Develop shared local strategic outcomes for your place

Understand your community and your place

Identify how the outcomes can be delivered sustainably

Secure investment commitment to outcome delivery

2019
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In developing this guidance, we have tried to recognise and articulate the journey and challenges faced by local authorities in determining local priorities and outcomes and in making effective investment into provision – both facilities and services.

The 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.

The commitment from local authorities to the provision of physical activity and sport opportunities for local communities is essential and an important contributor to the active environment which millions of people access for health, social and sporting benefits.

Local authorities are under increasing pressure to meet the growing needs of their communities with limited resources and using new approaches to commissioning services. The role that sport and physical activity has to play in providing opportunities and creating places where people can live healthy, fulfilling, productive, meaningful and happy lives is interwoven into the fabric of community life.

With further pressure on budgets, changing demographics and increasing demands on services such as health, mental health, adult social care and education, sport and physical activity is increasingly seen as a co-producer of local outcomes.

Ensuring service delivery and the physical environment contribute most effectively to local strategic priorities and outcomes is essential to achieving the best return on the use of limited resources, and to ensuring political support at a local level.

We have long supported local authorities through the provision of tools and guidance, as well as National Lottery funds for programme and capital investment. However, we are seeing an increasing need from local authorities for assistance at an earlier stage – from developing a vision, through community engagement, identifying and addressing barriers to participation and into the implementation phase.

We are keen to support local authorities where needed and to collaboratively develop the strategic approach to sport and physical activity, to ensure that any local investment made is as effective as possible and is sustainable in the long term.

What we have learnt through working with a number of local authorities is that this cannot be a ‘one size fits all’ approach. There are some key principles to approaching this work and this high-level guidance is designed to recognise the journey. It will help create a planned approach prior to implementation and will assist local authorities in identifying areas where further work or assistance is needed and where to go for this support. We have drawn on a number of case studies from recent work with local authorities, who
have already started to prepare for and, in some cases, 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 and also supports our national strategy, Towards an Active Nation.

We are happy to explore where support is most needed and, where possible, assist local authorities to make the most effective investment decisions to achieve the local strategic outcomes which benefit the communities served.

We hope you will find the guidance helpful in your work to improve local strategic health, social and wellbeing outcomes in your communities.

Kevin Mills  
Director of Capital Investment  
Sport England
Develop shared local strategic outcomes for your place - Stage 1

1. Understand your community and your place
2. Identify how the outcomes can be delivered sustainably
3. Secure investment commitment to outcome delivery
4. Commitment
Developing shared local strategic outcomes is the key starting point in developing an approach for sport and physical activity 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.

Taking time to define and communicate the contribution that sport and physical activity can make to wider local strategic outcomes is the key to securing political ‘buy in’ and support for the development of greater insight to inform the emerging approach.
STEP 1A
DEVELOP AN UNDERSTANDING OF THE WIDER LOCAL STRATEGIC OUTCOMES FOR YOUR PLACE

WHY IS THIS STEP IMPORTANT?

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

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
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:

<table>
<thead>
<tr>
<th>Second Tier Local Authorities</th>
<th>Unitary authorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Plans</td>
<td>For unitary authorities, the scope of the council strategic documents should include the list on the left but also:</td>
</tr>
<tr>
<td>Community Plans</td>
<td>Sustainability and Transformation Plans (STP)</td>
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<tr>
<td>Local Plan</td>
<td>(Health)</td>
</tr>
<tr>
<td>Spatial Plans/Strategies</td>
<td>Children and Young People’s Plan</td>
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<tr>
<td>Joint Strategic Needs Assessment (JSNA)</td>
<td>Adult and Social Care Plan</td>
</tr>
<tr>
<td>Leisure and/or Cultural Strategy</td>
<td>Youth Offending Plan</td>
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<tr>
<td>Health and Wellbeing Strategy</td>
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<tr>
<td>Town Centre Master Plan</td>
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<tr>
<td>Playing Pitch Strategy</td>
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<tr>
<td>Open Spaces Strategy</td>
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<tr>
<td>Leisure Built Facilities Strategy</td>
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</tr>
</tbody>
</table>
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, sport and physical activity and opportunities for co-production of services.

