#)

🔖 [Affordable Sports Centres Guidance](#)

Step 3B
Determine the optimal and sustainable mix of facility and service interventions

3

Identify how the outcomes can be delivered sustainably

INTERVENTIONS

A Consider a range of facility and service interventions across the broad range of provisions

B Determine the optimal and sustainable mix of facility and service interventions

C Explore and identify effective management option(s) to deliver core facility and service interventions

D Establish the key performance indicators (KPIs) for each intervention
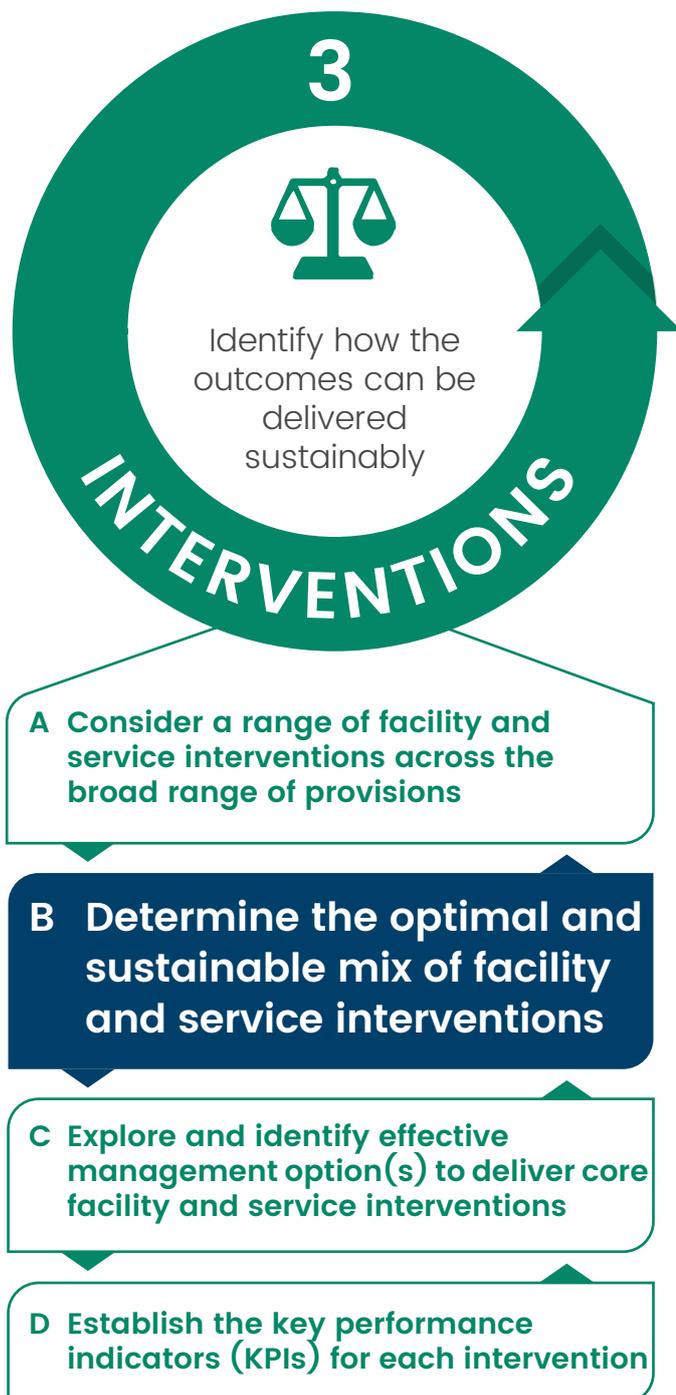
Why is this step important?

Step 3B focuses on refining the list of affordable and sustainable facilities and community-based outreach interventions as part of a broad range of local provision. This step will use insight, financial and non-financial evaluation to ensure that what is being proposed is fit for purpose, affordable and sustainable.

Key drivers for this step will often be primarily financial and this approach seeks to support a reasoned and evidence-based approach to optimize what resources are available as a result of Covid-19.

The service intervention element of this step is also vitally important and links to identifying what revenue-based services supporting active communities, such as community outreach or local grants to key partners, should be considered. This can be within and beyond facility management arrangements or separate and complimentary. Often a key ingredient for success is local collaboration and co-production rather than a top down intervention.

Taking account of the wider market's contribution to facility provision – e.g. private sector, education, third sector will be increasingly beneficial in identifying the right level of market intervention by the local authority.

Feasibility studies may need to be undertaken in this step for core wet and dry provision including sport/leisure/centres and/or repurposing provision to community health and wellbeing hubs.

What are the key elements that could be considered for this step?

i) Feasibility Studies for Capital Interventions

If capital investment has been identified as a priority, often specialist input from project managers, leisure consultants, architects, cost consultants and potentially other technical advisers, is required. A clear brief that explores all facility mix options (new build and/or refurbishment) at a high level is recommended, followed by an options appraisal to refine the list. This will focus limited resources on developing the preferred option.

A feasibility study typically includes the following elements:

Strategic position

- terms of reference
- community needs*
- key stakeholders*

Needs analysis

- demographic analysis
- supply and demand analysis, including competition analysis
- latent demand analysis

Current performance analysis

- impact on local strategic objectives and outcomes*
- user experience
- occupancy levels
- financial performance
- condition survey
- current maintenance costs

Site appraisal(s)

- planning assessment
- geographical locations and target communities
- consultation with planning, highways and transport authorities

Facility mix options development

- essential mix
- desirable mix
- site options linked to essential and desirable mix
- high level design/layout options
- high level indicative business plans for all options
- high level construction and development costs for all options

Facility mix options appraisal

- options appraisal to select preferred option(s)

Business plan

- income and expenditure
- fittings fixtures and equipment
- lifecycle and maintenance costs
- detailed construction and development costs
- funding and financing options

Construction procurement options

- options available
- options appraisal
- construction option recommendation and timescales

Recommendations and next steps

- recommendations
- implementation plan
- costings
- design development programme
- construction programme.

If Stages 1 and 2 have been completed comprehensively, the feasibility study can include a summary of those relevant findings. If not, it is recommended that these stages are revisited to present a solid basis for the ongoing work. These are highlighted with an asterisk*.

ii) Identifying the service mix

Using the evidence and insight developed in previous stages enables the identification of non-facility based interventions to support local communities whose needs cannot be met through core facilities.

Key considerations for this element include:

- the alignment with objectives identified in Stage 2
- the geographical locations and communities where services are to be targeted
- the scope and scale of intervention
- local community delivery capacity
- partnering opportunities
- the indicative resource requirements
- monitoring and evaluation

Assessing the relative resource implications of this service mix is important to ensure that sufficient resources are allocated to enable this aspect of the high-level service design and any co-production to support effective commissioning.

This can be further refined and explored in Stage 4 – Commitment through the business case. This may need to involve a range of stakeholders, particularly if services are to be co-produced by a number of partners, in the context of the management model selected, which will determine if the local authority plans and delivers services directly (in-house) or commissions it indirectly.

iii) Securing 'buy in' to the desirable optimal mix

It is recommended that the optimal mix of facilities and associated lifecycle costs, any proposed facility investment and services provision is presented to the steering group to consider and agree. The optimal mix is likely to include some, or all, of the following elements:

- active environment
- open spaces
- playing pitches
- leisure facilities
- partnerships
- community and education facilities
- development and community outreach and service interventions

This creates an opportunity to further reinforce the benefits of undertaking a more holistic approach with the steering group, prior to the consideration of the management model(s) (Step 3C) and development of key performance indicators (Step 3D).

It is important to note that these interventions can be refined and developed further in Stage 4, through the business case, but the overarching direction and provision should be approved at this stage.

What are the key enablers that could be considered for this step?

Securing support from key stakeholders in shaping service interventions

Specialist support for producing feasibility studies

Specialist support for co-designing/producing community outreach and service interventions

What are the key outputs from this step of the process?

Community outreach and service Intervention co-design

Feasibility studies

Management Options Appraisal

Committee report detailing optimal mix of facility and service interventions for approval to progress to Stage 4

Further guidance, materials and case studies

- Active Places Power

- Facilities Planning Model

- Sports Facility Calculator

- Affordable Sports Centres Guidance

Step 3C
Explore and identify effective management option(s) to deliver core facility and service interventions

3

Identify how the outcomes can be delivered sustainably

INTERVENTIONS

A Consider a range of facility and service interventions across the broad range of provisions

B Determine the optimal and sustainable mix of facility and service interventions

C Explore and identify effective management option(s) to deliver core facility and service interventions

D Establish the key performance indicators (KPIs) for each intervention
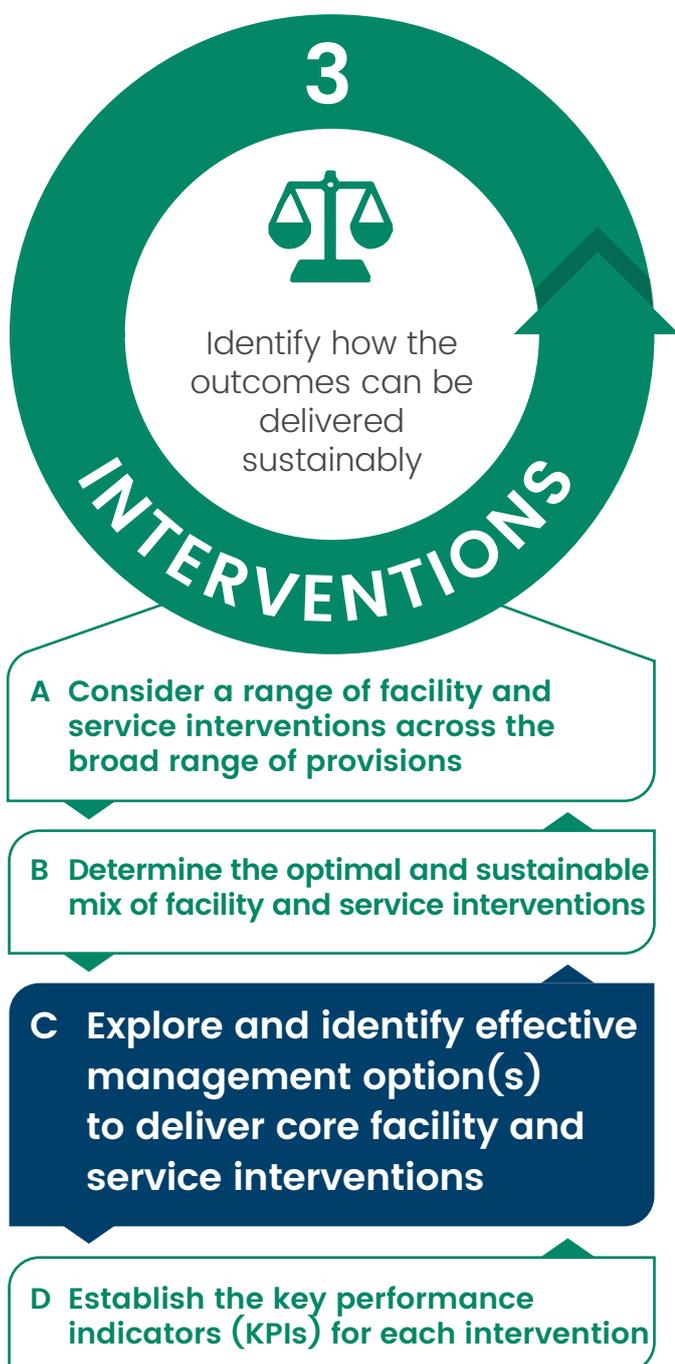
Why is this step important?

The core management models to manage core leisure facilities and deliver outreach services supporting active communities are:

- in-house
- local authority trading company
- outsourced to an external partner.

Each of these models have specific features and fiscal advantages/disadvantages that will need to be explored in line with the local authority's policy and strategic objectives.

Key areas of difference between the models include:

- risk transfer
- financial performance
- client function
- control
- ability to cross-subsidise neighbourhood outreach services.

Some local authorities may already be partnered in a long-term agreement with a local leisure trust or have an existing operating long-term contract with an external partner operator with several years to run.

This stage is only relevant for those clients with the potential of implementing a new management model arrangement within three years.

Due to increased pressure on local authority funding exacerbated by Covid-19, reviews of management models are often seen as a key element of service review, but this needs to be balanced with the broader benefits and contribution to the wider corporate agenda.

Often the reaction to the need to reduce costs (e.g. as a result of Covid-19) results in an immediate focus on management options, when the first consideration should be on the facility and service mix.

Following the Leisure Services Delivery Guidance, a management options appraisal process will support a considered approach and optimise the potential of balanced financial and social outcomes.

What are the key elements that could be considered for this step?

i) Confirm the Council's legal position on Management Model Options and Procurement

The local authority may choose to confirm the legal options available to it through specialist legal advice should it wish to consider selecting an alternative management option in the future or extend current arrangements with its existing partner. This advice would enable the council to understand the relative legal risks of any route it is considering and whether procurement is required or necessary with regard to those options.