Some key themes where there is a synergy include:

- housing
- infrastructure
- economic development
- sustainability
- community safety
- tackling social isolation
- healthy communities
- placemaking
- 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. Possible stakeholders to consider are:

- public health/clinical commissioning group
- County Sports Partnership
- county council (for non-unitary authorities)
- higher and further education
- voluntary and community service (VCS)
- housing associations
- Police and Crime Commissioner
- fire and rescue service
Understanding what level of direct or indirect influence they have over sport and physical activity 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 strategic approach.

### iii) Consultation with key stakeholders

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

- objectives
- current perceptions of the contribution sport and physical activity makes to their area of work
- 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:

- showing political commitment to the process
- providing a briefing paper to provide context
- detailing aims of the consultation meeting and an agenda.

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 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 but 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.

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, county sports partnership, voluntary sector, education, police and housing associations etc. Securing senior representatives attendance to the first meetings is vitally important to secure cross sector senior level ‘buy in’. This will deepen working relationships and optimise the potential synergies from working more collaboratively.

There are 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 sport and physical activity 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

 Strategie Commissioning Guidance
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
- socio-economic and demographic profiles
- population trends
- current levels of sport and physical activity
- 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.
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
- 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 sport and physical activity

Sport England’s Active Lives Survey analyses non-traditional activities as well as traditional sport and physical activity levels across an activity spectrum ranging from inactive to active. Furthermore, Sport England Local Sports Profiles as well as information from the County Sports Partnership 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:
- 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.

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 said of the 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 sport and physical activity
- 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
- Sport England Insight Packs
**STEP 1C**

**ESTABLISH THE CONTRIBUTION SPORT AND PHYSICAL ACTIVITY CAN MAKE**

**WHY IS THIS STEP IMPORTANT?**

Using the evidence gathered in Steps 1A and 1B, this step will enable sport and physical activity 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, supporting a more holistic approach to a place.

**WHAT ARE THE KEY ELEMENTS THAT COULD BE CONSIDERED FOR THIS STEP?**

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

Developing a simple matrix of local strategic outcomes against direct or indirect contributions made by sport and physical activity 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

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

This is current best practice and the application of this model will need to be tailored to each local strategic approach.
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 sport and physical activity. 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.

EXAMPLE: PHYSICAL ACTIVITY AND HEALTH – YOUR STORIES

ELLIE, 64, PETERBOROUGH

Ellie was diagnosed with Alzheimer’s in 2014. She has 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.
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 sport and physical activity to wider strategic outcomes

Outcomes Framework

FURTHER GUIDANCE, MATERIALS AND CASE STUDIES

LGA Outcomes Framework

Sport England: Physical Activity and Health: Your Stories
why is this step important?

Establishing early ‘buy in’ from leaders within the local authority and key stakeholders secures the contribution and role of sport and physical activity in the context of a place’s shared local outcomes.

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

A local authority 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.

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:

- 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 responsible for sport and physical activity/health and wellbeing
- strategic director responsible for sport and physical activity/health and wellbeing
- head of service responsible for sport and physical activity/health and wellbeing
- public health lead
- adult social care lead
- children’s service lead
- planning lead
- parks and open spaces/streetscene lead
- county sports partnership 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.

Babergh and Mid Suffolk Joint Councils’ Strategic Vision is “To support, encourage and inspire our communities to be more Active” – this was developed over a series of workshops with elected members and officers, informed by a needs analysis.
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 – Babergh and Mid Suffolk Joint Councils Leisure Sport and Physical Activity Strategy

Example Strategy – East Northamptonshire Council Healthy and Active Lifestyles Strategy

Example Strategy – Malvern Hills District Council

Example Strategy – Fit and Active Barnet Framework
UNDERSTAND YOUR COMMUNITY AND YOUR PLACE

STAGE 2
STAGE 2
UNDERSTAND YOUR COMMUNITY AND YOUR PLACE

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

Taking time to understand what contribution the wider physical environment and infrastructure in a place can make is important. This can enable 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 will form a needs analysis that can be used by a local authority to identify where it wants to be in the future.