During Covid-19, there were examples where local emergency powers were given to local authorities to 'flex' procurement regulations to enable quicker decision making in emergency situations where service delivery has been disrupted.

ii) Confirming the Scope of Services for the Management Model Options Appraisal

The local authority will need to confirm the scope of the core services for which they want to include in the management model options appraisal. This should have been developed in the previous step (3B).

iii) Comparing the relative advantages and disadvantages of models

Each option has particular features, advantages and disadvantages. It is recommended that external independent advice is sought to explore this for local authority senior officers and members' consideration through a formal management model options appraisal exercise. The management model options appraisal should be bespoke and focused on a local authority's priorities for the service and thus the key areas of comparison should be adapted for that local authority. It will be important to base this exercise on facts and use this as an opportunity to address any perceptions or 'myths' about certain models.

iv) Undertaking a Management Model Options Appraisal

The local authority should undertake the following key steps:

- developing a shortlist of options
- financial modelling
- carrying out analysis of the options
- carrying out evaluation of the options.

An evaluation panel team can carry out the management model options appraisal. The panel is typically made up of:

- senior officers
- members including the service portfolio holder
- independent specialist consultants to provide technical guidance
- internal audit to ensure impartiality and transparency.

What are the key enablers to support this step of the process?

Full and clear understanding of Stage 1 and 3A and 3B

Independent approach to management options appraisal

What are the key outputs from this step of the process?

Management Options Appraisal

Scope of facilities and services to be included

Financial and non-financial evaluation criteria

Shortlist of options to be evaluated

Financial models of each option

Analysis of shortlisted options

Evaluation results

Recommendation of a preferred option

Further guidance, materials and case studies

The Outsourcing Playbook

Step 3D
Establish the key performance indicators (KPIs)

3

Identify how the outcomes can be delivered sustainably

INTERVENTIONS

A Consider a range of facility and service interventions across the broad range of provisions

B Determine the optimal and sustainable mix of facility and service interventions

C Explore and identify effective management option(s) to deliver core facility and service interventions

D Establish the key performance indicators (KPIs) for each intervention

Why is this step important?

Identifying a baseline position of current performance across your place is critical. Defining future targets to collectively work towards will provide a clear performance management framework to track progress. This can be used to measure the effectiveness of facility provision, partnerships, the active environment, community outreach and service interventions in supporting active communities.

This process will require an investment of time and resources, working closely with stakeholders and partners, to develop meaningful local and national KPIs (to support benchmarking and the sector feeding back to government) linked to objectives identified in Stage 2, and the optimal mix of facilities, community outreach and service interventions identified in Stage 3.

This will ensure that what gets measured and monitored is implemented and can be improved and adjusted over time to meet changing needs and priorities.

What are the key elements that could be considered for this step?

i) Development of KPIs with key stakeholders

The local authority and leisure operator partner(s) will need to refine and agree the overall performance management framework relating to their contract/management agreement/service level agreement.

This process should include a detailed examination of the KPIs to ensure both parties fully understand them. The leisure operator and other delivery partners should be able to confirm precisely how they are to be measured and reported. There should be a particular focus on those KPIs which demand a more sophisticated approach to measuring participation levels in less active or inactive sections of the community.

ii) Development of place based KPIs

Assessing the progress of key contributors to supporting more active communities in your place is also of real value. This can be specific to your local authority area or based on neighbourhoods. These could include KPIs which track:

- quality of parks and open spaces
- quality and utilisation of playing pitches
- numbers and relative 'health' of sports and voluntary organisations
- quality and numbers of community facilities made available to support active communities.

Key considerations are as follows:

- establish the baseline performance for the KPI (if a new KPI is selected, it may require additional data sources/partner support)
- set a realistic target to be achieved over a period of time e.g. one, two and three years, five years
- ensure core data can be collected consistently and efficiently to avoid resources being disproportionately focused on collection rather than analysis
- have a mechanism in place to test the validity of data being used at key intervals to ensure its integrity
- consider a review mechanism or progression of that KPI over time to support increased impact
- be prepared to adjust targets and understand the causal factors for a KPI which is not being achieved.

iii) Agreement of KPI's

The steering group should review and sign off the KPIs. It should check and challenge the link between the interventions, strategic objectives, local strategic outcomes and their associated KPIs to ensure there is a 'golden thread' or clear link running throughout. The group should also challenge the methods proposed to ensure they are robust and will provide effective monitoring and evaluation on a regular basis.

What are the key enablers to support this step of the process?

Positive relationships with key partners, in particular the partner operator, to access data

Practical and realistic KPI design process linked to a local authority's and partners' capacity and resources to monitor and report

What are the key outputs from this step of the process?

Agreed set of KPIs with clear links to interventions that support the strategic objectives

Agreed client-side resources required to support performance monitoring with partner agreement and commitment

Agreed approach for baselining new KPIs in partnership with the partner operator and other delivery partners

Further guidance, materials and case studies

📌 [A guide to developing a local outcomes framework for culture and sport](#)

Stage 3 Case Studies

1. Sheffield City Council
2. Barnet Council
3. Buckinghamshire Council, Chiltern Area

Sheffield City Council

SOPG diagnostic, Leisure Investment and Facilities Review, and business case

Description of SOPG-related work

- Review of Sheffield City Council's leisure and entertainment portfolio using Sport England's Strategic Outcomes Planning Guidance (SOPG).

Relevant stages/steps

A. In April 2019, a highly confidential review of Sheffield City Council's leisure and entertainment portfolio was conducted to explore a new vision for leisure and entertainment across the City. The internal review was supported by an assessment of facility investment opportunities for Sheffield's venues and a management options appraisal.

B. Building on the previous review of Sheffield's leisure and entertainment assets and services, an Active Sheffield Strategy was developed. The Strategy presents a bold and ambitious vision for Sheffield capturing the imagination of residents, businesses, visitors, partners, and stakeholders.

C. A key recommendation arising from the review of Sheffield's leisure and entertainment portfolio was the development of a Leisure Investment and Facilities Review to support the future transformation of the City's services.

D. The Leisure Investment and Facilities Review is based on a review of key needs and opportunities for investment into strategic leisure facilities, a review of indoor bowls facilities and golf courses across the City and a high-level vision for sports and leisure services for the next 10 year.

E. The strategic work is supported by the development of a Business Case for the transformation of Sheffield's leisure and entertainments facilities and services – building on the previously developed Leisure Investment and Facilities Review.

Activity and output

1. A new and ambitious vision for the next 30 years, building on existing ideas and visions of the Council and key stakeholders

2. Development of an Active Sheffield Strategy, establishing a clear policy position for the Council and informing strategic priorities for investment and partnership

3. Visioning, Strategy, and Investment workshops with key stakeholders informing the development of a Leisure Investment and an Active Sheffield Strategy

4. Facilities Planning Model review for Swimming and Sports Halls

5. Detailed review of leisure assets and feasibility work on selected strategic leisure sites, informing the development of facility mix options for the Council to support sustainable delivery of leisure services moving forwards

6. Development of a Leisure Investment and Facilities Review for Sheffield following an extensive review of the City's leisure, entertainment and events assets and services

7. Development of a business case, building on the Leisure Investment and Facilities Review, for the transformation of facilities and services – including a review of management options for the Council.

Stage 3 Key learning

- The consultants supported Sheffield City Council in the development of a Leisure Investment and Facilities Review

- As recommended in the SOPG, the Leisure Investment Strategy is supported by a detailed review of leisure assets and facility mix options for the Council.

Outcome

- The Covid-19 pandemic presents an opportunity for Sheffield to reflect on its sporting history and develop its future high-level Vision for an active city, building on the work undertaken.

- Sheffield City Council has established a clear and ambitious Vision for the next 30 years and an Active Sheffield Strategy to support future investment and policy decisions

- Sheffield's Leisure Investment and Facilities Review was reviewed, adopted by the Council, and is now supporting the development of a business case for the transformation of leisure facilities and services across Sheffield

- The Review has identified a package of sustainable development options for Sheffield's Council Members to consider.

Testimonial

> "Sheffield City Council are embarking on an exciting journey to transform our leisure estate, improving sustainability and increasing the role that facilities play within communities.
>
> Supported by consultants we have used the SOPG to ensure that our future plans are outcome focused and support the wider strategic outcomes of the Council and its key strategic partners. This includes the development of a Physical Activity Strategy which will set out the Councils approach to Sport and Physical Activity in the City.
>
> In order to progress this work, it has been important to gain a clear understanding and insight of our current position, this work began with a review of our existing assets and their future investment needs. Consultancy input has been invaluable in supporting the Council to develop long term business plans supported by facility planning modelling and comparable facility performance. We are now testing a range of scenarios and exciting development options which will feed into our decision making processes during 2021."
>
> **Tammy Barrass, Head of Partnerships and Projects (Culture, Parks & Leisure Service)**

Stage 3
Case study 2

BARNET LONDON BOROUGH

London Borough of Barnet

Services Specification and Performance Management Framework

Description of SOPG-related work

- In 2017, the London Borough of Barnet commenced procurement of a new leisure management contract which included an objective to ensure that: 'Public health outcomes are reflected within a new leisure management contract, through a holistic approach that is not specific to interventions.'

- As part of this, a key element was to develop a performance management framework that would demonstrate the 'measurable contribution from physical activity, sport and wellbeing to the health and wellbeing of the residents of Barnet'.

Relevant stages/steps

A. Stage 2C: Establish where you are now and where you want to be in the future.

B. Stage 2D: Agree the objectives needed to contribute to shared local strategic outcomes.

C. Stage 3: Identify how the outcomes can be delivered sustainably.

D. Stage 3A: Explore and identify an effective management model.

E. Stage 3D: Establish the key performance indicators.

Activities and outputs

1. Designed a procurement process and developed contract documentation which included a performance management system that would enable the provider to demonstrate their contribution to local strategic outcomes across all aspects of the service.

2. Linked the local strategic outcomes to the national Public Health Outcomes Framework, reflective of indicators.

3. Recognised a whole system approach which identified the role of leisure in supporting health and wellbeing.

4. Determined approx. 33 indicators across four health outcomes including an additional domain relating to performance and improvement.

5. Created a system which includes indicators, outcomes, performance standards and measures (KPI).

6. Compiled baseline data that supports each indicator.

7. Identified targets for each indicator at agreed timescales.

8. Applied a percentage weighting against each indicator, priority indicators are included as part of a commercial scorecard.

9. Utilised benchmarking to support relative performance against family groups and nationally.

10. Developed a reporting mechanism, e.g. dashboard, to support decision making and partnership working.

Outcomes

- London Borough of Barnet developed a Services Specification that is built around four headline public health outcomes, and their corresponding public health objective, linked to the national Public Health Outcomes Framework, and a fifth domain of performance and improvement linked to service delivery, quality assurance and continuous improvement.

  The five domains are:
  1. Wider Determinants of Health
  2. Health Improvement
  3. Health Care and Prevention
  4. Health Protection
  5. Performance and Improvement.

- The five outcomes are supported by approx. 33 indicators which include inactivity, excess weight, prevention and management of long- term conditions, such as recorded diabetes, support for carers and those cared for.

- As part of the procurement process, bidders were required to complete a series of method statements which related to each domain areas and the corresponding indicators. This is a less traditional approach compared to submitting 10 methods statements which can often relate to more operational aspects of service delivery.

- The leisure management contract enables the provider to demonstrate the contribution to outcomes across all aspects of the service, removing expectation for additional funding for targeted initiatives and the importance of considering this as part of a standard delivery model.

- This is linked to the four domains of the national Public Health Outcomes Framework and a fifth domain of performance and improvement linked to service delivery, quality.

- This approach has contributed to early successes which include the introduction of a Borough wide 'Fit and Active Barnet' (FAB) Card which coincided with the launch of a FAB Campaign in July 2018 and a digital FAB Hub, offering information, advice and guidance on health and wellbeing. Within 10 weeks of the campaign launch 9000 residents had signed up for the FAB card and as at March 2020 over 27,000 residents were registered.

Local authority contact
Cassie Bridger, Assistant Director: Greenspaces & Leisure

Stage 3 Key learning

- Barnet Council, using a joint commissioning approach through public health and other directorates, identified an outcomes-based approach to its leisure contract to support its Public Health Outcomes Framework.

- The KPIs that were developed are supported by an agreed approach to baselining and setting clear targets.

- Performance management and continuous improvement was embedded into the overall approach to commissioning.

Buckinghamshire Council, Chiltern Area

Strategic Outcomes Planning Model

Description of SOPG-related work

- The initial driver to commence the planning model was the need to develop The Chiltern Lifestyle Centre, a new state-of-the-art leisure and community facility in Amersham to replace the existing Chiltern Pools and Gym.

Relevant stages/steps

A. **Stages 1-4**: In order to understand the current and future facility and service requirements for Chiltern in relation to physical activity, sport and wellbeing, the consultant undertook a full SOPG review

B. **Stages 1-4**: The review was undertaken to ensure any future investment into facilities and services will directly impact the delivery of the Council's local strategic outcomes and priorities.

C. **Stages 1-4**: Whilst the planning document is aimed at the district as a whole, because of the Council's priority to replace Chiltern Pools and Gym, there has been a specific focus on Amersham.

D. **Stage 2**: The planning model considered the local and national context, under-represented groups, health priorities in the area, consultations findings, identification of key stakeholder groups, outlined facility interventions required, design options and business models.

E. **Stage 3**: The facility mix will include: a 160 station fitness suite with four studios, a spa, an eight-lane 25 metre swimming pool, a diving/teaching pool, a children's splash pad area, soft play, clip and climb, a four badminton court sports hall, squash courts, a climbing wall, library, café area and community centre.