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 interventions.
STEP 2A
GATHER INSIGHT FROM THE LOCAL COMMUNITY AND STAKEHOLDERS TO IDENTIFY BARRIERS AND OPPORTUNITIES FOR BEHAVIOUR CHANGE

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 and define the underlying causes of lower levels of physical activity within particular communities, areas or target groups.

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

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) 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 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 and will present a chance to explore potential solutions that are developed ‘bottom up’. For example:

<table>
<thead>
<tr>
<th>Potential issues and barriers</th>
<th>Potential target group representatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confidence</td>
<td>Young single parents</td>
</tr>
<tr>
<td>Motivation</td>
<td>Disabled people and their carers</td>
</tr>
<tr>
<td>Age</td>
<td>Young people aged 16-24 from a BAME community</td>
</tr>
<tr>
<td>Injury and illness</td>
<td>Socially isolated elderly people</td>
</tr>
<tr>
<td>Awareness</td>
<td>Existing active users of clubs/schools/facilities</td>
</tr>
<tr>
<td>Family and childcare commitments</td>
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<tr>
<td>Time</td>
<td></td>
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<tr>
<td>Affordability</td>
<td></td>
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<tr>
<td>Physical Environment</td>
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</table>
Questionnaires or surveys could be completed by target group representatives to provide an alternative means of engagement. Suggestion boxes 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 can provide insight and create opportunities to identify a more joined up approach to tackling longstanding issues preventing participation. This may be through leveraging existing local networks but may also be creating new partnerships.

There are also a number of published research guides that will provide evidence that supports behaviour change in relation to levels of sport and physical activity that 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, but 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
**STEP 2B**

**CONSIDER THE CONTRIBUTION FROM THE WIDER PHYSICAL AND SOCIAL ENVIRONMENT**

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**WHY IS THIS STEP IMPORTANT?**

The environment where people choose to be active can be any place or space. How the whole physical environment is described and designed can have a significant impact on behaviour, both in terms of how the environment is used but also how it is perceived so it is important to explore the local place 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.

**WHAT ARE THE KEY ELEMENTS THAT COULD BE CONSIDERED FOR THIS STEP?**

1. **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’ through alignment with shared objectives and outcomes.

   A local authority should explore and identify any environment that can be an Active Environment in the local area, including homes, streets, parks, leisure centres etc.
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. Further, activation such as parkrun or community run programmes can further boost physical activity in a space, particularly when targeting certain groups.

Finally, understanding how these environments work together collectively to provide a seamless journey for the user 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.

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**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 sport and physical activity activation opportunities**

**FURTHER GUIDANCE, MATERIALS AND CASE STUDIES**

- **Active Design Guide**
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 a local authority 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, paving the way in the next stage for what interventions can enable achievement of the strategic objectives and contribute to 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 and investment.

Some local authorities 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 sport and physical activity
   • 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 sport and physical activity can contribute to. 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
WHY IS THIS STEP IMPORTANT?

Developing a clear set of objectives, which are evidence based, will provide a clear policy position for the local authority. It will help shape the local authority and its partners’ approach to exploring and selecting facility and service interventions in the next stage.

By taking senior stakeholders on this journey, there will be a growing enthusiasm and understanding of the potential impact sport and physical activity can have on a place.
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 objectives which have emerged through the previous stages. This prioritisation exercise should be based on an 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

It may well be that some current priorities are no longer 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

- Babergh and Mid Suffolk Joint Councils – Leisure, Sport and Physical Activity Strategy
- North Kesteven District Council – Sport and Physical Activity Strategy
IDENTIFY HOW THE OUTCOMES CAN BE DELIVERED SUSTAINABLY

STAGE 3
Strategic Outcomes Planning Guidance: Identify how the outcomes can be delivered sustainably – stage 3
Having used insight to identify strategic objectives, the focus in Stage 3 is on what interventions will have the greatest impact on the objectives and the greatest contribution to strategic outcomes.