Activities and outputs

- **Stage 1** – Considerable collaboration and consultation between stakeholders from the youth centre, library, and community centre to ensure that their requirements, both facility and service, were fully considered in the vision and planning of the new Lifestyle Centre. This resulted in a 'street' design through the Lifestyle centre that connects all facilities with a social area and café. This will encourage connections between people using different parts of the building, and also attracting users into new activity areas.

- **Stage 2** – Insight focused on those residents most in need that were not taking part in physical activity within the Chiltern area and how new service provision could influence their attitudes and the barriers they faced. Small focus groups were held with a variety of groups; older people, young families and older children to understand in detail the issues they faced.

- **Stage 3** – The service interventions stage was developed in parallel to the procurement of an operator to manage the new Lifestyle centre. Whilst the service interventions were developed from the insight gained from Stages 1 and 2, the timing was such that the prospective operators were challenged to set out their approach to increase activity levels and work with stakeholders of the Lifestyle Centre as part of their tender submission. This led to the relevant service interventions forming part of the Services Specification and commitments by the preferred operator subsequently, becoming their KPIs. This has provided a clear thread between strategic outcomes through to the operator KPIs which can be monitored and reviewed on an on-going basis.

Outcome

- The report has been successfully submitted and signed off by the Council and Sport England and a successful expression of interest was submitted in summer 2019. A £1.6m capital fund application was secured from Sport England. Since working on the SOPG, the consultant was appointed to manage the procurement process for an operator of the new Chiltern Lifestyle Centre, which is in progress.

- The Council is working towards a completion date of the new Chiltern Lifestyle Centre by 2021.

Testimonial

> " In 2018 the consultant was commissioned to deliver a Strategic Outcomes Planning Guidance Report for Chiltern District Council, the driver for the planning model was the need to develop the Chiltern Lifestyle Centre, a new state of the art leisure and community facility in Amersham. The final SOPG report has resulted in a successful EOI submission to Sport England, and £1.6m grant secured. The consultants did a great job of pulling together the Strategic Outcomes Planning Guidance Report which was instrumental to securing the grant."
>
> **Paul Nanji, Leisure and Communities Manager**

Stage 3 Key learning

- The facility mix for this leisure and community facility was established after careful consideration of the national and local context, local health priorities and shaped through detailed consultation.

- The design of the facility has been influenced by multiple stakeholders to optimize the impact of the facility and support behaviour change. This was driven by the input from future users: older people, young families and older children.

Secure commitment to strategic approach and delivery of outcomes

4

COMMITMENT

Secure commitment to a strategic approach and delivery of outcomes

Stage 4

Stage 4
Secure commitment to strategic approach and delivery of outcomes

In light of Covid-19, many local authorities and their partners are revisiting their approach to leisure services and facility provision and in many cases will be prompted by the crisis to fundamentally realign services to protect priority local provision.

This may necessitate facility rationalisation and investment.

Some local authorities are exploring transforming traditional leisure provision towards community wellbeing hubs and more targeted interventions. This is often combined with a more collaborative partnership-based approach linked to a mixed economy of provision.

This final stage provides a holistic and comprehensive view of the local authority's strategic approach and the associated financial and resource implications.

It brings together all the key outputs from previous stages into a business case. This stage will provide clarity and confidence that implementation of the proposed mix of provision, facilities (and any investment), neighbourhood outreach and service interventions is affordable, achievable and sustainable.

Linked to this is identifying how any strategic approach will be overseen and supported through a fit for purpose governance structure. This will include the monitoring and evaluation of facility operational performance, support for and effectiveness of partnerships, neighbourhood outreach and service interventions.

The Leisure Services Delivery Guidance will provide support in establishing an approach to oversight and governance.

A key step in this stage is the identification of resources to support implementation. This could relate to governance arrangements, role of client/commissioner, external or additional internal support for project managing facility developments, commissioning services, service redesign/transformation and specialist support to support any change of management model.

This approach will enable the local authority, leisure trust or Active Partnership to confidently move towards implementation of its strategic approach having secured stakeholder commitment and 'buy in' from its elected members.

Step 4A
Agree a sustainable and effective business case

4

Secure commitment to a strategic approach and delivery of outcomes

COMMITMENT

A   Agree a sustainable and effective business case

B   Identify resource requirements to support implementation

C   Secure stakeholder commitment and move to implementation

Why is this step important?

Developing a comprehensive business case, which brings together previous stages, will provide robust evidence for final review and agreement to implement the strategic vision and approach. The business case needs to satisfy a case for change and optimise value for money in terms of economic, social and environmental benefits. It needs to be financially viable and achievable.

What are the key elements that could be considered for this step?

i) Business Case

The business case will be informed and supported by the elements completed in Stages 1-3:

- a clear evidence base
- cross sector engagement and commitment
- local insight
- approach to partnership working
- optimal range of facility and service interventions (possibly proposed facility investments/rationalisation decisions)
- clarity on management option
- client/commissioner role for implementation and monitoring.

There should now be no new elements to consider at this point prior to implementation.

Key elements of the business case need to be tailored and can include:

1. **Introduction and background**

2. **Strategic approach**
   Outlines overarching strategic context including:
   - summary of local insight
   - summary of local strategic plans/ of key partners
   - key drivers for the organisation
   - vision
   - local strategic outcomes
   - local strategic objectives
   - Action Plan and KPIs.

3. **Economic impact assessment**
   Demonstrates that the proposed interventions will provide value for money in terms of:
   - direct impacts e.g. number of jobs created
   - indirect impacts e.g. number of jobs created in the supply chain
   - induced impacts e.g. spending by the people employed on the project.

Our Economic Value of Sport Indicator provides useful guidance and information.

4. **Commercial case for Investment in facilities (if relevant)**

Sets out an affordability picture based on:

- state aid issues
- risk assessment and mitigation
- capital projects – whole life costs
- management options appraisal*
- management model proposed*
- procurement strategy (if applicable)*
- capital funding and borrowing calculations
- revenue business plan(s) including projected costs of a leisure management contract (if applicable)*.

5. **Commercial case for Investment in revenue based service interventions (if relevant)**

Sets out an affordability picture based on:

- budgetary considerations
- risk assessment and mitigation
- management model proposed
- procurement strategy (if applicable)*
- revenue business plan(s).

6. **Delivery plan**

Highlights the practical steps required to achieve the agreed approach, including:

- programme management/project management arrangements and resources*
- procurement process (capital projects and management models if applicable)*
- timetable and key milestones*
- programme of workstreams*.

7. **Summary and recommendations**

Detailed items such as a needs analysis, physical activity, sport and wellbeing strategy, financial modelling, cost plans, designs etc. can be included as an appendix.

These sections with an asterisk (*) are covered in detail in our Leisure Services Delivery Guidance.
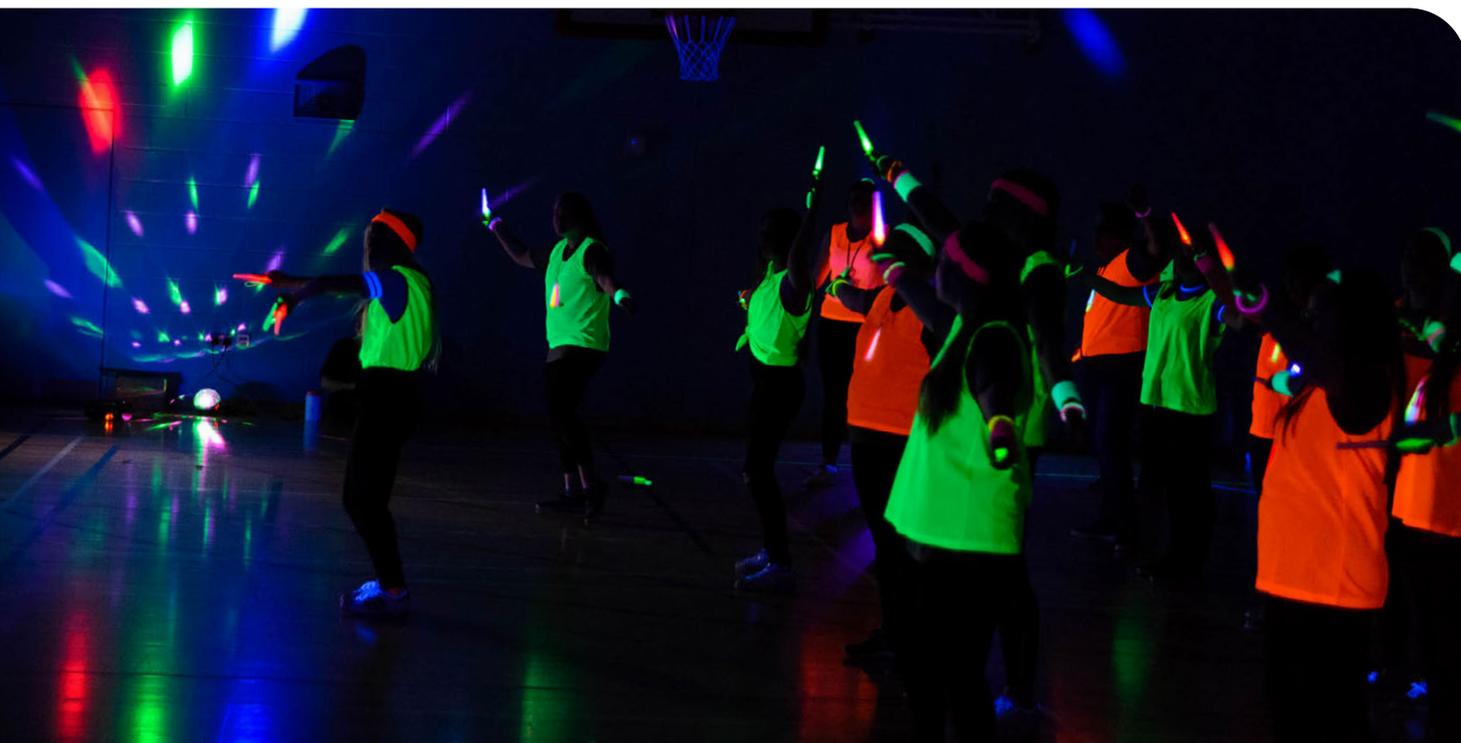
What are the key enablers to support this step of the process?

High quality data and analysis from Stages 1, 2 and 3

Direct involvement from local authority finance team to ensure compliance with financial regulations and standing orders

Securing time and resources from the steering group, using external consultant support if required

What are the key outputs from this step of the process?

Full Business Case

Step 4B
Identify resource requirements to support implementation

4

Secure commitment to a strategic approach and delivery of outcomes

COMMITMENT

A Agree a sustainable and effective business case

B Identify resource requirements to support implementation

C Secure stakeholder commitment and move to implementation

Why is this step important?

Looking ahead to implementation of any service or facility interventions the local authority and partner(s) may require additional internal and external specialist support, depending on the future workstreams that are being considered. Additional support needs to be carefully explored and costed and built into the business case.

This step is covered in detail in the Leisure Services Delivery Guidance.

What are the key elements that could be considered for this step?

i) Resources and support

Additional support may be identified for:

- project management of facility developments (if applicable)
- procurement support for outsourcing services (if applicable)
- planning service redesign of transformation (if applicable)
- commissioning services (if applicable)
- developing partnership arrangements
- developing new service specifications and related performance management frameworks.

What are the key enablers that could be considered for this step?

Direct involvement of budget holders

Specialist support to scope workstreams and cost external support

What are the key outputs from this step of the process?

Committee Reports (or equivalent) for review and agreement by the local authority

Step 4C
Secure stakeholder commitment and move to implementation

4

Secure commitment to a strategic approach and delivery of outcomes

COMMITMENT

A **Agree a sustainable and effective business case**

B **Identify resource requirements to support implementation**

C **Secure stakeholder commitment and move to implementation**

Why is this step important?

Securing formal sign-off of the business case and proposed implementation programme will enable the local authority to progress with the full support of its cabinet/members. It will provide clarity for all partners on the scope and objectives moving forward. It will also confirm what is out of scope.

What are the key elements that could be considered for this step?

i) Understanding the scrutiny, overview and approval process

Early engagement with the Council's democratic services team (or equivalent) to understand the approval process and respective timescales to support the project is strongly encouraged. These additional elements will need to be built into the overall business case programme, making allowance for steps such as Scrutiny and Overview, call in or formal ratification by Full Council.

i) Committee Report

A full report should be presented to cabinet/ members for approval that summarises the key elements of the business case. It is important to ensure that cross sector partner support has been secured in advance and senior officers have been briefed ahead of any meetings.

At this stage members should have been thoroughly briefed, this exercise should be procedural and there should be 'no surprises'.

What are the key enablers that could be considered for this step?

Steering group and member approval

Securing committed funds/budget for investment

Agreed contributions to medium term financial strategy, subject to further affordability analysis in the implementation stage

What are the key outputs from this step of the process?

Approval from cabinet/members to progress to implementation

Further guidance, materials and case studies

Stage 4 Case Studies

1.   North East Derbyshire Council
2.   Nuneaton and Bedworth Borough Council
3.   Salford City Council
4.   Great Yarmouth Borough Council

North East Derbyshire District Council

Sharley Park Active Community Hub

Description of SOPG-related work

- Using the Strategic Outcomes Planning Guidance (SOPG) to develop the evidence base for a community activity hub. This comprised of co-located formal sports facilities, outreach health services, a library provision, Citizens Advice, Council Contact Centre, a café, shared meeting room facilities, complementary local business and social space linked into the active environment of Sharley Park, including a new floodlit 3G, Disc Golf and off road cycling provision.