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

Local authorities may also wish to review the management model(s) being used to deliver their core sport and physical activity services to ensure they have the most effective and efficient model for their local area and one that is sustainable 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

Why is this step important?
Understanding the current range of provision, facility and service interventions and how they meet the identified needs, objectives and outcomes from previous stages will develop tangible opportunities for development. Areas to consider in the context of their location, age and condition, include:

- playing pitches
- open space
- outdoor sports and physical activity facilities
- school and community facilities
- infrastructure including walking and cycling routes/facilities
- the Active Environment
- sports and community clubs
- voluntary groups
- sport and physical activity programmes in community venues
- schools (primary and secondary)
- care homes
- GP surgeries and hospitals
- parks
- open spaces
- 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 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 facilities
   b. playing pitch
   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 and leisure facility provision to identify issues and opportunities in relation to supply and demand will identify some key strategic issues and opportunities that could include:

- facility investment
- rationalisation
- co-location

These must be carefully considered, based on the insight gained from previous stages and in light of the local authority’s strategic outcomes and objectives. Challenges around timing and budgets for co-location of organisations can potentially hinder progress and may not 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 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 – firstly to support their statutory planning role and secondly 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 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 provision in a place. These facilities can often be 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 meet 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 facilities and services in light of the local authority’s medium term financial strategy (MTFS) is encouraged. In supporting this the local authority should have:

- explored opportunities for joined-up management, governance and co-location of services and whether there are opportunities for rationalising assets
- considered service integration and rationalisation in response to their strategic approach to sport and physical activity which should have already been developed
- ensured there is a market or different 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)
- taken account of the impact of population growth and new housing developments which will impact on supply and demand for facilities and services

If savings are required in the future, 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.

This stage considers the extent to which the authority’s existing sport and physical activity service can deliver the identified local strategic objectives and contribute towards local strategic outcomes.

A list of potential service, facility and infrastructure interventions to best 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 community-based programmes.

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

All interventions must be considered within the capital and revenue parameters of the authority and stakeholders. The objective is to ensure the best outcomes are achieved given the resources available.

Changes to the current service and facility mix are likely to have cost implications.

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

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

- partnerships
- funding applications
- re-allocation of resources (decommissioning and commissioning)
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?

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
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<tbody>
<tr>
<td>Scope of the review of capital and revenue interventions</td>
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<tr>
<td>Identification of resources required (internal and external) to support workstreams</td>
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<tr>
<td>Condition surveys of facilities in scope</td>
<td></td>
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<tr>
<td>Playing pitch strategy</td>
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<td>Open spaces strategy</td>
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<td>Leisure built facilities strategy</td>
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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**
**STRATEGIC OUTCOMES PLANNING GUIDANCE: IDENTIFY HOW THE OUTCOMES CAN BE DELIVERED SUSTAINABLY – STAGE 3**

**WHY IS THIS STEP IMPORTANT?**

Step 3B focuses on refining the list of possible interventions to determine the optimal mix of facilities and services as part of a broad range of provision to sustainably deliver the strategic objectives and make a contribution to local strategic outcomes. This step will bring the preferred mix and portfolio of interventions together supported by financial information to ensure that what is being proposed to support the strategic approach is affordable in terms of any capital investment and sustainable in terms of long-term revenue implications.

The service intervention element of this step is also vitally important and links to identifying what revenue-based services supporting active communities, such as outreach, should be considered.

Feasibility studies may need to be undertaken in this step for core leisure provision including sport/leisure centres and/or 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 intervention has been identified as a priority for investment, often specialist input from project managers, leisure consultants, architects, cost consultants and potentially other technical advisers, is required. A clear brief that explores all capital 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
- the indicative resource requirements

Assessing the relative resource implications of this service mix is important to ensure that sufficient resources are allocated to enable this aspect of the service to be effective. 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 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 outreach/intervention services

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

WHAT ARE THE KEY OUTPUTS FROM THIS STEP OF THE PROCESS?