- The Active Community Hub will include a 6-lane x 25m pool, a learner pool and moveable floor, 4 badminton court sports hall, a 120 station fitness suite, and two studios, soft play and a children's gym, and outdoor play area

- All of the above is located within Sharley Park – a 10 hectare public park, located on the edge of the town centre, including 2 cricket pitches, 2 football pitches, a children's play area, bowling greens and a community centre.

Relevant stages/steps

- **Stages 1- 4**: Building on insight development of the SOPG approach.

Activities and outputs

- The SOPG has shaped and supported the development of the Active Community Hub.

- NEDDC has re-focused its whole approach to physical activity provision in Clay Cross through this process, moving from a leisure centre refurbishment to a co-located Active Community Hub.

- This is further supported by a new Physical Activity and Lifestyles (PALs) initiative to work in the community and engage people who are furthest away from physical activity and work with them one-to-one to remove some of those known barriers to physical activity.

- The SOPG output is a clear direction of travel for physical activity provision in Clay Cross, embedded at the core of the Town's Fund vision for change.

Outcome

- The proposed Active Community Hub is supported by NEDDC and has been adopted as part of the commitment to the Town's Fund change programme for Clay Cross.

- The proposed co-located Community Activity Hub has formal commitment from all partners who will comprise the Hub and is aligned to health and wellbeing priorities for the area, district and county.

- The insight developed for Clay Cross clearly illustrates that a traditional leisure centre is not a priority for the local community; they need a social environment which makes them feel welcome and involves and engages them with physical activity inside and outdoors.

- Developing a response to these findings has been shaped through the SOPG approach.

- The project addresses the significant challenges around promoting healthy lifestyles in Clay Cross which are impacting on community health, aspirations, and productivity. The delivery of a new active community hub is a key priority arising from consultation (850 users and non-users responded to engagement in support of a new active community hub).

- Complementary development and improvements in Sharley Park will add to the physical activity offer further promoting active lifestyles and an increase in visitors to the town.

- Translating need into the appropriate and sustainable places and spaces has created a wide strategic partnership at local level, driven by the fact that all organisations are working to reduce health inequalities in Clay Cross. This sense of shared purpose provides the rational for such a complex co-location.

- Development of the Community Activity Hub will also enable activation of the park where the Hub will be located, in partnership with NGBs, local clubs and other Town Fund projects.

Testimonial

" **Although the project is yet to commence on site, the partnership approach and acknowledgement from all partners that we are all dealing with the same 'customers' has driven the project brief/outcomes to become a genuine hub which will improve the health and well-being of the community.**

The barriers to physical activity are wide and varied but common with other lifestyle improvements such as securing employment or further education. Working together on common barriers produces improved outcomes for both residents of Clay Cross and the partner organisations.

The PALs project, along with the development of the facility, is already changing people's lives and getting them closer to physical activity. The SOPG approach has provided the structure and process to focus on the common goals which will improve the health and wellbeing of Clay Cross for the long-term."

Matthew Broughton, Joint Head of Service – Transformation & Organisation

Stage 3 Key learning

A formal commitment to developing Sharley Park Active Community Hub from all its strategic partners has been achieved through following the SOPG stages:

- The business case developed had the vision, evidence and insight to support the development of a proposal that has secured financial commitment to delivery.

- The facility development is a direct outcome of a process that has built consensus, confidence, and commitment to realising a shared vision. This has enabled a transformational investment from traditional leisure facility to a Community Activity Hub.

Nuneaton and Bedworth Borough Council – Boroughwide Investment in Physical Activity

Description of SOPG-related work

- Using the Strategic Outcomes Planning Guidance (SOPG) to develop the evidence for three new physical activity hubs to contribute to the corporate priority of reducing health inequalities across the borough.

Relevant stages/steps

A. **Stage 2 and 3**: Building on development of a Built Facility Strategy (BFS) and feasibility studies
B. **Stage 1 to 4**: Development of Stages 1-4 of the SOPG approach.

Activities and outputs

- SOPG has shaped a strategic borough-wide vision for physical activity based around two physical activity hubs in destination parks replacing ageing leisure stock, and one new physical activity hub in the north of the borough, co-located with a new Free Academy and a GP surgery.

- The vision is inextricably linked to the Towns fund which will facilitate development of a boroughwide active environment, re-developing an old riverbed to provide active travel routes, safe routes to school, and opportunities to be more active every day.

- Using the SOPG shared outcomes were established and extensive insight developed underpinning the need and case for investment.

- The BFS identified the need for additional physical activity provision given the 14,000 new homes to be built in the Borough by 2034. The FPM was used to verify the BFS and concluded that the scale and location of proposed physical activity hubs would address current and future need. Options for new provision were tested through feasibility studies, capital, and revenue modelling.

- Cross partner strategic support for the proposed interventions was established through stakeholder engagement, and development of new partnerships bringing planning, education, health, S106 and relevant policies together.

- The physical activity hubs will link to existing outdoor facilities through a new boroughwide network of walking and cycling routes.

Outcome

- The SOPG has been adopted by the Council; it is now informing development of the first physical activity hub and new cycling facilities.

- The SOPG process has helped to forge new partnerships and a very strong political commitment to invest in physical activity, enabling implementation of this inspirational Vision over the next 5 years.

Testimonial

" The local authority had a leisure strategy in place, however following the SOPG stages challenged our existing approach. The need to consider the wider impact of leisure and the active environment, not just built facilities but also long-term sustainability and needs of our residents was key to our approach. Evidence gathered as part of the work has enabled the authority to link with many partners in a joined-up approach, to support improving health and well-being across the Borough.

The SOPG has been an influential document in reporting to Members, Partners and external agencies in the authority's Vision and direction of travel. It supports its Local Plan and contributions from local Housing Development towards a range of additional facilities to meet the growing needs of the Borough.

Support provided by a range of external consultants and ongoing advice from Sport England has enabled Nuneaton and Bedworth to be in a very strong position in delivering its future Borough-wide leisure strategy for the next 40 years."

Kevin Hollis, Director – Leisure, Recreation & Health

Stage 4 Key learning

- Nuneaton and Bedworth Borough Council used the SOPG to shape a strategic borough-wide Vision for physical activity which is now resulting in a visible and long-term commitment to an active environment, leisure investment and strategic interventions.

- This is now translating into commitment to a number of strategic investments to deliver maximum impact for the community to support longer term local strategic outcomes.

Stage 4
Case study 3

Salford City Council (SCC)

Pendleton Community Activity and Health Hub (PCAHH)

Description of SOPG-related work

- Using the Strategic Outcomes Planning Guidance (SOPG) to develop the evidence base for a new physical activity offer, replacing an existing ageing facility in the most deprived area of Salford.

Relevant stages/steps

- Building on a Built Facility Strategy (BFS) which recommended replacement of three facilities, development of stages 1-4 of the SOPG approach.
- **A. Stage 1 and 2**: Development of shared outcomes; development of insight through extensive stakeholder engagement; exploration of co-location opportunity; role and development of PCAHH concept.
- **B. Stage 3**: Development of the PCAHH concept, indicative programming, pricing, and access policies.
- **C. Stage 4**: Development of RIBA Stage 2 report; indicative capital costs, revenue modelling, confirmation of strategic support; SCC formal commitment to supporting the required PCAHH subsidy.

Activities and Outputs

- The BFS identified the need to replace Clarendon Leisure Centre but did not link this to addressing local needs and priorities. Starting from the initial investment commitment, SCC and partners have developed an understanding of shared local outcomes, and developed comprehensive insight driven by the local community.
- The insight highlighted the need for some free access to facilities for families and young people, and a flexible pricing system as many local people will not be able to afford memberships. This included the delivery of a range of opportunities for young people.
- The strategic Vision to improve the lives of Pendleton residents has forged partnerships and bought together organisations to develop a relevant physical activity and health offer in the heart of the community. This forms a part of the overall masterplan which will see new housing, re-activated parks and open spaces and a network of walking and cycling routes better connecting Pendleton to Salford and the wider area.
- SCC worked with architects to develop the hub concept and translate it into places and spaces where people can be active, source a range of community and health services and socialise. This includes multi-purpose spaces providing a base for youth organisations and family activity, as well as a café, Active Play and meeting places.

- Following the SOPG process, the context for capital intervention has been demonstrated, and the PCAHH developed to specifically address local needs so it will contribute to a reduction in inequalities.

Outcome

- The SOPG provided the opportunity to pull together a significant amount of data and evidence to develop the case for intervention in Langworthy ward.

- The SOPG has confirmed the shared outcomes for the City in terms of transformational change and investment to improve the life chances of the community. Physical activity is at the heart of this.

- Critically, the SOPG supported extensive community engagement to build the insight informing need, local priorities, barriers to participation, and the concept for the new Pendleton Community Activity and Health Hub (PCAHH).

- This concept was then translated into costed places and spaces, and a detailed revenue model developed to underpin the sustainability of the intervention.

- PCAHH health hub provides a clear way forward for physical activity and health in Pendleton; the hub facility mix reflects community Insight; programming and pricing policies address identified barriers to participation. The SOPG has provided SCC the confidence to go forward with the delivery and ongoing revenue subsidy of the PCAHH to ensure it has the intended impact at local level.

Testimonial

" **Utilising the SOPG process has provided the basis from which SCC is able to take forward the PCAHH with an assurance that the activities found within it have been evidenced by need, are focused to result in tangible relevant outcomes, all in the context of a sustainable business case.**

The SOPG has been central to realising a great facility for the people of Pendleton."

Jackie Ashley, Project Manager

Stage 4 Key learning

- Using the staged approach advocated by the Strategic Outcomes Planning Guidance gave the Council the confidence to move the project forward.

- The insight and evidence gained confirmed the shared outcomes which translated into a facility mix and a sustainable business case which provided a clear way forward for the project and allowed key partners to commit to the project.

Stage 4
Case study 4

Great Yarmouth Borough Council

Description of SOPG-related work

- Strategic Planning Outcomes report completed on behalf of Great Yarmouth Borough Council as part of a successful Strategic Facilities Fund application. The work was undertaken as the development of a new leisure facility was progressing through RIBA-3 and RIBA-4 stages of design.

Relevant stages/steps

A. The SOPG process was completed in tandem with the development of designs for the new Great Yarmouth Leisure Centre.

B. The SOPG diagnostic exercise was used to identify the additional work the Council needed to undertake, building on their work to date. The iterative diagnostic exercise was repeated as the project progressed, tracking in progress and completed works.

C. Extensive needs analysis works had already been completed prior to the commencement of the SOPG process. These included sports and leisure strategies, needs analysis, feasibility studies and business planning exercises.

D. After reviewing work undertaken to date, the following additional work was identified and completed:

i. Development of key strategic outcomes and KPIs for management of the leisure portfolio

ii. Consultation with key stakeholders and establishment of a working group

iii. Development of a detailed business plan in consultation with the operator, Council, and project managers

iv. Management options appraisal.

Activities and outputs

- The initial SOPG work was initiated as part of a wider commission to submit a Strategic Facilities Fund application. The project was one of the first SOPG processes, so guidance was updated as the project progressed. Sport England supported the Council in this process.

- The consultants had been working with Great Yarmouth Borough Council for a number of years through the development of the new Great Yarmouth Leisure Centre. The consultants had compiled an initial needs analysis for a new centre, feasibility studies from RIBA 0 through to RIBA 2 and completed several business planning exercises and therefore well informed about the strategic background and able to complete the SOPG diagnostic exercise. The consultants subsequently identified the additional work required to complete the SOPG process and worked with the Council to undertake this.

- Consultation exercise and members' workshop to establish key strategic priorities for the Council's leisure portfolio.

- Development of practical KPIs and ways of specific ways to deliver against the agreed outcomes. Close cooperation

with the local Active Partnership (Active Norfolk) and the Council's operator was important in ensuring that the SOPG outcomes were useful in the short, medium and long term.

- Development of a detailed business business plan, working closely with the Council's operator.
- Management options appraisal to ensure best value.

- The SOPG process was completed in tandem with the development of designs for the new Great Yarmouth Leisure Centre. This allowed the outcomes of the process to be incorporated in detailed designs and inform management decisions.

Outcomes

- The Council have now set up an 'Active Great Yarmouth' function to better deliver against the strategic priorities of their leisure portfolio. The Strategic Planning Outcomes report allowed the Council to better understand the strategic priorities for the new Great Yarmouth Leisure Centre development.
- Working with the Council, operator and local Active Partnership ensured that the Council came out of the process with a clear matrix mapping the strategic priorities to specific activities and programmes to be delivered within the new centre.
- The SOPG was submitted as part of a successful Strategic Facilities Fund application.

> " The development of the Strategic Planning Outemes for the Great Yarmouth Leisure Centre was a vital piece of work to help the Council build its understanding of how to plan effectively and maximise the engagement of the local community in their new Centre. Great Yarmouth is a borough with real challenges in terms of health outcomes and deprivation and so to gain buy in from all stakeholders and to be able to develop clear shared outcomes will be vital to the success of the centre post opening."
>
> **Lindsay Barker, Strategic Director**

Stage 4 Key learning

- Great Yarmouth Borough Council has used the SOPG to develop a detailed business case for the Great Yarmouth Leisure Centre to optimise the potential for this investment to achieve their local strategic outcomes.

- The impact of this investment will be maximised as a result of the systematic approach to planning and the commissioning of leisure services moving forwards.