- Feasibility studies
- 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 MODEL(S)

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

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 outreach services for active communities

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

This stage is only relevant for those local authorities with the potential of implementing a new management model arrangement within three years.
Due to increased pressure on local authority funding, 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. Following the Leisure Services Delivery Guidance 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.

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 and 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.

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
WHY IS THIS STEP IMPORTANT?

Identifying a baseline position of current performance and defining future targets to work towards will provide a clear performance management framework. This will be used to measure the effectiveness of interventions in the delivery of the strategic objectives and contribution towards the wider local strategic outcomes.

This process will require an investment of time and resources, working closely with stakeholders and partners, to develop meaningful KPIs linked to objectives identified in Stage 2, and the optimal mix of facility and service interventions in Stage 3.

This will ensure that what gets measured and monitored is implemented and can be improved over time.
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 will need to discuss, refine and agree the overall performance management framework. This process should include a detailed examination of the KPIs and ensure both parties fully understand them and for the leisure operator, and other delivery partners, 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.

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

ii) 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 capacity and resources to monitor

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

FURTHER GUIDANCE, MATERIALS AND CASE STUDIES

A guide to developing a local outcomes framework for culture and sport
SECURE INVESTMENT COMMITMENT TO OUTCOME DELIVERY

STAGE 4

Strategic Outcomes Planning Guidance: Secure investment commitment to outcome delivery – Stage 4
STAGE 4
SECURE INVESTMENT COMMITMENT TO OUTCOME DELIVERY

This stage brings together all the key outputs from previous stages into a business case that provides a holistic and comprehensive view of the local authority’s strategic approach. This stage will provide clarity and confidence that implementation is affordable, achievable and sustainable.

A key step in this stage is the identification of resources to support implementation. This could relate to external or additional internal support for project managing facility developments, commissioning services, service redesign/ transformation and procurement of services if they are to be outsourced.

This approach will enable the local authority to confidently move towards implementation of its strategic approach having secured stakeholder commitment and ‘buy in’.
STEP 4A
AGREE A SUSTAINABLE AND EFFECTIVE BUSINESS CASE

WHY IS THIS STEP IMPORTANT?

Developing a comprehensive business case, which brings together the key elements from previous stages, will provide a robust and evidenced approach for final review and agreement to implement the strategic vision. 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 finally it needs to be 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
- local insight
- optimal range of facility and service interventions

There should now be no new elements to consider at this point.
Key elements of the business case can include:

1 **Introduction and Background**

2 **Strategic Need**
   Outlines overarching strategic context including:
   - summary of local insight
   - summary of local strategic plans/visions of key partners
   - key drivers for the local authority considering a strategic approach
   - local strategic outcomes
   - local strategic objectives
   - 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**
Sets out an affordability picture based on:
- state aid issues
- risk assessment and mitigation
- management options appraisal
- management model proposed
- procurement strategy if applicable
- capital projects – whole life costs
- capital funding and borrowing calculations
- revenue business plan(s) including projected costs of a leisure management contract (if applicable)

This section is covered in detail in our Leisure Services Delivery Guidance.

5 **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

6 **Summary and Recommendations**
Detailed items such as a needs analysis, sport and physical activity strategy, financial modelling, cost plans, designs etc. can be included as an appendix.
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, possibly using external consultant support

WHAT ARE THE KEY OUTPUTS FROM THIS STEP OF THE PROCESS?

- Full Business Case
WHY IS THIS STEP IMPORTANT?

Looking ahead to implementation, the local authority 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 our 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

WHAT ARE THE KEY OUTPUTS FROM THIS STEP OF THE PROCESS?

Committee Reports (or equivalent) for review and agreement by the local authority
WHY IS THIS STEP IMPORTANT?

Securing formal sign-off of the business case and proposed implementation programme will enable the local authority to progress to implementation with full support of its cabinet/members. It will provide clarity for all partners on the scope and objectives moving forward, and confirm what is not expected or in scope.

WHAT ARE THE KEY ELEMENTS THAT COULD BE CONSIDERED FOR THIS STEP?

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